

EDUCATION WEEK WEBINAR

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FREE WEBINAR:

TRANSITIONING TO A WEIGHTED STUDENT-FUNDING FORMULA





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Transitioning to a Weighted Student-Funding Formula

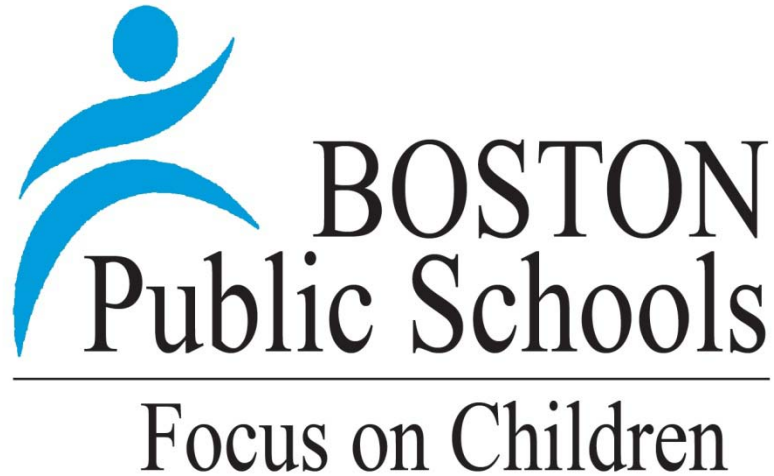
Expert Presenters:

John McDonough, chief financial officer, Boston Public Schools

Seth Racine, deputy chief financial officer, Boston Public Schools

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Weighted Student Funding: The Boston Experience

Education Week Webinar

Agenda

- December 2010
- Background
- New Allocation: Weighted Student Funding
- Questions & Discussion

Boston Public Schools faced many challenges in December 2010

FY2012 Budget

- \$63 million challenge in Fiscal Year 2012 due to increases in benefits, loss of federal stimulus funding (ARRA) and one time savings in Fiscal Year 2011 that had to be replaced

Special Education

- Isolated and discontinuous substantially separate classes in schools
- Desire to create new highly specialized programs, more inclusive settings and new language

English Language Learners

- Department of Justice agreement requiring specific hours for thousands of newly identified ELL students

