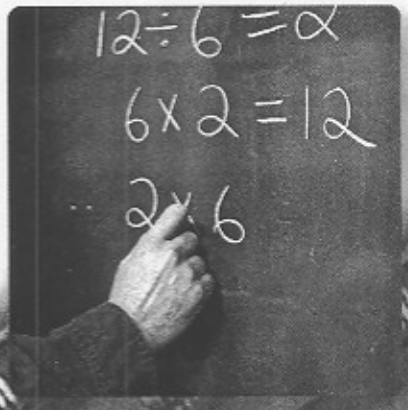
THE OREGON QUALITY EDUCATION MODEL



The Oregon Quality Education Model

Relating Funding and Performance

Legislative Council on *The Oregon Quality Education Model*
Oregon Legislative Assembly
June 1999

Legislative Council on the Oregon Quality Education Model

The Legislative Council on *The Oregon Quality Education Model* was appointed in 1997 by the Speaker of the Oregon House of Representatives, Lynn R. Lundquist, and charged with developing *The Oregon Quality Education Model.*

This model identifies the fundamental requirements and costs for a quality education designed to meet the high academic standards established in Oregon by the Education Reform Act. The Council, which was originally chaired by Speaker Lundquist, consists of eighteen citizens and five legislators.

The Oregon Quality Education Model: Relating Funding and *Performance* is published by the Oregon Legislative Assembly under the direction of the Legislative Council on *The Oregon Quality Education Model.*

June 1999

Legislative Council on *The Oregon Quality Education Model*
Oregon Legislative Assembly
Policy and Research
State Capitol
Salem, Oregon 97310
503/986-1813

The Oregon Quality Education Model

Legislative Council on The Oregon Quality Education Model

Lynn R. Lundquist, M.A., Chairman
Speaker of the Oregon House of Representatives, 1997-99
Powell Butte, Oregon

Vern B. Ryles,Jr.,Vice Chairman
President/CEO
Poppers Supply Company
Portland, Oregon

Boyd L. Applegarth, Ed.D
Retired Superintendent, Beaverton School District, 1989 Oregon Superintendent of the Year
Durham, Oregon

Victor L. Backlund, M.A.
State Representative
Former High School Teacher
Keizer, Oregon

R. Patrick Burk, Ph.D.
Assistant to the Superintendent
Portland Public Schools
Portland, Oregon

John V. Byrne, Ph.D.,
President Emeritus
Oregon State University
Corvallis, Oregon

Tim Carman, Ed.D.
Superintendent
Albany Public Schools
Albany, Oregon

Gary L. Conkling
President
Conkling Fiskum & McCormick
Portland, Oregon

Sal M. Coxe
Middle School Teacher
Eugene, Oregon

Randall Edwards, M.B.A.
State Representative
Communications Consultant
Portland, Oregon

Stephen P. Greer, C.P.A.
Greer and Associates
Bend, Oregon

Jonathan Hill, Ed.D.
Superintendent
Lake County Education Service District
Lakeview, Oregon

James K. Jamieson
Principal
Willamette High School
Eugene, Oregon

Peggy Lynch
Citizen Education Activist
Retired Businesswoman
Corvallis, Oregon

Frank P. McNamara, M.S.W.
Director, Oregon School Services Bureau,
Confederation of Oregon School Administrators
Salem, Oregon

James B. Minturn, J.D.
Retired District Attorney
Prineville, Oregon

Robert L. (Ozzie) Rose, Ph.D.
Executive Director
Confederation of Oregon School Administrators
Salem, Oregon

Ken Strobeck
State Representative
Public Affairs Director/
Blue Cross and Blue Shield of Oregon
Beaverton, Oregon

G. Dale Weight, Ph.D.
Retired Dean, Atkinson School of Management
Willamette University
Portland, Oregon

Ben J. Westlund
State Representative
Agri-Business Owner
Bend, Oregon

Gary Withers, Ph.D.
Former Academic Relations Program Manager, Intel Corporation
Beaverton, Oregon

Duncan Wyse, M.B.A.
President
Oregon Business Council
Portland, Oregon

Consultant to the Council

David T. Conley, Ph.D.
Professor, University of Oregon
Executive Director, PASS
Eugene, Oregon

Council Administration

Margaret H. Hunt
Public Relations Consultant
Chief of Staff to former Speaker of the Oregon House
Portland, Oregon

Table of Contents

Acknowledgments

The work of the *Legislative Council on The Oregon Quality Education Model* was produced under the auspices of the State of Oregon Legislative Assembly and benefited greatly from the assistance of Mike Stinson, Legislative Fiscal Officer; Jim Scherzinger, former Legislative Revenue Officer; Steve Meyer, Economist, Legislative Revenue; Janet McComb and Sue MacGlashan in Policy and Research; Norma Paulus, former State School Superintendent; Greg McMurdo, Oregon Department of Education; and James K. Sager, Sr., President, Oregon Education Association.

The council wishes to especially acknowledge Governor John Kitzhaber whose support and assistance to this project was critical to its successful completion.

The specific contribution of David T. Conley, Ph.D., consultant to the Council and University of Oregon professor, must be given extraordinary note. Dr. Conley's particular expertise was invaluable to the development of *The Oregon Quality Education Model.*

Special recognition must be given to the contribution of Nancy Heiligman, Director of the Governor's Database Project, working under the direction of the Governor's office and the Oregon Department of Education. Ms. Heiligman coordinated the development of a uniform chart of accounts for all school districts and developed and implemented a database that tracks school expenditures and other school statistics by function. The existence of this database was invaluable to the work of this Council and Ms. Heiligman's advice and assistance with the statistical analysis for this report was critical to the development of *The Oregon Quality Education Model.*

This project also benefited from the input of a number of reviewers: Clement Lausberg, Education Finance Consultant, Portland; Walter Koscher, Coordinator of School Finance and Data Information Services, Oregon Department of Education; Jean Thorne, Education Advisor, Governor's Office; and Dave Frajer, Department of Administrative Services; and Representative Elaine Hobson, Oregon District 2.

Of significant value was the prior work in this area prepared by Frank McNamara of the Confederation of Oregon School Administrators and published by the Oregon Association of School Executives School Funding Coalition for the Governor's Quality Education Work Group, entitled "Keys To A Quality Education."

Appreciation should be expressed to Margaret Hunt, Administrator and Consultant to the Legislative Council on *The Oregon Quality Education Model*, for her help in editing a complex project and producing a presentable and well-formatted report.

And, finally, special thanks to all of those who continued to believe that the key questions could and must be answered: ***What is a quality education and what does it cost?***

Foreword from the Council Chairman

Of all the challenges facing a servant of the people, none is more daunting nor dire than the funding of our children's education. Bad education policy that may seem to have only short-lived effects can remain to affect generations. Temporary political trade-offs in funding decisions can become permanent compromises of quality in our schools. Our children are our future. We cannot afford mistakes.

But even the most well-intentioned public servant must have the right tools with which to make decisions. To this end, I am very proud to introduce *The Oregon Quality Education Model.* It is foremost a remarkable tool — unique in the nation — that will enable the lawmakers of this state and potentially others to make reliable decisions about the funding of education. And for the first time, that funding can be linked to performance.

I, along with every past, present and future legislator, educator and parent, am indebted to the members of the Legislative Council on *The Oregon Quality Education Model.* This talented and tenacious citizen-based group ignored the skeptics, refused to let go of the vision and worked and fought for this project simply because they knew it had to be done for the kids. The result is the most significant development in the field of education for many years. I thank them sincerely.

Lynn R. Lundquist

Lynn R. Lundquist, Chairman
Former Speaker of the Oregon House of Representatives

Foreword from the Council Vice Chairman

Every decade or so, politics and principle join hands in the interest of the common good. When this happens, the results are always extraordinary. *The Oregon Quality Education Model* is just such an extraordinary result, an effort that has produced not just a unique education funding model but a model for a successful public-private partnership. Through all my years of civic involvement, no project has brought me greater satisfaction, not only because of what it means to the children of Oregon but because it was the product of citizens and lawmakers truly working together.

This council was primarily composed of volunteer citizens from all over the state, some traveling many hundreds of miles for our regular meetings. Both citizens and legislators were taking time from very busy schedules to serve the children of Oregon. All of us understood that no success in any other area of government can compensate for the failure to properly educate our children. I am immensely proud of my fellow Council members and grateful for their altruism and dedication.

