

SB2591

Measure Title: RELATING TO EDUCATION.

Report Title: Department of Education; Weighted Student Formula;
Superintendent's Reserve

Description: Requires principals to consult with teachers and school community councils when expending moneys provided to their schools. Requires the weighted student formula to include a superintendent's reserve to address needs at unique and remote schools. Grants the DOE discretion in allocating superintendent's reserve funds to specific schools; provided that the committee on weights shall recommend the amount of the reserve and criteria for use of the reserve.

Companion: [HB2583](#)

Package: None

Current Referral: EDU, WAM

Introducer(s): KIDANI, HARIMOTO, SHIMABUKURO



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

Date: 02/10/2016
Time: 01:15 PM
Location: 229
Committee: Senate Education

Department: Education

Person Testifying: Kathryn S. Matayoshi, Superintendent of Education

Title of Bill: SB 2591 RELATING TO EDUCATION.

Purpose of Bill:

Department's Position:

The Department takes no position on SB 2591, but would respectfully like to provide comments for the committee's consideration.

The bill states "Principals, in consultation with teachers and school community councils, shall expend moneys provided to the principals' school." Section 302A-1124, HRS currently defines the role of the school community council and mandates a composition that includes teachers.

The new language related to a "superintendent's reserve" states both that the reserve is "to address needs at unique and remote schools," and that "the committee on weights shall make recommendations...for how the reserve should be used." Stating that the reserve is for "unique and remote schools" may be unnecessary if the intent is to allow the committee on weights to determine the criteria for the reserve's use.

Note that the Department has used a weighted student formula (WSF) reserve since school year 2012-13 based on a committee on weights recommendation that was approved by the Board of Education. A portion of WSF funds are set aside in this reserve to provide supplemental funds to schools that demonstrate a need so long as the school is a combination school, geographically isolated, has very low enrollment, or is experiencing an extraordinary circumstance. The distribution of the funds are made based on these committee on weights recommended guidelines.

Thank you for the opportunity to provide testimony on this measure.



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Corey Rosenlee
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TESTIMONY BEFORE THE SENATE COMMITTEE ON
EDUCATION

RE: SB 2591 - RELATING TO EDUCATION

WEDNESDAY, FEBRUARY 10, 2016

COREY ROSENLEE, PRESIDENT
HAWAII STATE TEACHERS ASSOCIATION

Chair Kidani and Members of the Committee:

The Hawaii State Teachers Association **strongly supports SB 2591**, relating to education.

Since the passage of Act 51 in 2004, Hawai'i has experimented with a weighted student formula to equalize school funding. Intended to make funding for public education more equitable, transparent, and decentralized, WSF had the unintended consequence of limiting academic programming for children in small and rural schools. A recent report commissioned by the Hawai'i Department of Education and completed by the American Institutes of Research reveals that "small or isolated schools do not have adequate funding under WSF and that the formula does not account adequately for diseconomies of scale associated with small schools or for additional costs due to geographic isolation."

Small and geographically remote schools sometimes lack sufficient funds to cover programming above and beyond basic operations. Isolated communities lack the economic breadth available to their urban counterparts, while experiencing distance from essential services and less access to technology. The American Institutes for Research, therefore, suggest that "extra support" be provided for schools that are small or isolated, including a recalculation of WSF to "accurately account for the differential costs of providing an equal opportunity for all students to achieve, regardless of their individual needs or circumstances (such as geographic location)."

That said, we do not feel that the current contents of this measure adequately address the programmatic, staffing, or service shortfalls experienced by small and remote schools, nor does it encompass the unique needs of special education students by adding SPED teachers to the committee on weights. Accordingly, we encourage you to replace the contents of this bill with the contents of SB 2586, Part VI, which reads:

PART VI. WEIGHTED STUDENT FORMULA

SECTION X. The purpose of this part is to improve funding and staffing equity in public schools.