School Closings

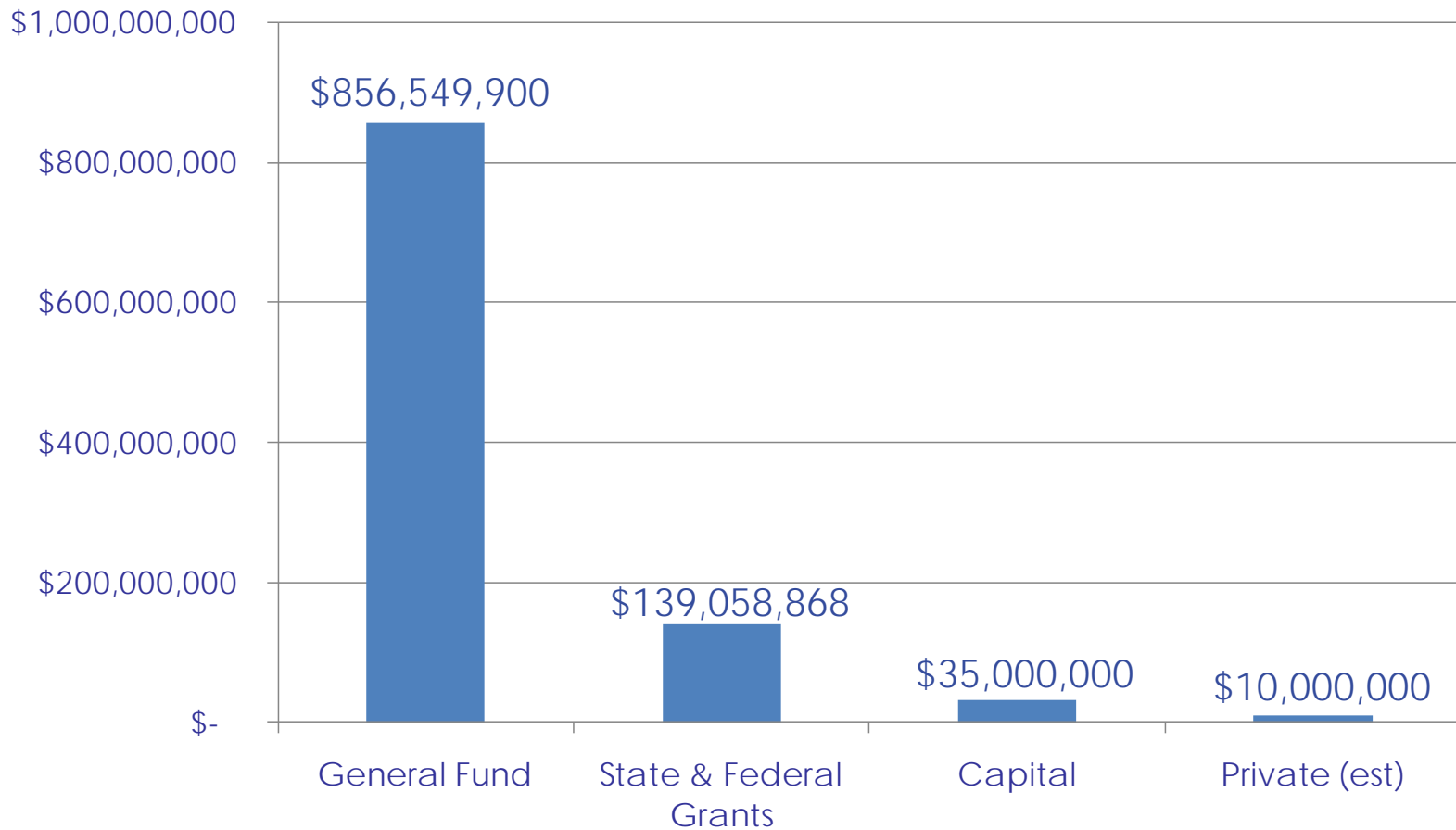
- Announced 14 school closings for the FY2012 school year
- Public criticism for inability to guarantee services for displaced students

