



**Office of Superintendent of Public Instruction**  
K-12 Financial Resources

# Basic Education Formula Translated into New Formula Structure

Preview of Crosswalk Progress

November 2, 2009

# What is the Crosswalk?

- ESHB 2261 enacts a new funding formula 9/1/2011 without funding values
  - Funding formula values currently in RCW 28A.150.260 are repealed
- Whether for the budget construction or for statutory adoption:
  - *Must identify the method and result to distribute all current funding formulas into new staffing and operating costs (MSOC) funding structure in time for 2010 Legislature to adjust any formula structure in ESHB 2261*
  - *Without final formulas in 2010, OSPI cannot be ready for 9-1-11*



# Goal = Cost Neutral Representation of:

Staff per 1,000 Students	Codified Law (A)	Budget (B)
K-3 / K-4 CIS	49	53.2
4-12 / 5-12	46	46
Classified	16.67	17.021
Administrative	4	4
Vocational High School	51.282	51.282
Skills Centers	59.880	59.880
Non-Employee Costs (07-08)	\$447,054,663	\$463,153,124
Learning Assistance Program	\$123,703,438	\$123,703,438
State Transitional Bilingual	\$74,977,714	\$74,977,714
I-728	Target Undecided	Target Undecided



# 3 Simple Staff Categories Need to be Arrayed Across 4 Groups and 24 Elements

		Certificated Instructional	Classified	Certificated Administration
1	Classroom Teachers	X		
2	School Staff	X	X	X
3	Districtwide Support		X	X
4	Central Administration		X	X



# Purpose of Today's Presentation

1. Update QEC on FFTWG progress to date
2. QEC dialogue with FFTWG re: nuances of method decisions
3. Initial decisions from QEC on selected Crosswalk assumptions so that December 1 conversation can focus more complex formula recommendations



# Progress to Date

		Crosswalk Status	New?
A	General Education (incl MSOC): 28A.150.260	Done, but FFTWG considering Central Admin formula	Yes, new staffing distribution since September
B	General Education: Budgeted	Same as Above	Same as Above
	General Education: Actual District Expend (incl Levy \$)	Not Complete	
	Learning Assistance Program	Preliminary	Yes
	State Transitional Bilingual	Preliminary, but FFTWG considering different formula	Yes
	Gifted/Highly Capable	Not Complete	
	I-728 Resources	Not Complete	



# Key Focus of FFTWG in Crosswalk Debate:

- Crosswalk represents an **allocation** of current state resources
- It is detailed, and the group may consider rolling some categories into others
- Detail is a function of:
  - ensuring cost neutrality,
  - reflection of system complexity, and
  - providing structure that gives policymakers the ability to identify allocations for new resources specifically



# Number of Students by Prototype

- Actual Average is a false sense of precision
- Actual schools have no clear grade configuration pattern
- Purpose of prototype is to provide simple accessible understanding of state funding levels of the prototype compared to actual school(s)
- FFTWG recommended using Task Force prototype

	BEFTF	Wa Learns	Actual Avg
Elementary K-6	400	432	422
Middle 7-8	432	450	407
High 9-12	600	600	692



# Class Size

Calculating Class Size is complex

- Requires *Hours per Day* variable
- Requires *Planning Time Provided*
- State only sets
  - *Hours per Year Offered*
  - *Days per Year Offered*
  - *Number of Teachers per 1,000 Students*



# What We Know

- Current requirement: At least offer a districtwide average of 1,000 instructional hours per year across at least 180 days
  - State does not dictate number of hours per day on average or dictate hours per day by grade level/span
  - Anecdotal: Districts frequently offer six periods per day for secondary students
  - Anecdotal: Districts offer varied hours at elementary school; often driven by most efficient use of buses and hours worked per day by certificated staff



# FFTWG: Crosswalk Should Reflect Reality

- Rejected assumption that state pays for 5 hours per day (1 period = .2 FTE and therefore state only pays for 1.0 FTE total)
  - Cannot meet 1,000 hour requirement
- On average, state pays for 5.6 hours per day, all grades (1,000 hours / 180 days)
  - No district has a full time certificated contract of only 5.6 hours per day
  - Teachers need/receive planning time



# FFTWG: Crosswalk Should Reflect Reality

- Teacher schedule includes planning time; 13% elementary and 17% secondary
  - Elementary based on typical day; Secondary is 1 period out of 6 for planning time
  - Drives 15% and 20% increase in teachers respectively
- Debating whether or not the state pays for 5 hours per day at elementary and 6 hours per day at secondary
  - Equates to 900 and 1,080 respectively; averages to about 1,000



