



STATE OF HAWAII
DEPARTMENT OF EDUCATION
P.O. BOX 2360
HONOLULU, HAWAII 96804

OFFICE OF FISCAL SERVICES

May 23, 2017

TO: The Honorable Grant Chun
Chairperson, Finance and Infrastructure Committee

FROM: Mitchell Otani *Mitchell H. Otani*
Chairperson, Committee on Weights X

SUBJECT: **Committee Action on the Recommendations of the Committee on Weights X Regarding the Weighted Student Formula Fund Allocation for the 2017-2018 and 2018-2019 School Years**

1. RECOMMENDATION

The Committee on Weights X (COW) recommends the Board of Education (Board) accepts the COW's findings and recommendations related to the Weighted Student Formula (WSF) for School Years 2017-2018 and 2018-2019 (see attachment).

a. Specific to the formula, the COW recommends that:

- i. As average salaries are updated for purposes of schools' Financial Plans, the base funding amount be adjusted accordingly beginning Fiscal Year (FY) 2017-18.
- ii. English Language Learners (ELL) have a static weighting factor at each level of English proficiency (Fully English Proficient, Limited English Proficient, Non-English Proficient) in the WSF beginning FY 2017-18, versus calculating the weighting factor based on a fixed dollar amount as is currently done.
- iii. If additional resources are provided, funding be prioritized to support homeless students at a weight of 0.20 beginning FY 2018-19.*
- iv. If additional resources are provided, funding be prioritized to increase the support for ELL beginning FY 2018-19.*

**Should any additional funding be allocated to the WSF program for FY 2018-19, the funds will be proportionally distributed between the prioritizations for homeless and ELL students, per the recommendations by the COW.*

- b. A request was made from the Board that this year's COW consider the issue of adequacy. As in previous years, the COW found that the current level of funds in the WSF is inadequate. The COW discussed the issue and reviewed the last formal adequacy study for the Department of Education (Department) performed in 2005 by Grant Thornton.
 - i. Based on the last adequacy study performed, the COW recommends that the Board seek an additional \$258 million in the FY 2018-19 Executive Supplemental Budget Request for the WSF budget.
 - ii. If for whatever reason the finding from the 2005 adequacy study is deemed not applicable, acceptable, or feasible, it is recommended that funding be requested in the FY 2018-19 Executive Budget Request to conduct a new study.
- c. Finally, there was discussion by the COW centering on seeking and obtaining community support for schools. As such:
 - i. The COW recommends that the Department take coordinated action at the state level to pursue expanded resources to support school and community-based plans for student success. Additional funds and community partnerships are critical to advance equity and excellence for all schools and every student.

2. RECOMMENDED EFFECTIVE DATE

The COW recommends an effective date for changes to the formula at the beginning of FY 2017-18 and FY 2018-19 as described in the recommendations (see item 1 above).

3. RECOMMENDED COMPLIANCE DATE

Same as effective date.

4. DISCUSSION

a. Conditions leading to the recommendation

Hawaii Revised Statutes (HRS) 302A-1303.5 calls for the COW to meet not less than once every odd-numbered year to review the WSF and, if the COW deems necessary, recommend changes to the WSF for adoption by the Board. The COW has convened for this purpose nine times previously in 2005, 2006, 2007, 2008, 2009, 2010, 2011, 2013, and 2015. A record of the recommendations resulting from the previous COW meetings and Board actions taken can be found on the Department's WSF website.

On January 10, 2017, the Department recommended a composition for the COW members to the Board's Finance and Infrastructure Committee (FIC). The intent of the recommendation was to bring to the table members from various school community role groups that represent the unique and diverse characteristics and needs of schools system-wide, such as large and small; rural and urban; Oahu and neighbor island; and elementary, middle, high, and combination schools.

Of the fifteen members that comprised the COW, eight were principals, two were teachers, one was a school administrative services assistant, one was a complex area business manager (CABM), one was a registrar, one was a complex area superintendent (CAS), and one was a community member.

These members came from each county:

- Nine of the members were from Oahu;
- Two from Maui County;
- Two from Hawaii Island; and
- Two from Kauai.

The members came from various school levels and sizes:

- Four members, two of whom were principals, were from high schools;
- Three members, one of whom was a principal, were from elementary schools;
- Two members, both principals, were from middle or intermediate schools;
- Three members, all principals, were from K-12 combination schools; and
- Three members were not from a single school level (CAS, CABM, and community member).

The COW held a series of five all day public meetings from February 3, 2017 to May 5, 2017.

b. Previous action of the Board on the same or similar matter

Nine times since 2005, the Board either modified or considered modifying the WSF. The last time the Board considered modifying the WSF was August 18, 2015.

c. Other policies affected

None.

d. Arguments in support of the recommendation

The recommendation will enable schools to continue their planned process with their School Community Councils to develop their academic and financial plans for upcoming school years.

e. Arguments against the recommendation

Some may argue that school communities cannot be trusted or should not be forced to determine whether or not specific programs or activities will be maintained via WSF funds.

Schools with lower enrollments, in particular, may express concerns that they cannot provide equal access to educational opportunities as larger schools.

Schools with higher enrollment may express concern that the use of base funding results in a considerable amount of the WSF funds being distributed via a non-weighted characteristic, which has the impact of reducing the value of 1.0.

f. Other agencies or departments of the State of Hawaii involved in the action

The recommendation requests that the Board propose to increase state support for the WSF in the Executive FY 2018-19 Supplemental Budget, which would require the Governor's approval as well. The Legislature would be involved in considering the merits of the proposal to increase funding for the WSF.

g. Possible reaction of the public, professional organizations, unions, DOE staff and/or others to the recommendation

The possible reaction from school communities to maintain the existing formula for weighted characteristics will likely be well received by schools seeking funding stability and predictability. Nevertheless, reaction will likely be mixed as a result of the inability of the formula to provide adequate funding to all schools.

h. Educational implications

The COW found that the current level of funds in the WSF is inadequate to sustain the goal of supporting student success.

i. Personnel implications

No negative impact. Procedures are already established to add and reduce positions per the annually created WSF Financial Plan and via the buy/sell process through February of the school year.

j. Facilities implications

None.

5. OTHER SUPPLEMENTARY RECOMMENDATIONS

Beyond the specific changes to the formula and other recommendations that require Board action, the COW prepared an extensive report that details their work, deliberations, and findings.

MO:ks
Attachment

c: Amy S. Kunz, Senior Assistant Superintendent and CFO
Budget Branch

Committee on Weights X
Introduction and Recommendations

Introduction:

Hawaii Revised Statute calls for the Committee on Weights (COW) to meet not less than once every odd-numbered year to review the Weighted Student Formula (WSF) and, if the COW deems necessary, recommend changes to the WSF for adoption by the Board of Education (Board). A copy of the sections of statute that call for the COW and the WSF are attached as **Exhibit A**.

The COW has convened for this purpose nine times previously in 2005, 2006, 2007, 2008, 2009, 2010, 2011, 2013, and 2015. A record of the recommendations resulting from the previous COW meetings and Board actions taken can be found on the Department of Education’s (Department) WSF website.¹

On January 10, 2017, the Department recommended to the Board’s Finance and Infrastructure Committee (FIC) a composition for the COW X members. The intent of the recommendation was to bring to the table members from various school community role groups that represent the unique and diverse characteristics and needs of schools system-wide, such as large and small; rural and urban; Oahu and neighbor island; and elementary, middle, high, and combination schools.²

Based on the Board’s approved composition, the Department was able to secure the participation of the following volunteers to serve on the COW X:

Chair	Mitchell Otani	
Vice-Chair	Chad “Keoni” Farias	
Members	Daniel Hamada Jan Iwase Roxane Martinez Glen Miyasato Bruce Naguwa Ann Paulino Osa Tui	Justin Hughey Elton Kinoshita Wendy Matsuzaki Cary Miyashiro Gail Nakaahiki Bill Taylor

¹<http://www.hawaiipublicschools.org/VisionForSuccess/SchoolDataAndReports/StateReports/Pages/Weighted-Student-Formula.aspx>

²<http://boe.hawaii.gov/Meetings/Notices/Pages/January-10%2c-2017-Finance-and-Infrastructure-Committee-Meeting.aspx>

The COW, like other statutorily established panels, is subject to the State’s Sunshine Law (HRS, Chapter 92). As such, agendas for each meeting were filed with the Lieutenant Governor’s Office and posted on the State’s calendar at least seven days prior to the meeting, posted to the Department’s website, and posted to the Board’s bulletin board on the fourth floor of the Queen Liliuokalani Building. Input from schools and the public were both welcomed and encouraged. Each meeting began with a scheduled period to receive public testimony. Testimony received is attached as **Exhibit B**. Once approved, meeting minutes were posted to the Department’s WSF website.³

Recommendations:

The COW members took into consideration many factors in developing its recommendations, including feedback from principals and other stakeholders, input from program managers who presented at the meetings, and their own independent observations and experiences. The COW recognizes that there will always be a need for continuous improvement in the delivery of education and related services, and has made several recommendations to possible areas for program improvement. The following specific recommendations were voted on and passed unanimously:

