

U.S. Department of the Interior Bureau of Indian Education

Listening Session

Indian Student Equalization Program (ISEP)

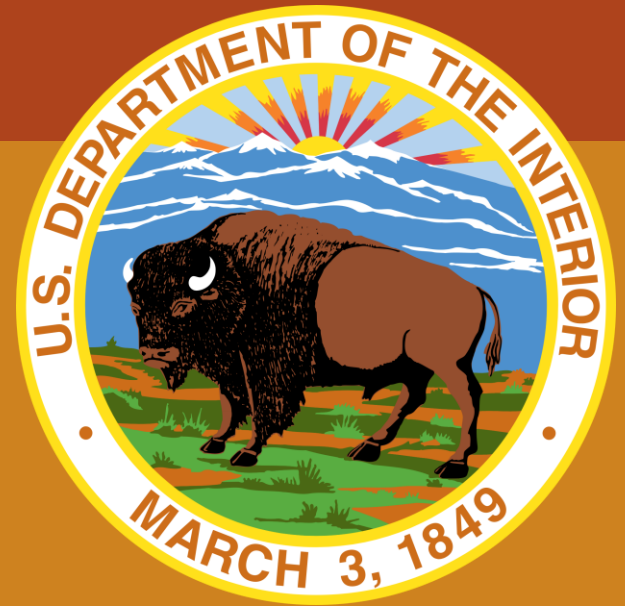
Tony Dearman, Director, Bureau of Indian Education

Sharon Pinto, Deputy Bureau Director, Bureau of Indian Education

Larry Palmer, Budget Officer, Bureau of Indian Education

April 20, 2021

Online at: bie.edu



Welcome



The image shows a Zoom meeting welcome screen. At the top, the Zoom logo and 'WELCOME!' are displayed. Below this, the text 'To begin, follow the steps below:' is centered. On the left, a microphone icon with a slash through it is accompanied by the instruction 'Please mute your microphone. (Bottom Left)'. On the right, a speech bubble icon is followed by the instruction 'Hello! As you join the meeting, hover to locate the CONTROL Toolbar at bottom of screen (see black bar below)'. Below this, another speech bubble icon is followed by the instruction 'Please type in your name, school or tribe, and state in the CHAT box.' Below that, a third speech bubble icon is followed by the instruction 'CHAT: We will be using the CHAT box throughout the session. Please type them into the CHAT box at any time.' At the bottom, a black control bar contains icons for Unmute, Stop Video, Security, Participants (1), Chat, Share Screen, Record, Reactions, and an End button. An orange arrow points from the 'CHAT' icon in the control bar to the 'CHAT: We will be using the CHAT box...' instruction.

zoom
WELCOME!

To begin, follow the steps below:

Please mute your microphone. (Bottom Left)