SECTION X. Section 302A-1303.5, Hawaii Revised Statutes, is amended to read as follows:

"§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] factors that will be weighted[;], including but not limited to student characteristics, enrollment trends, and class size;
- (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.



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(b) When developing the weighted student formula, the committee shall incorporate the following:

(1) Weights to account for necessary special education teachers and special education support staff;

(2) Weights to account for anticipated enrollment increases and associated facility concerns; and

(3) Weights to reduce class size at each grade level.

~~[(b)]~~ (c) 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 shall include principals, regular education teachers, special education 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.

~~[(e)]~~ (d) The committee on weights may form advisory subcommittees to obtain input from key stakeholders as determined necessary by the committee.

~~[(d)]~~ (e) 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."

SECTION X. Section 302A-1303.6, Hawaii Revised Statutes, is amended to read as follows:

"§302A-1303.6 Weighted student formula[-]; specialized positions. (a) 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, in consultation with teachers and school community councils, 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.

(b) Remote schools and other schools designated by the committee on weights shall not be allocated operating funds using the weighted student formula and shall instead be allocated operating funds by categorical allotments that guarantee the funding of a minimum number of instructional and support staff positions to ensure that at least minimum course requirements are maintained; provided that instructional positions shall not be combined with support staff positions.

(c) Beginning with the 2020-2021 school year, each public school with more than twenty-five students shall hire at least one librarian or library media specialist, technology coordinator, vice principal, and counselor; and each secondary school shall hire a special education transition coordinator. For schools at which these positions are vacant or do not exist, additional moneys shall be provided through the weighted student formula to carry out the requirements of this subsection.

(d) For the purposes of this section, "remote school" means any public school, except charter schools governed by chapter 302D, that is located at least a one-hour drive away from the next nearest public school offering the same grade levels, or located on the island of Lanai, Molokai, or Niihau; provided that if a high school is combined with an elementary, middle, intermediate, or other lower level of schooling, that entire school shall be deemed a high school for the purposes of this subsection."

To increase funding equity through our state's public school system, the Hawaii State Teachers Association asks your committee to **support** this bill.



46-063 Emepela Pl. #U101 Kaneohe, HI 96744 · (808) 679-7454 · Kris Coffield · Co-founder/Executive Director

TESTIMONY FOR SENATE BILL 2591, RELATING TO EDUCATION

Senate Committee on Education
Hon. Michelle N. Kidani, Chair
Hon. Breene Harimoto, Vice Chair

Wednesday, February 10, 2015, 1:15 PM
State Capitol, Conference Room 229

Honorable Chair Kidani and committee members:

I am Kris Coffield, representing IMUAlliance, a nonpartisan political advocacy organization that boasts over 350 members. On behalf of our members, we offer this testimony **in support of the intent, with proposed amendments for Senate Bill 2591, relating to education.**

While we appreciate this measure's intent to advance funding equity throughout the Hawaii State Department of Education—especially for small and geographically isolated, or “remote,” schools served by the superintendent's reserve—we believe that the current contents of this bill do not significantly alter departmental processes. Thus, we urge you replace the contents of this bill with the contents of Part VI of SB 2586, the Schools Our Keiki Deserve Act, which provides categorical funding for remote schools, establishes minimum positions for schools suffering staff shortages, and includes special education teachers within the committee on weights.

Mahalo for the opportunity to testify **in support of the intent** of this bill.

Sincerely,
Kris Coffield
Executive Director
IMUAlliance

Testimony In Support of Senate Bill 2590
Senate Committee on Education
Wednesday, February 10, 2016