ISSUE	RECOMMENDATION
Formula	<ul style="list-style-type: none"> ● Committee recommends that as average salaries are updated for purposes of schools’ Financial Plans, the base funding amount be adjusted accordingly beginning FY2017-18. ● Committee recommends that English Language Learners (ELL) have a static weighting factor at each level of English proficiency (Fully English Proficient, Limited English Proficient, Non-English Proficient) in the WSF beginning FY2017-18, versus calculating the weighting factor based on a fixed dollar amount, as is currently done. ● Committee recommends that if additional resources are provided, funding be prioritized to support homeless students at a weight of 0.20 beginning FY2018-19.* ● Committee recommends that if additional resources are provided, funding be prioritized to increase the support for ELL beginning FY2018-19.* <p style="margin-left: 40px;">* <i>Should any additional funding be allocated to the WSF program for FY2018-19, the funds will be proportionally distributed between the prioritizations for homeless and ELL students, per the recommendations by the COW.</i></p>

³<http://www.hawaiipublicschools.org/VisionForSuccess/SchoolDataAndReports/StateReports/Pages/Weighted-Student-Formula.aspx>

<p>Adequacy</p>	<ul style="list-style-type: none"> • Based on the last adequacy study performed, the Committee recommends that the Board seek an additional \$258 million in the FY2018-19 Executive Supplemental Budget Request for the WSF budget. • If for whatever reason the finding from the 2005 adequacy study is deemed not applicable, acceptable, or feasible, it is recommended that funding be requested in the FY2018-19 Executive Supplemental Budget Request to conduct a new study.
<p>Community Support</p>	<ul style="list-style-type: none"> • Committee recommends that the Department take coordinated action at the State level to pursue expanded resources to support school and community-based plans for student success. Additional funds and community partnerships are critical to advance equity and excellence for all schools and every student

Committee on Weights X Program Report

Overview:

The COW was tasked with reviewing non-WSF programs and positions to determine if any of the programs or positions could be added into the WSF. Please see **Exhibit C**, "FY2016-2017 General Fund Operating Budget".

The COW members also looked at the "Criteria for New Program Funds To Be Included in WSF" which was updated by COW VI and states that the COW agrees that program funds will be recommended for inclusion in WSF if the funds:

1. Were provided to all schools;
2. Were provided to all schools of a particular level (i.e., High School);
3. Could be distributed equitably by formula;
4. Would provide greater flexibility to the school community; or
5. Were previously distributed in a manner that resulted in an inequity.

The COW also reviewed programs and positions currently in WSF to determine if any programs or positions should be taken out of WSF. Please see **Exhibit D**, "Listing of Programs Included in Weighted Student Formula (WSF) as of FY2017".

During the discussion, it was suggested that the COW review the work from COW IX regarding "big ticket" items, since they would have the greatest impact on the formula. These "big ticket" items were Utilities, Student Transportation, Food Services and Athletics. After careful review, the COW X agreed with the findings of COW IX that due to federal requirements, contractual needs and/or the ability to determine an equitable way to distribute funds to all schools, it was not feasible to place any of these four programs into the WSF.

Additionally, there was an expressed interest in discussing the School-Based Behavioral Health (SBBH) program and if any vacant positions in this program could be moved into WSF. The discussion of this program found that vacant positions could not be moved into WSF since the cost savings generated is utilized to cover contractual costs needed to continue providing services despite these vacancies.

**Committee on Weights X
Formula**

Formula Overview:

For the COW X, the primary focus, pursuant to Section 302A-1303.6 and the items related to the formula, the committee may:

1. Create a list of student characteristics that will be weighted;
2. Determine specific student weights, including their unit value;
3. Recommend a weighted student formula to the Board; and
4. Perform any other function that may facilitate the implementation of the weighted student formula.

As such, the COW X members went through an extensive review of the current student characteristics and looked at proposed additions to the WSF. The following provides information on the recommendations that the COW X proposed and voted on to accept.

Proposed changes to the Weighted Student Formula (WSF):

Recommendations for Formula Changes, effective FY2017-18 (Exhibit E)

Base funding: As average salaries are updated for Financial Plan purposes (every two years), the base funding amount should be adjusted accordingly (which could result in an increase OR decrease).

School Type	# of Schools	Current Base	Proposed Base	CHANGE
Elem	167	\$259,524	\$283,000	\$23,476
Elem - Multi-Track	1	\$339,524	\$373,000	\$33,476
Middle	36	\$406,524	\$442,000	\$35,476
Middle - Multi-Track	2	\$486,524	\$532,000	\$45,476
High	33	\$413,524	\$450,000	\$36,476
Combination Schools				
K-12	5	\$673,048	\$720,000	\$46,952
K-8	4	\$462,524	\$503,000	\$40,476
6-12	5	\$469,524	\$511,000	\$41,476

English Language Learners (ELL): Modify weights for ELL to hold them constant, instead of determining the weight based on a total fixed dollar amount for ELL. This change will affect the total amount of dollars allocated for ELL in any given year, based on value of 1.00 and the ELL counts.

Characteristic	Proj Count	Current Weight	Current Value	Proposed Weight	Revised Value *	CHANGE
English Language Learners (ELL)	18,210					
Fully English Proficient	6,119	0.0648	\$267.54	0.0648	\$267.59	\$0.05
Limited English Proficiency	8,927	0.1944	\$802.61	0.1944	\$802.77	\$0.16
Non- English Proficient	3,164	0.3887	\$1,605.22	0.3888	\$1,605.55	\$0.33

** The dollar value above is an estimate, based on current counts and appropriation.*

Recommendations for Formula Changes, effective FY 2018-19 (Exhibit F)

These recommendations are being made provided additional funds are appropriated in FY2018-19. If the additional funding provided is less than the total requirements as estimated below, the changes will be applied proportionally.

Homeless Students: Add new student characteristic and weight for homeless students.

Characteristic	FY2017-18			FY2018-19		CHANGE
	Proj. Count	Current Weight	Current Value	Proposed Weight	Revised Value *	
Homeless	2,837	N/A	N/A	0.200	\$825.90	\$825.90
TOTAL EST REQUIRED *						\$2,343,077

** The dollar value above is an estimate, based on current counts and appropriation.*

English Language Learners (ELL): Increase the weights for all levels of ELL to provide additional resources.

Characteristic	FY2017-18			FY2018-19		CHANGE
	Proj Count	Current Weight	Current Value	Proposed Weight	Revised Value *	
English Language Learners (ELL)	18,210					
Fully English Proficient	6,119	0.0648	\$267.54	0.1115	\$460.44	\$192.90
Limited English Proficiency	8,927	0.1944	\$802.61	0.3345	\$1,381.32	\$578.71
Non- English Proficient	3,164	0.3887	\$1,605.22	0.6690	\$2,762.64	\$1,157.42
TOTAL EST CHANGE						\$10,009,020

** The dollar value above is an estimate, based on current counts and appropriation.*

Committee on Weights X

Adequacy

Board Request:

On January 10, 2017, during the FIC's consideration of the composition of this year's COW, a request was made that COW X consider the issue of adequacy. The minutes from the FIC meeting recorded the request as follows:

Committee Member De Lima expressed appreciation for a consistent process and for a developed methodology that has been embraced by teachers and Principals. Committee Member De Lima noted that one of the issues pointed out is that this is not a matter of adequacy, but it is a process to equitably distribute funds. He... highlighted that the challenge from the Board's perspective is the adequacy piece. Committee Member De Lima stated that resources in Hawaii are limited and that public education is a priority because the only way to grow an economy and provide for society is through an educated mass. He inquired what adequacy funding is necessary for each school. Committee Member De Lima noted that COW has made suggestions in the past about incremental funding increases; however, a change in the law is to create a system of weights to determine the relative cost of educating any student, and the law calls on COW to provide what dollar amount is necessary to educate any student... Committee Member De Lima stated that it will be helpful for members of the COW to say that the adequacy dollar amount will be "X" and that this will lend credence when going to the Legislature.

Committee Work

The COW work on this issue included: a review of the COW's enabling statute to confirm the roles and responsibilities; a presentation by and discussion with Richard Seder, an individual from the University of Hawaii with an extensive background in the subject; a review of materials on the issue of adequacy from experts in the field; and a review of the 2005 Adequacy Study performed for the Hawaii Department of Education.

Review of Statute

Each year, the COW reviews their statutory charge per Section 302A-1303.5. (See **Exhibit A**).

The COW found this section of statute does not support the assertion that, "*the law calls on COW to provide what dollar amount is necessary to educate any student.*" Nevertheless, the COW X appreciates the importance of the question and recognizes that Hawaii's public schools are not adequately funded. Every previous COW has found that the available budget is not adequate. In response to this recognition, the COWs VII and IX recommended that additional WSF funding, \$34 million and \$26.5 million respectively, be sought from the State Legislature to

begin to address the issue. The COW X has also taken on the issue of adequacy and explored its implications for public education in Hawaii.