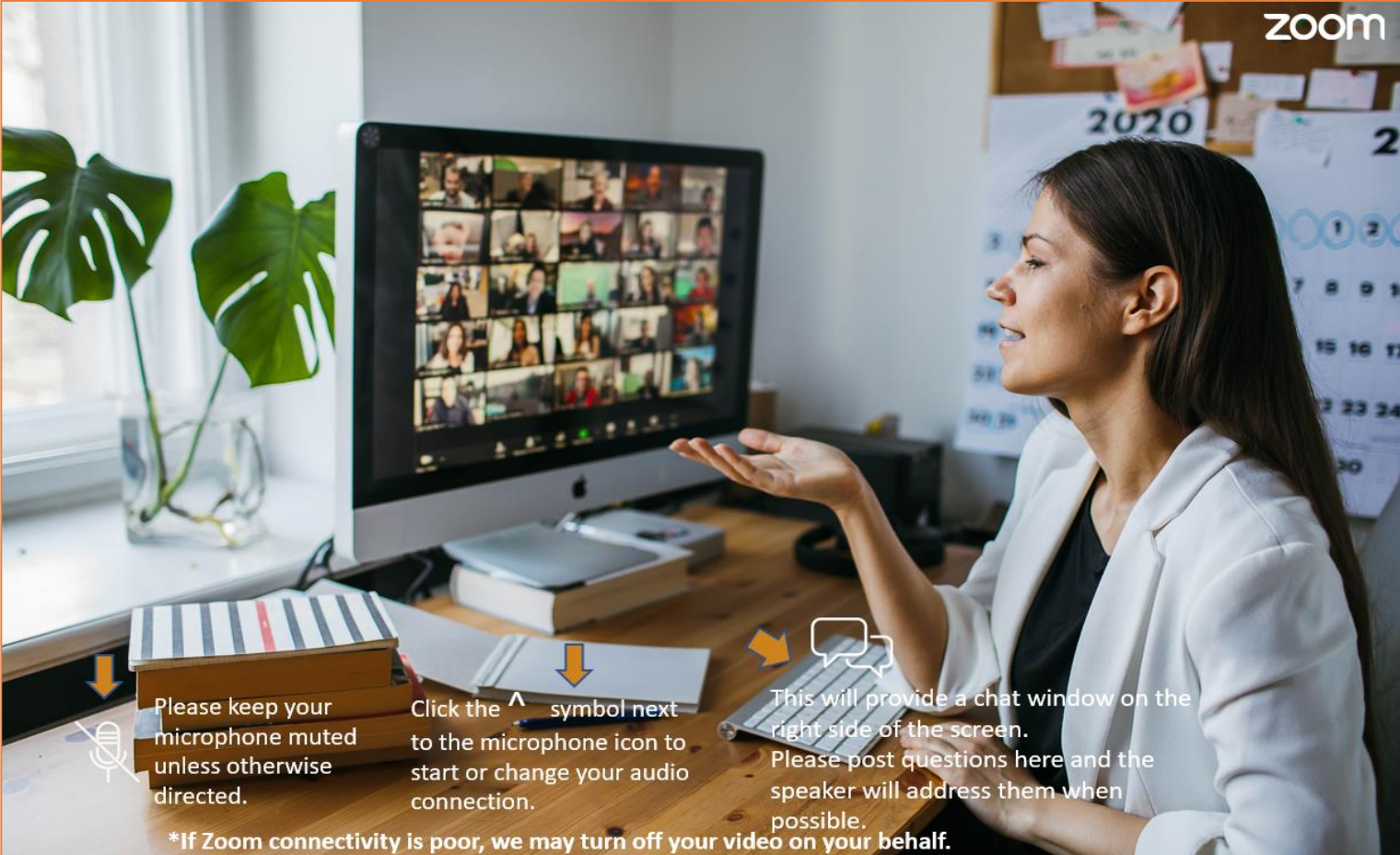
Hello! As you join the meeting, hover to locate the CONTROL Toolbar at bottom of screen (see black bar below)

Please type in your name, school or tribe, and state in the CHAT box.

CHAT: We will be using the CHAT box throughout the session. Please type them into the CHAT box at any time.


Unmute Stop Video Security Participants 1 Chat Share Screen Record Reactions End

Connectivity



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Please keep your microphone muted unless otherwise directed.

Click the  symbol next to the microphone icon to start or change your audio connection.

This will provide a chat window on the right side of the screen. Please post questions here and the speaker will address them when possible.

***If Zoom connectivity is poor, we may turn off your video on your behalf.**

Today's Listening Session Purpose

To provide an overview of the current 25 CFR Part 39 regulations, which were written in 2005; and to **seek your feedback** on these (2) general topics:

1. ISEP funding formulas
2. Funding distribution process

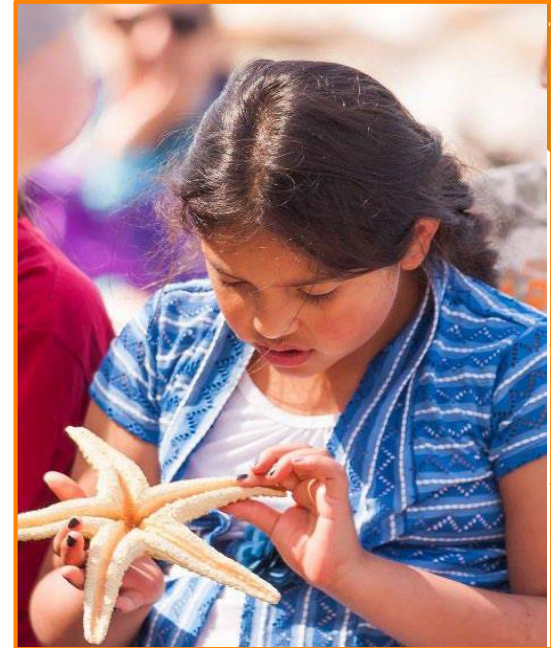
Your input will inform our review of regulatory guidance and potential need for changes in current processes



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Indian Student Equalization Program (ISEP)

The **Indian School Equalization Formula** was established to allocate Indian School Equalization Program (ISEP) funds. OIEP applies ISEF to **determine funding allocations** for Bureau-funded schools as described in 25 CFR Part 39.204 through 39.206. We use this formula for all day and residential schools.



ISEP Statutory Authority

- 25 U.S.C. 2001-2020 (The Education Amendments Acts of 1978) 92 Stat. 2143, P.L. 95-561, as amended.
- 25 U.S.C. 2501 et seq. (*The Tribally Controlled Schools Act of 1988*), 102 Stat. 385, P.L. 100-297, as amended.
- 20 U.S.C. 7401 et seq. (*The No Child Left Behind Act of 2001*), P.L. 107-110, Authorized through 2007.
- 25 U.S.C. 2015 (Every Student Succeeds Act), Part B.

ISEP Funding Purpose

§ 39.201 Does ISEP reflect the actual cost of school operations?

- ISEP serves as the primary funding source for BIE-funded elementary and secondary schools.
- Historically ISEP funding is the largest percent of BIE annual appropriations.
- ISEP covers many costs of operating school programs and includes:
 - Teacher and administrative salaries
 - Basic instruction
 - Gifted and Talented
 - Special Education programs - 15% of ISEP instruction
 - Residential programs and Food services
 - Language Development (Limited English Proficient and Language)
 - Summer programs

The logo for the Board of Education (BIE) is located on the right side of the slide. It features the letters "BIE" in a white, serif font, centered within a large, orange diamond shape. The diamond is part of a larger graphic design consisting of several overlapping, stylized shapes in orange and dark teal, creating a modern, geometric look.

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ISEP Funding Purpose - Continued

- Congress appropriates annual ISEP funding which is distributed among all BIE-funded K-12 schools.
- Annual appropriated funds change from year to year based on Congressional action.
- After Congressional action, funds are distributed following CFR guidance.
- ISEP does not assess the actual cost of school operations.
- It is a relative distribution of available funds by comparison with all other Bureau-funded schools.

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ISEP Academic Base Funding

25 CFR Part § 39.102 - What is academic base funding?

Academic base funding is Average Daily Membership (**ADM - Attendance**) times the **Weighted Student Unit (WSU)**.

In calculating ISEP funding, BIE first determines a school's ADM.

- The ADM is the total ISEP-eligible membership (**attendance**) of a school for a school year, divided by the number of school days in the school's calendar.
- The WSU is (1) the measure of student membership **adjusted by weights** or ratios used as factors (**slides 11 & 13**);

§ 39.206 How does BIE calculate the value of one WSU?

Divide systemwide average number of WSUs for **the previous 3 years** into the current year's appropriation.

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Calculating Total WSUs for the School Year

25 CFR Part § 39.205 - How is a ISEP school's total WSUs for the school year?

(a) Add weights obtained from the calculations in paragraphs (a)(1), (a)(2), and (a)(3) of this section (below) to obtain the total WSUs for each school.