Dear Honorable Chair Kidani and committee members,

Nearly one in six schools in Hawai‘i is rural, and these small, rural schools serve over 8,500 students. Our students in small and rural schools require more focused attention and policy-making because the students in these schools are generally more vulnerable with fewer social and economic supports. Despite median household incomes close to the national median, persistent rural adult unemployment remains a concern in Hawaii.[1] Rural household mobility in Hawai‘i is very high, at almost 15%, and national analysis reveals that children of all racial-ethnic groups are more likely to live in poverty if they live in a rural place than if they live in either an urban or suburban place.[2] In rural areas of Hawaii, over 40% of families with children from ages 0-5 are below the poverty line, and over 75% of single mother families with children from ages 0-5 are below the poverty line.[3] This is a critical issue for education policy in Hawai‘i because research suggests that experiencing poverty before age 18 is particularly harmful and has implications for brain development as well as educational occupational, health, and family consequences.[4] While developing policies to reduce poverty rates is the more holistic approach, because it can reduce overall societal costs and improve outcomes for individuals and families, we can begin by buffering our children in rural areas from the most brutal effects of this poverty and lack of stability in multiple ways.[5]

Policymakers first need to fund rural schools in ways that are at least sufficient to support basic educational goals. Our keiki in less populated rural areas deserve quality school opportunities, and to strengthen the educational institutions in rural areas, every school should be adequately staffed to provide a solid educational foundation with counselors, librarians, and elective teachers. To do this, we will need to increase the differentials for rural schools and decrease financial incentives designed to reward increases in school size, as a wide body of research shows the small schools generally yield better learning outcomes.[6]

In the past few years, with the support of federal funds, Hawai‘i has embarked on a focused campaign to improve education for its most disadvantaged students. This includes the establishment of Zones of School Improvement and the creation of the Weighted Student Formula (WSF) under the Reinventing Education Act of 2004. WSF was intended to make funding for public education more equitable, transparent, and decentralized. However, the academic opportunities available to children in rural and small schools has been dramatically limited by the unintended effects of this funding mechanism. A recent report commissioned by the Hawai‘i Department of Education and completed by the American Institutes of Research (AIR) reveals that “small or isolated schools do not have adequate funding under the WSF and that WSF does not account adequately for diseconomies of scale associated with small schools or for additional costs due to geographic isolation.”[7]

Lack of funding is a major challenge, especially for small schools that “need to support essential personnel” and small schools and those in geographically remote locations were “especially lacking sufficient funding to cover much more than a minimally operating program.”[8] Other factors that have cost implications for operating

schools need to be taken into account, such as the inability of “necessarily small” schools to take advantage of the economies of scale associated with operating larger schools. More isolated communities lack wider and deeper alternative funding sources. Lack of opportunity is more pronounced in rural areas, due to distance from services, and rural communities and families in poverty have less access to technology. The American Institutes for Research suggest that “extra support” be provided for schools that are small or isolated.[9] This requires a reconsideration of the weighting factors that make up the WSF so that they more “accurately account for the differential costs of providing an equal opportunity for all students to achieve, regardless of their individual needs or circumstances (such as geographic location).”[10]

There are a number of issues connected to teacher staffing in rural schools. Rural schools in Hawai‘i serve children with high needs who require additional resources, special programs, and expert teachers to be successful learners. Class size in Hawai‘i’s rural public schools is above average for rural schools nationally.[11] There are “geographic differences in resource prices, especially with respect to staff,” so that not all rural schools are able to attract and retain qualified staff.[12] Rural schools in Hawai‘i are generally “hard-to-staff” with highly qualified teachers, tend to have high rates of teacher turnover and out-of-field teaching assignments, and frequently use substitutes to fill vacancies or assign out-of-field teachers thereby failing to place a qualified teacher in each classroom. While there is currently a bonus for teaching at hard-to-staff schools, the authors of the AIR report question whether it “is large enough to fully adjust for this cost factor.”[13]

Rural schools in Hawai‘i serve children with high needs who require additional resources, special programs, and expert teachers to be successful learners. Using the Weighted School Formula mechanism, however, small rural schools are less likely to have counselors, librarians, and a wide choice of electives. Research has established that certified school librarians have a positive effect of literacy and achievement, particularly for poverty stricken areas.[14] In Windward Oahu, 98% of schools have at least one school librarian, while fewer than 30% of schools on the Big Island, the county with the highest poverty rate in the state, have a school librarian (and those are mostly in the urban areas).[15] This type of deep disparity indicates that the implementation of Weighted Student Formula has not resulted in educational equity. Compounding the issue of unfunded core positions, like certified librarians, counselors and elective teachers, is the absence of appropriate and useful professional development opportunities for teachers in rural schools aligned with teachers’ professional needs. There is a mismatch between the perceived usefulness of professional development and the content of professional development that teachers in rural schools are offered. In addition, very few rural schools offer incentives to pursue professional development, such as stipends or re-certification credit.