Richard Seder Discussion

There are strengths and weaknesses with each method to determine adequacy, but each relies on a belief in a systematic relationship between educational inputs and outcomes. The question of adequacy is complex and thus requires complex answers.

Considerations for an adequacy study:

- Scope
- Purpose
- Use
- Time
- Money
- Analysis of what schools have historically and are currently doing with funds.

Four Traditional Methods of Determining Adequacy⁴

Cost Function:

This approach uses data on educational expenditure and correlates these with measures of student need; scale (size) of district operation; measures of efficiency, if available; and educational outcomes based on achievement test results. The result estimates an education “cost function” which measures the cost associated with producing a given level of “output” (i.e., students educated to a certain standard) under specific conditions defined by measures of student need and scale of operations.

Pros:

- Determines the average cost of achievement;
- Allows for derivation of marginal costs of meeting atypical students’ needs; and
- Uses actual data.

⁴ Adapted from: Chambers, J. G & Levin J.D., *Determining the Cost of Providing an Adequate Education for All Students* (2009), American Institutes for Research, National Education Association.

Cons:

- Requires large amounts of input data;
- Econometrically complex;
- Opaque process to stakeholders;
- May rely on sole outcome measure (e.g., standardized achievement test); and
- May be less reliable when used across a wide variety of settings.

Professional Judgement:

Within this approach are both panel and survey methods. The panel method involves comprehensive panels of educators (e.g., teachers, principals, special education and English language learner specialists), who specify the resources (e.g., levels of administrative and student/instructional support, teacher staff, supplies, and materials) necessary to deliver a set of defined “adequate” educational outcomes at a minimal cost across a variety of settings defined by student needs and school size. These resource specifications are used to calculate the costs of the desired achievement outcomes across each setting. The survey method differs in that it focuses on educators specifying resources to maximize outcomes subject to a budget constraint and then outlining the expected outcome.

Pros:

- Method is transparent to stakeholders;
- Process is sensitive to stakeholders’ viewpoints;
- Allows an estimate of the marginal costs of adequately serving high-needs students;
- Considers a broader range of outcomes that may take into account cognitive and non-cognitive dimensions; and
- Involves those closest to the schools.

Cons:

- Costs may be overestimated based on inefficiencies of specifying resources;
- Survey method does not present opportunities for interaction leading to consensus;
- Assumes educators are in the best position to determine allocation of resources; and
- Confirming and anchoring biases may occur.

Successful Schools:

This approach looks at the spending of schools or districts that have achieved what researchers consider appropriate, “adequate” educational outcomes. An alternative approach, called “beating the odds,” uses statistical techniques to identify schools that are doing better than expected given their population demographics.

Pros:

- Transparent method;
- Easy to understand; and
- Transferable.

Cons:

- Wealthy communities with high-achieving schools often serve lower needs populations and tend not to need improvements as compared to schools in less wealthy areas;
- Does not consider exactly how successful schools or districts actually use funds;
- “Beating the odds” approach requires years of data collection; and
- Investigations have shown that relatively few schools “beat the odds” in the long run.

Evidence-Based:

This approach uses the research literature on educational effectiveness to specify the appropriate resources for successful schools.

Pros:

- Transparent method; and
- Published research is easy to use.

Cons:

- Research literature can provide conflicting information;
- Selection of studies can greatly impact results;
- Assumes a one-size-fits-all model;
- Lacks flexibility in designing funding for a variety of schools; and
- Lacks flexibility in measuring marginal costs.

Hybrid:

The hybrid model relies on the strengths of each of the approaches, particularly the professional judgement approach, and also incorporates elements of the other approaches as well. The hybrid model emphasizes the importance of engagement with not only education practitioners, but also various external stakeholders.

Pros:

- Draws on the best elements of previous approaches;
- Transparent and inclusive method; and
- Considers fiscal contexts of the SEA/LEA.

Cons:

- See cons for previous methods.

Challenges to Conducting a Study to Define Adequacy

Several challenges exist regarding the definition of adequacy:

- Securing agreement on a single set of goals and desired outcomes.
- Dedication of financial and time resources to conduct the study
 - cost range: \$250,000 to over \$1 million
 - time range: 3 months to 18 months
- Ensuring existing funds are being expended efficiently to achieve desired goals/outcomes.
- Accounting for variances in resource inputs to schools (e.g., community/parental support, facilities, etc.).
- Accounting for variance in capacity of students to learn using different strategies (e.g., cultural variances, student confidence, and cognitive abilities).
- Accounting for variance in capacity of school staff to support student learning (e.g., professional development and leadership).

Previous Hawaii Department of Education Adequacy Studies

In 2005, an adequacy funding study was conducted by Grant Thornton for the Department⁵. The Grant Thornton method relied on developing Baseline School models that accurately reflected current educational practices and expenditures at elementary, middle, and high school levels. Using the Baseline school models, the next step was to create “adequate” school models that included “interventions” designed to improve effectiveness in educating students to meet previously identified goals. Various policy statements from stakeholders including the Department, Board, and the Hawaii legislature were integrated to develop fourteen adequacy goals, which considered best-practice based interventions that would require additional funds. These adequacy goals were listed as the following policy statements:

1. Offers students an equal educational opportunity to enroll in programs regardless of race, color, religion, sex, sexual orientation, disabilities, or national origin
2. Transmits the most important elements of the diverse cultures that make up the State, while simultaneously advancing the endowment of those cultures for the benefit of subsequent generations of students and society at large
3. Builds upon a partnership among highly-qualified professional educators, parents, and community members who work together for student success
4. Enables all students to participate fully in a democratic society, and engage productively in a market economy
5. Equips all students to function effectively in today’s pluralistic society

⁵<http://www.hawaiipublicschools.org/VisionForSuccess/SchoolDataAndReports/StateReports/Pages/Weighted-Student-Formula.aspx>

6. Systematically develops student mastery of fundamental academic skills, including literacy and numeracy, so that all students reach high levels of performance, the purpose of which is to close the gap in achievement between different racial and economic groups
7. Exposes students to a broad body of knowledge and comprehensive set of skills that support lifelong learning, effective decision-making, self-awareness, and higher order thinking
8. Offers a comprehensive curriculum to all students built around a core that includes English language arts, sciences, mathematics, social studies, fine arts, health and fitness, world languages, and home and work skills
9. Ensures student safety and well-being within environments that have adequate facilities, equipment, books, and other learning resources
10. Allows students to move continuously and seamlessly from entry into pre-school to a successful transition to high school
11. Serves as the primary means for students who arrive from other nations to make a successful transition to the American educational system and culture
12. Addresses the special needs of students who face educational challenges
13. Engages parents and the community as full partners in the student's learning process
14. Promotes continuous improvements in student learning through research-based practices, site-based decision-making, and public accountability

Findings of the Grant Thornton Adequacy Study

The study found that the amount required at that time to raise all schools to adequacy was \$278 million in additional annual funding, with a five year timeline to reach this level.

In addition, the study recommended the creation of a non-partisan commission that would be responsible for updating the adequacy models regularly.

Response to the Grant Thornton Adequacy Study in 2005⁶

Some Board members, who commissioned the study as part of the Board's Fiscal Accountability Project, noted that there is wide disagreement on what constitutes an "adequate" education and that the report could be picked apart by legislators. "This is definitely something that validates what we've been saying, that schools need more money and that the system is not some huge bloated thing," said board member Karen Knudsen. Per Georgina Kawamura, the State's Finance Director at the time the report was released, "In a perfect world, studies like this might provide some basis for more funding, but we can't provide anything of that magnitude."

⁶ From: Martin, Dan, "Study lists \$278M in needs for schools", *Honolulu Star-Bulletin*, January 26, 2005, <http://archives.starbulletin.com/2005/01/26/news/story1.html>.

Grant Thornton Adequacy Study Recommendations - Adjusted for Today

With Act 51 and additional functions such as the construction management and human resource functions, it is difficult to make comparisons. Nevertheless, an adjustment can be made by starting with the Department’s 2005 general fund budget and the Grant Thornton Adequacy Study recommendation, and then adjusting both for inflation using the Consumer Price Index (CPI). By looking at the sum with the 2016 actual general fund appropriation and the 2018 appropriation, it is apparent there is a considerable gap. While lower than the funding gap identified in 2005, the updated funding gap comes out to \$258 million for 2018.

Note: Consumer Price Index for Honolulu: in 2005 it was 197.8, the 2016 actual was 265.3, and as of the first quarter of 2017 Quarterly Outlook for the Economy report issued by the State Department of Business Economic Development and Tourism is projected to rise to 278.4 by next fiscal year (FY2017-18).