The Oregon Quality Education Model is, of course, a work in progress that will be refined with usage over time. Those of us who have been privileged to serve on this Council took the first immense step. We look forward to seeing the many important steps that will follow.

Vern B. Ryles, Jr., Vice Chairman
President/CEO
Poppers Supply Company, Portland

Executive Summary

Introduction

No issue that the Oregon Legislature faces has presented a greater challenge than the funding of the state's K-12 education system. Even though Measure 5, passed in 1990, fundamentally changed the way Oregon schools are funded, the Legislature continued to rely upon on a formula-based model. That method provided dollars on a per-student basis, but did not take into consideration whether funds were adequate. Nor did the formula method relate the funds districts received to the performances students demonstrated. In short, the Legislature has made funding decisions on good intentions and guess work. It has made for a difficult and contentious process every two years for all stakeholders — from the legislators to educators to parents and eventually to students, who experience the ultimate effects of these decisions.

Faced with providing 70 percent of local district budgets while simultaneously needing to meet the needs of all other governmental agencies, many lawmakers were demanding more information on how much money schools needed. Where was money going? What performances were resulting? Was the target being met? Was the state properly fulfilling its obligation to provide a quality education for every student in Oregon?

The Legislative Council on *The Oregon Quality Education Model* was appointed in March 1997 by Representative Lynn R. Lundquist, then Speaker of the Oregon House of Representatives, to answer these questions. Twenty-three prominent educators, lawmakers, business leaders and parents were charged with identifying the fundamental requirements and costs of a quality education, including basic curriculum, facilities and all school services.

Report Overview

Policies and Politics of the Oregon Education Environment

The report of the Legislative Council on *The Oregon Quality Education Model* begins by providing an in-depth look at the policies and politics of the Oregon educational environment. Prior to the 1990s, local school boards and district voters determined the size of K-12 budgets funded mainly with local property taxes. Wide disparity in funding levels existed throughout the state since primary budgetary control was at the local level.

Several key pieces of legislation and policy changes dramatically altered the face of school funding in Oregon:

> **Measures 5, 47 and 50.** These ballot initiatives limited the number of dollars per thousand that school districts could assess on local property and required the state to replace some but not all of local property tax revenue losses. As a result, the state now provides approximately 70 percent of the funding to most school districts and control of local school funding has effectively moved to the state.

The Oregon Education Act for the 21st Century. In 1991, the Oregon Legislature passed legislation that, for the first time, authorized the state to develop standards for what students should know and assessments to determine how well they had mastered the knowledge and skills outlined in the standards. Oregon's education reform legislation sets some of the highest academic standards in the country and requires school districts to adapt their curriculum to meet those levels.

School Funding Equalization. Also in 1991, legislation was passed mandating equalization of funding among Oregon's 200 school districts. The goal was to level the playing field between high and low-spending districts and set the stage for comparisons of the results schools were achieving with similar resources.

The Database Initiative Project. In 1997, the Legislature passed and funded the Database Initiative Project designed to create common definitions of various spending functions. All districts will code and report expenditures in a uniform manner beginning December 1999 so that by January 2001, it will be possible for the first time to compare spending decisions at any school or district to all other schools and districts in the state.

The Proficiency-based Admissions Standards System (PASS). In 1994, the Oregon University system adopted new admission requirements for students to be admitted to Oregon's public universities that are aligned with the standards established for K-12 in Oregon's Education Act for the 21st Century. These standards reinforce and lend credibility to the standards that exist at the K-12 level. PASS also removes one of the most often-heard criticism of standards which is that colleges and universities will not be interested in students who have met the required standards.

The above legislation and policy changes have resulted in the ability to compare Oregon schools in ways that did not exist before 1991. These commonalities created a framework in which the true relationship between costs and performance could, for the first time, be determined. The groundwork was laid for the development of *The Oregon Quality Education Model.*

The Process and the Approach

In order to define the components and costs of a quality education, the Council determined that *The Oregon Quality Education Model* must achieve three broad goals:

1. Examine and confirm support for high academic standards for all students.
2. Determine the components of a complete, quality education designed to meet Oregon's high academic standards.
3. Develop a model to determine the costs of those components.

The Oregon Quality Education Model (OQEM) considers the total educational experience. It describes a quality education that leads to improved performance by all students. It is not a model for how to improve test scores alone, but rather, takes into account all the elements of a quality education and learning environment.

After extensive analysis, the Council determined that a quality education is defined as including the following:

- **The 1991 Oregon Education Act** as amended with its academic content, performance standards and assessment of student achievement. Specifically:

  Academic Content: English, Mathematics, Science, Social Sciences, the Arts, Second Languages, Health Education, Physical Education and Technology

  Performance Standards: The Certificate of Initial Mastery (CIM) and the Certificate of Advanced Mastery (CAM)

  Assessment of Student Achievement: At grades 3, 5, 8, 10 and 12 in English , Mathematics, Science and Social Sciences.

- **The seven developmental goals** identified by the Oregon Board of Education. Specifically:
  - To insure all students a quality education in a safe, motivating environment;
  - To hold all students to rigorous academic standards;
  - To provide all students with the opportunities to demonstrate their achievement in knowledge and skills;
  - To encourage parental and community involvement in student's education;
  - To develop students lifelong academic skills;
  - To develop in students core ethical values, including, respect, responsibility, caring, trustworthiness, justice and fairness, and civic virtue and citizenship;
  - To equip students with the knowledge and skills necessary to pursue the future of their choice and function effectively in various life roles.
- **Class size adequate** to allow students to master standards and reach specified levels on assessments.
- **Professional development** for teachers and administrators to develop necessary skills to implement state standards and improve student performance to specified achievement levels and to deliver *The Oregon Quality Education Model* successfully to all children.
- **Duration of instruction** time adequate to allow those students who need more time to master the standards the opportunity to do so.
- **Operational support** to implement *The Oregon Quality Education Model*, including instructional materials, guidance and counseling, libraries, personnel administration, business and fiscal services.

The model was developed with attention to quality rather than determining a priori what the cost should be. Further, the assumptions and components of the model are variable and can be modified as new research and data determines more precisely the keys to a quality education. Over time, the use of the model will help to refine and redefine those keys.

What does a school patterned after *The Oregon Quality Education Model* look like? The following are examples of an Elementary School, Middle School and High School as developed from the model currently:

ELEMENTARY SCHOOL:

- All day kindergarten
- 20:1 pupil-teacher ratios at all grade levels
- Specialists for areas like art, music, P.E., second language or counseling at each building's discretion
- On-site instructional improvement/curriculum development support
- Additional time for students having trouble reaching standards
- Professional development time and resources for teachers and support staff to develop skills to enable most students to reach standards
- Resources to reimburse teachers for out-of-pocket expenses necessary to help students reach standard
- Adequate funds for building maintenance so that instructional funds do not have to be diverted to maintenance

MIDDLE SCHOOL:

- 29:1 class size maximum in core academic courses
- 1.5 extra teachers to provide extra options in math, English, science
- Additional time for students who are having trouble reaching standards including summer school
- One counselor per 250 students
- Adequate professional development resources to allow teachers to develop skills to teach to standards successfully and assess student work reliably
- On-site instructional improvement/curriculum development support
- Volunteer coordinator and community outreach worker
- Adequate campus security
- Alternative programs for special needs students
- Resources to reimburse teachers for out-of-pocket expenses necessary to help students reach standard
- Adequate funds for building maintenance so that instructional funds do not have to be diverted to maintenance

HIGH SCHOOL:

- 29:1 class size maximum in core academic courses
- 3 extra teachers, one each in math, English, science
- Additional time for students who are having trouble reaching standards including summer school
- Volunteer coordinator and community outreach worker
- One counselor per 250 students
- Adequate professional development resources to allow teachers to develop skills to teach to standards successfully and assess student work reliably
- On-site instructional improvement/curriculum development support

- School-to-work coordinator
- Adequate campus security
- Alternative programs for special needs students
- Resources to reimburse teachers for out-of-pocket expenses necessary to help students reach standard
- Adequate funds for building maintenance so that instructional funds do not have to be diverted to maintenance

Determining the Costs of The Oregon Quality Education Model

The Oregon Quality Education Model is grounded on the concept of the school as the unit of analysis although funding is still to be distributed on a per-pupil basis. *The Oregon Quality Education Model* builds a relationship between funding and performance designed around a school building. It seeks to demonstrate that a certain level of funding can be reasonably associated with a certain level of student performance. To do this, *Prototype Schools* — elementary, middle and high —were developed. The Prototype Schools were designed to account for all of the funds allotted to a school district. In other words, the Prototype Schools account for the total education budget by distributing all centralized costs like administration and busing to the Prototype Schools in addition to all school-based costs such as teachers and supplies. In this way, the Prototype Schools account for and incorporate the total costs of schooling, and, when multiplied by the number of elementary, middle, and high school students in the state, project a total amount needed for the education budget.

