



WASA SPECIAL  
EDUCATION DIRECTOR  
ACADEMY

**Welcome to Session #4 of  
Special Education Director Academy  
2024-2025**

**We're glad you are here!**



# Welcome



Shawn Batstone, WASA Assistant Executive Director  
Rachel Dickson, WASA SPEDA Facilitator  
([rdickson@fifeschools.com](mailto:rdickson@fifeschools.com))

# Check In

Small group discussion

(breakout rooms for 10 minutes)

- Intro yourself
- District/Role

**Choose your prompt:**

1. What is a goal you would like to focus on this month/semester/year (personal, work etc)
2. Coming back from Winter break, how are you feeling?



# Materials

Materials can be accessed  
on  
WASA Special Education  
Director Academy

(after the session today)



# Agenda



- 8:40-9:15 Finance Panel Discussion- WA CASE Board
- 9:15-9:45 Legislative Advocacy- Dan Steele
- 9:45-10:00 Follow up questions

# Who is your WA CASE Board?

President: Franklin Day, Cheney Public Schools

Vice President: Sue Ann Bube, Dynamic Education Solutions

Past-President: Michaela Clancy, Dieringer School District

Secretary: Joan Lawson, Issaquah School District

Treasurer: Open Position

CAN Coordinator: Open Position

WASA Representative: Tracy Wilson, Pasco School District

At-Large Members:

Rachel Dickson, Fife School District

Shannon Hitch, Lake Washington School District

# Finance Panel with CASE



- What is apportionment? How do you find and use the monthly report?
  - Dr. Michaela Clancy, Executive Director Student Service, Dieringer SD
  - Franklin Day, Director, Student Support Services, Cheney SD
- Safety Net Analysis
  - Franklin Day, Director, Student Support Services, Cheney SD
- Q and A



# Special Education Funding In Washington State

“There are two primary sources of revenue to support special education services to students: basic education and special education. Each student receiving special education and related services is first and foremost a basic education student

The state special education formula has two parts. The first part is for calculating funding for students ages 3–5 who are not enrolled in kindergarten and are eligible for and receiving special education services. The second part applies to students ages 5–21 who are eligible for and receiving special education services and enrolled in K–12.

Special education funding is in addition to, or in “excess” of, the full basic education allocation (BEA) available for any student. The result is that school districts have two primary sources of revenue to support special education services to students: basic education and special education.

The allocation for students with disabilities is indexed at 16 percent of the resident K–21 full time enrollment. The allocation for students with disabilities aged 3 to 5 and not yet enrolled in kindergarten is not indexed”.

<https://ospi.k12.wa.us/policy-funding/special-education-funding-and-finance/special-education-funding-washington-state>





# Apportionment

- How to get there
  - <https://ospi.k12.wa.us/policy-funding/school-apportionment>



1191 SER Report (1220)

Sept-Dec based on Nov. Child Count of previous year

Jan. based on Year to Date Average Annual Enrollment

Preschool, K-21 LRE Tiers 1 and 2

3121, 4121, and PLD- Total on Line Z

To: Fife School District

From: State Treasurer, Credit Receipts Accounts as Follows For the Month of December