	<u>2005</u>	<u>2016</u>	<u>2018</u>	
a	Exec Budget General Fund Appropriation (FY18 = HB100 CD1/17)	\$ 1,050,073,155	\$ 1,530,655,758	\$ 1,610,321,050
b	Grant Thornton Recommendation	\$277,539,388	\$ 277,539,388	\$ 277,539,388
c	CPI-U Honolulu	197.8	265	278.4
d	% change from 2005	0%	34.1%	40.7%
e=a*(1+d)	General Fund Budget 2005 (adj'ed) for CPI only	\$ 1,050,073,155	\$ 1,408,414,601	\$ 1,477,959,385
f=b*(1+d)	Grant Thornton Recommendation (adj'ed for CPI)	\$ 277,539,388	\$ 372,250,757	\$ 390,631,778
g=e+f	General Fund Budget + Grant Thornton Recommendation (adj'ed for CPI)	\$ 1,327,612,543	\$ 1,780,665,357	\$ 1,868,591,163
h=g-a	Shortfall	\$277,539,388	\$250,009,599	\$258,270,113

Committee Findings:

1. The COW X found the budget for public education is not adequate (similar to all previous COWs).
2. State law (HRS §302A-1303.5) calls for the COW to determine the relative cost of educating students, but not the dollar amount necessary to educate any student.
3. There are several approaches that can be employed to determine adequacy, each with its strengths and weaknesses.
4. Conducting an adequacy study is a significant undertaking beyond the scope or expertise of the COW. In addition, the cost of hiring consultants to perform a study of this scale ranges from \$250,000 to over \$1 million and would likely require over a year of work to complete.
5. The last formal adequacy study for the Department was performed in 2005 by Grant Thornton, which found:
 - a. The Department required \$278 million in additional funds; and
 - b. There is a need for the creation of a non-partisan commission responsible for regularly updating the adequacy models.
6. Adjusting the 2005 general fund budget and the Grant Thornton recommendation for inflation, and comparing that to the FY2017-18 projected budget, found the funding shortfall to be \$258 million.
7. Providing a specific amount necessary to ensure adequacy on its own is beyond the scope and expertise of the COW.
8. Conducting an adequacy study is a technical undertaking, best performed by experts in this discipline.

Committee Recommendations:

1. Based on the last adequacy study performed, the COW recommends that the Board seek an additional \$258 million in the FY2018-19 Executive Supplemental Budget Request for the WSF budget.
2. If, for whatever reason, the finding from the 2005 adequacy study is deemed not applicable, acceptable, or feasible, it is recommended that funding be requested in the FY2018-19 Executive Supplemental Budget Request to conduct a new study.

Committee on Weights X
Report on Other Considerations

OVERVIEW:

Throughout the various COW X meetings that were held, members had questions or concerns that were addressed through presentations by various Department personnel. Presenters and topics for COW X are listed below.

TOPICS/DISCUSSION:

TOPIC: Special Education (SpEd)

Presenters: A.S. Suzanne Mulcahy and Debra Farmer of the Office of Curriculum, Instruction and Student Support (OCISS)

ISSUE	DISCUSSION
Weighted Staffing Methodology switch to Proportional Methodology	<ul style="list-style-type: none"> • The Department used weighted staffing methodology until SY2009-10. • Due to the Individuals with Disabilities Education Act (IDEA) requirements, switch was made to proportional methodology in SY 2010-11. • Proportional methodology is fair, objective, and easily understandable; allows for conversion of positions between Article VI and SpEd as needed; and promotes inclusion.
District and Complex Area distribution of positions and funds to schools	<ul style="list-style-type: none"> • There are three methods: proportional, off the top for special classes/services then proportional, and ratio allocation. • Funding amount changes only if Governor reduces statewide funding. • OCISS is working with Complex Area Superintendents (CASs) to be more transparent on the distribution of positions to schools.
Inclusionary Practices – Less positions?	<ul style="list-style-type: none"> • There are sufficient inclusion classrooms, but not enough teachers able to fill positions. • Currently, there is a Request for Proposal (RFP) for all teachers to receive intensive training for SpEd inclusion, modeling and scheduling to improve services to students.
Autism	<ul style="list-style-type: none"> • Funding is provided through Program ID 15179, Services for Children with Autism, including special placements.

Keeping Students in Hawaii versus Mainland Placements	<ul style="list-style-type: none"> • Competitive pay issues for Educational Assistants (EAs). • Lack of capacity can be due to providing more to demanding parents • Student base model show some schools spend less.
Attorney Fees and Settlements	<ul style="list-style-type: none"> • Attorney fees paid from State office and settlements paid from District funds and do not affect funding to schools.

TOPIC: English Language Learners (ELL)

Presenters: A.S. Suzanne Mulcahy and Andreas Wiegand of OCISS

ISSUE	DISCUSSION
ELL funding	<ul style="list-style-type: none"> • Funded categorically until SY2005-06. • ELL placed into WSF in SY2006-07. • ELL will carry greater weight under the Every Student Succeeds Act (ESSA) subgroups. • COW IX discussed increasing the weights for ELL, which led to request to the legislature for \$10M increase funding, but funds were not appropriated.

TOPIC: Strategic Plan

Presenter: A.S. Tammi Chun of the Office of Strategy, Innovation and Performance (OSIP)

ISSUE	DISCUSSION
Overview of Strategic Plan	<ul style="list-style-type: none"> • The Department proposed to update and review the current Strategic Plan that was in effect till 2018. • In the middle of the review, the ESSA Act was passed. • ESSA provided more flexibility to states.
Pre-K students	<ul style="list-style-type: none"> • More positions being requested for preschoolers.
Economically Disadvantaged	<ul style="list-style-type: none"> • 30 high-needs schools. • High schools have fewer students qualified than lower grades. • Student aspirations to attend college are higher than rate of students enrolling in college.
Why do students need to take Tests and Assessments?	<ul style="list-style-type: none"> • Some tests are optional, like ACT. • Federal minimum for high school students under ESSA. • Starting SY2019-20, schools will decide on resources for student and staff success.
Strategic Plan Shifts	<ul style="list-style-type: none"> • There is a focused set of indicators.

TOPIC: Every Student Succeeds Act (ESSA)

Presenter: A.S. Tammi Chun of OSIP

ISSUE	DISCUSSION
Overview of ESSA	<ul style="list-style-type: none">• New Federal requirement for per pupil expenditure reporting by federal and state/local sources, not including A+ and Adult Ed.• ESSA reports not due until December 2018, but DOE is planning to start now.• Hawaii reports will reflect actual salaries.• WSF versus Categorical• Challenge is where school funds are going and what they are being spent on.

TOPIC: Personnel / Retention and Recruitment

Presenter: A.S. Barbara Krieg of the Office of Human Resources (OHR)

ISSUE	DISCUSSION
OHR	<ul style="list-style-type: none">• There are varying levels of questions and concerns, but none that required discussion about input into WSF.

TOPIC: Learning Centers

Presenter: Anna Viggiano of OCISS

ISSUE	DISCUSSION
Overview of Learning Center programs	<ul style="list-style-type: none">• Each Learning Center has different criteria but should be open to all students.• Outreach to schools that do not have Learning Centers.• Communication needs to be more systematic.• Sometimes it is hard for students to get to the Learning Centers.• No Geographic Exception (GE) is needed for students to attend Learning Centers.

TOPIC: Services for Deaf and Blind

Presenter: Debra Farmer of OCISS

ISSUE	DISCUSSION
Hawaii School For the Deaf and the Blind (HSDB)	<ul style="list-style-type: none">● Need to have a school for students to have social interaction with students with similar disabilities.● Boarding for middle and high school students.● HSDB staff uses American Sign Language and half the staff is also deaf.● Specialized service comes at a high cost.
Other specialized sites	<ul style="list-style-type: none">● Aikahi and Waimalu● Can be draining on resources to send child to special school, but if not who will the child relate to.● Might be best for home school to keep elementary and middle school students, since young children should go home and see family.

**TOPIC: Community Support
Committee Discussion**

A COW member expressed a concern over the possible disparity relating to fundraising, fundraising efforts, and the level of donations across the schools. Large schools, especially high schools, have the ability and resources to raise a larger amount of funds through boosters and various associations affiliated with the school, which can then go to help supplement their WSF funding. Smaller schools do not have as much of an opportunity as the larger schools, which provides them with an even smaller pool of possible funding sources.

Based on the discussion the COW had around this issue, the COW X recommends that the Department take coordinated action at the State level to pursue expanded resources to support school and community-based plans for student success. Additional funds and community partnerships are critical to advance equity and excellence for all schools and every student.

§302A-1303.5 Committee on weights. (a) There is established within the department of education the committee on weights to develop a weighted student formula pursuant to section 302A-1303.6. The committee may:

- (1) Create a list of student characteristics that will be weighted;
- (2) Create a system of weights based upon the student characteristics that may be applied to determine the relative cost of educating any student;
- (3) Determine specific student weights, including their unit value;
- (4) Determine which moneys shall be included in the amount of funds to be allocated through the weighted student formula;
- (5) Recommend a weighted student formula to the board of education;
- (6) Perform any other function that may facilitate the implementation of the weighted student formula; and
- (7) Meet not less than once every odd-numbered year, to review the weighted student formula and, if the committee deems it necessary, recommend a new weighted student formula for adoption by the board of education.