Fairness, grounded in a strong sense of what is *pono*, requires that we provide, at the very least, equality of learning opportunities for our children. Nearly one in six schools in Hawai‘i is rural, and there are over 8,500 students in these schools. Hawai‘i is first in the nation in terms of the percent of students of color in rural schools.[16] NAEP performance in Hawaii’s rural areas for 2013-2014 is lower than in nearly all other states with the absolute lowest score in fourth grade reading.[17] Hawai‘i ranks in the lowest overall quartile, with the lowest *rural* NAEP scores, on all four NAEP indicators, both 4th

and 8th grade in both reading and math.[18] Many of these challenges of providing equal educational opportunities in rural and small schools in Hawai‘i can be addressed if our first principle is that all of our keiki deserve the very best education we can offer them. This principle will require that policymakers return to the mechanisms used to allocate resources and not only find additional funding for all public schools, but also use existing resources to more equitably support our small, rural schools, which could have a profound effect on stabilizing remote communities and contribute to a more sustainable Hawaii.

Sincerely,

Amy Perruso, Ph.D
Mililani High School

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- [1] Johnson, Jerry, Daniel Showalter, and Robert Klein. "The Facts About Rural Education in the 50 States." *Why Rural Matters 2013-14* (May 2014): 55. *Rural.edu*. Rural School and Community Trust, May 2014. Web. 15 Jan. 2016.
- [2] Ibid.
- [3] Ibid.
- [4] Jensen, Eric. "How Poverty Affects Behavior and Academic Performance." *ASCD.org*. Association for Supervision and Curriculum Development, n.d. Web. 15 Jan. 2016.
- [5] Biddle, Bruce J. *The Unacknowledged Disaster: Youth Poverty and Educational Failure in America*. Boston: Sense, 2014. Print.
- [6] Iatarola, Patrice, Amy Ellen Schwartz, Leanne Steifel, and Colin Chellman. "Small Schools, Large Districts: Small-School Reform and New York City Students." *TCRecord.com*. Teachers College Record, 1 Dec. 2008. Web. 15 Jan. 2016.
- [7] Levins, Jesse, Jay Chambers, Diane Epstein, Nick Mills, Mahala Archer, Antonia Wong, and Kevin Lane. *Evaluation of Hawaii's Weighted Student Formula*, p. 144. Rep. American Institutes for Research, June 2013. Web. 15 Jan. 2016.
- [8] Ibid, 149.
- [9] Ibid, 145.
- [10] Ibid, 149.
- [11] Johnson, Jerry, Daniel Showalter, and Robert Klein. "The Facts About Rural Education in the 50 States." *Why Rural Matters 2013-14* (May 2014): 55. *Rural.edu*. Rural School and Community Trust, May 2014. Web. 15 Jan. 2016.
- [12] Levins, Jesse, Jay Chambers, Diane Epstein, Nick Mills, Mahala Archer, Antonia Wong, and Kevin Lane. *Evaluation of Hawaii's Weighted Student Formula*, p. 154. Rep. American Institutes for Research, June 2013. Web. 15 Jan. 2016.
- [13] Ibid.
- [14] *School Library Impact Studies Project*. School Library & Information Technologies Graduate Program, 1 Dec. 2013. Web. 16 Jan. 2016.
- [15] "Poverty Map." *Poverty USA: A CCRD Initiative*. PovertyUSA.org, 1 Dec. 2015. Web. 16 Jan. 2016.
- [16] Jimerson, Lorna. "Teachers and Teaching Conditions in Rural New Mexico." *Rural.edu*. Rural School & Community Trust, 1 June 2004. Web. 15 Jan. 2016.
- [17] Johnson, Jerry, Daniel Showalter, and Robert Klein. "The Facts About Rural Education in the 50 States." *Why Rural Matters 2013-14* (May 2014): 1-94. *Rural.edu*. Rural School and Community Trust, May 2014. Web. 15 Jan. 2016.
- [18] Ibid.