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Where does our money come from?

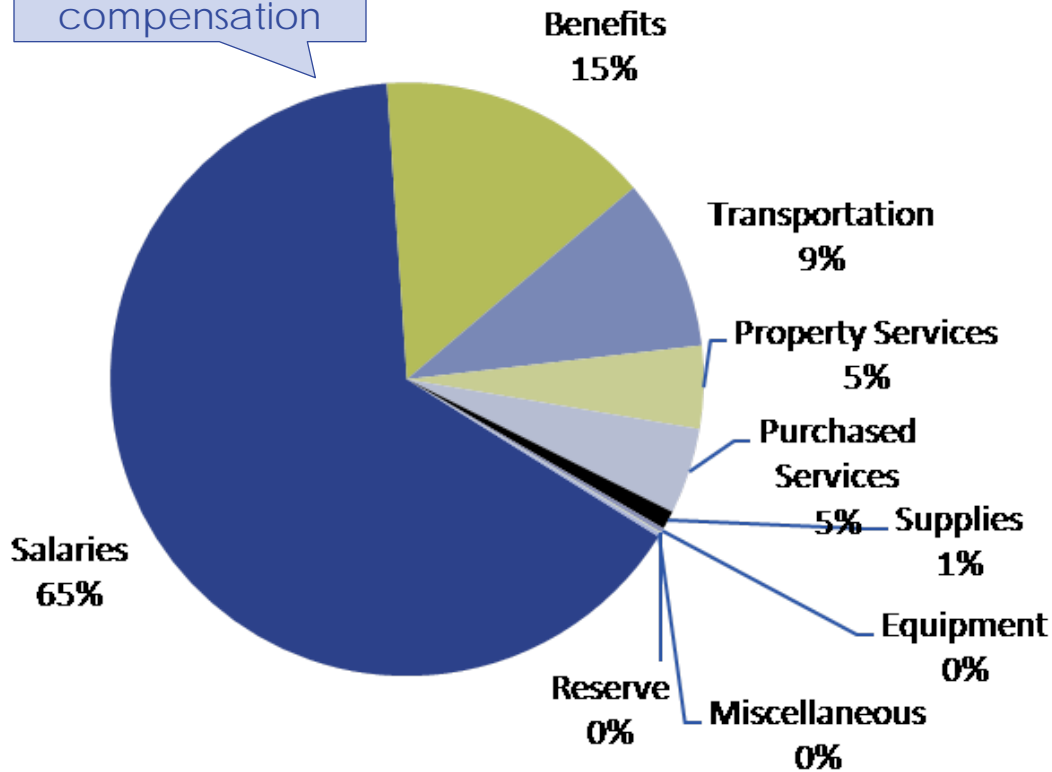
Boston Public Schools FY2013 All Funds Budget



