Quality Education Commission

Wednesday, October 21, 2026 8:00am - 10:00am

Hybrid: MS Teams or In Person at Oregon Public Services Building

Commission Members: *Tricia Mooney (Chair), Karinn Calhoun, Gary Roberts, Tyler Scialo-Lakeberg, Dana Lovejoy*
ODE Staff: *Evan Fuller, Dr. Candice Castillo, Isabella Jacoby, Leah Thorp, Anna Horning*
Meeting Scribe: *Anna Horning*

Introductions

Chair Mooney welcomed commissioners, staff and opened the meeting. ODE leadership provided updates on agency priorities, including support efforts for the Bend-La Pine community following the recent tragedy. Staff also shared information about recent State Board actions, including adoption of instructional time rulemaking and high-quality instructional material rules. Commissioners were encouraged to remain aware of ongoing implementation efforts and support ODE is providing to school districts statewide.

Quality Education Model Overview

Staff continued the Commission's onboarding process with a comprehensive overview of the Quality Education Model (QEM), its statutory foundation, and its role in estimating the resources necessary to support Oregon's educational goals. Discussion focused on the Commission's responsibility to identify funding levels necessary to provide a quality education and how the QEM serves as an educational adequacy benchmark rather than a school funding formula.

Commissioners reviewed the history and development of the model and discussed how it has evolved over time while maintaining its core purpose and structure. Staff explained the distinction between maintaining current educational services and identifying the resources needed to fully implement the practices outlined in the Quality Education Model. The group also reviewed common misconceptions about the model, including its relationship to the State Fund and legislative budgeting process.

Understanding the Model and Oregon's Funding System

Staff provided a deeper look at how the Quality Education Model is constructed using prototype elementary, middle and high schools to estimate statewide educational costs. Commissioners discussed the various factors included in the model, including staffing, instructional supports, class size assumptions, transportation, technology, operational expenses, and employee benefits.

The Commission also discussed changes in Oregon's K-12 funding structure and the growing use of targeted grant programs alongside the State School Fund. Members noted the complexity of multiple funding streams and the challenges associated with understanding how resources, programs, and outcomes connect at both the state and district levels. Discussion highlighted the importance of funding transparency and the need for commissioners to understand the broader education finance landscape as they prepare for future report development.

Policy Context and Future Commission Work

Commissioners discussed the increasing legislative interest in educational funding adequacy, accountability, transparency, and student outcomes. Staff described how educational research, professional judgement, and best practices contribute to the ongoing evaluation of the model and inform future recommendations.

The group also explored issues likely to influence future Commission work, including changes to financial reporting systems, efforts to align funding with outcomes, and possible refinements to the model's methodology. Staff introduced alternative approaches to educational cost modeling and discussed the tradeoffs between simplicity, accuracy, transparency, and comparability.

Next Steps

Chair Mooney encouraged commissioners to continue documenting questions and topics for future discussion. Staff will continue the onboarding process in upcoming meetings with additional information on accountability systems, educational funding structures, and Quality Education Model assumptions. The next meeting will future support commissioners' understanding of the model, its role in informing Oregon's education policy discussions and include staff presentations regarding the Education Accountability Act.

Wrap Up

Chair Mooney concluded and adjourned the meeting.

NEXT MEETING: WEDNESDAY, NOVEMBER 18, 2026

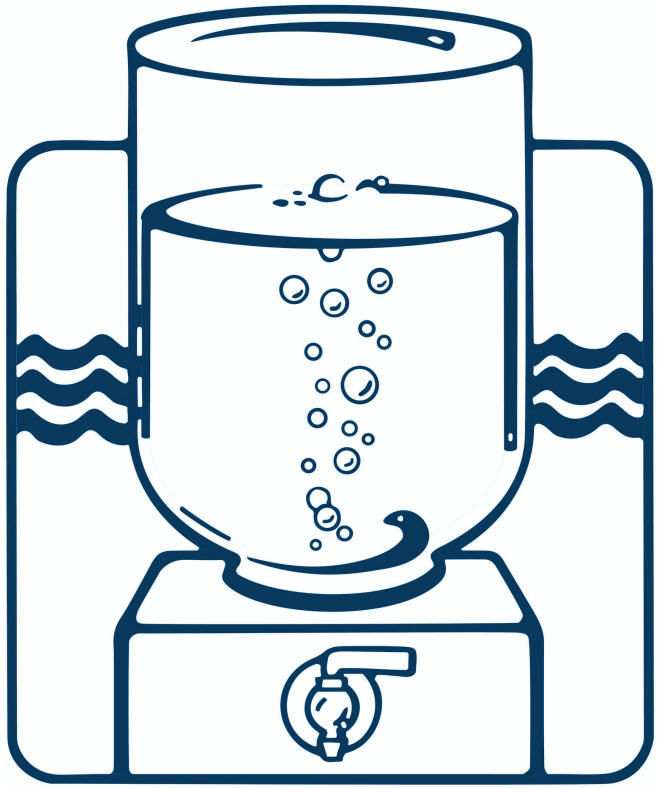
8:00 AM – 10:00 AM(Hybrid: MS Teams or In Person at Oregon Public Services Building)

