

## **EXPLANATION/ANALYSIS OF LOWELL HIGH SCHOOL'S PRELIMINARY WEIGHTED STUDENT FORMULA BUDGET FOR THE 2009-2010 SCHOOL YEAR**

### **INTRODUCTION TO THE WEIGHTED STUDENT FORMULA**

The San Francisco Unified School District (SFUSD) employs a site-based budgeting process called the Weighted Student Formula (WSF). Under this system, schools are allocated budget dollars based upon a formula that awards a certain number of dollars per student plus additional per student amounts for students who meet certain criteria (i.e., English language learners, students who come from low-income families, etc.). The concept is that students who face certain additional challenges should be provided additional resources in terms of academic support.

Lowell also receives a significant amount of additional WSF funding based upon the number of Advanced Placement exams administered each year. The contract between the SFUSD and the United Educators of San Francisco (UESF – the teachers union) calls for each high school teacher who teaches at least one Advanced Placement class to be given a preparation period, which means that a full-time teacher who teaches at least one AP class will have a reduced courseload of only four classes per semester (instead of the normal five classes per semester). Since these AP prep periods increase the staffing costs for schools with AP programs, the SFUSD has traditionally recognized this extra cost by awarding high schools funding sufficient to pay for one prep period for every 20 AP exams administered. However, the SFUSD has recently announced a revision to the AP funding formula whereby high schools will now receive funding sufficient to pay for one prep period for every 24 AP exams. The UESF has taken the position that this change to the funding formula constitutes a contract violation by the SFUSD. According to Paragraph 7.2.8 of the current UESF-SFUSD contract:

The District shall provide two (2) additional conference/preparation periods to each regular high school for Advanced Placement (AP) classes, plus an additional conference period for each twenty (20) AP exams above forty (40) taken at said school the prior year. Teachers of AP classes may make recommendations to the principal for allocating AP additional conference/preparation periods.

**Under the SFUSD's new AP formula, Lowell's funding for 2009-2010 will be reduced by more than \$400,000 compared to what we would have received under the prior formula.**

Due to the fact that so many Lowell teachers teach multiple sections of AP classes each semester but “consume” only one prep period, the SFUSD’s AP funding formula provides Lowell with significantly more money than is needed to pay for the actual AP prep periods used by Lowell teachers. This additional funding is used throughout the school to allow us to employ additional classroom teachers, counselors and other staff. To take a concrete example, for the 2008-2009 year, Lowell was granted additional funding equivalent to 155 AP prep periods because Lowell administered 3,100 AP exams in May 2008 (and the SFUSD used the 20:1 ratio at that time rather than the new 24:1 ratio). But since so many teachers at Lowell teach multiple sections of AP courses, the faculty only used a total of 46 AP prep periods. Therefore, the funding we received for the 109 additional AP prep periods (equivalent to 21.8 full-time classroom teachers and a total of more than \$1.6 million of WSF funding) above and beyond the actual AP prep periods assigned to teachers was used to fund positions throughout the school, allowing us to hire more teachers and counselors which means Lowell can offer more courses with smaller class sizes as well as additional counselors and other staff.

Once the WSF funding formula is applied to the student population at a given school, you know how many budget dollars that school will be able to use to hire teachers, counselors, administrators, other staff, supplies, equipment, consultants, etc. The SFUSD establishes a WSF cost for each category of employee that represents the average salary and benefits. For example, the WSF cost for a classroom teacher for 2009-2010 is \$80,962, which means that the total cost (salary plus benefits) for the **average** classroom teacher will be that amount. (Of course, less senior teachers have a true total cost of less than this amount and the most senior teachers have a true total cost in excess of this amount.)

School site councils (composed of teachers, administrators, staff, parents and students at the high school level) are charged with allocating the WSF budget by deciding exactly how many administrators, teachers, counselors, librarians, deans, clerks, paraprofessionals and other staff will be employed and how much funding will be allocated to supplies and equipment.