The model groups all costs into broad organizing categories called *elements* and subcategories called *components.*

- An *element* is defined as a set of functions or activities that are important to the schools ability to offer an instructional program, e.g., supplies, teaching staff, administrative support. Elements often correspond with many of the more familiar budget categories contained in school budgets, but are selected to reflect their importance to student learning.
- A *component* is a subset of an element, allowing elements to be broken down into smaller parts, e.g., classroom sets, copying, media center materials, etc. Once again, school budgets contain in their subcategories many of these components. The OQEM selects these components to allow a closer look at how funds are being allocated in ways that affect student learning.

These elements and components were then assigned costs based on available data and research on effective educational practices. Specifically, costs were calculated from the following sources:

1. Statewide Database Initiative Project results
2. Research on effective educational practices
3. Data from the Oregon Department of Education
4. Data from Oregon education professional associations, e.g., Confederation of Oregon School Administrators, Oregon School Employees Association
5. Experts from Oregon school districts and schools, i.e., superintendents, principals, teachers, board members, parents

Further, both tangible and intangible characteristics are identified:

- **Tangible Characteristics** to which costs can be readily assigned, e.g., student-teacher ratio and,
- **Intangible Characteristics** that do not necessarily have direct costs associated with them but are critical in determining the ultimate effectiveness of the model's tangible elements, e.g., measure of parent involvement, principal effectiveness, teacher content knowledge. The interaction between tangibles and intangibles is what determines a school's ability to achieve the projected performance levels.

Assumptions are then made about each Prototype School regarding its socioeconomic status, geographic location, age of building, and other factors that help establish the context within which the elements, components, and characteristics are assumed to interact.

The OQEM is not an allocation or distribution method, but rather a tool for lawmakers to determine a total education budget amount. How that budget is than allocated to each individual district is determined by the state school funding formula which weights students in each district on the basis of special education needs, transportation needs and other factors.

Funds relating to Education Service Districts (ESDs), to federal funds, or to capital costs are not accounted for by the model.

Implementation of the Model

The Oregon Quality Education Model may be implemented in full with the expectation that the performance of all Oregon students would move toward required performance levels. While the amount of time it will take each school to reach any specified level may vary, the model assumes all schools will be able to reach the performance goal of 90 percent at benchmark standards, first at third grade, then at succeeding benchmarks as that cohort of students moved through the system. It also assumes that the remaining 10 percent of students are making significant progress to be as near to reaching the standards as possible within that same time frame. Any school that was not making progress or reaching the goal would be assumed to be at variance with the assumptions of the model — either tangible or intangible assumptions — or would be assumed to be utilizing resources in ways that do not lead to student learning.

To implement the total vision in one biennium would be a tremendous challenge — both to legislators and to schools. It is assumed that time is needed to gain insight into how both short-term and long-term improvement can be achieved by phasing in elements of the model in ways that allow schools to reach the expected performance levels.

Using the Model

The Oregon Quality Education Model is a model in two separate senses:

- As specific Prototype Schools envisioned by the Legislative Council on *The Oregon Quality Education Model.*
- As a policy tool, capable of generating any range of possible Prototype Schools.

It is valuable to bear in mind the utility of the model along these two equally important dimensions. First, it serves to define a clear vision of three schools designed to accomplish a specific purpose —

enabling the vast majority of Oregon youngsters to meet the standards established by the state while still providing a comprehensive, high-quality education program.

Second, it also serves as a valuable policy tool for the development of educational budgets. This more expansive concept of the model suggests the need to continue to develop and refine the basic modeling methodology between legislative sessions and to disseminate the model broadly to enable a variety of constituencies to conceive of educational programs and the costs associated with those programs. The model can be used to pursue efficiencies as well as add programs.

CONCLUSIONS

THE OREGON EXAMPLE: COSTS OF A QUALITY EDUCATION

- Costs for Full Implementation of *The Oregon Quality Education Model* as outlined in the Prototype Schools would be $5.65 billion.
- Cost for Phased Implementation of *The Oregon Quality Education Model* as outlined in the Prototype Schools in Oregon would be $4.95 billion.

The Oregon Quality Education Model is, of course, a work in progress. As it is used, it will be improved and refined in order to become an integral tool in the development of future educational budgets. Its predictive value will increase as more and better data is made available from the school districts through the Database Project. Over time, *The Oregon Quality Education Model* can serve to bridge the gap among a range of political and ideological points of view by moving the discussion of funding from the plane of rhetoric to the level of successful programs and practices.

As governments and their public school systems work together to improve the quality of education, their partnership must be based on viable and mutually acceptable goals. *The Oregon Quality Education Model* represents a critical step forward in identifying those goals and linking funding to performance.

About The Council Members

Lynn R. Lundquist, Chairman

"No designation should be more judiciously and fervently protected than the title 'School' and no institution deserves such a name if it does not stimulate, excite, inspire, lift, motivate and challenge."

Former Speaker of the Oregon House of Representatives, Lynn R. Lundquist (R-Powell Butte), serves as Chair of the Legislative Council on *The Oregon Quality Education Model*, having appointed its members in 1997. He is a graduate of Oregon State University and holds a master's degree in economics from the University of Connecticut. By trade, he owns and operates a diversified ranch in eastern Oregon and has taught economics at the university level. As an innovative and energetic leader, he has accumulated a long list of civic accomplishments including election as President of the Oregon Cattleman's Association and appointment to the Oregon State Board of Agriculture. He rose quickly to leadership as a legislator, serving as Majority Leader in his first term and Speaker of the House in his second. In 1999, Lundquist was honored by the Oregon Education Association as "Education Citizen of the Year."

Vern B. Ryles, Jr., Vice-Chairman

"The most effective strategy for the establishment of a healthy and stable educational system is through a viable partnership between the local school district and the state."

Prominent Oregon businessman Vern B. Ryles serves as Vice-chair of the Legislative Council on *The Oregon Quality Education Model*, bringing over thirty years of outstanding philanthropic and civic leadership to the project. He is a former President of the National Association of Concessionaires, Chairman of the Oregon Agri-Business Council, Director of the Oregon Partnership for International Education, Chairman of the Portland Development Commission, Chairman of the Portland Metropolitan Chamber of Commerce, Chairman of the Portland Private Industry Council, member of the President's Advisory Board for Portland State University and Chair of the State Workforce Quality Council. Currently, he serves as a member of the Mayor's Business Roundtable and Chair of the Oregon-Washington I-5 Corridor Committee. His professional roles include President of Poppers Supply Company and membership on the Board of Directors of Northwest Pipe Company and ElectroScientific Industries headquartered in Portland. Ryles is a graduate of the University of Oregon.

Boyd L. Applegarth, Ed.D.

"If we do not place the education of our children first, it will, in the end, make little difference what we have done instead."

Dr. Applegarth, Oregon's 1989 Superintendent of the Year and a finalist for the national title, has served numerous Oregon school districts as Superintendent, including nineteen years for the Beaverton School District as well as interim terms for Riverdale School District, Gladstone School District and Canby Elementary School District. He has devoted much of his extracurricular time to various education boards and committees, including serving as President of the Confederation of Oregon School Administrators and President of the Oregon Association of School Executives. In addition, he has been an Adjunct Professor for Portland State University and the University of Oregon. In 1990, the Oregon Board of Education asked him to direct a ground-breaking effort to "Define Basic Education in Oregon", a precursor to *The Oregon Quality Education Model*. Dr. Applegarth earned his undergraduate and master's degrees at Utah State University and was awarded a Doctorate in Education from the University of California in Berkeley.

Victor L. Backlund

"Education is the basis of so much of what is good. I believe a strong public school system is an absolute must!"