Quality Education Commission 2026 Orientation

September 9, 2026

Human Housekeeping

- Restrooms:
  - Women's is just to the right of the room entrance
  - Men's is to the left down the hall a bit
  - Gender neutral are on the first floor, in the rear/street exit hallway
- Water:
  - Fountain/bottle refill is next to the women's restroom
  - Hot from the tap (e.g. for tea) is available in the break rooms (ask ODE staff)



Agenda

- Introductions and Group Agreements
- Quality Education Commission (QEC) Logistics and Expectations
  - Meetings
  - Charter
  - ODE's Role
- Intro to the Quality Education Model (QEM) Report
  - 2028 Report Timeline
- QEM overview, history, and context
- Breakouts: Establishing Connection
- Closing

Two 15 minute breaks are planned at roughly 9:00 and 10:30

Introductions



Who's in the Room?

Personal History Protocol

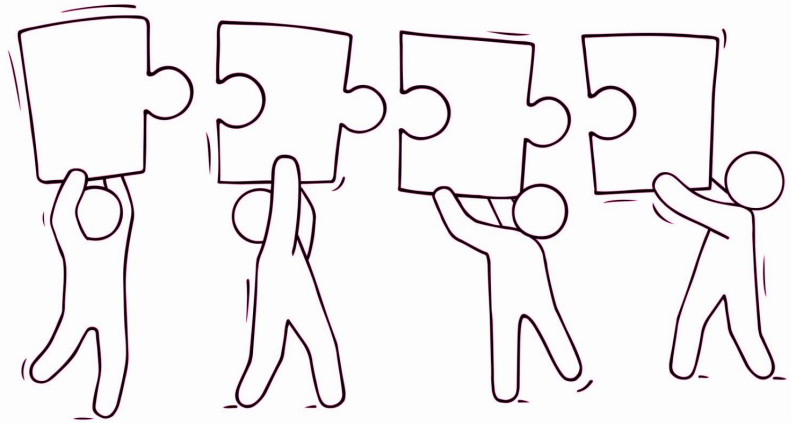
Take 1-2 minutes to jot down some ideas for the following & then each person will share (as many as you'd like):

- Name
- Hometown
- Number of kids in family
- Interesting childhood or current hobbies
- Biggest challenge or celebration growing up
- A question you have about the work

Reminder: all QEC meetings are public and recorded.

Community Agreements
What We Need as Team Members

1. Think about a personal and positive experience working with a team. Any group that was a positive learning community.
2. Write a few key things. You might include the reason for the group's existence, how the group was structured, or what made it a positive learning place.
3. Choose 1 key element that was the most important in answer to the question, "What's your one thing you absolutely need from your community?"



(2 minutes)

Community Agreements
What We Need as Team Members



Whole-Group Share

4. Each person will share their element and why they chose that one.
5. Reach consensus on agreements.

Sample Agreements

- Active Listening – Be engaged in the meeting/conversation while others are talking.
- Sidebars – If you absolutely "must" discuss something, take it outside.
- Equity of Voice – Everyone has an opportunity to speak, no monopolizing discussions.
- Be fully Present – No texting, checking emails, social media, etc.
- Honor Perspectives – Respect other views even when you do not agree.

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QEC Foundations

QEC Legislative Establishment and Requirements

The Quality Education Commission was established in 2001 in ORS 327.497 and 327.500:

> *"The Quality Education Commission should be established to define the costs sufficient to meet the established quality goals for kindergarten through grade 12 public education."*

ORS 327.506:

(2) Each biennium the Quality Education Commission shall determine the amount of moneys sufficient to ensure that the state's system of kindergarten through grade 12 public education meets the quality goals.

(3) In determining the amount of moneys sufficient to meet the quality goals, the commission shall identify best practices that lead to high student performance and the costs of implementing those best practices in the state's kindergarten through grade 12 public schools. Those best practices shall be based on research, data, professional judgment and public values.

(4) Prior to August 1 of each even-numbered year, the commission shall issue a report to the Governor and the Legislative Assembly that identifies:

> (a) Current practices in the state's system of kindergarten through grade 12 public education, the costs of continuing those practices and the expected student performance under those practices; and
>
> (b) The best practices for meeting the quality goals, the costs of implementing the best practices and the expected student performance under the best practices.

(5) In addition, the commission shall provide in the report issued under subsection (4) of this section at least two alternatives for meeting the quality goals. The alternatives may use different approaches for meeting the quality goals or use a phased implementation of best practices for meeting the quality goals.

Commissioner Appointments

QEC Statutes

- 11 members appointed by the Governor.
- The Governor may not appoint more than five members of the commission who are employed by a school district at the time of appointment.
- The term of office of each member is four years, but a member serves at the pleasure of the Governor.
- Before the expiration of the term of a member, the Governor shall appoint a successor whose term begins on August 1 next following.
- A member is eligible for reappointment.
- If there is a vacancy for any cause, the Governor shall make an appointment to become immediately effective for the remainder of the unexpired term.