What do we buy with our funds?

FY13 Budget by Account Code Summary General Fund

80% of budget is for employee compensation

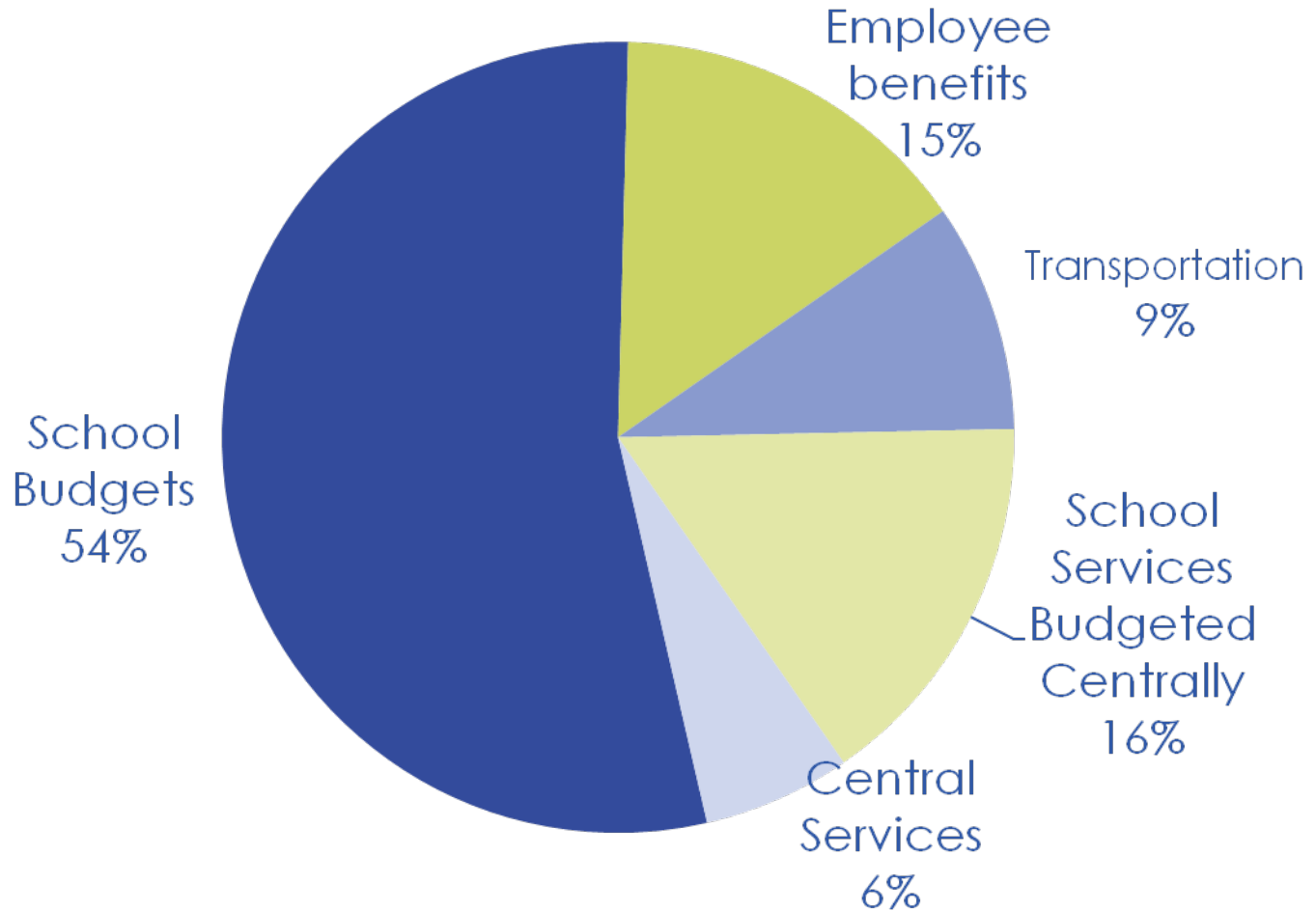


Salaries	\$557,030,702
Benefits	\$127,710,928
Transportation	\$80,014,338
Property Services	\$38,619,259
Purchased Services	\$40,226,932
Supplies	\$8,569,512
Equipment	\$2,217,138
Reserve	\$419,341
Miscellaneous	\$1,741,751
TOTAL	\$856,549,900

Where is our money?

FY13 Budget by Service Area

General Fund



BPS Allocation Methodology in 2010

Traditional Schools

- Schools are allocated staff and resources based on the number of students in particular programs
 - If a program is located in a school, funding is provided
 - Some of these requirements are contractually required, others are policy driven
 - Ensures that there is funding for staff despite the number of students enrolled in the program

Example

- 1 teacher for every 22 reg. ed. students in Grade 1
- 1 teacher and 1 para for every 22 students in Kindergarten 1
- 1 teacher for every 20 bilingual/SEI students
- 1 principal per school

BPS Allocation Methodology in 2010

Pilot Schools

- Schools are allocated a per pupil amount based on the number of projected students
 - Per pupil amounts are differentiated by level based on the average cost of educating a student at that level
 - Funding is not differentiated by student need or programmatic requirement
 - Schools use the total allocation to create a school budget

Example

- \$7,750 per elementary school student
- \$8,544 per middle school student
- \$8,988 per high school student

BPS has responded to economic challenges by layering adjustments on this methodology since FY2004

FY2004 – FY2009

- Schools were allocated resources and then had to reduce their budgets by a certain percentage

FY2010

- Some schools could not absorb the full budget reduction and still serve all their students (e.g. could not afford a Grade 4 teacher)
- Restorations were based on multiple factors

FY2011

- School budgets were “rolled forward” from the previous year, adjusting for major changes in enrollment
- School allocations were reduced by \$400 per student and \$2,500 per school

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Weighted student funding: Principles for effective school budgeting

Principle	Description
Student focused	Provides resources based on students, not on buildings, adults, or programs
Equity	Allocate similar funding levels to students with similar characteristics, regardless of which school they attend
Transparency	Easily understood by all stakeholders
Differentiation based on need	Allocate resources through a comprehensive framework that is based on student needs
Predictability	School allocation process is predictable and is structured to minimize school-level disruption
School empowerment	Empowers school-based decision-making to effectively use resources
Alignment with district strategy	Supports the Acceleration Agenda, our five-year strategic plan

Weighted Student Funding will be a more equitable, transparent and empowering budget approach

What is Weighted Student Funding?