Representative Vic Backlund (R-Keizer), who served for thirty-seven years as a U.S. History and Government high school teacher and coach, is a current member of the Oregon House of Representatives and serves as Assistant Majority Leader and a member of the Ways & Means Subcommittee on Education. During his years in education at North Salem High School and McNary High School, he developed the Advanced Placement United States History program, one of the first such curriculum offerings in the state. At the same time, Backlund, a former Los Angeles Dodger, had no trouble leading McNary High School to two state baseball championships and numerous league titles. Backlund, who devoted years of volunteer time on behalf of community youth sports, was honored with the Keizer First Citizen Award in 1986. He received both his undergraduate and master's degrees in history from Willamette University in Salem.

R. Patrick Burk, Ph.D.

"The defining characteristic of American public education is open and free access to programs of the highest quality for all students. We face a challenge to our collective will. Do we choose to provide all of our children an education of this caliber or something less? We are all accountable for our answer."

Dr. Burk brings an impressive resume of educational experience to this project, particularly as a former Principal of a K-12 alternative school, the Metropolitan Learning Center in Portland, and as a former Principal of Ockley Green Middle School, Hayhurst Elementary School, Buckman Elementary School in Oregon and DuPage Community High School in Illinois. He currently serves as the Assistant to the Superintendent/Grants Management for Portland Public Schools, Oregon's largest urban school district, where his responsibilities include the supervision of $65 million in federal, state and foundation grants. Dr. Burk's well-known expertise in school finance has brought him appointments to this Council as well as the Governor's Task Force on School Quality and numerous key projects for the Oregon Department of Education. Prior to his role in the Superintendent's office, Dr. Burk served the Portland School District as Director of the Oregon Education Improvement Act, Oregon's landmark education reform policy. Dr. Burk received both his master's degree and Ph.D. in Educational Administration from the University of Chicago.

John V. Byrne, Ph.D.

"The future of our nation, our state and our communities depends directly on the education of our citizens. The people of Oregon deserve the brightest future possible; but that can happen only if our K-12 and higher education systems are of the highest quality."

Dr. Byrne, President Emeritus of Oregon State University, has had a noteworthy career in education and oceanography, serving both in Oregon and Washington, D.C. He spent sixteen years in Oceanography at OSU as a faculty member, department chair and Dean of the College. Subsequently, he served OSU as Dean of Research, Dean of the Graduate School, Vice President for Research and Graduate Studies and then later as President. He took leave from OSU from 1981-84 and served in Washington, D.C. as Administrator of the National Oceanic and Atmosphere Administration. Dr. Byrne's contributions to higher education include the promotion of international education for all students and the introduction of Total Quality Management, then a brand-new concept in universities. Significantly, Dr. Bryne guided OSU through the financial turbulence brought about by Ballot Measure 5. Though retired, he continues to be active in higher education reform, serving as a senior advisor to the State of Oregon and Executive Director of the Kellogg Commission on the Future of State and Land Grand Universities. Dr. Byrne received his M.A. from Columbia University and a Ph.D. from the University of Southern California.

Tim Carman, Ed.D.

"We have forty million reasons for school failure, but not a single excuse. To invest in our future we must invest in our children but this will take courage. In the words of Leo Rosten: 'Courage is the capacity to confront what can be imagined.'"

Dr. Carman, is the Superintendent of Albany Public Schools and has been an aggressive and highly effective supporter of Oregon's Education Act for the 21st Century which established academic standards unique in the country. His success is measured by the fact that, currently, his third, fifth and tenth grade students are performing at least a grade level higher than students were five years ago. Dr. Carman, who has taught at all grade levels from kindergarten through graduate school, has been an educator for thirty years serving as a teacher, coach, high school principal, assistant high school principal, deputy superintendent, superintendent and also as an adjunct professor and director of administration programs at Lewis & Clark College in Portland. In addition, he has served on numerous councils at both the state and local levels and is a current advisor to the Oregon State Board of Education. Dr. Carman received his master's degree in American History from Montana State University and earned a Doctor of Education degree from that same institution in Curriculum and Instruction.

Gary L. Conkling

"Education is the foundation of a strong economy and an enlightened citizenry. Investing in students is the key to ensuring we build upon today for a strong tomorrow."

Gary Conkling is the President of Conkling, Fiskum & McCormick (CFM), a public affairs and strategic communications firm based in Portland with offices in Washington, D.C. and Salem. A former newspaper editor, Conkling worked as Staff Director to Oregon Congressmen Les AuCoin and Ron Wyden in Washington, D.C. His Oregon clients include the state's third largest school district, Beaverton School District, and the Industrial Customers of Northwest Utilities. In 1997, Conkling led the Oregon Energy Coalition in an effort to pass a pro-competition electricity restructuring bill in the Oregon Legislature. Conkling's civic involvement is extensive, including service as a member of the Tri-Met Board of Directors, a board member of the Business Education Compact, and Chair of the Metropolitan Exposition and Recreation Commission which runs the Oregon Convention Center, the historic Civic Stadium, and the Portland Center for the Performing Arts.

David T. Conley, Ph.D.

"A society's visions and dreams are the blueprints for its ultimate achievements."

Dr. Conley is an Associate Professor in the area of Educational Policy and Management, College of Education, at the University of Oregon in Eugene. In addition, he serves as Executive Director for the Proficiency-Based Admission Standards System (PASS) which is responsible for the development of a new system for admission to higher education in Oregon based on student proficiency. He is well-known for his role in the development and implementation of Oregon's landmark school restructuring bill, the Oregon Education Act for the 21st Century, and continues to lecture and consult on school reform and restructuring as well as proficiency-based college admissions within Oregon, throughout the nation and internationally. Dr. Conley has extensive experience in multi-cultural education having directed and taught in multicultural programs in Colorado, California and Oregon. He is the author of two books, numerous articles and research studies which have gained him national attention from scholars, practitioners and policy makers . Dr. Conley received his master's and doctoral degrees from the University of Colorado.

Sal M. Coxe

"An assembly line produces many identical items in a period of time. An artist produces a unique work over time. This model, which is about funding quality learning on an individual student basis, helps the teacher be an artist."

Sal Coxe, a high school and middle school teacher for over twelve years, brings a unique blend of education and business experience to this project. Leaving a business career, she returned to her academic roots to teach at Lincoln Junior High School, Newport Middle School and Damascus Middle School in Oregon. Trained in English and Spanish, Coxe spent a year in Ecuador teaching English at the high school level and continues to instruct Oregon students in Spanish studies as well as language arts, literature and various other exploratories and electives. She has been uniquely involved in the implementation of Oregon's Education for the 21st Century Act, having instructed many of her peers in the adaptation of curriculum and assessment to the new education reform guidelines as Mentor Teacher for the State Mentor Teaching program. In 1995, she served as an education issue research and advisor to the Oregon State Legislature. Coxe graduated cum laude from Linfield College in Oregon and has completed a fifth year of study in English and Education at the University of Oregon.

Randall Edwards

"A well-educated populous is the cornerstone to a civilized society."

Representative Randall Edwards (D-Portland), a small business owner, is a current member of the Oregon House of Representatives serving on the House Judiciary Committee, the Ways and Means Subcommittee on Education, the House Judiciary Committee, the Legislative Administrative Committee, and the House Special Committee on School Finance. Edwards has a broad range of government experience, having served as the Oregon State Treasurer's Director of Communications and Public Policy. In that capacity, he worked with the 1993 and 1995 legislatures to improve state and local government finances, including issuing bonds for schools and helping local governments invest tax revenues. He coordinated the Treasurer's Retirement Task Force which explored new ways to help citizens save for a secure retirement. Edwards has also served in Washington D.C. in the executive and legislative branches on agriculture, trade and native American issues. As a trade analyst with the U.S. Commerce Department, he worked on the U.S./Canada Softwood Lumber agreement and anti-dumping cases against foreign countries. Edwards received his undergraduate degree from Colorado College and earned a Master of Business Administration from George Washington University in Washington, D.C. Edwards has also received recognition for his legislative leadership and in 1998, graduated in the Emerging Political Leaders Program from the Darden Graduate School of Business Administration, University of Virginia.

Stephen P. Greer

"The public education system is our most important public/private partnership. Each of the partners — individual families, the Oregon State government and local governments — must demand the highest returns for the precious resources they invest."