Expectations of Commissioners



- Attend and be fully engaged at each meeting
- Review meeting materials, as needed, ahead of meetings
- Complete assigned tasks between meetings
- Comply with group agreements
- Uphold all public meeting and conflict of interest laws

QEC Leadership

Per ORS 327.502:

“The Governor shall select one of the members of the Quality Education Commission as chairperson and another as vice chairperson, for such terms and with duties and powers necessary for the performance of the functions of those offices as the Governor determines.”

Tricia Mooney is the current chairperson.

Public Meeting Law

- All commissioners are responsible for upholding public meeting law
- Attorney General's Public Records and Meetings Manual (starts on page 117)
- All meetings must be open to the public
- A meeting is defined as the convening of the QEC for which a quorum (minimum number of commissioners) is required in order to make a decision or to deliberate toward a decision on any matter
  - Serial electronic written communication (email, chat, collaborative documents, phone calls) is considered a meeting
- Public notice must be given ahead of the meeting
- All official actions must be taken by a public vote
- Minutes or recordings must be provided to the public within a reasonable time

QEC Meetings

- Meetings comply with public meeting law (agendas posted ahead of time on website, meetings are recorded and posted on the QEC website)
  - Public may be non-participating observers in person or online
- Meetings are a hybrid of in person and virtual
  - The in person location is typically in Salem, travel is reimbursed
  - Virtual attendance requires the commissioner to provide the device and internet for attendance; these are not reimbursed
    - Commissioners receive their own virtual link to allow full participation (do not share your link with others)
- Meetings are monthly, except August, and are typically 2 hours long
- For accessibility needs, please reach out to the board administrator ahead of the meeting (at least 1 day prior)
- Meeting quorum (minimum number to do business) is a majority of members (ORS 327.502)

QEC Meeting Travel Reimbursement Process

- Complete the required form
- Submit to Anna Horning

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255 Capitol Street NE
Salem, Oregon 97310

Office of Finance & Administration
Accounting Services

EXPENSE CLAIM FOR BOARDS AND COMMISSIONS

☐ State Board ☐ _____ Board ☐ _____ Commission

Meeting Attended or Purpose of Travel _____

Date(s) and Place of Meeting _____

$30 per diem is claimed for the following days:
(Subject to the availability of funds therefor in the budget — ORS 292.495)

Date				
Purpose*				

*Meeting, travel, etc.

REIMBURSEMENT IS CLAIMED FOR THE FOLLOWING:

Meals and Lodging — The Department of Education will reimburse for necessary lodging and meals en route to, at, and from the meeting place at actual cost with receipts required. You may opt to be reimbursed for meals at the state per diem allowances with receipts not required. **Miscellaneous** — Parking and other expenses will be reimbursed at actual cost. Receipt must accompany any charge of $25 or more. **Private Car Mileage** — Mileage will be paid at the rate established by the Executive Department for mileage from residence to place of meeting and return. If number of miles is not indicated, the Department will use Oregon Official Mileage Chart to determine number of miles. **Public Conveyance** — The Department will reimburse for actual fare. Receipt must accompany claim.

Ethics and Conflict of Interest

- Oregon Government Ethics Commission (OGEC)
- Oregon Government Ethics Law Guide for Public Officials (2026)
  - Pg 35: Conflicts of interest
  - A conflict of interest occurs when a public official makes a decision or recommendation, or takes an official action that would (actual conflict of interest) or could (potential conflict of interest) financially impact, positively or negatively, any one or more of the following:
    - The public official
    - A relative of the public official
    - A member of the public official's household
    - A business associated with the public official
    - A business associated with the public official’s relatives or household members

    It is important to note that the types of conflicts of interest addressed in Ethics Law are limited to financial conflicts of interest. They do not address issues such as bias or favoritism.

Ethics and Conflict of Interest (continued)

- Prohibited Use of Office or Position (pg 62)
- Ethics Law prohibits public officials from using or attempting to use their office or position to obtain a financial benefit or to avoid a financial harm (together referred to as a financial impact), if the financial impact would not otherwise be available but for the office or position they hold. The prohibited use of office or position provisions apply to financial impacts on:
  - the public official, the public official's relatives, and the public official's household members
  - any businesses that the public official, their relatives, or their household members are associated with

  The following are some examples of a public official's prohibited use or attempted use of their office or position:
  - A state employee uses a government vehicle to take their children to soccer practice.
  - A school superintendent signs a contract between the school district and the company that employs the superintendent's spouse.
  - A volunteer firefighter lets their roommate do their laundry at the fire station.
  - A city councilor pressures staff to change a proposed ordinance to increase the value of real estate that the city councilor owns

Ethics and Conflict of Interest (continued)

- Gifts (pg 94)
- Ethics Law limits the value of gifts a public official can accept from certain people.

  If the source of a gift has a legislative or administrative interest in the actions of the public official, the public official can only accept gifts from that source with a total value of $50 or less in a calendar year. However, if the source of the gift does not have a legislative or administrative interest, there is no limit on the value of the gift or gifts that the public official can accept.

  The restrictions on the value of gifts from a source with a legislative or administrative interest include gifts given to public officials, their relatives, or members of their household. To decide if a gift can be accepted with or without limit, the public official must know the source of the gift. Anonymous gifts cannot be accepted. The burden of knowing whether a gift can be accepted rests on the individual public official.