# If the FFTWG settles on an assumption of 5/6 hours:

- Crosswalk = declaration that state is funding 5 hours per day at elementary level (900 hours per year)
  - ESHB 2261 requires 1,000 hours for each grade, grades 1-6
  - Therefore the cost to implementing ESHB 2261 is associated with 100 additional hours per year
- Crosswalk = declaration that state is funding 6 hours per day at secondary level
  - ESHB 2261 requires 1,080 hours for each grade, grades 7-12 and opportunity to obtain 24 credits
  - Some districts do not do this; such districts may be providing nearly 1,080 hours, but not 6 periods
  - Once opportunity for Core 24, must require same hours more courses; such districts will have to increase class size in order to offer more courses



# What This Means...

## Class Size is the Balancer

- Lower Assumption re: # Hours Provided Today = Lower Class Size
- Higher Assumption re: # Hours Provided Today = Higher Class Size

FFTWG question came down to, Should:

- crosswalk reflect actual class size today? OR
- crosswalk reflect long-standing assumptions re: the number of hours that state pays for?
- *No clear answer, each has pitfalls.... But FFTWG will decide and make a recommendation*



# Other Assumptions Related to Class Size

- High poverty schools are funded for the same class size as non-high poverty schools
- 100% of CIS enhancement for K-3/K-4 employs classroom teachers, not Librarian/ESAs
  - Allowable to employ other CIS, but here assume all teachers



# Certificated Instructional Staff: Core Teachers

	Staff /1,000 28A.150.260	Classroom Teachers per 1,000 Students	Students per Staff w/ No Planning Time	% Increase in Teachers to Cover Planning	Students per Staff w/ Planning Time	Funded Class Size
Elem (K-3)	49	45.766	21.85	15%	25.13	<b>25.13</b>
Elem (4-6)	46	42.766	23.38	15%	26.89	<b>26.89</b>
Middle (7-8)	46	42.051	23.78	20%	28.54	<b>28.54</b>
High (9-12)	46	41.717	23.97	20%	28.77	<b>28.77</b>
K-4	53.2 (budget not law)	49.966	20.01	15%	23.02	<b>23.02</b>



# School Staffing Assumptions

- Category for Professional Development Coaches (Instructional Coaches) (included b/c ESHB 2261 specifies)
  - Crosswalk contains zero state funded staff
  - Personnel report has not included this category
- Category for “Other”
  - System is too complex to boil down to 4 elements
- Most school staff distributed across elementary, middle, high based on actual staffing patterns of 85% of system



# Certificated Instructional Staff: Librarian, Educational Staff Associates and Support

A : RCW 28A.150.260	Elementary	Middle	High
Prof. Dev. Coach	0	0	0
Teacher Librarian	.663	.519	.523
Counselor	.493	1.116	1.909
Nurse/Soc. Wrkr. / Other	.135	.068	.118
Other Certificated Staff	.003	.003	.020
Instructional Aides	.371	.256	.217
Office Staff/Other Aides	.798	.849	1.087
Security	.031	.033	.046
Facilities Maintenance, Grounds, Custodial	.534	.577	.801
<b>Total</b>	<b>3.028</b>	<b>3.421</b>	<b>4.720</b>



# Districtwide Support

- ESHB 2261 is designed with 3 funding categories:
  - Class Size
  - School support
  - Central Admin
- FFTWG adds a 4<sup>th</sup> category:
  - Districtwide Support
  - Current accounting system is divided in this manner
  - Technology, security, facilities maintenance, warehouse, laborers are not central administration but also frequently not linked to a specific school



# Districtwide Support

RCW 28A.150.260	Elementary	Middle	High
Supervisors/Finance/ Personnel/Comm.	.018	.019	.027
Technology	.072	.078	.109
Student/Staff Security	.013	.014	.020
Warehouse/Laborers/ Mechanics	.024	.026	.036
Office Clerical	.007	.008	.011
Maintenance, Custodians, Grounds	.192	.207	.288
Certificated Admin	.008	.007	.010
<b>Total</b>	<b>.335</b>	<b>.360</b>	<b>.500</b>



# Central Administration

	Staff per 1,000 Students
Office Clerical	1.642
Supervisors/Finance	.688
Certificated Administrators	.799
CTE Central Admin	.779
<b>Total</b>	<b>3.908</b>



# Administration Assumptions

- Districts employ 3.7 Administrators per 1,000 students
- Crosswalk must account for full state allocation
- Prorate extra administrators between Principals and Central
- Crosswalk is conducted for staffing at this time; FFTWG is considering a different formula approach



# Principals/Vice-Principals in School Staffing Plan

- Totals to 3 staff per 1,000 students (rounded)
- Includes vocational administrative staff deducted from class size calculation

	Elementary	Middle	High
Principal and Other School Admin	1.231	1.404	1.935



# Career and Technical Education Assumptions

- State currently permits 8% administrators but districts hire fewer
  - Assume 8% not actual
  - Split between School and Central administration based on split of general 4/1,000