It is worth noting that certain staff (custodians, JROTC instructors, security aides, special education teachers and special education aides/paraprofessionals) are not funded through the WSF but are instead part of the SFUSD’s central budget. The central budget also pays for utilities (heat, electricity), facilities repair and improvements.

### **CURRENT STAFFING LEVELS AT LOWELL**

A useful starting point for understanding the preliminary 2009-2010 WSF budget for Lowell is to consider the current staffing. The table below lists all of the current staff (as of March 2009) and the funding source for those positions. The vast majority of the

Lowell staff is funded by the WSF budget, supplemented by funding from the Lowell PTSA and Lowell Alumni Association as well as other sources, as described below.

You will notice that some positions (e.g., 1.0 FTE counselor position) received special funding from the SFUSD this school year, but we do not know if that additional funding will continue for 2009-2010, as described in the notes column. On the other hand, there are some other positions receiving special funding (a portion of the nurse's position is funded with special money for violence prevention and wellness) that is expected to continue for 2009-2010.

<b>JOB CLASSIFICATION</b>	<b>CURRENT STAFFING LEVEL (FTE)</b>	<b>2009-10 WSF COST PER FTE*</b>	<b>2008-2009 FUNDING SOURCE</b>	<b>NOTES</b>
Principal	1.0	\$141,467	WSF	
Asst Principal	3.0	\$119,378	WSF	
Counselor	6.8	\$80,962	WSF	
Counselor	1.0	\$80,962	SFUSD/Pupil Services	No commitment by SFUSD for continued 2009-10 funding
Dean	1.0	\$98,313	WSF	
Librarian	2.0	\$80,962	WSF	
Dept Head	7.0	\$97,131	WSF	
AP Exam Coordinator	.5	\$80,962	WSF	
Classroom Teacher	108.9	\$80,962	WSF	
Classroom Teacher	4.0	\$80,962	PTSA/LAA	
Classroom Teacher	1.0	\$80,962	SFUSD/High School Ops	Add'l PE teacher; no commitment by SFUSD for continued 2009-10 funding
Classroom Teacher	0.2	\$80,962	Cisco	Funding expected to continue for 2009-10
Classroom Teacher	0.4	\$80,962	SFUSD/Prop H	Currently funds ceramics program; no commitment by SFUSD for continued 2009-10 funding

Peer Resources	0.5	\$80,962	WSF	Site budget must include 0.5 FTE in order to secure matching 0.5 FTE from SFUSD/Prop H
Peer Resources	0.5	\$80,962	SFUSD/Prop H	Matching offer expected to continue for 2009-10
Nurse	0.2	\$99,740	WSF	
Nurse	0.6	\$99,740	SFUSD/Wellness	Funding expected to continue for 2009-10
Nurse	0.2	\$99,740	SFUSD/Violence Prevention	Funding expected to continue for 2009-10
Info Systems Administrator	1.0	\$102,058	WSF	
Clerk/1426	8.0	\$64,089	WSF	
Theater Tech	1.0	\$54,456	WSF	
Paraprofessional	2.0	\$57,273	WSF	

**\*NOTE: All WSF costs shown in the table above are district-wide averages for each job classification and include salary and benefits. Specific staff at Lowell may earn more or less than these average amounts.**

**BEST CASE SCENARIO FOR 2009-2010 – BUDGET GAP OF \$900,000**

The best case scenario for next year would be that the SFUSD continues its additional funding for all of the positions they funded this year (1.0 counselor, 1.6 classroom teachers, .8 nurse, .5 Peer Resources teacher). If that occurs, we would need a total of \$12.2 million in WSF budget to retain all of the remaining current staff and budget \$200,000 for a bare bones supplies and equipment budget.