  In analyzing whether an offer of a thing of value can be accepted, you want to ask four questions. We will analyze each question below.

  - Does the thing of value being offered qualify as a gift under the Ethics Law?
  - Is the gift being offered by a source that has given the public official other gifts valued in excess of $50 in aggregate (including the value of the gift being offered) during the calendar year?
  - Could the source of the gift be reasonably known to have a legislative or administrative interest in the public official's decisions or votes?
  - Do any of the gift exceptions in ORS 244.020(7)(b) apply?

Ethics and Conflict of Interest (continued)

- Nepotism (pg 114)
- Generally, public officials may not participate in personnel actions, including interviews, discussions, or debates by their public body when the personnel action involves their relatives or household members. Personnel actions include:
  - Appointments
  - Employment
  - Promotions
  - Discharges
  - Firings
  - Demotions

  This prohibition includes when the relative or household member is seeking to become a member of a governing body over which the public official exercises jurisdiction or control, even if that member would serve in an unpaid capacity. For example, if the Mayor's spouse was seeking an appointment to a position on the City's budget committee, the Mayor could not participate in actions related to their appointment including interviews, discussions, or debates.

Check for Understanding



Do you feel like you have the tools you need to meet the board/commissioner requirements set by the state?

Take 3 minutes to discuss with a neighbor.

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QEC Charter

QEC Charter - Overview

Establishment and Purpose:

Created under ORS 327.506 to define the funding levels needed for K-12 public schools to adequately:

1) Continue at the status quo delivery level of service from the prior biennium
2) Operate under a higher service delivery model designed to meet the state quality education goals, as defined in ORS 329.015

Independent Authority:

Operates as an independent body, supported by the Oregon Department of Education, which provides technical, administrative, and advisory support

QEC Charter - Key Responsibilities and Mandates

Quality Education Model (QEM):

Maintain, refine, and update the QEM to reflect current research, school data, and public values.

Biennial Reporting:

Deliver a full report to the Governor and Legislative Assembly by August 1 of every even-numbered year.

Alternative Funding Models:

Outline at least two alternative strategies to meet the quality education goals of the state if funding targets cannot be met.

QEC Charter - Governance and Structure

Commission Structure:

Comprised of 11 Governor-appointed members serving 4 year terms

Leadership roles:

Governor designates the Chairperson and Vice Chairperson

Support Systems:

Supported by ODE advisors, executive board administration, leadership partners, and staff analysts

QEC Charter - Commissioner Representation

(page 4): Commissioners are dedicated to having a diverse commission that has representation from:

- Regional representation across Oregon's five regions, as defined by the Department of Transportation (Portland Metro, Willamette Valley and North Coast, Southwestern Oregon, Central Oregon, and Eastern Oregon)
- Gender representation (e.g., male, female, non-binary, other)
- Representation across K-12 contexts (e.g., grade bands K-5, 6-8, & 9-12) as well as connections to preK/early childhood and community colleges/higher ed.
- Representation across multiple employers (e.g., public education, workforce, community-based organizations, education/economic researchers)
- Student focal group expertise/experience (including race/ethnicity/language)

QEC Charter - Core Beliefs

(page 2) Equity In Education Core Beliefs Include (but not limited to):

- **Universal Access:** All students have the right to a quality education that prepares them for their futures.
- **Language as an Asset:** Bilingualism and biliteracy are celebrated, supported, and integrated as a valuable part of school.
- **Inclusive Education:** Special education services are integrated into mainstream classrooms.
- **At-Risk Students:** Students from marginalized groups have opportunities for improvement based on their needs.

…

QEC Charter - Operational Guiding Principles

Evidence-Based Policy:

Model updates and recommendations grounded in empirical research, state data, and practitioner-informed professional judgement.

Transparency and Compliance:

Operate in strict compliance with Oregon Public Meeting Law and conflict-of-interest statutes.

Equity and Best Practices:

Focus on identifying cost-effective best practices that eliminate achievement gaps and support all Oregon Learners

QEC Charter - Decisions and Voting

The QEC strives to work through consensus.

When formal decisions are needed, the QEC will generally adhere to Robert's Rules of Order.

Formal decisions shall be made when a majority of seated members is present, according to the table:

Quick Reference					
	Must Be Seconded	Open for Discussion	Can be Amended	Vote Count Required to Pass	May Be Reconsidered or Rescinded
Main Motion	√	√	√	Majority	√
Amend Motion	√	√		Majority	√
Kill a Motion	√			Majority	√
Limit Debate	√		√	2/3rds	√
Close Discussion	√			2/3rds	√
Recess	√		√	Majority	
Adjourn (End meeting)	√			Majority	
Refer to Committee	√	√	√	Majority	√
Postpone to a later time	√	√	√	Majority	√
Table	√			Majority	
Postpone Indefinitely	√	√	√	Majority	√

QEC Charter - Committee Success Measures



- Production of the biennial QEM report
- Adherence to charter and proper management of charter changes
- Accurate tracking of decisions and changes
- Accurate recording and timely distribution of meeting minutes
- Feedback from and engagement with education and community partners regarding the content and quality of the biennial QEM report

Checking In

Share Out:

What requirements, beliefs, or principles from the charter reflect why you are here today?