(b) The composition of the committee on weights shall be determined by the board of education based on recommendations from the superintendent of education and dean of the University of Hawaii at Manoa college of education and include principals, teachers, and other members with the appropriate professional skills, experiences, and qualifications needed to facilitate the work of the committee. The superintendent or the superintendent's designee shall chair the committee on weights.

(c) The committee on weights may form advisory subcommittees to obtain input from key stakeholders as determined necessary by the committee.

(d) The members of the committee on weights shall serve at the pleasure of the board of education and shall not be subject to section 26-34. Members of the committee on weights shall serve without compensation but shall be reimbursed for expenses, including travel expenses, necessary for the performance of their duties. [L 2004, c 51, §3; am L 2011, c 93, §2; am L 2012, c 133, §23]

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§302A-1303.6 Weighted student formula. Based upon recommendations from the committee on weights, the board of education may adopt a weighted student formula for the allocation of moneys to public schools that takes into account the educational needs of each student. The department, upon the receipt of appropriated moneys, shall use the weighted student formula to allocate funds to public schools. Principals shall expend moneys provided to the principals' schools. This section shall only apply to charter schools for fiscal years in which the charter schools elect pursuant to section 302D-29 to receive allocations according to the procedures and methodology used to calculate the weighted student formula allocation. [L 2004, c 51, §4 and am c 221, §7; am L 2006, c 298, §13; am L 2011, c 93, §3; am L 2012, c 130, §12 and c 133, §24]

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03/31/2017

I just received word that the COW was accepting testimony and understand that the committee is meeting this morning for your last meeting. If possible, would you accept testimony from Kohala High School. I apologize for this late submittal.

Kohala High School is one of the smallest if not the smallest stand alone Hawaii public high school. With an enrollment ranging from 234 to 250 in the last three years, it has not been possible for us to provide the base level of services for the high school level with WSF funding alone. We are about 20 students short of being able to manage within the WSF distribution.

I am asking the COW to consider the special needs of very small high schools due to the following circumstances that result in a lack of equity for our students.

1. Regardless of size, high schools need to provide a necessary range of course offerings for its students to fully address college and career readiness. In order to provide a greater range of courses, the school has no choice but to utilize PTTs as teachers for courses (3 sections-AVID elective, 1 section-Core Business, 1 section-Finance, 1 section-PHS Core, 2 sections-Culinary Arts I/II)
2. The increasing requirements for a high school diploma and access to honor diplomas have put another layer of strain on the school budget
3. Small schools do not have the benefits of economy of scale that larger schools can draw upon; therefore cannot afford to budget for full-time instructional coaches, test coordinators, registrars, and counselors. Necessity has demanded that my Vice-Principal and I serve as test coordinators for the ACT and SBA. This past year, budget required a reducing our 1.0 counselor position to .5 fte.
4. Under the current financial distribution, it is common for teachers to have 4-5 different preps for courses in their assigned teaching line.
5. In the past, we have had relied on WSF Reserve funding to provide a master schedule that provides a base level of services and programs for our students.

I realize that the COW already figures in small school weights; however, our circumstances extend beyond the supports we currently have as a designated schools.

Respectfully Submitted,

Janette Snelling
Principal
Kohala High School

Information for Committee On Weights X (2017)
FY2016-2017 General Fund Operating Budget

FY 2017 SUPPLEMENTAL OPERATING BUDGET			< F I S C A L Y E A R 2 0 1 6 - 2 0 1 7 >								
EDN	ProgID	Program Description	PERM FTE	TEMP FTE	A	A1	B	C	M	TOTAL	% of Budget
EDN 100 SCHOOL BASED BUDGETING											
EDN100	42100	WEIGHTED STUDENT FORMULA	12,288.000	530.800	710,089,706	51,217,991	74,453,489	32,240,765	-	868,001,951	55.369%
EDN100	15849	Vocational & Applied Technology	80.000	-	4,761,740	257,372	788,361	73,184	-	5,880,657	0.375%
EDN100	18869	Olomana Youth Center	12.000	1.000	699,140	30,000	30,565	50,000	-	809,705	0.052%
EDN100	18864	Alternative Programs	26.000	22.000	2,367,785	-	115,345	-	-	2,483,130	0.158%
EDN100	18205	Olomana Hale Hoomalu	2.000	2.000	221,303	-	8,468	2,500	-	232,271	0.015%
EDN100	18206	Olomana School	28.250	14.000	2,368,831	44,584	32,438	16,917	-	2,462,770	0.157%
EDN100	18863	High Core(Storefront)	8.000	-	480,772	81,200	39,345	25,000	-	626,317	0.040%
EDN100	27042	Student Conference	-	-	-	-	55,985	-	-	55,985	0.004%
EDN100	27036	State/District Student Council	-	-	-	-	56,792	-	-	56,792	0.004%
EDN100	27043	Student Travel Program (non-recurring)	-	-	-	-	400,000	-	-	400,000	0.026%
EDN100	27000	Athletics (Transp. Intersch.)	-	-	-	-	785,053	-	-	785,053	0.050%
EDN100	27100	Athletics (Salary, Supp & Equip)	-	-	-	5,543,482	-	-	-	5,543,482	0.354%
EDN100	27400	Athletics (Supplies & Equipment)	-	-	-	-	684,569	63,180	-	747,749	0.048%
EDN100	27900	Athletics (Transp. Spec. Maui)	-	-	-	-	41,999	-	-	41,999	0.003%
EDN100	27480	Athletic Trainers	75.000	-	4,063,761	3,000	157,213	4,580	-	4,228,554	0.270%
EDN100	27300	Athletics-Gender Equity	-	-	-	445,790	76,494	13,162	-	535,446	0.034%
EDN100	16770	LEARNING CENTERS	-	14.500	907,400	98,000	211,647	202,900	-	1,419,947	0.091%
EDN100	16158	JR RES OFFICER TRNG CORP	10.000	44.000	2,655,850	-	58,048	2,500	-	2,716,398	0.173%
EDN100	16732	HAWAIIAN LANGUAGE IMMERSION PROGRAM	7.000	34.000	2,203,604	100,000	173,238	66,000	-	2,542,842	0.162%
EDN100	16173	Lahainaluna Boarding Dept-Gen Fund	12.000	-	452,955	-	139,300	11,538	-	603,793	0.039%
EDN100	16403	Niihau School	4.000	-	158,765	2,160	4,900	1,521	-	167,346	0.011%
EDN100	16204	Home/Hospital Instruction	-	-	-	240,000	150,000	-	-	390,000	0.025%
EDN100	23026	Advanced Placement (AP) Incentive	1.000	-	64,401	-	-	-	-	64,401	0.004%
EDN100	16791	Challenger Center	5.000	-	-	-	-	-	-	-	0.000%
EDN100	25222	Teacher Recruitment and Retention	-	-	-	3,600,000	-	-	-	3,600,000	0.230%
EDN100	12658	Substitute System	2.000	-	63,381	7,000	47,111	-	-	117,492	0.007%
EDN100	12675	Superintendent's Position Reserve	-	5.000	275,560	78,302	-	-	-	353,862	0.023%
EDN100	25040	School Health Aide Administration	-	10.000	264,802	-	133,701	-	-	398,503	0.025%
EDN100	16807	HAWAIIAN STUDIES	1.000	3.000	289,833	2,092,000	113,688	10,000	-	2,505,521	0.160%
EDN100	23001	Workers Compensation	-	-	-	-	8,523,490	-	-	8,523,490	0.544%
EDN100	23002	Unemployment Insurance	-	-	-	-	2,256,888	-	-	2,256,888	0.144%
EDN100	12666	HCPS-School Accountability	-	-	-	8,500	593,630	8,347	-	610,477	0.039%
EDN100	12667	HCPS-Standards Resource Development	1.000	-	86,513	-	290,272	-	-	376,785	0.024%
EDN100	27483	GIA-After-School All-Stars Hawaii (non-recurring)	-	-	-	-	200,000	-	-	200,000	0.013%
TOTAL EDN 100 SCHOOL BASED BUDGETING			12,562.250	680.300	732,476,102	63,849,381	90,622,029	32,792,094	-	919,739,606	58.669%

Information for Committee On Weights X (2017)
 FY2016-2017 General Fund Operating Budget