Revenue Account	Description	Annual Allotment (A)	Adjustment in Allotment due Previous/Current Year (B)	Percent Due % (%)	Allot Due [C= { %XA } +B] (C)	Allotment Paid Previously (D)	Allotment for December (E)
3100	REGULAR APPORTIONMENT	40,881,500.11	0.00	0.3100	12,673,265.03	8,993,930.02	3,679,335.01
3121	APPOR SP ED	1,233,725.64	0.00	0.3100	382,454.95	271,419.64	111,035.31
410001	General Fund Projects	1,082.00	0.00	1.0000	1,082.00	1,082.00	0.00
4121	SPECIAL ED	5,469,516.14	0.00	0.3100	1,695,550.00	1,203,293.55	492,256.45
4155	LEARNING ASSISTANCE PROG	2,280,052.76	0.00	0.3100	706,816.36	501,611.61	205,204.75
415804	State Grants	101,479.00	0.00	1.0000	758.77	458.75	300.02
4165	TRANS. BILINGUAL	1,009,950.48	0.00	0.3100	313,084.65	222,189.11	90,895.54
4174	HIGHLY CAPABLE	132,144.04	0.00	0.3100	40,964.65	29,071.69	11,892.96
419801	BREAKFAST	719.49	0.00	1.0000	719.49	719.49	0.00
419803	REDUCED BREAKFAST	1,074.30	0.00	1.0000	1,074.30	1,074.30	0.00
419804	REDUCED LUNCH	2,997.60	0.00	1.0000	2,997.60	2,997.60	0.00
419806	State CEP Copay Breakfast	13,546.05	0.00	1.0000	13,546.05	13,546.05	0.00
419807	State CEP Copay Lunch	41,170.67	0.00	1.0000	41,170.67	41,170.67	0.00
419808	Free Meals - State Supp Bkft	12,566.05	0.00	1.0000	12,566.05	12,566.05	0.00
419809	Free Meals - State Supp Lunch	36,126.09	0.00	1.0000	36,126.09	36,126.09	0.00
4199	TRANSP OPERATIONS	2,681,689.18	0.00	0.3100	831,323.65	589,971.62	241,352.03
4499	TRANSP DEPRECIATI	273,793.25	0.00	0.0000	0.00	0.00	0.00
6113	ESSER III	0.00	15,316.01	1.0000	15,316.01	15,316.01	0.00
6114	Learning Loss	0.00	124,725.13	1.0000	124,725.13	124,725.13	0.00
6124	SPECIAL ED SUPPL	827,221.00	0.00	1.0000	417,547.63	345,817.70	71,729.93
6151	DISADVANTAGED	628,868.00	0.00	1.0000	217,165.51	167,121.90	50,043.61
615201	School Improvement EGMS	142,020.00	0.00	1.0000	115,409.55	112,686.00	2,723.55
6164	LIMITED ENGLISH PROF	91,832.00	0.00	1.0000	907.30	907.30	0.00
6198	SCHOOL FOOD SERVICE	237,198.17	0.00	1.0000	237,198.17	237,198.17	0.00