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ODE Support for the QEC

Oregon Department of Education (ODE) Roles

QEC Advisor

Dr. Charlene Williams, Director of the Oregon Department of Education

Board Administrator

Anna Horning, Executive Support

Strategic Partnership Leaders

Dr. Candice Castillo, Deputy Director of Academics

Dr. Andrea Lockard, Assistant Superintendent

Economist

Evan Fuller

Other ODE staff are frequently invited to present information or support report development.

Board Administrator Duties

- Coordinate board operations, meetings, records, and communications.
- Support compliance with statutes, bylaws, policies, Public Meetings Law, Public Records Law, ethics requirements, and ADA accessibility standards.
- Coordinate with agency and commission leadership on board member recruitment, application review, candidate vetting, appointments, reappointments, and vacancy management
- Support board members through onboarding, training tracking, engagement, and ongoing guidance.
- Build and sustain relationships with community partners, agency leadership, and the Governor's Office.
- Coordinate legislative communications and ensure alignment with Governor's Office processes and expectations
- Oversee administrative functions including board compensation, reimbursement, reporting, budgeting, and Workday record maintenance

Economist Duties

Economic Analysis & Research: Conduct data-driven statistical analyses and draft policy white papers detailing the cost implications of educational practices to inform QEC decision-making.

QEM Development & Cost Forecasting: Maintain and update the Quality Education Model (QEM) to project Status Quo Service Level (SQSL) costs, statutory goal targets, and prototype school funding scenarios.

Data Integration & Modeling: Synthesize economic, demographic, and stakeholder input into the QEM, incorporating factors like PERS rates, cost of living, staffing, and per-pupil categorical expenditure data.

Compensation Forecasting: Build and maintain the Oregon Educator Workforce Compensation Forecast Model (OEWCFM), the state's official compensation growth baseline for DAS State School Fund CSL estimates.

Best Practices Survey Administration: Design, administer, and analyze the QEC Best Practices Survey to gather stakeholder data and embed proven practices directly into financial models.

ODE Support for Public Meeting Law



To support adhering to public meeting law and maintain transparency with the public, ODE staff:

- Maintains the QEC website
- Posts the agenda to the website ahead of meetings
- Creates calendar invitations, sends to Commissioners
- Records the meetings
- Takes meeting minutes
- Posts the meeting recordings and minutes to the website

Quiz Time! (Check for Understanding)



Who should you reach out to if you have an accessibility request for meetings?

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QEM Report Overview

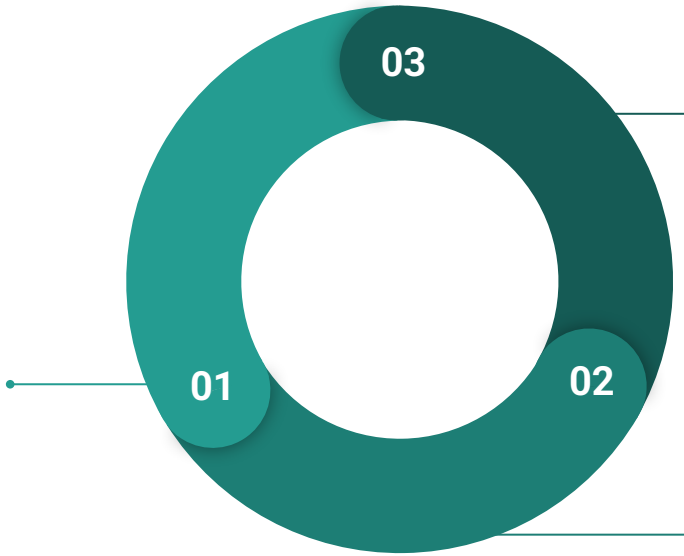
QEM Report Requirements

Legislatively, the QEM report must:

- Contain current practices in the state's system of kindergarten through grade 12 public education, the costs of continuing those practices and the expected student performance under those practices; and
- Contain the best practices for meeting the quality goals, the costs of implementing the best practices and the expected student performance under the best practices.
- Contain at least 2 alternatives to meeting the education goals should full funding not be available
- Be produced by August 1 of even-numbered years

Report Process

The two years between reports is filled with:



Drafting the report

Gathering best or promising practices

Considering and making revisions to the model

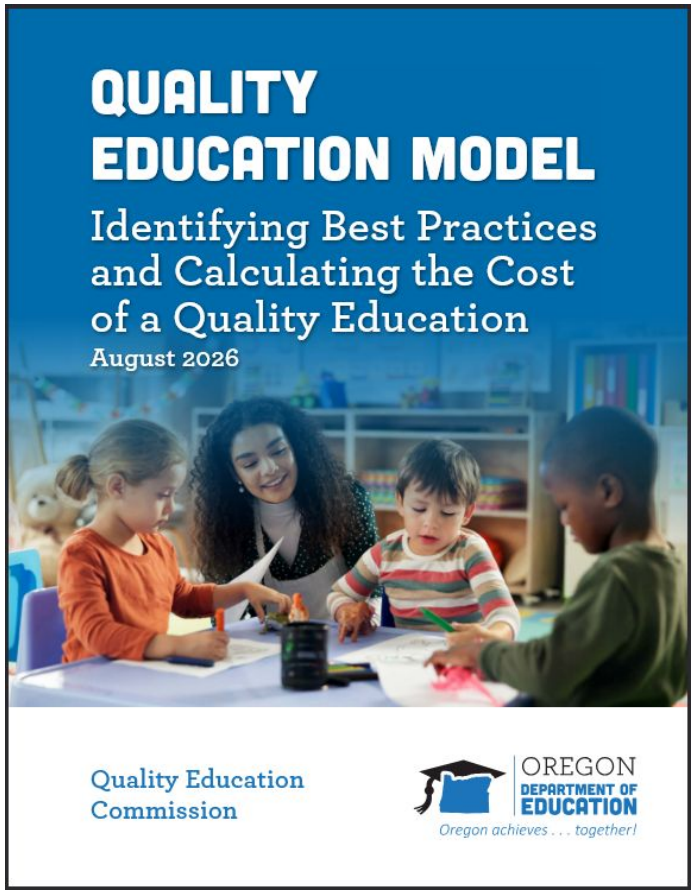
Roles:

- ODE support with the model generation, and writing of the report
- Commissioners write, review, edit, and approve the report
- ODE complete final formatting, submit the report, and post on the QEC website

Prior Report's Content

The past few reports have contained:

- Executive summary
- Introduction, Commissioner Bios, QEC Mission
- Oregon's Current Status, improvement initiatives, impactful legislation
- Best practices
- Quality Education Model information
- Alternatives to meeting the model
- Methodology
- Considerations
- Findings, Recommendations, and Conclusion
- Technical Appendices



JPEA Digestion and Response

- The QEM Report is submitted to the legislature and governor by August 1
- “The Legislative Assembly shall appropriate in each biennium a sum of money sufficient to ensure that the state's system of public education meets quality goals established by law, and publish a report that either demonstrates the appropriation is sufficient, or identifies the reasons for the insufficiency, its extent, and its impact on the ability of the state's system of public education to meet those goals.” (Oregon’s Constitution, Article VIII, Section 8. Adequate and Equitable Funding.)
- The legislature’s Joint Committee on Public Education Appropriations (JPEA) reviews the QEC report, the funding level, and issues the report on sufficiency
  - 2025 Report
  - Informational Hearing on the draft report (recording), Nov 19, 2025

2028 Report Timeline



Walk through the next two years of meetings, learning, and collaboration.

2027 Legislative Session

- QEM Report use
- Where do questions go?
- Historic bills impacting the QEC



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Questions? Comments? Rumors?

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Quality Education Model

Purpose and Statutory Intent

Statutory Baseline (ORS 327.497–327.506): Codifies the Quality Education Commission (QEC) to determine the level of funding required to meet state performance goals.

Adequacy Benchmarking: Establishes a research-grounded target for public K–12 education, serving as an analytical tool rather than a budget execution formula.

Independent Evaluation: Designed to enable the legislature to evaluate whether state education appropriations are sufficient to support high-quality educational services across Oregon.

Focus on Statutory Goals: Directly connects state funding estimates to statutory educational targets, including student achievement standards and high school completion.

Constitutional Anchor (Article VIII, Section 8)

C**onstitutional Requirement:** Oregon's Constitution explicitly requires the Legislative Assembly to appropriate funds sufficient to provide a quality education system.

Mandated Biennial Reporting: If state funding falls below the QEM adequacy target, the Legislature must issue a formal report explaining why appropriations are insufficient.

The QEM's Analytical Role: Acts as the objective standard and technical evidence base used by lawmakers to evaluate constitutional funding sufficiency.

Legislative Accountability: Provides a transparent benchmark connecting revenue decisions to their real-world impact on educational services.

Model Overview

Bottom-Up Cost Modeling: Calculates educational service costs from the ground up by identifying baseline activities, staffing, and operational inputs required to deliver quality instruction.

Full-System Scope: Evaluates total state public education resources—not strictly those distributed through the State School Fund (SSF).

Evidence-Based Design: Incorporates educational research, best practice surveys, and demographic adjustments to establish resource requirements.

Dynamic Recalibration: Updated biennially to reflect shifts in student demographics, labor costs, PERS rates, and operational inflation.

Dual Fiscal Framework:

- **Baseline Cost of Service Delivery:** Establishes the cost required to maintain current operational activities across Oregon public schools under existing economic conditions.
- **Full QEM Target:** Projects the comprehensive investment required to fully implement research-backed educational best practices and achieve state quality goals.
- **Quantifying the Adequacy Gap:** Allows the legislature to evaluate the variance between Legislative Adopted Budgets, baseline operational costs, and the full QEM target.
- **Policy Application:** Allows budget-writers to distinguish between simply maintaining status-quo operations and actively funding systemic quality goals.