Stephen Greer, a prominent Certified Public Accountant in Bend, Oregon, adds his significant expertise in accounting, finance and business planning to this project. Greer has directed the audits of numerous Oregon municipalities and has served as peer reviewer, examining the quality of accounting practices for other CPA firms. He is a member of the American Institute of Certified Public Accountants and has been selected to serve as a reviewer for the special review committee of The Association of School Business Officials program for Certificate of Excellence in financial reporting. Greer's civic involvement is a major focus of his efforts, having served as a member of the Bend Chamber of Commerce, Your Community 2000, the Cascade Festival of Music, the School Foundation, the Deschutes Children's Foundation and numerous other service boards and organizations. Greer received his undergraduate degree from Portland State University and is now accredited in Business Valuation and as a licensed Municipal Auditor in the State of Oregon.

Jonathan Hill, Ed.D.

"Priorities: 1. The kids. 2. The adults. 3. Everything else."

Dr. Hill, Superintendent of the Lake County Education Service District since 1992, has spent nearly thirty years in education in Washington, Oregon and California serving as an elementary and middle school teacher, an elementary school principal, program specialist, district program director and, today, a district superintendent. He currently serves as a commissioner on the Oregon Teacher Standards and Practices Commission and is the Chair of that group's Public Relations Committee. Dr. Hill's development and research on behalf of TSPC as well as Education Service Districts has commanded his consultation to numerous education efforts, including the Oregon Private Industry Council, the Lake County Commission on Children & Families, the American Education Finance Association and the Oregon State Legislature's examination of ESD funding. Dr. Hill received his undergraduate degree from Willamette University and did his post-graduate work at Portland State University, California State University and the University of Nevada at Las Vegas. He receive his Doctor of Education degree in Educational Leadership and Administration from Loma Linda University in California.

James K. Jamieson

"In the words of Herbert George Wells, 'Human history becomes more and more a race between education and catastrophe.' We must help our children win that race."

Jim Jamieson, Oregon's 1995 Principal of the Year and recipient of the Milken National Education Award, is Principal of Willamette High School, a large four-year comprehensive high school located in Eugene. His career in education to date is a study in private and public partnerships as he has successfully worked to ally the business community with its schools. He developed a Community Advisory and Futures Forum and worked with business leaders to introduce a mentorship program stressing problem solving and thinking skills for teens. Jamieson has played a significant role in the implementation of Oregon's Education for the 21st Century Act, securing a $95,000 Workforce 2000 Grant for its development at Willamette. Jamieson, who has taught at the junior high and high school levels and is a published writer, has also served as Chair of the Oregon Workforce Development Sites, President of the Midwestern League Principals, a member of the Oregon Assessment Advisory Committee and adjunct professor in the graduate studies program at Lewis and Clark College in Portland. Jamieson earned his master's degree from Lewis and Clark College in Portland, Oregon.

Peggy Lynch

"Achieving Oregon's educational standards will prepare our children for the challenges of tomorrow. Investing in that education for ALL Oregon's children is in the best interests of ALL Oregon's citizens."

Peggy Lynch, Oregon's premier school activist, has spent twenty-five years volunteering her time and ingenuity on behalf of education for all children in the state. Beginning with the chairmanship of her local intermediate school committee, she expanded her involvement over the years to include serving as the chair of her local high school committee, Chair of the Speakers Bureau for Citizens for School Support, membership on the Beaverton School District Long Range Planning Committee, Chair of the Beaverton Education Foundation Board of Directors, membership on the Northwest Regional Education Service District Board of Directors and membership on the School Finance Review Committee for the League of Women Voters. Lynch was also a key participant in advancing the original TAG (Talented and Gifted) state mandate through the Legislature. In addition, Lynch served as a member of U.S. Senator Gordon Smith's Washington County Citizens Advisory Council, Chair of the Washington County Committee for Citizen Involvement and was a recipient of the Harold M. Haynes Citizen Involvement Award in 1998. Lynch attended Oregon State University, Portland State University and a variety of other continuing education programs.

Frank P. McNamara

"Don't worry that children never listen. Remember instead that they are always watching — we must consistently DO what is right not just talk about it."

Frank McNamara, currently the Director of Oregon School Services Bureau at the Confederation of Oregon School Administrators, has a long history of interest and involvement with young people. His original professional training as a clinical social worker and social service administrator took him to the position of Senior Staff Social Worker and Assistant Executive Director of the Parry Center for Children and Executive Director of Christie School in Portland. In addition, McNamara developed a private practice in family counseling and child therapy and has taught child therapy and child development seminars for the Portland State University Graduate School of Social Work. In 1983, McNamara moved exclusively to education, serving as Manager of Government Relations for the Portland School District after serving eight years as an elected member of the Portland Board of Education. In his current position at COSA, he provides multiple services to Oregon's school districts, including management and program reviews on best educational practices, school funding and education finance. McNamara also directs the Oregon Educational Technology Consortium, a non-profit corporation providing low-cost software and hardware to schools and promoting the use of technology in education. McNamara received his undergraduate degree from San Francisco State and a master's degree from the University of Connecticut.

James B. Minturn, J.D.

"Remember the old saw: 'You get only what you pay for'."

James Minturn, retired District Attorney for Crook County in Oregon and past president of the Central Oregon Bar Association, has spent four decades in service to his community both professionally and as a volunteer. His civic involvement, always clearly directed toward the law and education, has included Chairmanship of the Crook County School Board, past President of Prineville Kiwanis, past President of Crook County Jaycees, Chairman of the Crook County Commission on Children and Families, Chairman of the Citizen's Committee to fund new schools, Trustee for the Central Oregon Community College Foundation and membership on the Central Oregon Leadership Council, an advisory committee to the Oregon Community Foundation. While serving on the Central Oregon Committee, Minturn's leadership was instrumental in convincing the Oregon Legislature to authorize the establishment of Central Oregon Community College. Minturn received both his undergraduate degree and his Doctor of Jurisprudence from Willamette University in Salem.

Robert L. (Ozzie) Rose, Ph.D.

"Public education: The door to a better future for every child who enters."

Ozzie Rose, now in his twenty-fifth year as Executive Director of the Confederation of Oregon School Administrators, served as the Chief Executive Officer during the formation of the state's first umbrella organization of school administrators and continues to be responsible for developing programs in areas of legislation, professional growth, professional assistance and special services. Rose, who holds a Ph.D. in School Administration from the University of Oregon, began his education career as a teacher/coach in Washington, eventually serving as Assistant Director, Field Training and Service Bureau, College of Education at the University of Oregon where he developed inservice activities for Oregon public school administrators. In 1987, he was invited to head the Governor's Commission on School Funding Reform and continues to play a key role as an education advocate in the Oregon Legislature. Rose has been an active community volunteer, serving as President of the Salem Area Boys and Girls Club, President of the State Executives Association, Director on the Salem-Kawagoe Sister Cities Program Board, Governor, Oregon District of the Active 2/30 Club and a member of the Salem Rotary Club.

Ken Strobeck

"Stable, adequate funding of education is the single most important task of the State Legislature. As policy makers, we need objective tools and standards to quantify expected results based on funding levels. This project goes a long way to make a direct connection between the level of state funding and the achievement of results as defined by the Education Reform Act."

Representative Ken Strobeck (R-Beaverton), Public Affairs Director for Regence BlueCross & BlueShield of Oregon, is currently serving his third term as a member of the Oregon House of Representatives. Prior to accepting the position in the health care industry, Strobeck was the Senior News Producer for KATU-Channel 2 News. During his legislative career, Strobeck has served on numerous task forces and committees and currently chairs the House Revenue Committee. He has been described as an effective, independent-minded legislator. His awards and recognitions have been numerous, including being named Flemming Fellow for 1996 by the Center for Policy Alternatives in Washington D.C., serving on the national board of an affiliated group of the American Hospital Association and participating in the Reforming State Groups on health care issues. Strobeck received his undergraduate degree in Journalism from the University of Oregon.

G. Dale Weight, Ph.D.

"It is my opinion that educating the youth of Oregon is a sacred trust, the responsibility of which is held by the Legislature, parents, teachers and school administrators. All of these parties have accountability for providing adequate funding and demanding that performance standards be established and measured."