(1) Each year's **ADM is multiplied by applicable WSU** for each grade level;

(2) Calculate supplemental WSUs generated by students; and

(3) Calculate supplemental WSUs generated by the schools. (i.e. small school, isolation, and BIE school board adjustments)

(b) The total WSU for the school year is the sum of paragraphs (a)(1), (a)(2), and (a)(3) of this section.

3-Year Average Membership (Attendance)

25 CFR Part § 39.202 – What are the definitions of terms used in this subpart?

Three-year average means:

- (1) For academic programs, average daily membership of the **3 years before the current year of operation**; and
- (2) For the residential programs, the count period membership of 3 years before the current year of operation.

25 CFR Part § 39.103 - What are factors used to determine base funding?

Grade Level	Base Academic
Kindergarten	1.15
1-3	1.38
4-6	1.15
7-8	1.38
9-12	1.50

Residential Programs

25 CFR Part § 39.217 - How are students counted for funding residential services?

The school must document a student was:

- a) In residence at **least 1 night during first full week** of October;
- b) In residence at least **1 night during week preceding** the first full week in October;
- c) In residence at least 1 night during the week following the first full week in October; **and** Present for both the **after-school count and the midnight count** at least one night during each week specified in this section.

25 CFR Part § 39.218 – Funding formulas for residential services?

Residential programs are funded if they operate at least **4 nights a week receive 4/7 of the WSU; 5 to 7 nights receive the full WSU (7/7).**

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Residential Program Weights

25 CFR Part § 39.103 - What factors determine residential base funding?

Grade Level	Base Residential
Kindergarten	0
1-3	1.75
4-6	1.60
7-8	1.60
9-12	1.60

Language Development Programs and Weight

25 CFR Part § 39.136 - WSU for Language Development programs?

25 CFR Part § 39.137 - May schools operate a language development program without a specific appropriation from Congress?

- Schools can use ISEP funds to implement Language Development programs that demonstrate the positive effects of Native language programs on students' academic success and English proficiency.
- Language Development programs are funded at **0.13 WSUs per student.**

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Gifted and Talented

25 CFR Part § 39.114 - What qualifies student as gifted & talented?

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- Gifted & Talented students receive a total **WSU of 2.0** per Part 39.121. for each eligible student that:
 - is gifted and talented; and
 - is enrolled in the school on **a full-time basis**
- Students can be designated G&T based on characteristics of:
 - Intellectual Ability
 - Divergent Thinking
 - Academic Aptitude/Achievement
 - Leadership
 - Visual and Performing Arts

Gifted and Talented Weights

25 CFR Part § 39.121 - WSU for gifted and talented students?

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GRADE LEVEL	G&T WSU
Kindergarten	0.85
Grades 1-3	0.62
Grades 4-6	0.85
Grades 7-8	0.62
Grades 9-12	0.50


Financial Plans and Programs Memo

IN REPLY REFER TO:
Education - Code BIE-11

MAY 30 2018

MEMORANDUM

To: Associate Deputy Directors

From:  Director, Bureau of Indian Education

Subject: ISEP Planning for School Year 2018-2019 Funding

School supervisors and school boards should use the following dollar amounts to develop their financial plans and programs for the period July 1, 2018, to June 30, 2019. For the Indian School Equalization Program (ISEP), use \$4,435 per Weighted Student Unit (WSU), which is 80 percent of the estimated appropriations divided by the school year (SY) 2017-2018 WSU (calculated three year average) of 70,871.14. For ISEP transportation, use \$2.76 per mile, which is 80 percent of the SY 2017-2018 per mile rate of \$3.4572.

Please note:

These are planning amounts only. The final per WSU dollar amount issued to the schools will be based on the 2018 appropriations and the three year average WSU for SYs 2015-2016, 2016-2017, and 2017-2018. The WSU for SY 2018-2019 will not be known until all schools have certified their SY 2017-2018 ISEP student count.