Pause for Questions

QEM Architecture: The Prototype School Approach

- **Standardized Educational Prototypes:** Constructs statewide cost estimates using three baseline school profiles:
    - Elementary School Prototype: 360 students
    - Middle School Prototype: 500 students
    - High School Prototype: 1,000 students
- **Resource Scaling:** Maps licensed teachers, classified staff, specialists, administrators, and materials directly to prototype student counts.
- **Analytical Aggregation:** Scales prototype resource models upward to build the statewide K–12 adequacy estimate.

Core QEM Cost Drivers

Class Size & Staffing Ratios: Defines target class sizes and instructional staffing requirements across elementary, middle, and high school levels.

Instructional Time: Models the cost of school year length, summer learning, and professional development days for educators.

Specialized Student Supports: Factors in dedicated staffing for English learners, special education, alternative education, and mental health resources.

Operational Inputs & Benefits: Incorporates compensation schedules, PERS employer contribution rates, health insurance, instructional technology, and facility overhead.

Myth/Fact: QEM Purpose & Scope

Myth: The QEM is a budget execution or allocation tool that determines local school district spending or sets the State School Fund formula.

Fact: The QEM is an adequacy benchmarking tool. It sets a statewide funding standard so the Legislature can evaluate proposed budgets against quality goals, leaving actual local spending decisions to school boards.

Myth: The QEM models only funds distributed through the State School Fund.

Fact: The QEM evaluates all state public education resources and programs, capturing the total state investment required for K–12 service delivery.

Myth/Fact: Costing Mechanics vs. DAS CSL

Myth: The QEM uses top-down expenditure tracking and standard inflation to calculate a State School Fund Current Service Level (CSL).

Fact: The QEM is a bottom-up resource model that covers all state K–12 resources; not just the State School Fund. Rather than applying top-down inflation to historical budgets, it models the actual cost of baseline educational activities, adjusting for specific shifts in enrollment, input costs, and economic factors.

Myth/Fact: Target Stability & Scope Expansion

Myth: The QEC arbitrarily adds new components to the model over time to continuously push the adequacy target higher.

Fact: For most of the past 25 years, the full QEM adequacy target remained below what the original 1999 full QEM estimate would have been if simply adjusted for standard inflation and enrollment growth. Rather than expanding scope, modern adjustments reflect structural cost shifts (such as rising benefit rates, operational overhead, and specialized student supports) that have outpaced general inflation.

QEM History

Post-Measure 5 Tax Shifts (1990s): Passage of Measure 5 (1990) and Measures 47/50 (1996–1997) shifted K–12 funding responsibility to state general revenues, creating a need for a statewide adequacy benchmark.

1999 Model Inception: Developed under Speaker Lynn Lundquist to establish a bottom-up cost estimate for quality education, moving policy away from funding solely based on available historical revenues.

Kitzhaber/Bunn Interim Commission (1999–2000): Refined initial model assumptions and developed a phased strategy for state implementation.

Statutory Codification (2001): HB 2295 formally created the independent Quality Education Commission (ORS 327.497–327.506) to maintain the model and report biennially.



Pause for Questions

25 Years of QEM Findings: Adequacy Gap Trends

Persistent Funding Gap: Over 25 years of reporting consistently demonstrate a variance between actual legislative appropriations and the full QEM target.

Economic Cycle Vulnerability: The adequacy gap expands sharply during state economic downturns (e.g., 2001, 2008) and contracts during periods of revenue expansion.

Impact of Structural Costs: Rising non-discretionary costs, particularly PERS employer rates and healthcare premiums, have historically consumed revenue gains intended for QEM quality enhancements.

Longitudinal Benchmark Value: Provides a multi-decade historical record documenting the relationship between state investment levels and public education funding needs.

Evolution of QEM Best Practices & Target Goals

Shift Beyond Basic Inputs: Evolved from modeling basic staffing ratios toward incorporating research-backed educational best practices.

Targeted Equity Practices: Integrated evidence-based interventions for multilingual learners, historically underserved populations, and high-poverty schools.

Expanded Outcome Metrics: Expanded model targets to incorporate early literacy, career-technical education (CTE), and mental/behavioral health supports.

Regular Best Practices Surveys: Refined through periodic statewide surveys of Oregon educators and administrators to ground model assumptions in current classroom realities.

Current Context

Institutional Skepticism: Key legislative leaders and budget committees have raised questions regarding the QEM framework, citing widening adequacy gaps alongside flat student achievement outcomes.

Legislative Overhaul Proposals: Lawmakers have considered proposals to modify, restructure, or re-evaluate the QEC's scope and reporting framework to align more directly with legislative budgeting needs.

Outcome Alignment Demands: Heightened focus on connecting financial adequacy benchmarks directly to measurable student performance metrics and state accountability systems.

Framework Modernization: Context is defined by an active state effort to ensure educational adequacy modeling remains reliable, transparent, and policy-relevant.



Pause for Questions

Non-SSF K–12 Investments

Rising Non-SSF State Support: Approximately $2.2 billion in state K–12 support (2025–27) is provided outside the State School Fund through targeted grant-in-aid programs (JPEA Report Figure 14).

Major Grant Streams: Includes Student Investment Account ($1.1B), High School Success ($338M), Specialized Student Services ($446M), Early Literacy ($94M), and Summer Learning ($70M).