Dr. Weight, recently retired Dean and Professor of Finance of the Atkinson Graduate School of Management at Willamette University, currently serves as an independent consultant to the financial services industry and a member of the Governor's Council of Economic Advisors. Prior to his affiliation with Willamette, Dr. Weight played a prominent role in the Oregon financial industry, serving for seven years as Chairman and Chief Executive Officer of Benjamin Franklin Savings and Loan Association headquartered in Portland. He has also served in the public sector as a federal government economist with the Federal Reserve System and as a federal government financial institution regulator. Dr. Weight's list of civic accomplishments is lengthy and includes service as Chairman of the Oregon State Board of Education, Chairman of the Associated Oregon Industries Foundation, board member of the Federal Reserve Bank of San Francisco, the Federal Home Loan Bank of Seattle, the Oregon Independent College Foundation, the Portland Rose Festival Association and the Columbia-Pacific Council, Boy Scouts of America. Dr. Weight earned his undergraduate degree from the University of Utah and his master's and doctoral degrees from the University of Utah. Recently, Dr. Weight was awarded an Honorary Professorship (Ph.D.) from Aomori Public College in Aomori, Japan.

Ben J. Westlund

"Given the consequences of ignorance, we cannot afford to ensure anything less than a society of well-educated citizens."

Representative Ben Westlund (R-Tumalo), an agri-businessman from Central Oregon, is currently serving his second term as a member of the Oregon House of Representatives and has been an avid supporter of education throughout his political career. Westlund's extensive civic and community involvement includes service on his local school board, membership on the Deschutes County Republican Central Committee, Redmond Rotary and Crooked River Ranch Lions. During the current legislative session, Westlund was appointed to serve as Chairman of the Ways and Means Subcommittee on Public Safety and Regulation and also serves on the Ways and Means Subcommittee on Natural Resources as well as the full Ways and Means Committee. Westlund received his undergraduate degree from Whitman College in Washington and continued his education in the graduate studies program at the University of Oregon.

Gary Withers, Ph.D.

"In this free society, where we are all created equal but born into diverse circumstances, quality education provides many of the tools necessary so that everyone can be as successful and productive as they desire, regardless of how or where they started in life."

Gary Withers, a former commissioned officer and Staff Instructor in the U.S. Navy Nuclear Power School, recently retired from Intel, Oregon's largest employer and high-tech enterprise, where he served as an Academic Relations Program Manager. In this position, Withers managed the day-to-day relationship between Intel and ten major universities and helped coordinate the company's $95 million grant program. Withers, who is fluent in French, brought a unique blend of intellect and technology to this project. His expertise was fine-tuned while training Navy personnel in the principles of engineering, mathematics and physics necessary for the operation of nuclear power plants on board submarines and aircraft carriers and creating and managing Intel's Corporate Finance Information System Educational Service. His activities and recognitions include a National Science Foundation Graduate Fellowship, Distinguished Toastmaster, Toastmaster Area Governor, American Heart Association Speakers Bureau, the American Management Association and the National Society of Professional Engineers. Withers was a summa cum laude graduate from the University of Idaho and received his master's degree from the University of Oregon in Eugene.

Duncan Wyse

"The Oregon Quality Education Model is not about a specific school funding budget number. It is about linking, for the first time, state school budgets to school performance expectations. It is about knowing where dollars are going — and monitoring results."

Duncan Wyse, well-known as one of Oregon's forward thinkers, is currently the President of the Oregon Business Council located in Portland. This non-profit, non-partisan organization consists of forty-four business executives who work to focus the business community on key, long-range public policy issues facing Oregon, such as the funding of K-12 and higher education. Prior to this position, Wyse was Executive Director of the Oregon Progress Board where he developed an innovative long-range strategy for economic growth called Oregon Shines and the equally resourceful Oregon Benchmarks, indicators measuring how Oregon is doing as a people, place and economy. Over a seven year period, Wyse has served as an advisor to three Governors on a wide range of policy issues. Wyse's civic involvement is extensive, including membership on the Portland-Multnomah Progress Board, the Multnomah County Commission on Children, Families and Community, the Board of Directors of Oregon Junior Achievement, the Governor's Tax Review Technical Advisory Committee and the Governor's Task Force on Higher Education and the Economy. Wyse received his undergraduate degree from Pomona College and a master's in Business Administration from Stanford University.

Policy and Politics of the Oregon Education Environment

To appreciate the scope of the task undertaken by the *Legislative Council on The Oregon Quality Education Model*, it is important to first understand the educational environment in Oregon.

Prior to the 1990's, local school boards and district voters determined the size of the kindergarten through twelfth grade school district budgets funded mainly with local property taxes. The state played a minimal role, providing less than 30% of the operating funds. Under such a scenario, there was naturally wide disparity throughout the state in the amount of money provided per student. Some districts simply had the ability to raise more money than others. All control was centered at the local level.

Beginning in 1990, the passage of a series of critical legislation shifted control from the local district to the state and dramatically changed the face of school funding in Oregon:

MEASURE 5, 47 AND 50

In opposition to what voters believed were unacceptably high tax rates, Measure 5 was passed by initiative in 1990 limiting the number of dollars per thousand that education districts could assess on local property for operations. (Capital and bonded debt were excluded.) The state was required to replace the local property losses to the local districts and, in doing so, control of local school funding was effectively moved to the Legislature.

Two additional tax initiatives — Measure 47 and Measure 50 — were passed by the voters in 1996 and 1997, respectively, which further reduced property taxes and increased the state's school funding burden.

Today, the state provides approximately 70% of the funding to most school districts. The amount the state distributes to K-12 districts is determined by the amount the state Legislature approves in its biennial K-12 budget, which represents nearly half of the state's entire general fund budget.

THE OREGON EDUCATION ACT FOR THE 21ST CENTURY - HB 3565 AND HB 2991

In 1991, the Oregon Legislature passed legislation that, for the first time, authorized the state to develop standards for what students should know and assessments to determine how well they had mastered the knowledge and skills outlined in the standards. Based on "rigorous academic content standards" in mathematics, science, history, geography, economics, civics and English, the Act requires that school districts award a Certificate of Initial Mastery (CIM) to eligible 10th graders beginning in the 1998-99 school year and a Certificate of Advanced Mastery (CAM) to eligible 12th graders beginning in the year

2004-05. Benchmarks for state testing in English, mathematics, science and social sciences were determined for the 3rd, 5th, 8th and 10th grade levels.

Oregon's education reform legislation sets some of the highest academic standards in the country and requires school districts to adapt their curriculum to meet those levels. The goal of the legislation was to have the "best educated citizens in the nation by the year 2000 and a work force equal to any in the world by the year 2010." Implementation has been challenging, particularly for districts facing annual budget cuts.

School Funding Equalization

Also in 1991, a third important piece of legislation passed mandating equalization of funding among Oregon's school districts. The goal was to "level the playing field" between high and low-spending districts and set the stage for comparisons of the results schools were achieving with similar resources. The equalization formula was gradually phased in with flat funding and stop-loss formulas used to protect districts that would experience sharp reductions in revenue. Additional state revenue allocated to schools has been used to bring up the funding of districts that previously had low per pupil expenditures using the equalization formula. By 1999, the state had equalized funding for approximately 92% of Oregon's 200 school districts.

The Database Initiative Project

The fourth major piece of legislation impacting Oregon's school funding was the passage and funding of the Database Initiative Project in 1997. Prior to this time, Oregon had no centralized or common database of information from its 200 school districts. This project was designed to create common definitions of various spending functions among all schools. The pilot of this project has been completed and the database is now ready to move to full implementation. All districts will code and report expenditures in a uniform manner beginning December 1999 so that by January 2001, it will be possible for the first time to compare spending among school buildings and districts statewide.

In addition to the above legislation, one major policy change at the higher education level has significantly impacted the Oregon education environment:

The Proficiency-based Admission Standards System (PASS)

In 1994, the Oregon University System adopted new admission requirements for students to be admitted to Oregon's public universities, to be phased in beginning with the fall term of 2001. The PASS system moves the focus of the admission process from courses taken to knowledge and skills mastered. To gain admission, students are required to demonstrate that their knowledge and skills — which are defined in terms of proficiencies — meet or exceed the required standards in English, mathematics, science, social science, second languages and visual and performing arts. These standards are aligned with the standards established for K-12 in Oregon's Education Reform Act.

The above legislation and policy changes have resulted in a commonality in Oregon schools that did not exist before 1991. It also created a framework in which the true relationship between costs

and performance could, for the first time, be determined. The groundwork was laid for the development of *The Oregon Quality Education Model.*

The Politics of Education Funding in Oregon

The political environment surrounding the education funding issue in Oregon is complex, contentious and inconstant.

