

Understanding San Francisco's Weighted Student Formula Policy

As state and federal policies increasingly hold individual schools accountable for student performance, policies that provide differentiated funding and greater discretion to schools have become increasingly important. Some districts, including San Francisco, have now implemented policies — such as a weighted student formula — that shift responsibility for and the nature of a district's resource allocation decisions away from the central office to schools. Intended to increase funding equity as well as the efficiency of funding disbursement and spending, weighted student formula policies are receiving increasing interest across the country. Understanding the questions and implementation challenges a district like San Francisco has faced can provide useful information to other district policymakers considering a weighted student formula policy.

A new report prepared by the Regional Educational Laboratory West (REL West) at WestEd¹ describes the planning and implementation of San Francisco's weighted student formula policy over six years. It examines San Francisco's policy goals, planning and implementation considerations, and how the policy interacted with other local, state, and federal policies. The study also documents what district and school staff, union leaders, and community members say about the process of designing and using such a policy in a large urban school district.

Undertaking an Equity-Driven, Student-Based Planning and Budgeting Policy

A weighted student formula, by allocating funding based on student characteristics at the school, is designed to replace the traditional budgeting process, which allocates resources to cover schools' operating costs based almost entirely on the number (not the type) of students enrolled at each school.

In theory, weighted student formulas provide a more equitable distribution of resources by linking school funding with the specific needs of students at the school. In addition, schools gain autonomy in developing their own academic plans and corresponding budgets. Parents

can also gain a measure of autonomy, as they are typically involved in the increased decision making at the school site.

What the Study Found

San Francisco implemented a weighted student formula policy with two intended goals: (1) to increase equity by providing additional resources to students based on need as measured by poverty, English learner status, and student disability; and (2) to increase the effectiveness of decision making by allowing for more school-level autonomy.

Key questions and considerations in implementing San Francisco's weighted student formula policy included:

- » **Calculating school allocations:** What student populations need additional weights? How much additional weight should these populations receive? How should these weights be calculated? After the allocations are made, will all schools have enough money to cover their basic operating costs?
- » **Calculating school salaries:** Should school's budgets be charged the average teacher salary of the district or the actual teacher's salary? Additionally, should schools be charged average or actual benefits?

- » **Determining school-level discretion:** How much budgetary discretion should schools have? How much planning and programmatic discretion should schools have?
- » **Establishing links with the academic planning process:** How can the district help schools ensure that the money being spent is aligned with the needs of the school site as outlined in the academic plan?
- » **Ensuring school and district participation:** How should the district approach the policy's design and implementation to ensure that district- and school-level staff are willing to support the policy?
- » **Building school site capacity:** How can the district ensure that school staff are adequately prepared to manage budgets and make effective resource allocation decisions?
- » **Encouraging community involvement:** What role should the community serve in the school's planning and budgeting process? How can the district assist schools to ensure authentic and diverse engagement of the school's parents and the community?

Different education policies at the local (e.g., school supervision and intervention programs, funding streams, labor contracts, and enrollment policies), state (e.g., categorical programs and budgetary cycles), and federal (e.g., the No Child Left Behind Act) levels affected San Francisco's weighted student formula policy.

Despite requiring additional work from both school and district staff, respondents at all levels conveyed strong support for San Francisco's weighted student formula policy. All but one respondent — a union leader — would rather maintain the weighted student formula policy than revert to the old planning and budgeting model.

Methodology: Study Data and Analyses

Researchers collected data from interviews with a small cross-section of stakeholders in the district — among them district administrators, school board members, union leaders, school principals, teachers, and parents

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— as well as from relevant district documents and district training sessions.

Policy Considerations

There is no one exact way to implement a weighted student formula policy. Indeed, the decisions that San Francisco made may not be appropriate in a different district context with different policies and different collective bargaining agreements. However, several lessons from San Francisco's experience may prove useful to other districts considering implementation of similar policies.

- » Weighted student formula policies cannot offset the effects of declining school district revenues from federal, state, and local sources. Furthermore, while most San Francisco staff preferred the weighted student formula to the traditional budgeting model, support for the policy did erode as the district's financial situation worsened.
- » Even when well-received by school and district staff, weighted student formula models require frequent and comprehensive reviews to ensure fidelity of implementation that is aligned to the stated goals of the policy. For instance, if a district experiences large changes in demographics over the course of several years, the district's weights for different student populations might need to change as well.
- » District respondents suggested that a reduction in the number of separate state categorical programs would make implementation of a weighted student formula policy easier at the school level since schools would not have to track so many different programs and regulations.

1 Shambaugh, L., Chambers, J., Delancey, D. (2008) *Implementation of the weighted student formula in San Francisco: a descriptive study of an equity-driven student-based planning and budgeting policy*. (Issues and Answers Report, REL 2008-No. 061) Washington D.C.: U.S. Department of Education, Institute of Education Services, National Center for Education Evaluation and Regional Assistance, Regional Education Laboratory West.