## 3121- Special Education- General Apportionment

- November count previous year

## 4121- Special Education

- Sept-Dec Budgeted amt
- Jan-June average of current year

## 6124- IDEA

**TOTALS**

**Account 4121 Special Education**

A. Age 3-Pre K Resident Special Education Enrollment	42.00
B. TK Resident Special Education Enrollment LRE1	0.00
C. TK Resident Special Education Enrollment Other	0.00
D. Age K-21 Resident Special Education Enrollment LRE1	187.00
E. Age K-21 Resident Special Education Enrollment Other	230.00
F. BEA Resident FTE Enrollment	3,840.00
G. Age K-21 Special Education Enrollment Percent $\frac{([Enroll\ SpEd\ TK\ Tier\ 14/18] + [Enroll\ SpEd\ TK\ Tier\ Other] + [Enroll\ SpEd\ K-21\ LRE1] + [Enroll\ SpEd\ K-21\ Other])}{[Enroll\ BEA\ Resident]}$ $(0.00 + 0.00 + 187.00 + 230.00) / 3,840.00$	0.1086
H. Excess Age K-21 Special Education Enrollment Percent IF $([Enroll\ SpEd\ %\ K-21] > [SpEd\ Max\ Fund\ %])$ THEN $([Enroll\ SpEd\ %\ K-21] - [SpEd\ Max\ Fund\ %])$ ELSE(0)  IF $(0.1086 > 0.160000)$ THEN $(0.1086 - 0.160000)$ ELSE(0)	0.0000
I. BEA Rate for Special Education $[TOTAL\ Salary\ BEA] + [TOTAL\ Benefits\ BEA] + [Substitutes\ BEA] + [MSOC\ BEA\ Per\ Student] + [Total\ SpEd\ BEA\ PD]$ $6,664.26 + 2,488.50 + 31.79 + 1,596.04 + 97.92$	\$ 10,878.51
Portion of BEA Rate Attributed to PLD (Report 1191SER 4120pd) $[CIS\ BEA\ PD\ Salary] + [CIS\ BEA\ PD\ Benefits]$ $83.33 + 14.59$	\$ 97.92
J. Age 3-Pre K Allocation IF $([Switch\ SpEd\ Coop]) > (0)$ THEN $([Enroll\ SpEd\ 3-PK] * [Coop\ SpEd\ BEA\ Rate] * [SpEd\ 0-PK\ Alloc\ Factor])$ ELSE $([Enroll\ SpEd\ 3-PK] * [SpEd\ BEA\ Rate] * [SpEd\ 0-PK\ Alloc\ Factor])$  IF $("No") > (0)$ THEN $(42.00 * 0.00 * 1.20)$ ELSE $(42.00 * 10,878.51 * 1.20)$	548,276.90
K. Age K-21 Allocation	
1. 2004-05 Fed Funds Integration Rate Per Student	\$ 135.26
2. Fed Funds Int Rate Per Student $([Fed\ Funds\ Int\ Rate] * [Fed\ Funds\ Int\ Rate\ (1)] / [Fed\ Funds\ Int\ Rate\ (2)])$ $(135.26 * 24 / 145)$	\$ 22.39
3. TK Tier 14/18 Allocation IF $([Switch\ SpEd\ Coop]) > (0)$ , THEN $([Enroll\ SpEd\ TK\ Tier\ 14/18] * ((([Coop\ SpEd\ BEA\ Rate] * [SpEd\ K-21\ Alloc\ Factor\ LRE1]) - [Fed\ Funds\ Int\ Rate\ Per\ Student])))$ , ELSE $([Enroll\ SpEd\ TK\ Tier\ 14/18] * ((([SpEd\ BEA\ Rate] * [SpEd\ K-21\ Alloc\ Factor\ LRE1]) - [Fed\ Funds\ Int\ Rate\ Per\ Student])))$  IF $("No") > (0)$ , THEN $(0.00 * ((0.00 * 1.1200) - 22.39))$ , ELSE $(0.00 * ((10,878.51 * 1.1200) - 22.39))$	0.00
4. TK Other Allocation	0.00