As control of local school finance has shifted to the state, school districts place ever greater pressure on the Legislature for funding increases. At the same time, the Legislature has had no reliable method to determine what level of funding is actually needed for schools. The net effect is that setting education funding levels has been, simultaneously, the most critical aspect of state budget building and, perhaps, the least precise.

Local school districts can control their expenditures but their revenue is received from the state's general fund which can increase or decrease with economic fluctuations. Districts' biennial budgets are determined by the allocation decision of the current Legislature and the equalization formula.

The most significant source of contention, however, is rooted in a ten-year history of politics and policy that has incrementally, albeit, unintentionally, reduced Oregon's school funding to levels below current service needs. The result has been a decade of deep cuts and disenfranchisement.

Four key state policy decisions have dramatically impacted the amount of money distributed to Oregon's schools over the last ten years:

1. The state, under the guidelines of Measure 5, replaced only 70% of the revenue lost by school districts as a result of the property tax limitation measure. Many districts experienced reductions in their budgets.

2. The state opted to achieve funding equalization for all school districts by funding to an approximate average funding level which increased some districts' funding and decreased others. Though some additional adjustments were made, many districts experienced reductions in their budgets.

3. The state mandated a new, performance-based standards and assessment act which required major curriculum changes and teacher development at the district level but allocated no additional funds for implementation. Many districts have been able to achieve performance expectations but only at the expense of other important courses such as music, art, counseling, speech, as well as extra-curricular activities.

4. The state continues to set the K-12 biennial state school budget with an arbitrary process not based on what education actually costs but on what the Legislature determines it can afford.

For the last ten years, Oregon state and local school resources on a per student basis have grown at 60% of the rate of inflation, reducing the inflation adjusted dollars from $4100 (per weighted student) in 1990 to $3300 per student in 1998. Only a remarkably strong state economy and an

increase in lottery dollars largely due to video poker has enabled the state to keep school funding at reasonable levels.

As lawmakers and the Governor struggle each biennium with the school funding budget using a funding process that is fundamentally flawed, they have repeatedly asked but never answered one essential question: What does it really cost to give a child a quality education in Oregon public schools? Student count is measured by average daily attendance rather than enrollment on some given date. Extra weight is assigned to students in special categories such as special education or English as a second language. Extra weights are also assigned to small schools distant from other schools and on the basis of proportion of poverty as measured by the 1990 census.

Until now, there has been no answer to this question, not only in Oregon but in any other state in the country. Costs for other government agencies can be disaggregated and considered at a unit level, e.g., how much per mile of road resurfaced or constructed or how much per prisoner per bed. But educational costs have never been broken out in detail in a way that allows comparison between districts. Nor have the effects of funding decisions on students' learning ever before been systematically considered in Oregon.

It was in this educational and political environment that *The Oregon Quality Education Model* was developed. For the first time, lawmakers could examine resources devoted to education in some sort of cause-and-effect relationship. Education funding could truly be linked to education performance.

Introduction to the Oregon Quality Education Model

THE RATIONALE AND THE GOAL

WHY A MODEL WAS NEEDED

The funding of education in Oregon has been determined through the use of an arbitrary process that simply takes the current service level, adds a cost of living and student population growth factor and then increases the budget by whatever the current Legislature decides it can afford in that biennial funding cycle. With the state now responsible for 70% of the funding to Oregon's schools, this process has become woefully inadequate for determining the proper funding amount.

The state needed to know whether or not it was hitting the mark. What is a quality education for Oregon's students and how much does it cost?

DETERMINING A QUALITY EDUCATION

The Oregon Quality Education Model (OQEM) considers the total educational experience. It describes a quality education that leads to improved performance by all students. It is not a model for how to improve test scores alone but, rather, takes into account all the elements of a quality education and learning environment. For this reason, some elements of the OQEM go beyond the immediate boundaries of the Oregon content standards and assessments. This is consistent with the preponderance of evidence that a comprehensive education program leads to enhanced success by more students than a model that focuses strictly on academic areas. Education is more than state standards and assessments, important as they may be. The OQEM takes a comprehensive view of what it takes for students to reach high levels of achievement, yet the model remains firmly centered on achievement of state standards.

DETERMINING THE COSTS

The Oregon Quality Education Model then builds a relationship between funding and performance. It demonstrates that a certain level of funding can be reasonably associated with a certain level of student performance. To demonstrate this relationship, Prototype Schools — elementary, middle and high — were developed, with their characteristics and functions broken down into elements and components. These elements and components were then assigned costs based on available data and research on effective educational practices. The Prototype Schools model closely reflects reality and also sug-

gests possibilities. It provides a context for determining how much improvement in student performance could be expected as a result of changes in funding. It also allows projections of the specific impacts of funding cuts on educational programs. The model creates a framework for focused discussion to identify those educational services that are most valued by the state. It also allows the state to make an implicit commitment to fund essential services at a level that will result in the desired performance.

PURPOSE OF THE MODEL

TO LINK FUNDING TO PERFORMANCE, NOT ALLOCATE FUNDS.

The Oregon Quality Education Model is not an allocation or distribution tool. The model generates a number—an amount of money that should result in certain levels of student achievement—when other assumptions of the model are met. It is a tool for lawmakers to determine a total education budget amount. How that budget is then allocated to each individual district is determined by the state school funding formula which "weights" students in each district on the basis of special education needs, transportation needs and other factors. The Legislative Council on *The Oregon Quality Education Model* has investigated some of the issues associated with distribution but makes no recommendations at this time. The state will need to reexamine the assumptions and mechanisms of its distribution formula once it begins to use *The Oregon Quality Education Model* to generate an initial figure for school funding.

TO SUPPORT NOT USURP LOCAL CONTROL.

The purpose of *The Oregon Quality Education Model* is NOT to dictate specific strategies or organizational structures to local schools.

Instead, it is designed to demonstrate that a certain level of funding can be reasonably associated with a certain level of student performance. Districts and schools retain the right to organize their programs as they deem appropriate. However, the local school is expected to meet the assumed performance level. A school receiving the level of funding associated with a certain level of performance could organize however it thought best for its students but the school would still be expected to meet high performance levels.

The model is an attempt to bridge the gap between the state's centralized decisions about funding and the school districts' decentralized decisions about programs while still retaining some level of accountability for funds allocated.

THE TWO SENSES OF THE WORD "MODEL"

The Oregon Quality Education Model is a model in two separate senses. Throughout most of this document, the word "model" is synonymous with a set of three Prototype Schools and their attendant funding requirements. The other sense of the word "model" is in terms of the mechanism that is used to generate these specific prototypes.

These, then, are the two notions of the model:

- *The model as specific Prototype Schools envisioned by the Legislative Council on the Oregon Quality Education Model*
- *The model as a policy tool, capable of generating any range of possible Prototype Schools.*

The Council wishes to emphasize the utility of the model along these two equally important dimensions. It has served to define a clear vision of three schools designed to accomplish a specific purpose — enabling the vast majority of Oregon youngsters to meet the standards established by the state while still providing a comprehensive, high-quality education program.

But the model is more versatile than this. The model will likely become an integral tool in the development of future educational budgets. It can serve to bridge the gap among a range of political and ideological points of view by moving the discussions of funding from the plane of rhetoric to the level of programs and practices.

This more expansive conception of the model as a policy tool suggests the need to continue to develop and refine the basic methodology between legislative sessions and to disseminate the model broadly to enable a variety of constituencies to conceive of educational programs and the costs associated with those programs. The model can be used to pursue efficiencies as well as to add and enhance programs.

It is worth restating that the modeling mechanism incorporates two distinct dimensions:

- *Tangible Elements* to which costs can be readily assigned, and
- *Intangible Elements* that do not necessarily have direct costs associated with them but are critical in determining the ultimate effectiveness of the model's tangible elements.

Educators in particular must work to ensure that school programs meet the model's intangible assumptions and do not simply address the tangible elements. When the model is used in this manner, it serves to create a vision as well as to define the conditions for the operation of highly successful school programs. While no district is obligated to duplicate the model, the intangible elements in particular must be thoroughly addressed if the model is to enable the students to meet assumed performance levels.

The Process and the Approach

The Work Process

The Legislative Council on *The Oregon Quality Education Model*, consisting of 23 prominent educators, business leaders, parents, teachers and lawmakers, began its work in March of 1997, meeting regularly in the Oregon State Capitol building in Salem, Oregon until April of 1999.