The final transportation per mile dollar amount issued to the schools will be based on the September 24-28, 2018, ISEP transportation mileage and the 2018 appropriations.

By law, 80 percent of the SY 2017-2018 ISEP, Transportation, and Tribal Grant Support Costs (Administrative Cost Grants) funds received by a tribally controlled grant school are to be included in the school's SY 2018-2019 grant on July 1, 2018. However, tribally controlled grant schools should develop their budget and expenditure plans based on their projected ISEP count and mileage, not on a projected dollar amount based on the 80 percent to be issued July 1, 2018.

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NASIS Verification/Certification Report

ISEP Eligible/Non-Eligible/Exceptions Roster - cont.
Report Type: Certification

Calendar: 2011-2012 ES 2011-2012 HS 2011-2012 MS

Exceptions Certifications

Total Exceptions: 1

Name	Grade	Exception Type
		MultiGrade

Verification Summary for Qualified Students

Grade	Total Students	ADM*	SPED	LANG	GT
KG	71	61.06	17	71	0
01	42	36.18	12	42	8
02	63	56.16	15	63	7
03	59	57.65	16	59	14
04	46	39.59	14	46	12
05	63	57.33	16	62	12
06	54	47.51	7	54	21
07	59	52.10	9	59	23
08	62	55.28	14	61	19
09	72	61.41	17	72	17
10	57	45.08	14	57	12
11	42	34.59	17	42	12
12	33	26.30	10	33	10

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ISEP Formula Calculations

ISEP SUPPLEMENTAL FORMULA CALCULATION EXAMPLE BASED on \$4435.00 WSU				
WEIGHTED AMOUNTS				
GRADE	BASE ISEP	G & T	LANGUAGE	RESIDENTIAL
K	1.15	0.85	0.13	0
1 to 3	1.38	0.62	0.13	1.75
4 to 6	1.15	0.85	0.13	1.6
7 to 8	1.38	0.62	0.13	1.6
9 to 12	1.5	0.5	0.13	1.6
WEIGHTED AMOUNTS (X) WSU				
GRADE	BASE ISEP	G & T	LANGUAGE	RESIDENTIAL
K	5,100.00	3,770.00	577	\$0
1 to 3	6,120.00	2,750.00	577	7,761.00
4 to 6	5,100.00	3,770.00	577	7,096.00
7 to 8	6,120.00	2,750.00	577	7,096.00
9 to 12	6,653.00	2,218.00	577	7,096.00
EXAMPLE WEIGHTED STUDENT UNIT (WSU) (X) AVERAGE DAILY MEMBERSHIP (ADM)				
GRADE	# of STUDENTS	ADM	WSU	TOTAL WEIGHTS
K	71	61.06	1.15	70.22
1	42	36.18	1.38	49.93
2	63	56.16	1.38	77.5
3	59	57.65	1.38	79.56
4	46	39.59	1.15	45.53
5	63	57.33	1.15	65.93