EDUtestimony@capitol.hawaii.gov

Heading: Testimony in support of SB2591

Testimony for: Committee on Education Hearing on Wednesday, February 10, 2016 1:15pm

Honorable Chair Kidani and committee members,

My name is Debbie Anderson. I am a teacher at Waiakea Intermediate School on the island of Hawaii. As a teacher of over 25 years in Hawai'i, I am writing in support of SB2591 Weighted Student Formula, SB2586 The Schools Our Keiki Deserve Act subcomponent Part VI, which "Requires principals to consult with teachers and school community councils when expending moneys provided to their schools. Requires the weighted student formula to include a superintendent's reserve to address needs at unique and remote schools. Grants the DOE discretion in allocating superintendent's reserve funds to specific schools; provided that the committee on weights shall recommend the amount of the reserve and criteria for use of the reserve."

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Basic Staffing

Policymakers first need to fund rural schools in ways that are at least sufficient to support basic educational goals. Our keiki in less populated rural areas deserve quality school opportunities, and to strengthen the educational institutions in rural areas, every school should be adequately staffed to provide a solid educational foundation with counselors, librarians, and elective teachers. To do this, we will need to increase the differentials for rural schools and decrease financial incentives designed to reward increases in school size, as a wide body of research shows the small schools generally yield better learning outcomes.[6]

Weighted Student Formula

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Teacher Staffing

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Thank you for listening and considering legislative changes to Education.
Debbie Anderson, NBCT

- [1] Johnson, Jerry, Daniel Showalter, and Robert Klein. "The Facts About Rural Education in the 50 States." Why Rural Matters 2013-14 (May 2014): 55. Rural.edu. Rural School and Community Trust, May 2014. Web. 15 Jan. 2016.
- [2] Ibid.
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- [4] Jensen, Eric. "How Poverty Affects Behavior and Academic Performance." ASCD.org. Association for Supervision and Curriculum Development, n.d. Web. 15 Jan. 2016.
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- [6] Iatarola, Patrice, Amy Ellen Schwartz, Leanne Steifel, and Colin Chellman. "Small Schools, Large Districts: Small-School Reform and New York City Students." TCRecord.com. Teachers College Record, 1 Dec. 2008. Web. 15 Jan. 2016.
- [7] Levins, Jesse, Jay Chambers, Diane Epstein, Nick Mills, Mahala Archer, Antonia Wong, and Kevin Lane. Evaluation of Hawaii's Weighted Student Formula, p. 144. Rep. American Institutes for Research, June 2013. Web. 15 Jan. 2016.
- [8] Ibid, 149.
- [9] Ibid, 145.
- [10] Ibid, 149.
- [11] Johnson, Jerry, Daniel Showalter, and Robert Klein. "The Facts About Rural Education in the 50 States." Why Rural Matters 2013-14 (May 2014): 55. Rural.edu. Rural School and Community Trust, May 2014. Web. 15 Jan. 2016.
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- [13] Ibid.
- [14] School Library Impact Studies Project. School Library & Information Technologies Graduate Program, 1 Dec. 2013. Web. 16 Jan. 2016.
- [15] "Poverty Map." Poverty USA: A CCRD Initiative. PovertyUSA.org, 1 Dec. 2015. Web. 16 Jan. 2016.
- [16] Jimerson, Lorna. "Teachers and Teaching Conditions in Rural New Mexico."Rural.edu. Rural School & Community Trust, 1 June 2004. Web. 15 Jan. 2016.
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- [18] Ibid.