5. Age K-21 LRE1 Allocation IF $([Switch\ SpEd\ Coop]) > (0)$ , THEN $([Enroll\ SpEd\ K-21\ LRE1] * ((([Coop\ SpEd\ BEA\ Rate] * [SpEd\ K-21\ Alloc\ Factor\ LRE1]) - [Coop\ Fed\ Funds\ Int\ Rate\ Per\ Student])))$ , ELSE $([Enroll\ SpEd\ K-21\ LRE1] * ((([SpEd\ BEA\ Rate] * [SpEd\ K-21\ Alloc\ Factor\ LRE1]) - [Fed\ Funds\ Int\ Rate\ Per\ Student])))$  IF $("No") > (0)$ , THEN $(187.00 * ((0.00 * 1.1200) - 0.00))$ , ELSE $(187.00 * ((10,878.51 * 1.1200) - 22.39))$	2,274,208.20
6. Age K-21 Other Allocation IF $([Switch\ SpEd\ Coop]) > (0)$ , THEN $([Enroll\ SpEd\ K-21\ Other] * ((([Coop\ SpEd\ BEA\ Rate] * [SpEd\ K-21\ Alloc\ Factor\ Other]) - [Coop\ Fed\ Funds\ Int\ Rate\ Per\ Student])))$ , ELSE $([Enroll\ SpEd\ K-21\ Other] * ((([SpEd\ BEA\ Rate] * [SpEd\ K-21\ Alloc\ Factor\ Other]) - [Fed\ Funds\ Int\ Rate\ Per\ Student])))$  IF $("No") > (0)$ , THEN $(230.00 * ((0.00 * 1.060) - 0.00))$ , ELSE $(230.00 * ((10,878.51 * 1.060) - 22.39))$	2,647,031.04
7. If Age K-21 Special Ed Enrollment Percent exceeds threshold IF $([Switch\ SpEd\ Coop]) > (0)$ , AND IF $[Coop\ Enroll\ SpEd\ %\ K21] > [SpEd\ Max\ Fund\ %]$ , THEN $(([SpEd\ TK\ Tier\ 14/18\ Allocation] + [SpEd\ TK\ Tier\ Other\ Allocation] + [SpEd\ K-21\ LRE1\ Allocation] + [SpEd\ K-21\ Other\ Allocation]) * -1) / [Coop\ Enroll\ SpEd\ %\ K-21]) * [Coop\ SpEd\ K-21\ Excess\ %]$ , ELSE 0, THEN IF $[Enroll\ SpEd\ %\ K21] > [SpEd\ Max\ Fund\ %]$ , THEN $(([SpEd\ TK\ Tier\ 14/18\ Allocation] + [SpEd\ TK\ Tier\ Other\ Allocation] + [SpEd\ K-21\ LRE1\ Allocation] + [SpEd\ K-21\ Other\ Allocation]) * -1) / [Enroll\ SpEd\ %\ K-21]) * [SpEd\ K-21\ Excess\ %]$ , ELSE 0  IF $("No") > (0)$ , AND IF $0 > 0$ , THEN $((0.00 + 0.00 + 2,274,208.20 + 2,647,031.04) * -1) / 0.0000$ , ELSE 0, THEN IF $0 > 0$ , THEN $((0.00 + 0.00 + 2,274,208.20 + 2,647,031.04) * -1) / 0.1086$ , ELSE 0	0.00
L. State Safety Net	\$ 0.00
M. Transfer of Account 4121 Special Education Allocation IF $([Switch\ SpEd\ Coop]) > 0$ , THEN $-[SpEd\ 3-PK\ Allocation] - [SpEd\ TK\ Tier\ 14/18\ Allocation] - [SpEd\ TK\ Tier\ Other\ Allocation] - [SpEd\ K-21\ Other\ Allocation] - [SpEd\ K-21\ LRE1\ Allocation] - [SpEd\ K-21\ Exceeds\ Max\ Fund\ %]$ , ELSE 0  IF $("No") > 0$ , THEN $-548,276.90 - 0.00 - 0.00 - 2,647,031.04 - 2,274,208.20 - 0.00$ , ELSE 0	\$ 0.00
N. Special Education Allotment $[SpEd\ TK\ Tier\ 14/18\ Allocation] + [SpEd\ TK\ Tier\ Other\ Allocation] + [SpEd\ 3-PK\ Allocation] + [SpEd\ K-21\ LRE1\ Allocation] + [SpEd\ K-21\ Other\ Allocation] + [SpEd\ K-21\ Exceeds\ Max\ Fund\ %] + [State\ Safety\ Net] + [4121\ Coop\ Transfer]$ $0.00 + 0.00 + 548,276.90 + 2,274,208.20 + 2,647,031.04 + 0.00 + 0.00 + 0.00$	\$ 5,469,516.14
O. Home and Hospital Allotment	\$ 0.00
P. Foster Home Allotment	\$ 0.00
Q. Calculated Allotment $[Total\ 4121] + [Home/Hosp\ Ed\ Alloc] + [Foster\ Care\ Alloc]$ $5,469,516.14 + 0.00 + 0.00$	\$ 5,469,516.14
R. Adjustment for Prior Year	\$ 0.00