Analytical Shift: Adequacy evaluation can no longer look at the State School Fund in isolation; it must account for total state K–12 investments.

Integration Challenge: Incorporating targeted categorical grants into a model historically structured around formula-driven core prototype resources.

System Mapping & Crosswalk Complexity

Disconnect Between Frameworks: State appropriations, grant programs, district accounting structures (PBAM), prototype assumptions, and outcome metrics do not naturally align.

Many-to-Many Relationships: A single funding stream (e.g., SIA) supports multiple QEM best practices; a single best practice often relies on multiple distinct state grants.

Analytical Crosswalk Need: Requires substantial technical mapping to trace dollars from legislative appropriations, through district expenditure accounting, to actual classroom service delivery.

Transparency Goal: Shifting policy focus from simply asking how much funding is available to verifying how resources are deployed and tracked.

2029 PBAM Revisions & Accountability Integration

Forthcoming Accounting Updates: Planned FY 2029 updates to the Program Budget and Accounting Manual (PBAM) will modernize how districts report operational expenditures.

Enhanced Expenditure Visibility: Creates new opportunities to track real-world resource allocation across districts with higher consistency and detail.

System Alignment Expectation: Elevates the need to establish clear crosswalks between state educational planning, budgeting models, district accounting, and accountability targets.

Commission Role: Expands the QEC's work beyond statutory charge to perform cost estimation into helping align Oregon's finance, accounting, and outcome measurement systems.



Pause for Questions

Considerations

Evolving Finance System: Evolving state grant structures and accounting models require the QEC to re-evaluate how adequacy is defined and measured.

Balancing Methodological Approaches: Weighing the strengths of professional judgment panels against empirical statistical modeling to guide future cycle updates.

Structural Policy Alignment: Navigating the relationship between statewide adequacy targets, district funding distributions, and legislative budget constraints.

Strategic Roadmap: Setting research priorities for the upcoming Commission cycle to ensure the QEM remains a trusted, objective evaluation tool.

Competing Costing Methodologies

Approach	Core Question	Key Benefit	Main Drawback
Professional Judgment (Oregon QEM)	What resources do educators say are needed?	Transparent & practice-driven	Subjective & less granular
Cost Function (AIR Study)	What does spending vs. outcomes show statistically?	Detailed & demographic-weighted	Complex ("black box") & volatile
Successful Schools	What do high-performing districts currently spend?	Highly intuitive to explain	Hard to find representative districts
Evidence-Based	What inputs does national research prescribe?	Direct tie to academic literature	May not fit local context

Core Policy Tensions

Adequacy vs. Allocation: Statewide adequacy benchmarks evaluate systemic need, while the SSF formula distributes available funds. Generating granular district-level adequacy estimates risks blurring the line between statewide benchmarking and local entitlement expectations.

Precision vs. Stability: Highly differentiated models offer greater demographic precision but create target volatility that complicates multi-year district planning. Stable models preserve longitudinal comparability across biennia.

Transparency vs. Complexity: Professional judgment panels clearly show non-technical audiences specific classroom inputs; statistical cost functions provide analytical depth through complex econometric formulas.

Granularity vs. Responsiveness: Detailed cost-function updates proposed on 8-year cycles may prove less responsive to real-time policy shifts than traditional biennial QEM updates.

Key Questions for the Next Commission Cycle

System Integration: How should the QEM incorporate non-SSF grant streams and align with upcoming FY 2029 PBAM accounting updates?

Methodological Design: What balance should future iterations strike between professional judgment panel inputs, empirical cost-function modeling, and student-level need weights?

Policy Priorities: How should the Commission balance analytical precision and local differentiation against model transparency, stability, and longitudinal comparability?

Role Definition: Should the QEM function primarily as a stable statewide constitutional benchmark, or evolve toward guiding local district-level funding distributions?

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Establishing Connections

Think…



- For **new commissioners**, what burning questions do you have about the work?

- For **returning commissioners**, what information do you think may not have been shared already that would be helpful for new commissioners to know?

Pair…

In your trios, please discuss some of what came up for you about burning questions or helpful information for new commissioners.



Share…



Whole-group Share Out

What came up in your discussions?



Questions

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Intentional Closing

Choices to engage…



How: Either in the chat or verbally

What:

GLAD

- What are you Grateful for?
- What is something you Learned?
- What is something you Appreciated?
- What is something you Delayed for additional reflection?

General appreciations

- What is one thing you appreciate about others in the room?

Resources

Quality Education Commission website

Oregon Public Commission Requirements

Department of Justice Public Records and Meetings Manual (2024)
Oregon Government Ethics Law Guide for Public Officials (2026)

QEC-Specific Documents

Charter (2025)
QEC Statutes (laws)

Past Reports, Meetings

QEC Reports Website
- 2026 Quality Education Model Report (2026)
- QEM Cost Model (2026)

QEC Meeting Website

Recent Legislative Actions

Joint Committee on Public Education Appropriations (JPEA)

- 2025 Report
- Informational Hearing on the draft report (recording), Nov 19, 2025

2026 Senate Bill 1555 (Did not pass)