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3 Year Average

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2015-2016 School Year				ISEP Instructional Three Year Averages				2017-2018 School Year						
Head Count	ADM	WSU	Total Weights	Head Count	ADM	WSU	Total Weights	Head Count	ADM	WSU	Total Weights			
Kindergarten	66	60.3	1.15	69.345	Kindergarten	53	45.17	1.15	51.95	Kindergarten	71	61.06	1.15	70.22
1st Grade	63	59.21	1.38	81.7008	1st Grade	63	59.45	1.38	82.04	1st Grade	42	36.18	1.38	49.93
2nd Grade	43	38.53	1.38	53.1714	2nd Grade	59	53.38	1.38	73.66	2nd Grade	63	56.16	1.38	77.5
3rd Grade	60	53.25	1.38	73.485	3rd Grade	49	41.95	1.38	57.89	3rd Grade	58	52.65	1.38	79.56
4th Grade	52	47.56	1.15	54.694	4th Grade	61	53.7	1.15	61.76	4th Grade	46	39.59	1.15	45.53
5th Grade	39	37.58	1.15	43.217	5th Grade	47	43.45	1.15	49.97	5th Grade	63	57.33	1.15	65.93
6th Grade	55	48.16	1.15	55.384	6th Grade	52	47.32	1.15	54.42	6th Grade	54	47.51	1.15	54.64
7th Grade	63	55.8	1.38	77.004	7th Grade	57	48.96	1.38	67.56	7th Grade	59	52.1	1.38	71.9
8th Grade	40	32.6	1.38	44.988	8th Grade	62	56.95	1.38	78.6	8th Grade	62	55.28	1.38	76.29
9th Grade	54	45.69	1.5	68.535	9th Grade	55	43.08	1.5	64.62	9th Grade	72	61.41	1.5	92.12
10th Grade	49	38.02	1.5	57.03	10th Grade	54	41.7	1.5	62.55	10th Grade	57	45.08	1.5	67.62
11th Grade	52	41.53	1.5	62.295	11th Grade	33	26.58	1.5	39.87	11th Grade	41	34.59	1.5	51.89
12th Grade	51	37.02	1.5	55.53	12th Grade	45	38.14	1.5	57.21	12th Grade	33	26.3	1.5	39.45
TOTAL	687	605.25		811.3882	TOTAL	690	593.8		802.1	TOTAL	722	630.24		842.55

	Total 3-yr ADM	Total 3-yr ADM	Total 3-yr WSU	Total 3-yr WSU	ISEP Instruc. Funds per Grade
Kindergarten	166.53	55.51	191.52	63.8365	283,117.09
1st Grade	154.84	51.61333	213.68	71	315,887.31
2nd Grade	148.07	49.33667	204.34	68.113	302,081.15
3rd Grade	152.85	50.95	210.93	70.311	311,829.28
4th Grade	140.85	46.95	261.98	53.993	239,458.95
5th Grade	138.36	46.12	259.11	53.036	235,214.66
6th Grade	142.99	47.66333	164.44	54.813	243,095.65
7th Grade	156.86	52.28667	216.47	72.156	320,011.86
8th Grade	144.84	48.28	199.88	66.626	265,486.31
9th Grade	150.18	50.06	225.27	75.09	333,024.15
10th Grade	124.8	41.6	187.2	62.4	276,744.00
11th Grade	102.7	34.23333	154.05	51.35	227,737.25
12th Grade	111.46	37.15333	154.04	51.346	227,719.51
TOTAL		611.7767	2442.89		3,611,407.17

1,687,588.44 Total Elementary ISEP Instruc. Funds

858,593.82 Total Middle School Instruc. Funds

1,065,224.91 Total High School Instruc. Funds

15% for Spec. Ed.
 1,687,588.44 X 15% = **253,138.27**
 New ISEP after - 15% **1,434,450.17**

858,593.82 X 15% = **128,789.07**
 New ISEP after - 15% **729,804.75**

1,065,224.91 X 15% = **159,783.74**
 New ISEP after - 15% **905,441.17**

Part-Time Students & Home School Students

§ 39.215 Can schools receive funding for part-time students?

(a) A school can receive funding for the following part-time students:

(1) Kindergarten students enrolled in a 2-hour program

(2) Grade 7-12 students enrolled in at least half but less than a full instructional day.

(b) Schools must count students classified as **part-time at 50 percent of their basic instructional WSU value.**

§ 39.213 Will the bureau fund home schooled children?

The Bureau will **not fund home schooled** children.