FY 2017 SUPPLEMENTAL OPERATING BUDGET			< F I S C A L Y E A R 2 0 1 6 - 2 0 1 7 >								
EDN	ProgID	Program Description	PERM FTE	TEMP FTE	A	A1	B	C	M	TOTAL	% of Budget
EDN 150 SPECIAL EDUC & STUDENT SUPP SV											
EDN150	17131	Special Education In Regular Schools	4,072.000	1,089.250	226,658,554	-	-	-	-	226,658,554	14.458%
EDN150	17049	Special Education to Age 22	-	-	-	-	3,664,694	-	-	3,664,694	0.234%
EDN150	17201	Hawaii School for the Deaf and Blind	58.000	5.000	2,500,727	129,825	220,081	40,000	-	2,890,633	0.184%
EDN150	17351	SPED Services During School Breaks	-	-	-	2,796,676	11,998	-	-	2,808,674	0.179%
EDN150	17746	Attorney & Related Fees	-	-	-	-	877,500	-	-	877,500	0.056%
EDN150	17708	Transition Services (State Office Pos)	1.000	-	104,498	-	878	-	-	105,376	0.007%
EDN150	17712	SPECIAL OLYMPICS (POS)	-	-	-	-	87,055	-	-	87,055	0.006%
EDN150	28050	District Special Education Services	41.500	-	2,242,436	-	2,973,782	-	-	5,216,218	0.333%
EDN150	15623	Skilled Nursing Services	1.000	-	105,575	-	2,401,000	-	-	2,506,575	0.160%
EDN150	15192	SPED Related Services	351.000	5.500	20,676,439	-	4,143,523	117,532	-	24,937,494	1.591%
EDN150	15620	Social Workers	64.000	-	3,853,494	-	46,160	10,000	-	3,909,654	0.249%
EDN150	15609	Educational Interpreters	15.000	-	481,170	-	13,161	-	-	494,331	0.032%
EDN150	28176	Training & Retention MOAs	-	-	-	-	2,096,736	-	-	2,096,736	0.134%
EDN150	28178	Section 504 Implementation	1.000	-	120,996	-	427,026	3,000	-	551,022	0.035%
EDN150	25037	Special Education Section	7.500	2.000	794,329	-	13,163	-	-	807,492	0.052%
EDN150	15685	Integrated Special Education Database	-	-	-	-	238,083	-	-	238,083	0.015%
EDN150	15686	School Based Behavioral Health	384.500	99.500	28,726,353	-	6,224,699	548,000	-	35,499,052	2.264%
EDN150	15687	Targeted Technical Assistance	-	4.000	219,257	-	144,489	-	-	363,746	0.023%
EDN150	15179	Services For Children With Autism	179.000	25.000	8,645,185	302,346	34,661,142	-	-	43,608,673	2.782%
EDN150	28183	Medicaid Reimbursement	-	-	-	-	48,174	-	-	48,174	0.003%
TOTAL EDN 150 SPECIAL EDUC & STUDENT SUPP SV			5,175.500	1,230.250	295,129,013	3,228,847	58,293,344	718,532	-	357,369,736	22.796%

Information for Committee On Weights X (2017)
 FY2016-2017 General Fund Operating Budget

FY 2017 SUPPLEMENTAL OPERATING BUDGET			< F I S C A L Y E A R 2 0 1 6 - 2 0 1 7 >								
EDN	ProgID	Program Description	PERM FTE	TEMP FTE	A	A1	B	C	M	TOTAL	% of Budget
EDN 200 INSTRUCTIONAL SUPPORT											
EDN200	25023	Instructional Development-Admin Svcs	4.000	-	331,266	-	37,000	1,487	-	369,753	0.024%
EDN200	25024	Instructional Services Branch	18.000	2.000	1,647,192	4,000	37,333	10,000	-	1,698,525	0.108%
EDN200	25233	Sch Improvement/Comm Leadership Grp-Adm	1.000	-	100,452	7,000	-	-	-	107,452	0.007%
EDN200	15497	Athletics Administration	6.000	-	527,007	-	7,020	-	-	534,027	0.034%
EDN200	25045	Student Support Services Group-Admin	2.000	-	150,529	-	58,924	-	-	209,453	0.013%
EDN200	25237	Student Support Section	11.000	-	840,401	2,000	164,333	10,000	-	1,016,734	0.065%
EDN200	28177	CSSS Support System	-	1.000	88,639	-	20,588	-	-	109,227	0.007%
EDN200	25218	Educator Effectiveness System	-	-	-	-	600,000	-	-	600,000	0.038%
EDN200	25219	Coordinated Support	-	2.000	136,778	-	126,000	-	-	262,778	0.017%
EDN200	25220	School Transformation	2.000	19.000	1,826,527	-	3,017,051	-	-	4,843,578	0.309%
EDN200	25221	Declining Balance Debit Card Pilot Proj (non-recurring)	-	-	-	-	500,000	-	-	500,000	0.032%
EDN200	25912	Advance Tech Research Branch-Admin	1.000	-	34,987	-	258,919	-	-	293,906	0.019%
EDN200	25048	Hawaii Virtual Learning Network	6.000	-	399,683	507,312	389,200	-	-	1,296,195	0.083%
EDN200	25115	Sabbatical Leave-Teachers	-	-	-	592,000	-	-	-	592,000	0.038%
EDN200	25020	Employee Performance Management	-	-	-	-	15,400	4,598	-	19,998	0.001%
EDN200	25758	Nationally Board Certified Teachers	-	-	-	2,319,525	-	-	-	2,319,525	0.148%
EDN200	25234	Leadership Development	19.000	34.000	3,666,629	75,000	244,695	12,000	-	3,998,324	0.255%
EDN200	16772	Teleschool	11.000	-	672,802	-	163,137	85,000	-	920,939	0.059%
EDN200	25240	ICAA CI-Quality And Performance	194.000	23.000	13,245,258	275,846	1,500,431	33,889	-	15,055,424	0.960%
EDN200	25241	ICAA CI-System Quality	57.000	-	3,470,247	40,012	183,797	15,588	-	3,709,644	0.237%
EDN200	25242	ICAA-SBBH Services	21.000	-	1,051,105	-	-	-	-	1,051,105	0.067%
EDN200	25035	Cmplx Based Stem Wrkforce Dev Pilot Proj	2.000	-	129,710	-	2016 Leg Add On		-	129,710	0.008%
EDN200	33004	Systems Accountability Office	16.000	-	1,305,580	-	149,559	40,000	-	1,495,139	0.095%
EDN200	15654	Haw Content/Perform Stand-Assessment	6.000	-	477,352	-	8,711,000	-	-	9,188,352	0.586%
EDN200	15655	Haw Content & Perform Stand-Training	-	-	-	50,000	170,700	25,000	-	245,700	0.016%
EDN200	25230	ELP Standards/Assessments Implementation	-	-	-	30,000	825,514	-	-	855,514	0.055%
EDN200	25759	Homeless Concerns	2.000	-	81,797	405,984	91,338	-	-	579,119	0.037%
EDN200	18575	GIA-Read Aloud America (non-recurring)	-	-	-	-	100,000	-	-	100,000	0.006%
EDN200	18574	GIA-Read to Me International (non-recurring)	-	-	-	-	100,000	-	-	100,000	0.006%
TOTAL EDN 200 INSTRUCTIONAL SUPPORT			379.000	81.000	30,183,941	4,308,679	17,471,939	237,562	-	52,202,121	3.330%

Information for Committee On Weights X (2017)
 FY2016-2017 General Fund Operating Budget