# Certificated Instructional Staff: CTE Teachers

	Staff /1,000 Operating Budget	Admin Staff	Classroom Teachers per 1,000 Students	Assumed Educational Staff Associates	% Increase in Teachers to Cover Planning	Students per Staff w/ Planning Time	Funded Class Size
High School	51.28	8%	45.27	3.7%	20%	26.51	26.51
Skills Centers	59.88	8%	52.86	3.7%	20%	22.70	22.70



# CTE Summary

	HS CTE	Skills Centers
	Per 600 Students	Per 600 Students
Class Size	26.509	22.703
# Teachers for Class Size	27.159	31.715
Principal/School Admin	1.985	2.317
ESAs (usually Guidance)	1.148	1.340
Central Admin	.467	.545
Districtwide Support	.010	.011
<b>Total</b>	<b>30.769</b>	<b>35.928</b>
Equates to Students per Staff of:	19.500	16.700



# Core Non-Employee Related Costs

- 2 Calculations:
  - A: 2007-08 NERC funding minus small school factors and minus K-4 factors (\$493.64 per student)
  - B: A, but include K-4 factors (\$511.42 per student)
- FFTWG recommends Proportional distribution of current funding



# Core Non-Employee Related Costs

2007-08	District Actual	A: 28A.150.260	B: Budget
Technology	\$113.80	\$51.88	\$53.75
Textbooks and Consumable Curriculum	\$122.17	\$55.70	\$57.70
Library and Other Supplies	\$259.39	\$118.26	\$122.52
Professional Development	\$18.89	\$8.61	\$8.82
Utilities & Insurance	\$309.21	\$140.97	146.05
Central Support	\$98.64	\$48.38	\$50.12
Facilities Maintenance	\$160.66	\$69.84	\$72.35
<b>Total</b>	<b>\$1082.76</b>	<b>\$493.64</b>	<b>\$511.42</b>



# See Summary Sheet

- Refer to excel spreadsheet with entire staffing crosswalk/prototype



# General Education Remaining:

- Small School District Factors –
  - ESHB 2261 does not specify formula, just that a such a factor should be retained
  - Preliminary, but FFTWG appears to be recommending funding small school districts at the standard prototypical rate and add funds to “hold harmless” loss of revenue to current allocation amounts
  - FFTWG appears to support funding Remote and Necessary schools using current formulas



# Categorical Programs

	Current Formula	Equates to:
Learning Assistance Program (07-08)	<ol style="list-style-type: none"> <li>1. \$228 per income-eligible LAP unit</li> <li>2. Extra LAP units allocation for districts &gt;40% poverty</li> <li>3. Extra LAP units for districts &gt;40% and ELL population &gt; 20%</li> </ol>	<ol style="list-style-type: none"> <li>1. 1.658 hours per week extra time in class size of 15 for each LAP unit</li> <li>2. No extra allocation for &gt;40% poverty, this \$11.9 million associated w/ Hold Harmless</li> <li>3. No extra allocation for ELL concentration, this \$2.3 million is associated with Hold Harmless</li> <li>4. 0 hours per week for 4 weeks vacation tutoring for each LAP unit</li> </ol>
State Transitional Bilingual Program	<ol style="list-style-type: none"> <li>1. \$904 per headcount eligible student (08-09)</li> </ol>	<ol style="list-style-type: none"> <li>1. Elem: 1 instructional block in ELL classroom with 16 students</li> <li>2. Sec: 1 period of 6 in ELL classroom with 16 students</li> </ol>



# Risks to Outcome of Cost Neutral Crosswalk

- **Small school district factor**
  - If the FFTWG recommends a change in the formula, then cannot be cost neutral unless Hold Harmless factor
- **Central Administration**
  - Currently a staffing-based formula; if FFTWG recommends change, likely difficult to maintain cost neutrality by district
- **LAP**
  - New formula will likely shift resources b/c Ad Hoc group recommends no concentration factor (preliminary); group does recommend Hold Harmless factor
- **Special Education**
  - As long as resources in Vocational Ed are not shifted to general education, and Districtwide resources are not shifted out of general education, then Special Education will remain cost neutral, but
  - Change to Central Admin could impact Special Education; small school district factor also



# Preliminary QEC Decisions?

- Accept FFTWG recommendations on:
  - Prototype values of 400, 432, and 600 respectively?
  - 4 categories of Class Size, School Staffing, Districtwide Support, Central Administration?
  - Distribution of Vocational Education resources?



# Work Remaining

- Continue modeling for cost neutrality
- Model LAP/ELL by district
- Run entire crosswalk for 'District Actual Expenditures'
- Model I-728 crosswalk options for QEC