- Weighted Student Funding, or WSF, or Weighted Student Formula, is a way to distribute resources to schools.
- It is based on a per pupil allocation: “the dollars follow the student”
- The per pupil allocation is differentiated by student need
- WSF is not new to school districts
 - The methodology is used successfully in San Francisco, Cincinnati, Baltimore, Washington, DC, New York City, Edmonton, and others.
 - Each district has implemented a model that responds to its own unique needs. This is not a “one size fits all” approach.
- WSF is not new to Boston Public Schools
 - Task Force and past presentations to School Committee



Allocates funds based on student needs, improving equity, transparency and simplicity

WSF: Establishing the Weights

Weighted Student Funding (WSF) allocates a pool of resources to schools by assigning weights to all students based on need

Base weight: What all students receive (differentiated by grade)

Need weights: Additional support to meet needs of certain populations. Applied to all eligible students. Examples include:

- Programs (e.g., ELL / LEP, SPED, Vocational)
- Student characteristics (e.g., poverty)
- Academic performance (e.g., off track)

Weights equal a proportional dollar amount, based on total pool of resources

Example: Student A

Type	Weight	\$ Amount
Grade 6	1.4	\$5,121
Poverty	0.1	\$366
ELL	0.25	\$915
SUBTOTAL		\$6,402

Example: Student B

Type	Weight	\$ Amount
Grade 4	1.3	\$4,755
Autism	4.3	\$15,730
SUBTOTAL		\$20,485

WSF Example: Adams Elementary (Total Enrollment - 275 students)

Category		Enrollment	Weight	Per Pupil Rate	Budget Allocation (\$ * Enrollment)
Grade	K0 - K1	48	1.80	\$6,585	\$316,080
	K2	46	1.60	\$5,853	\$269,238
	1 - 2	93	1.40	\$5,121	\$476,253
	3 - 5	88	1.30	\$4,755	\$418,440
Poverty	% of Free and Reduced Lunch	88.1%			
	# of Free and Reduced Lunch Students	243	0.10	\$366	\$88,938
	# Above the District Average	23	0.10	\$366	\$8,418
English Language Learners	K0 - 5 ELL Students	153	0.05	\$183	\$27,999
Students with Disabilities	Low Severity	19	1.00	\$3,658	\$69,502
	Moderate Severity	10	1.40	\$5,121	\$51,210
	High Severity - Autism	21	4.30	\$15,730	\$330,330
School Foundation					\$200,000
TOTAL					\$2,256,408