FY 2017 SUPPLEMENTAL OPERATING BUDGET			< F I S C A L Y E A R 2 0 1 6 - 2 0 1 7 >								
EDN	ProgID	Program Description	PERM FTE	TEMP FTE	A	A1	B	C	M	TOTAL	% of Budget
EDN 300 STATE ADMINISTRATION											
EDN300	33005	BOARD OF EDUCATION SUPPORT OFFICE	3.000	-	184,096	-	27,027	-	-	211,123	0.013%
EDN300	33007	Superintendent's Office	10.000	1.000	896,127	-	51,211	-	-	947,338	0.060%
EDN300	33033	Military Interstate Compact	-	-	-	-	25,000	-	-	25,000	0.002%
EDN300	33790	Protocol Fund	-	-	-	-	1,688	-	-	1,688	0.000%
EDN300	33027	Communications & Community Affairs Ofc	9.000	-	652,402	-	21,000	500	-	673,902	0.043%
EDN300	33016	Corporate & Community Partnerships Offic	2.000	-	132,891	-	58,653	639	-	192,183	0.012%
EDN300	33025	Federal Compliance & Mgt Office	2.000	-	135,060	-	8,863	-	-	143,923	0.009%
EDN300	33017	Standard Practices Office	1.000	1.000	168,491	-	7,459	-	-	175,950	0.011%
EDN300	33012	Data Governance Office	2.000	-	195,256	-	-	-	-	195,256	0.012%
EDN300	33656	Internal Audit	8.000	-	578,450	-	70,530	4,995	-	653,975	0.042%
EDN300	33072	Ofc of Strategy, Innov & Performance	3.000	-	199,012	-	54,000	-	-	253,012	0.016%
EDN300	33079	Policy, Innovation, Planning & Eval	9.000	-	827,172	-	-	-	-	827,172	0.053%
EDN300	47213	Fiscal Services	3.000	2.000	462,423	-	13,233	3,000	-	478,656	0.031%
EDN300	33006	Budget	15.000	-	1,298,863	1,200	25,354	12,000	-	1,337,417	0.085%
EDN300	33010	Accounting Services	63.000	-	2,894,188	-	466,267	15,000	-	3,375,455	0.215%
EDN300	34001	Procurement Services	13.000	-	718,703	-	28,028	4,000	-	750,731	0.048%
EDN300	33001	Duplicating Services	-	-	-	-	108,225	-	-	108,225	0.007%
EDN300	33013	Civil Rights Compliance	4.000	1.000	464,782	-	42,893	-	-	507,675	0.032%
EDN300	33926	Office of Human Resources	6.000	-	481,420	20,500	878,230	4,500	-	1,384,650	0.088%
EDN300	33719	Service and Merit Awards	-	-	-	-	1,643	-	-	1,643	0.000%
EDN300	33829	Criminal History Check	10.500	-	352,910	-	255,990	2,600	-	611,500	0.039%
EDN300	15125	Blood Pathogen Control	-	-	-	-	63,592	-	-	63,592	0.004%
EDN300	23052	Workers Compensation-Administration	14.000	-	812,407	-	15,795	-	-	828,202	0.053%
EDN300	33292	Personnel Development Branch	24.500	-	1,806,607	41,500	1,265,446	2,500	-	3,116,053	0.199%
EDN300	33034	Teacher Mentor Program	-	-	-	-	378,932	-	-	378,932	0.024%
EDN300	33122	Para Educator Training Program	-	-	-	-	43,787	-	-	43,787	0.003%
EDN300	15689	Recruitment and Retention Incentive	-	-	-	-	40,365	-	-	40,365	0.003%
EDN300	33721	Personnel Assistance Branch	16.000	-	1,062,251	-	154,561	7,610	-	1,224,422	0.078%
EDN300	33722	Personnel Management Branch	105.500	-	5,538,088	-	1,367,180	20,000	-	6,925,268	0.442%
EDN300	33084	Office of Info & Tech-General Direction	3.000	-	263,386	-	1,532,807	3,200	-	1,799,393	0.115%
EDN300	33057	Enterprise Architecture	2.000	-	196,260	-	141,000	-	-	337,260	0.022%
EDN300	33058	Information Technology Project Mgmt	5.000	-	393,593	-	646,969	1,755	-	1,042,317	0.066%
EDN300	33088	School Process and Analysis	14.000	2.000	959,168	78,912	584,755	6,157	-	1,628,992	0.104%
EDN300	33089	Enterprise Infrastructure Services	32.000	1.000	2,171,212	-	1,336,000	1,690,000	52,000	5,249,212	0.335%
EDN300	33059	School Technology Services & Support	52.000	-	2,848,771	-	1,154,173	34,000	-	4,036,944	0.258%
EDN300	33021	Enterprise Systems	53.000	1.000	3,526,210	13,750	4,602,326	886,183	-	9,028,469	0.576%
TOTAL EDN 300 STATE ADMINISTRATION			484.500	9.000	30,220,199	155,862	15,472,982	2,698,639	52,000	48,599,682	3.100%

Information for Committee On Weights X (2017)
 FY2016-2017 General Fund Operating Budget

FY 2017 SUPPLEMENTAL OPERATING BUDGET			< F I S C A L Y E A R 2 0 1 6 - 2 0 1 7 >								
EDN	ProgID	Program Description	PERM FTE	TEMP FTE	A	A1	B	C	M	TOTAL	% of Budget
EDN 400 SCHOOL SUPPORT											
EDN400	35161	FOOD SERVICE ADMINISTRATION	7.000	-	405,469	-	68,100	1,293	-	474,862	0.030%
EDN400	35178	HCNP MAINTENANCE OF EFFORT FY15	-	2.000	107,725	-	78,118	-	-	185,843	0.012%
EDN400	35163	Food Services	318.000	-	13,341,448	5,100,000	6,713,420	-	-	25,154,868	1.605%
EDN400	33009	School Facility & Support Services	3.000	-	268,450	-	27,554	-	-	296,004	0.019%
EDN400	33022	Reprographic Services	15.000	-	741,273	-	316,778	-	-	1,058,051	0.067%
EDN400	37710	Facilities Development Branch	13.000	-	843,926	-	19,700	11,000	-	874,626	0.056%
EDN400	37711	Facilities Maintenance Branch	223.500	-	10,816,773	-	7,693,760	50,000	125,000	18,685,533	1.192%
EDN400	37932	Safety, Security & Emergency Preparednes	7.500	-	474,745	-	249,764	5,000	-	729,509	0.047%
EDN400	37712	Auxiliary Services Branch	18.000	1.000	1,139,637	20,000	16,085,761	608,000	-	17,853,398	1.139%
EDN400	37299	School Custodial Centralized Services	10.500	-	365,221	-	223,502	-	-	588,723	0.038%
EDN400	37325	Telephone (Centralized Services)	-	-	-	-	102,659	-	-	102,659	0.007%
EDN400	37330	Telecommunication Charges For Schools	-	-	-	-	1,267,075	-	-	1,267,075	0.081%
EDN400	37720	Utilities	-	-	-	-	54,744,136	-	-	54,744,136	3.492%
EDN400	37663	ENVIRONMENTAL SERVICES UNIT	1.000	-	55,510	-	555,200	12,500	-	623,210	0.040%
EDN400	19097	STUDENT TRANSPORTATION	19.500	-	713,774	-	60,557,419	-	-	61,271,193	3.908%
TOTAL EDN 400 SCHOOL SUPPORT			636.000	3.000	29,273,951	5,120,000	148,702,946	687,793	125,000	183,909,690	11.731%
EDN 500 SCHOOL COMMUNITY SERVICES											
EDN500	46403	ADULT EDUCATION PER PUPIL ALLOCATION	29.000	5.000	2,343,317	461,628	17,330	40,000	-	2,862,275	0.183%
TOTAL EDN 500 SCHOOL COMMUNITY SERVICES			29.000	5.000	2,343,317	461,628	17,330	40,000	-	2,862,275	0.183%
EDN 700 EARLY LEARNING											
EDN700	10301	Preschool	49.000	-	2,384,564	126,416	279,020	15,000	-	2,805,000	0.179%
EDN700	10304	Executive Office on Early Learning	-	3.000	159,132	-	25,500	6,240	-	190,872	0.012%
TOTAL EDN 700 EARLY LEARNING			49.000	3.000	2,543,696	126,416	304,520	21,240	-	2,995,872	0.191%
TOTAL DOE GENERAL FUNDS			19,315.250	2,011.550	1,122,170,219	77,250,813	330,885,090	37,195,860	177,000	1,567,678,982	100.000%

**Listing of Programs Included in Weighted Student Formula (WSF)
as of FY2017**

Year Added	EDN	Prog ID	Program Description
2007	100	12652	SCIENCE EDUCATION
2007	100	15103	CLASS SIZE REDUCTION
2007	100	15110	BASIC NEEDS
2007	100	15123	GRADE SCHOOL PRIORITY FUND
2007	100	15637	INSTRUCTIONAL MATERIALS FOR REGULAR ED
2007	100	15816	SCIENCE EQUIPMENT
2007	100	15852	MUSIC EQUIPMENT
2007	100	15878	STANDARDS SUPPORT
2007	100	16111	SCHOOL PRIORITY FUND-CASH
2007	100	16290	INSTRUCTIONAL RES AUGMENTATION
2007	100	16734	SKILLS-USA
2007	100	16735	JUNIOR SKILLS-USA
2007	100	16771	CORE LEARNING
2007	100	16816	PINS-STUDENT ACTIVITY COORDINATOR
2007	100	16817	PINS-BASIC SKILLS
2007	100	16830	WORLD LANGUAGES-SECONDARY
2007	100	16833	WORLD LANGUAGES-ELEMENTARY
2007	100	16871	GIFTED & TALENTED
2007	100	16887	ESLL
2007	100	16902	ENVIRONMENTAL EDUCATION
2007	100	16936	PINS-INSTRUCTION & SUPPORT SERVICES
2007	100	18291	COMPREHENSIVE SCHOOL ALIENATION PRGM
2007	100	19093	HEALTH FUND <i>(transferred out of DOE's Budget in 2011)</i>
2007	100	19094	PENSION ACCUMULATION <i>(transferred out of DOE's Budget in 2011)</i>
2007	100	19095	SOCIAL SECURITY <i>(transferred out of DOE's Budget in 2011)</i>
2007	100	23105	SCHOOL ADMINISTRATION
2007	100	23106	SAFETY MANAGERS
2007	100	24317	SCHOOL LIBRARIES
2007	100	26120	COUNSELING
2007	100	27032	DECA
2007	100	27362	INTRAMURALS
2007	100	27535	SCIENCE AND ENGINEERING FAIR
2007	100	27713	TRANSPORTATION FOR BAND
2007	100	27856	STUDENT ACTIVITIES COORDINATION SERVICES
2007	100	27857	TECHNOLOGY EDUCATION FAIR
2007	100	27867	MOLOKAI/LANAI STUDENT ACTIVITIES
2007	100	27868	ART EXHIBIT
2007	100	27875	MAUI INTER SCHOOL LEADERSHIP COUNCIL
2007	100	27876	FAMILY CAREER COMM LEADERS OF AMERICA
2007	100	27889	FUTURE FARMERS OF AMERICA
2007	100	36168	LUNCH AND BREAKFAST SUPERVISORS
2007	100	36172	CAMPUS SUPERVISION AND PATROL
2007	100	46793	PARENT COMMUNITY NETWORKING CENTER
2007	100	47282	ACT 51-CLASS SIZE REDUCTION K,1,2
2007	150	15630	HIGH RISK COUNSELORS
2007	150	15638	SCHOOL-BASED SERVICES EA
2007	150	15672	STUDENT SERVICES COORDINATORS-FELIX
2007	150	15674	PRIMARY PREVENTION/INTERVENTION-FELIX
2007	150	15684	FRP-EXTENDED SCHOOL YEAR
2007	150	17711	TRANSITION SERVICES
2007	150	17724	OCCUPATIONAL SKILLS LEARNING CENTER
2007	400	37297	SCHOOL CUSTODIAL SERVICES
2007	400	37305	CLASSROOM CLEANERS
2007	400	37325	TELEPHONE
2007	400	37662	REPAIRS AND MAINTENANCE OF SCHOOLS
2010	100	15636	YOUTH LEADERSHIP PROJECT
2010	100	16744	HEALTH CAREER ACADEMY
2010	100	18727	IN-SCHOOL SUSPENSION
2010	100	27358	ATHLETIC DIRECTORS
2010	150	16202	INSTRUCTION FOR PREGNANT ADOLESCENTS
2010	150	28715	PREGNANT TEEN CENTER - MAUI
2011	150	25040	SCHOOL HEALTH AIDES

