

San Francisco Unified School District

Introduction to the Weighted Student Formula And Site-Based Budgeting

November 2014

Summary of Presentation

- What is Weighted Student Formula?
- Mechanics / How the WSF Works
- Steps in Academic Planning and Budgeting

What is the Weighted Student Formula?

- The WSF distributes resources to schools based on individual students' attributes
- Money follows each student to his/her school, and each school's budget is expressed in dollars instead of FTE's (positions)
- School governance teams develop academic plans, budgets and staffing plans tailored to their school's specific academic needs
- The Central Office trains, assists, and monitors school governance teams in their work

Site-Based Budgeting Goals

- Provide more flexibility to local schools to fit unique objectives, circumstances, strengths, weaknesses, and strategies
- Build authentic participation of school community stakeholders
- Coordinate, simplify, and improve local school planning process and make site plan more helpful
- Build a facilitative relationship between central offices and sites

Mechanics: How the WSF Works

- The Weighted Student Formula provides the following for each school:
 - a foundation amount for every school equal to the cost of a principal and a clerk
 - a specific dollar amount for each student
 - an additional dollar amount for students with specific characteristics
 - ‘floor plan’ funding to allow all schools to achieve required basic staffing levels

Mechanics: How the WSF Works

- Schools' budgets are based on:
 - Total dollars available for the WSF
 - Foundation allocation
 - Equivalent to salary and benefits of a principal and a clerk
 - The Base Funding Factor
 - The dollar amount associated with a 1.0 weight
 - Weighted factors and respective weights
 - Grade levels
 - English Language Learners
 - Low Socio-Economic Status students
 - Special Education students
 - Floor Plan funding

Mechanics: How the WSF Works

- Each school's budget =
 - Foundation Allocation
 - Plus numbers of students X respective weights X Base Funding Factor
 - Plus Floor Plan funding
- Allocations are initially based on projections, then adjusted in the fall based on actual students
- Discretion is bounded by provisions of collective bargaining and state and federal regulations

Weights and Dollar Amounts

San Francisco Unified School District Final Weighted Student Formula Factors for SY 2014-2015

The **weight** times the **base funding factor** equals the **dollar amount** for each student in that category

Weights							
Grade Level	Base	ELL			Socio-Economic Status	Special Ed (Materials & Prof. Dev.)	
		Long-Term Non-Redesignated	Beginning/Intermediate	Advanced / Transitional		All Students	Pre-K / Mod/Severe / ED
Kindergarten	1.2640		0.0671	0.0520	0.0900	0.0168	0.0335
Primary (1-3)	1.2640		0.0671	0.0520	0.0900	0.0168	0.0335
Intermediate (4-5)	1.0000		0.0671	0.0520	0.0900	0.0168	0.0335
Middle School (6-8)	1.1402	0.0805	0.0805	0.0520	0.0900	0.0168	0.0335
High School (9-12)	1.1900	0.0805	0.1777	0.0520	0.0900	0.0168	0.0335
Dollars Based on Base Funding Factor of \$2,982.41							
Grade Level	Base	ELL			Socio-Economic Status	Special Ed (Materials & Prof. Dev.)	
		Long-Term Non-Redesignated	Beginning/Intermediate	Advanced / Transitional		All Students	Pre-K / Mod/Severe / ED
Kindergarten	\$3,770	\$0	\$200	\$155	\$268	\$50	\$100
Primary (1-3)	\$3,770	\$0	\$200	\$155	\$268	\$50	\$100
Intermediate (4-5)	\$2,982	\$0	\$200	\$155	\$268	\$50	\$100
Middle School (6-8)	\$3,460	\$240	\$240	\$155	\$268	\$50	\$100
High School (9-12)	\$3,519	\$240	\$530	\$155	\$268	\$50	\$100

Sample Allocation Sheet

The enrollment in each category times the base funding factor times the weight (previous slide) equals the school's dollar amount for that category.