**Account 3121 Special Education, General Apportionment**

T. Age K-21 Serving District Special Education Enrollment	417.00
U. General Apport Generated by Special Ed Enrollment IF ([Switch SpEd Coop]) > ( 0), THEN ([Serving SpEd K-21] * [Coop SpEd BEA Rate], ELSE ([Serving SpEd K-21] * [SpEd BEA Rate])  IF ("No") > ( 0), THEN (417.00 * 0.00, ELSE (417.00 * 10,878.51)	\$ 4,536,338.67
V. Allowance for Districtwide Expenditures - State Recovery Rate	\$ 0.1450
W. General Apport Available for Instructional Programs ([SpEd Gen Apport]) / ( 1 + [SpEd State Recovery Rate])  (4,536,338.67) / ( 1 + 0.1450)	\$ 3,961,867.83
X. Student Average FTE in Special Education Instruction	0.3114
Y. General Apport Allocated for Special Ed Program Acct 3121 IF [ESA112 Coop] > 0, THEN 0 ELSE [SpEd Gen Apport Instruct] * [% Stdnt Avg FTE SpEd]  IF 0 > 0, THEN 0 ELSE 3,961,867.83 * 0.3114	\$ 1,233,725.64
Z. Transfer of General Apport for Special Education Allocation  IF ([SpEd Coop] > (0) THEN -[SpEd General Apport 3121] ELSE (0)  IF (0 > (0) THEN -1,233,725.64 ELSE (0)	\$ 0.00
AA. Total General Apport for Special Ed Allocation  IF [ESA112 Coop] > 0, THEN [Coop SpEd Gen Apport Instruct] * [% Stdnt Avg FTE SpEd], ELSE [SpEd general apport 3121] + [General Apport 3121 Coop Transfer]  IF 0 > 0, THEN 0.00 * 0.3114, ELSE 1,233,725.64 + 0.00	\$ 1,233,725.64
<b>Total Allocation for Special Education Program 21 (M+U)</b>  <b>([3121 Allotment] + [Prog 21 Calc])</b>  <b>(1,233,725.64 + 5,469,516.14)</b>	\$ <b><u>6,703,241.78</u></b>
<b>Percentage Portion of BEA Rate Attributed to PLD (PLD / BEA Rate)</b>  (((Total SpEd BEA PD] / [SpEd BEA Rate]) * 100)  ((97.92 / 10,878.51) * 100)	0.90
<b>Portion of PLD (Total Allocation of SpEd * PLD%)</b>  (((Total 4121] - [State Safety Net]) * [PLD BEA Rate %]/100)  ((5,469,516.14 - 0.00) * 0.90/100)	\$ 49,225.65

# Safety Net Analysis

Year	Funding eligibility threshold	Amount Requested	Students Submitted	Award Received	Students Funded	Total Special Education Allocation	What we spent	
2019	\$ 31,761.00	\$ 40,510.00	1	\$ -	0	\$ 8,498,169.00	\$ 11,341,902.00	\$ (2,843,733.00)
2020	\$ 29,707.00	\$ 82,339.00	2	\$ 65,034.00	2	\$ 9,115,099.00	\$ 11,754,685.00	\$ (2,639,586.00)
2021	\$ 34,457.00	\$ 33,438.00	1	\$ -	0	\$ 9,034,558.00	\$ 11,065,819.00	\$ (2,031,261.00)
2022	\$ 35,067.00	\$ 151,916.00	6	\$ 115,466.00	6	\$ 9,365,090.00	\$ 11,855,905.00	\$ (2,490,815.00)
2023	\$ 37,599.00	\$ 136,272.00	6	\$ 119,657.00	5	\$ 10,075,495.00	\$ 11,679,173.00	\$ (1,603,678.00)
2024	\$ 39,158.00	\$ 252,456.00	11	\$ -	0	\$ 12,291,896.00	\$ 12,280,892.00	\$ 11,004.00

<https://ospi.k12.wa.us/policy-funding/special-education-funding-and-finance/applying-safety-net-funding>



# Core Issues with School Funding

- **School Funding website:** [www.waschoolfunding.org](http://www.waschoolfunding.org)
  - Useful—and easy to understand—information on the current funding dilemma so many school districts currently face
- **School Funding Toolkit** (or: <https://bit.ly/46yIFFp>)
  - Includes key messages, talking points, sample social media content, graphics, school funding FAQs, and other resources to assist and align our members (and partners) as you engage with your own legislators

# Links from Dan Steele

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<https://www.waschoolfunding.org/>

[WASA Government Relations Page](#)

• [WASA Legislative Toolkit](#)

dsteELE@wasa-oly.org

# Q and A





# Special Education Resource Library

<https://ospi.k12.wa.us/student-success/special-education/special-education-resource-library#S>

New SLD Tap Papers  
Transition Resources  
Services to Age 22

# Small Group Time-10 minutes

Introduce yourself: Name, Role and Location

Small group discussion about today's topic:

1. What do you see as your next steps from today's learning?
2. Was there a resource that was shared today that you would like to dive into?  
Receive more information/learning about?
3. February's session is legal updates with Carlos Chavez



# Upcoming Sessions and Due Dates

## WASA SPEDA

- February 5 Legal Updates with Carlos Chavez
- March 6
- May 1
- May 29



# WASA SPECIAL EDUCATION DIRECTOR ACADEMY

*Thank you*