Details of WSF Allocation Calculation, effective FY2017-18 as Recommended by the Committee On Weights X (2017) (increase base funding, hold ELL weights steady) based on FY2017-18 Preliminary Appropriation and Projected Enrollment						
		<u>Total PROJECTED Enrollment</u> ¹	<u>Weighting Factor</u>	<u>Weighted PROJECTED Enrollment</u>	<u>\$ per Student</u>	<u>TOTAL ALLOCATION</u>
1	Pre-K (SpEd)	1,610	1.000	1,610.00	\$4,129.50	\$ 6,648,490
2	K - 2	42,468	1.000	42,468.00	\$4,129.50	\$ 175,371,473
3	Other Elem	45,912	1.000	45,912.00	\$4,129.50	\$ 189,593,460
4	Middle	32,594	1.000	32,594.00	\$4,129.50	\$ 134,596,821
5	High	48,371	1.000	48,371.00	\$4,129.50	\$ 199,747,893
6	Subtotal	170,955		170,955.00		\$ 705,958,136
	¹ Total Enrollment includes General Education, Special Education and Pre-K (SpEd) at a rate of 1.00 per student.					
	Student Characteristics					
7	Grade Level Adjustment					
8	Middle	32,594	0.036	1,183.95	\$150.00	\$ 4,889,100
9	K-2 Class Size	42,468	0.150	6,370.20	\$619.42	\$ 26,305,721
10	English Language Learners (Aggregate)	18,210				\$ 13,883,898
11	Fully English Proficient (FEP)	6,119	0.065	396.50	\$267.59	\$ 1,637,352
12	Limited English Proficiency (LEP)	8,927	0.194	1,735.41	\$802.77	\$ 7,166,376
13	Non-English Proficient (NEP)	3,164	0.389	1,230.22	\$1,605.55	\$ 5,080,169
14	Economically Disadvantaged	87,936	0.100	8,793.60	\$412.95	\$ 36,313,144
15	Gifted & Talented	5,058	0.265	1,340.24	\$1,094.32	\$ 5,534,528
16	Transiency	6,551	0.050	327.55	\$206.47	\$ 1,352,605
17	Subtotal			21,377.66		\$ 88,278,996
	School Characteristics					
18	Neighbor Island	53,594	0.004	214.38	\$16.52	\$ 885,265
19	Subtotal			214.38		\$ 885,265
20	TOTAL WEIGHTED ALLOCATION	170,955		192,547.04		\$ 795,122,397
	Non-Weighted School Characteristics					
	Base Funding - per school based on school type		(no. of schools)			\$ 87,794,000
21	Elem		167	\$285,000		\$ 47,595,000
22	Elem - Multi-Track		1	\$375,000		\$ 375,000
23	Middle		36	\$440,000		\$ 15,840,000
24	Middle - Multi-Track		2	\$530,000		\$ 1,060,000
25	High		33	\$448,000		\$ 14,784,000
26	Combination Schools					
27	K-12		5	\$720,000		\$ 3,600,000
28	K-8		4	\$500,000		\$ 2,000,000
29	6-12		5	\$508,000		\$ 2,540,000
30	Subtotal		253			\$ 87,794,000
31	TOTAL WSF FUNDS AVAILABLE FOR TENTATIVE ENROLLMENT ALLOCATION					\$ 882,916,397
	³ DISCLAIMER: Projected allocations are tentative and are subject to change based on the Department's final appropriation for Weighted Student Formula and statewide enrollment figures. Final allocations will be determined based on Official Enrollment Count, taken August 2017.					

Details of WSF Allocation Calculation, effective FY2018-19 as Recommended by the Committee On Weights X (2017) based on FY2017-18 Preliminary Appropriation and Projected Enrollment <i>(new Homeless weight, increase ELL; contingent on additional funds appropriated)</i> for calculation of tentative allocations for Financial Plans						
		<u>Total PROJECTED Enrollment</u> ¹	<u>Weighting Factor</u>	<u>Weighted PROJECTED Enrollment</u>	<u>\$ per Student</u>	<u>TOTAL ALLOCATION</u>
1	Pre-K (SpEd)	1,610	1.000	1,610.00	\$4,129.51	\$ 6,648,516
2	K - 2	42,468	1.000	42,468.00	\$4,129.51	\$ 175,372,165
3	Other Elem	45,912	1.000	45,912.00	\$4,129.51	\$ 189,594,208
4	Middle	32,594	1.000	32,594.00	\$4,129.51	\$ 134,597,352
5	High	48,371	1.000	48,371.00	\$4,129.51	\$ 199,748,681
6	Subtotal	170,955		170,955.00		\$ 705,960,921
	¹ Total Enrollment includes General Education, Special Education and Pre-K (SpEd) at a rate of 1.00 per student.					
	Student Characteristics					
7	Grade Level Adjustment					
8	Middle	32,594	0.036	1,183.95	\$150.00	\$ 4,889,119
9	K-2 Class Size	42,468	0.150	6,370.20	\$619.43	\$ 26,305,825
10	English Language Learners (Aggregate)	18,210				\$ 23,889,826
			0.185	3,361.44	\$762.28	
11	Fully English Proficient (FEP)	6,119	0.1115	682.25	\$460.44	\$ 2,817,369
12	Limited English Proficiency (LEP)	8,927	0.3345	2,986.09	\$1,381.32	\$ 12,331,082
13	Non-English Proficient (NEP)	3,164	0.6690	2,116.81	\$2,762.64	\$ 8,741,375
14	Economically Disadvantaged	87,936	0.100	8,793.60	\$412.95	\$ 36,313,287
15	Gifted & Talented	5,058	0.265	1,340.24	\$1,094.32	\$ 5,534,550
15a	Homeless	2,837	0.200	567.40	\$825.90	\$ 2,343,086
16	Transiency	6,551	0.050	327.55	\$206.48	\$ 1,352,610
17	Subtotal			24,368.08		\$ 100,628,303
	School Characteristics					
18	Neighbor Island	53,594	0.004	214.38	\$16.52	\$ 885,269
19	Subtotal			214.38		\$ 885,269
20	TOTAL WEIGHTED ALLOCATION	170,955		195,537.46		\$ 807,474,493
	Non-Weighted School Characteristics					
	Base Funding - per school based on school type		(no. of schools)			\$ 87,794,000
21	Elem		167	\$285,000		\$ 47,595,000
22	Elem - Multi-Track		1	\$375,000		\$ 375,000
23	Middle		36	\$440,000		\$ 15,840,000
24	Middle - Multi-Track		2	\$530,000		\$ 1,060,000
25	High		33	\$448,000		\$ 14,784,000
26	Combination Schools					
27	K-12		5	\$720,000		\$ 3,600,000
28	K-8		4	\$500,000		\$ 2,000,000
29	6-12		5	\$508,000		\$ 2,540,000
30	Subtotal		253			\$ 87,794,000
31	TOTAL WSF FUNDS AVAILABLE FOR TENTATIVE ENROLLMENT ALLOCATION					\$ 895,268,493
	³ DISCLAIMER: Projected allocations are tentative and are subject to change based on the Department's final appropriation for Weighted Student Formula and statewide enrollment figures. Final allocations will be determined based on Official Enrollment Count, taken August 2017.					