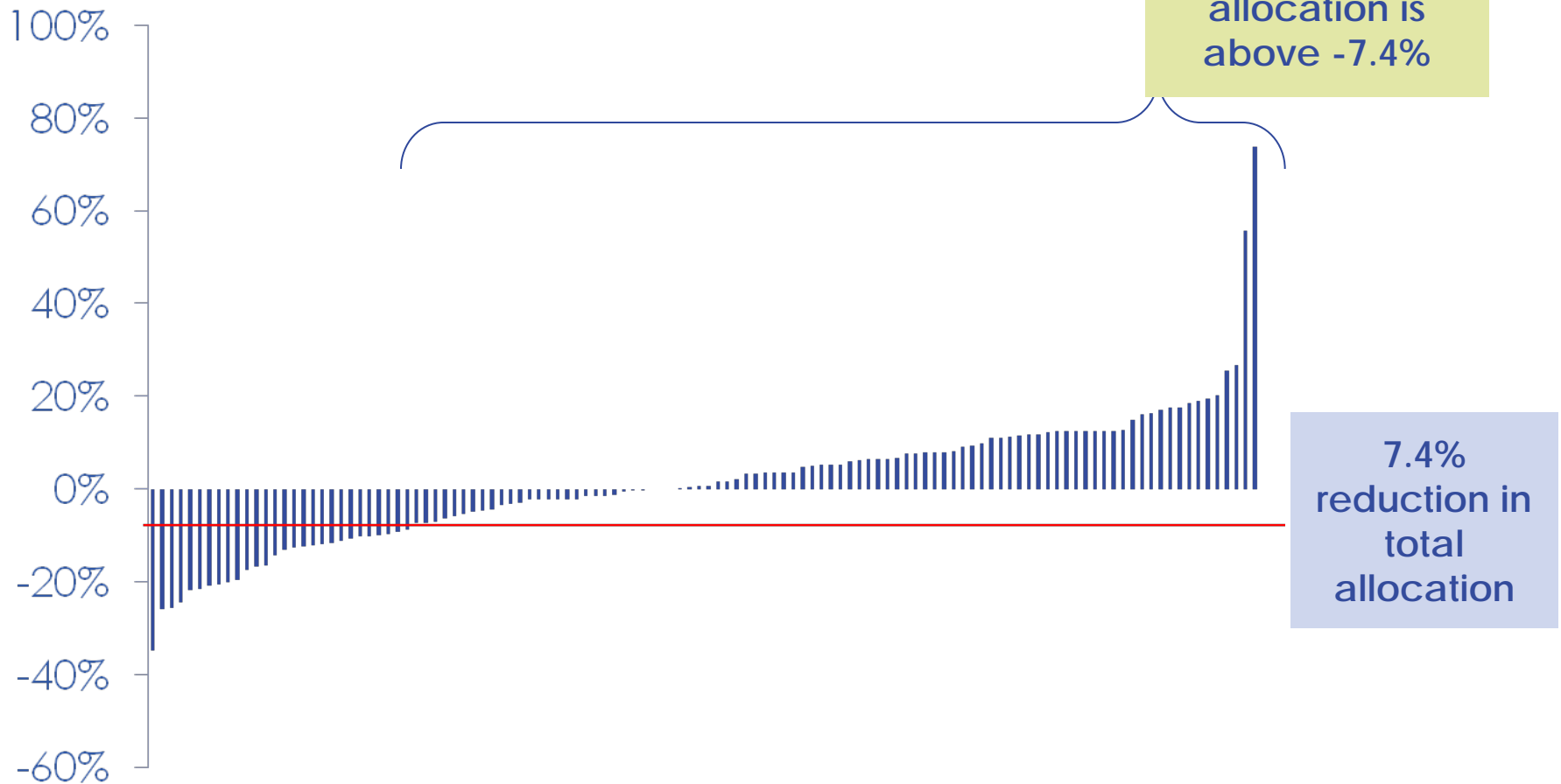
How it works: school allocation example

School	FY12 Enroll.	% Poverty	% SPED	% ELL	FY11 Avg. Per Pupil	FY12 Prelim. Per Pupil	Soft Landing Per Pupil	FY12 Adj. Per Pupil
Dorchester Academy	387	70%	47%	8%	\$7,975	\$8,629	0	\$8,629
Fenway High	306	67%	18%	4%	\$7,955	\$6,660	\$388	\$7,048

- These are two schools with similar enrollment levels but different populations of students
- Historically, they received the same per pupil amount
- Now, special education and ELL students receive appropriate resources in both schools
- Soft landing gives Fenway High School time to expand and manage enrollment to generate more resources

FY12 School Allocations – after adjustments

% Change in School Allocations FY12 Level Service to FY12 WSF



Reasons for Success

- Principles of weighted student funding: equity, transparency, student focused and differentiated based on need
 - Everyone could see how much every school received and knew why within minutes
 - The “little lady with curlers in her hair in South Boston” knew how much her child received
- Developed weights with central office staff and cross functional group (“Group of 60”)
- Principals and headmasters
 - Helping each other (e.g. BU PD event) and making all of these changes work in a very short period of time
- Changed the conversation to “one pool of resources”
 - Change one weight and everyone else goes down
- Rule based adjustments

Future Challenges

- Funding amount for schools
 - Weights are close to the contractual max
- Incentive for referring students with disabilities
- Responding to changes in enrollment
- Additional professional development and education for principals/headmasters, school site councils and the community
- More lead time to develop school budgets
- Exploring other areas (e.g. alternative education), but keeping consistency

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Q & A

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Transitioning to a Weighted Student-Funding Formula

Required Reading from *Education Week*:

[Districts Experiment With 'Weighted' Funding](#)

In moving to a "weighted student-funding formula," Boston joins other districts, such as Baltimore, Denver, Rochester, N.Y., and New York City, that believe this method better serves student needs and creates more transparency and fairness in district finances. And in a time of tight budgets, some also say this funding method creates a process where cuts can be managed around an individual school's needs, instead of coming by decree from the central office.