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Other Categories

39.211 Other categories of students a school can count?

Type of Student	
(a) Homebound	<p>(1) The student is temporarily confined to the home for some or all of the school day for medical, family emergency, or other reasons required by law or regulation;</p> <p>(2) The student is being provided by the school with at least 5 documented contact hours each week of academic services by certified educational personnel; and</p> <p>(3) Appropriate documentations is on file at the school.</p>
(b) Located in an institutional setting outside of the school	<p>The school is either:</p> <p>(1) Paying for the student to receive educational services from the facility; or</p> <p>(2) Providing educational services by certified school staff for at least 5 documented contact hours each week.</p>
(c) Taking college courses during the school day	<p>The student is both:</p> <p>(1) Concurrently enrolled in, and receiving credits for both the school's courses and college courses; and</p> <p>(2) In physical attendance at the school at least 3 documented contact hours per day.</p>
(d) Taking distance learning courses	<p>The student is both:</p> <p>(1) Receiving high school credit for grades; and</p> <p>(2) In physical attendance at the school at least 3 documented contact hours per day.</p>
(e) Taking internet courses	<p>The student is both:</p> <p>(1) Receiving high school credit for grades; and</p> <p>(2) Taking the courses at the school site under a teacher's supervision.</p>

Instructional Hours

§ 39.214 What is the minimum number of instructional hours to be considered a full-time educational program?

A full-time program provides the following number of instructional/student hours to the corresponding grade level:

Grade	Hours
K	720
1-3	810
4-8	900
9-12	970

Accountability

25 CFR § 39.404 - What is the certification and verification process?

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- School administrator and President of the School Board **certify the school's ADM and residential count** is true and accurate to the best of their knowledge or belief and is supported by appropriate documentation.
- Education Line Officer will **annually review** the following to verify that the information is true and accurate:
 1. The eligibility of every student;
 2. The school's ADM and supplemental program counts and residential count.

Reporting & Funds Distribution

§ 39.208 How are ISEP funds distributed?

(a) July 1, schools receive 80 percent of their prior-year funds.

(b) December 1, balance is distributed after verification of school counts.

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Native American Student Information Systems (NASIS)

NASIS serves as a student data management system to determine the number of eligible ISEP students for **equitable distribution of funds** to meet instructional and residential program needs.

The requirement for an information system for BIE originated in the Educational Amendments of 1978 to P.L. 95-561, as amended by the "No Child Left Behind Act." Part D is entitled the "Native American Education Improvement Act.

Blanket Waiver Authority

25 CFR Subchapter E – How Does this Waiver Support ISEP Funding?

- The Department of the Interior issued a blanket waiver of certain 25 CFR subchapter E regulatory requirements to the extent necessary to ensure that schools receive the level of Indian School Equalization Program (ISEP) and transportation funding for **school year 2021-2022** that they would have received absent COVID-19 related school facility closures;
- The blanket waiver addresses the following regulatory requirements applicable to school year 2020-2021 for all BIE schools: 25 C.F.R. § 39.710-.711(**bus transportation**), 39.702-.704 (**commercial transportation**), 39.216-.221(**residential**), 39.214 (**instructional hours**).
- To the extent a BIE school has already submitted a waiver request, which includes a request to waive regulations outside of those referenced above, the Department will continue to review those requests, but will limit the review only to those additional provisions.

Look for Updates Here

- BIE Tribal Consultations Web site
 - <https://www.bie.edu/landing-page/academic-success>
- Indian Affairs Consultation Web site
 - <https://www.bia.gov/consultation-listening-session/indian-school-equalization-program-isep-and-isep-transportation-0>
- ISEP & Student Transportation Federal Register notice
 - <https://www.federalregister.gov/documents/2021/04/05/2021-06923/indian-school-equalization-program-isep-and-isep-student-transportation-funding-formulas>
- Point of Contact:
 - Ms. Emmalani Longenecker
 - Special Assistant to the Deputy Bureau Director of School Operations, Bureau of Indian Education
 - Tel. (505) 563-5368
 - emmalani.longenecker@bie.edu

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Thank You!

Mvto HiyHiy LemLmts Wado
Wawaenon DaWaEh Miigwech Wopila
Quyana Pinagigi Wimblahaho
Baasee AnaaBasee HiriweTudahe
Ahéhee Pilamiya Taikuu
ThankYou Nya:Weh Aho
Tansi

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