SAMPLE ELEMENTARY SCHOOL Final Weighted Student Formula Allocation for SY 2014-15

Enrollment							Special Education		
Grade Levels	Total Enrollment	ELL			SES	Total	All	PK/MS/ED	Total
		LTNR	Beg. / Int.	Adv. / Trans.					
Kindergarten	62		49		49	59	3		7
Primary (1-3)	186		110	17	127	177	16		17
Intermediate (4-5)	110		47	26	73	106	17		18
Middle School (6-8)									
High School (9-12)									
Total	358		206	43	249	342	36		42
Allocation of Dollars Based on Base Funding Factor of \$2,982.41									
Grade Levels	Basic Education	ELL			SES	Total	Special Education		
		LTNR	Beg. / Int.	Adv. / Trans.			All	PK/MS/ED	Total
Kindergarten	\$ 233,726	\$ -	\$ 9,800	\$ -	\$ 9,800	\$ 15,837	\$ 150	\$ -	\$ 150
Primary (1-3)	701,177		22,000	2,635	24,635	47,510	800		800
Intermediate (4-5)	328,065		9,400	4,030	13,430	28,452	850		850
Middle School (6-8)									
High School (9-12)									
Total Student Allocation	\$ 1,262,967	\$ -	\$ 41,200	\$ 6,665	\$ 47,865	\$ 91,799	\$ 1,800	\$ -	\$ 1,800
Foundation Allocation "Floor Plan" Funds									196,440
Total Weighted Student Formula Allocation (Excluding Special Education)						\$ 1,599,070	WSF Sp. Ed. Allocation \$ 1,800		

Considerations in Designing Methodology

- What resources and responsibilities should be included in the WSF as a site-based responsibility vs. a centrally budgeted and administered responsibility?
- What student characteristics should be weighted?
- What should relative weights be for each student characteristic?
- How should schools and programs of various sizes be impacted and/or accommodated?

What's In and What's Out of Site Budgets? (Personnel)

Site Budget Responsibility	Central Office Budget Responsibility
General education teachers and paraprofessionals	Special education teachers, paraprofessionals, and related service providers
High-school librarians;* additional time for middle- and elementary-school librarians*	Part-time librarian for elementary and middle schools*
Site administration – Leadership	Food and nutrition staff and services
Site administration – Office Support	Custodial, maintenance and other facilities staff, supplies, and overtime**
Counselors***	Career Technical Education and Regional Occupation Program staff
Substitutes – staff development absences	Substitutes – non-staff development absences
	Athletics coaches
	Noontime supervisors (elementary)**
	Security aides (mostly secondary)**
	Part-time nurse, social worker or learning support specialist for elementary and middle schools (some schools receive a full-time position)**
	Part-time arts teacher for middle schools

* For more details, see the discussion of the Public Education Enrichment Fund on page 43 of the site based budgeting guide.

** These items will continue to be provided centrally at a base level, but sites may supplement the centrally provided level of service or items with their WSF funds.

What's In and What's Out of Site Budgets? (Services & Supplies)

Site Budget Responsibility	Central Office Budget Responsibility
Instructional materials	Equipment (Purchase, Repair and Maintenance)**
Library books	Furniture (Purchase, Repair and Maintenance)**
Replacement textbooks (for lost and damaged textbooks)	Basic textbooks (for new core adoptions and additional enrollment)
Special education professional development and supplies (excluding assistive technology)	Assistive technology for Special Education
Language translation for school-based communications and events	District-wide assessment
Site-based Professional Development	Transportation
	Telecommunications / telephones
	Utilities
	Business services, Human Resources, Legal services

** These items will continue to be provided centrally at a base level, but sites may supplement the centrally provided level of service or items with their WSF funds.

Annual Timeline

Spring

- ♦ School sites receive budget allocations and guidance from central offices
- ♦ Sites hold community meetings to gather input on school site plan and budget
- ♦ School sites develop and submit site plans and budgets
- ♦ Central offices review and approve plans
- ♦ Human Resources implements staffing decisions

Fall

- ♦ Budget allocations are adjusted to match actual enrollment
- ♦ School sites implement the plan