Unfortunately, the preliminary WSF budget provided by the SFUSD is only \$11.2 million. We do expect to receive about \$100,000 in additional funding in the fall, based upon an expected increase in the number of AP exams that will be administered at Lowell in May. That would bring Lowell's total WSF funding up to \$11.3 million. This still leaves a budget gap of \$900,000.

## **WORST CASE SCENARIO – BUDGET GAP OF \$1.1 MILLION**

The worst case scenario for next year would be that the SFUSD discontinues its additional funding for the positions denoted above with the phrase “no commitment by SFUSD for continued 2009-10 funding.” In that case, Lowell would need a total WSF budget of \$12.4 million in order to be able to retain all the current staff while also budgeting \$200,000 for supplies/equipment.

Unfortunately, the preliminary WSF budget provided by the SFUSD is only \$11.2 million. We do expect to receive about \$100,000 in additional funding in the fall, based upon an expected increase in the number of AP exams that will be administered at Lowell in May. That would bring Lowell’s total WSF funding up to \$11.3 million. This still leaves a budget gap of \$1.1 million.

## **DECISIONS TO BE MADE BY SCHOOL SITE COUNCIL**

In order to meet the site budget deadline established by the SFUSD, Lowell’s School Site Council (SSC) will be meeting on Tuesday, March 31<sup>st</sup> at 3:35pm to make final decisions regarding the allocation of the preliminary WSF budget. Given the fact that the preliminary WSF is inadequate to maintain all of the current staff, the SSC will have to make very difficult decisions regarding cutbacks in many, if not all, staffing categories.

Reductions in staffing levels will, of course, have impacts throughout the school. Cutbacks in counseling staff will result in higher caseloads for the remaining counselors, which will make it more difficult for students to obtain counseling services. Cutbacks in classroom teachers could result in the elimination of certain courses and/or higher class sizes in remaining classes. It may be necessary to eliminate one or more language offerings. Cutbacks in library staffing would result in reduced library hours. Cutbacks in paraprofessional staffing could result in closure of the language lab or the library’s computer lab.

## **OPTIONS FOR BRIDGING THE BUDGET GAP**

At this time, there are fairly few obvious options to deal with this budget gap other than to eliminate many teachers/counselors/staff from the site budget. The only realistic alternative other than raising money through the Lowell PTSA and Lowell Alumni Association to offset the budget cuts is the following:

- Raise class size for 9<sup>th</sup> grade English and math classes – potential savings of \$200,000

- Currently, Lowell and other SFUSD high schools participate in a special class-size reduction program that limits 9<sup>th</sup> grade English and math classes to 20 students. If we increase average class size in these classes to 25 students, we would could reduce English and math department staffing by 1.2 FTE teachers in each department for a total savings of approximately \$200,000.

## **QUESTIONS & ANSWERS**

**Q:** Won't the Rainy Day Fund money from the City of San Francisco provide Lowell with additional funding later this year?

**A:** No. We have been informed by SFUSD senior management that our current budget incorporates the assumption that the SFUSD receives the maximum amount possible from the city's Rainy Day Fund.

**Q:** How much of the budget gap will the Lowell PTSA and Lowell Alumni Association be able to fill with outside funding?

**A:** At this time, it is not known how much of the funding shortfall can be made up with funding from the PTSA and LAA. Although the funding provided by these groups has varied from year to year, it has never exceeded \$500,000.

**Q:** Is there any carryover money in the PTSA/LAA trust account? (Note: The PTSA/LAA trust account is the conduit through which the PTSA and LAA provide funding used for additional staffing at Lowell. Past donations by these groups have exceeded the actual cost for the teachers/counselors/staff funded by these groups, resulting in some carryover funds.)

**A:** Yes. The current projection is that we will end the 2008-2009 with approximately \$165,000 remaining in the PTSA/LAA trust account. This money will be available to help provide additional staffing at Lowell for 2009-2010.

**Q:** When will we know if the SFUSD will continue funding some of the additional staff positions they funded for 2008-2009?

**A:** Unknown.