The Development Plan for the Council began with the establishment of its Mission Statement which is:

"The mission of the Legislative Council on The Oregon Quality Education Model is to recommend governance and management structures and a finance system for public K-12 education, as well as higher education that intersects with K-12, that will enable students throughout Oregon to reach high academic standards at reasonable, sustainable costs and to identify changes in policy and practice necessary to implement them."

To achieve this mission, the Council determined that it must achieve three broad goals:

- Examine and confirm support for high academic standards for all students.
- Determine the components of a complete, quality education designed to meet Oregon's high academic standards.
- Develop a model to determine the costs of those components.

In determining the components of a quality education, the Council included a careful examination of four issues critical to a quality learning environment. Separate work groups spent nearly a year determining the appropriate recommendations regarding:

- Class Size
- Professional Development for Teachers and Administrators
- Duration of Instruction Time
- Operational Support

The complete reports from the Work Groups are found in Appendices B, C, D and E of this report.

In addition, the Council appointed five separate Work Groups to examine and make recommendations regarding the following issues:

• Special Education

The Work Group's recommendation that low-incidence special education students (costing at least 4 times ADMw) be funded outside the school funding formula through

a grant process was adopted as policy and made a part of *The Oregon Quality Education Model*. Though this recommendation is not yet in statute, the Associate Superintendent of the Oregon Department of Education for Special Education is currently developing a proposal which would reflect such an approach to the funding of special education. The Council supports this work and urges ODE to complete its study for recommendation to 71st Legislative Assembly.

In addition, this Work Group recommends that Family Resource Centers, funded and staffed by a variety of children and family service agencies, be available at local schools to assist families in coping with these special children. The Council further recommends that the Governor initiate a study on the development of such Centers, beginning with a review of programs already in place through the Department of Human Resources and certain school districts. This work group's preliminary report is found in Appendix G.

• Education Service Districts

This Work Group examined the significant contribution of Education Service Districts to school districts and reviewed the method through which ESDs are funded. It was the recommendation of the Work Group that a Task Force be appointed with both ESD and local school leadership represented and facilitated by the Oregon Department of Education with the goals of linking ESDs to *The Oregon Quality Education Model* and the Oregon Education Act for the 21st Century. In addition, it is recommended that the state move toward equalization of funding for all ESD's. This Work Group's Preliminary Report is found in Appendix J.

• Local vs. State-wide Collective Bargaining

This Work Group examined the issue of state-wide collective bargaining and its potential advantages and disadvantages to Oregon's educational system, in particular the impact on local control. Their report was made to the full Council which recommends that the matter be given further study, particulary in terms of how salary schedules impact the model as well as how the model impacts salary schedules. The Work Group's Preliminary Report is found in Appendix H.

• Regional Cost of Living Differential

This Work Group examined the issue of a regional cost of living differential depending on special needs in certain areas, for example, a large urban area such as Portland, and how it may or may not affect the equity of the state's school funding distribution formula. Their report was presented to the full Council which agrees that this issue has relevancy and should be further researched. The Work Group's Preliminary Report is found in Appendix I.

- IMPLEMENTATION OF THE MODEL

  This Work Group examined the framing and implementation issues related to the development of *The Oregon Quality Education Model*. The Work Group's Report and Recommendations are found in Appendix F.

THE APPROACH: USING THE PROTOTYPE SCHOOL

The Oregon Quality Education Model uses the school as the unit of analysis. Given that a quality education is considered to include a school's total program and state assessment scores are reported by school, it is logical to consider the effect of funding directly on schools.

Further, it is possible to demonstrate the effects of funding increases or decreases on the various elements of the school's instructional program with more precision than can be achieved by reporting effects at the district level, as is now the practice. Looking at schools rather than districts allows policy makers, educators and parents to understand more clearly the real effects of changes in funding and programs on a school's operations and on student success.

Research on schools indicates that schools are the proper unit of study when considering school improvement. While individual teachers can perform heroically, their gains can be wiped out if the other teachers are not aligning their efforts in a similar fashion. Schools are cultures where people shape their behavior to norms and expectations. Extensive evidence exists that schools with similar student populations in terms of income, racial composition, and other factors produce dramatically different results in terms of student learning. For these reasons, a quality education model should focus on identifying a prototype school model that should result in a projected level of student achievement.

WHY ASSUMPTIONS ARE IMPORTANT

In order to construct a Prototype School, it is necessary to make some assumptions. These assumptions fall into two broad categories: tangibles and intangibles.

Tangible assumptions have a direct relation to costs, i.e., as a particular aspect of that assumption changes, so do the costs. The following are examples of tangible assumptions:

- Pupil-teacher ratio
- Age of building
- Socioeconomic status of student body
- Gap between current student performance and desired level of performance in relation to benchmarks
- Number of English as a second-language (ESL) learners
- Number and type of special education students

Other assumptions are intangible, but still have implications for cost. For example, principal lead-

ership has been shown to be critically important, so it is necessary to assume that the principal of the Prototype School is capable and competent to lead a comprehensive improvement effort designed to enable more students to meet standards. If the principal is not able to do this, the likelihood of improvement diminishes dramatically regardless of funding increases. The following are examples of **intangible assumptions:**

- Principal Leadership
- Support for reform among teachers
- Measure of parent involvement
- Level of teacher training/expertise/experience
- Time devoted to academic instruction for all students
- Amount of homework assigned related to standards

The Oregon Quality Education Model also makes assumptions about how efficient the Prototype School is in its use of resources. Schools that are inefficient should not expect to be held to a lesser standard as a result of their inefficiencies. The model therefore makes certain assumptions about the efficiency with which schools use their resources and conduct their business. These assumptions must be fulfilled for schools to have adequate resources to devote to improving student performance.

Adequate evidence exists to suggest that simply increasing funding does not result automatically in improved student achievement. However, when funding is directed to specific, whole school programs focused on improved student learning, the results can be markedly different.

Assumptions of the Prototype Schools

It is necessary to identify a range of assumptions for the Prototype Schools in order to visualize the effects of a particular funding level and to define specific expenses. These characteristics represent a range of tangible and intangible assumptions that affect student performance directly or indirectly. The selected numbers and assumptions derive from a variety of sources, but generally are close to those of Oregon schools that are average or slightly below average.

Characteristics of any school can be compared to the characteristics of the Prototype Schools for similarities and differences. Adjustments can then be made to more accurately reflect a particular school's tangible and intangible characteristics.

Assumptions of Prototype Schools

Characteristic	Elementary, Middle and High Schools
District size	Large enough to provide full range of central office services
Geographic location	Bordering/in/or in close proximity to an urbanized area (not inner city)
Socioeconomic status	Slightly below the state median (approximately 40th percentile, students on free/reduced lunch, student mobility, student attendance, parent education level)
Special education students	Approximately 12 percent
English as a Second Language students	Approximately 5 percent
Facility condition	Approximately 35 years old, in reasonably good condition with reasonably good maintenance history
Quality of teacher force	Moderately open to reform goals Less than 10 percent teaching outside endorsement area Nearly all possess content knowledge necessary to teach to applicable state standards
Quality of principal leadership	Moderately supportive of reform goals Moderately knowledgeable about reform requirements and moderately involved in reform implementation Moderately skilled as a leader Highly skilled as a manager
Professional development needed to teach to standard	Substantial in the areas of assessment, adapting instruction to below-standard learners, scoring work samples, specifics of content standards, and curriculum articulation

CHARACTERISTIC	ELEMENTARY SCHOOL	MIDDLE SCHOOL	HIGH SCHOOL
Student enrollment (October enrollment)	340	500	1000
Teacher experience	14.5 years	14.7 years	15.7 years
Failure Rate (students retained or currently failing classes)	Approx. 5%	Math: 15% English: 15% Science: 10%	Math: 15% English: 15% Science: 10%
Percent of families attending at least 1 parent conference/year	60%	50%	40%
Proportion of time in English and Math devoted to standards	66%	50%	Math: 85% English: 60%
Hours of homework completed per student per week in subjects for which there is a state assessment	2 hours	4 hours	8 hours
Hours devoted to instruction not covered by state standards in one week	6 hours	8 hours	7-8 hours
Additional time available for students not meeting standard	120 hrs/student	120 hrs/student	120 hrs/student
Students/Computer	16.7/1	16.7/1	16.7/1
Percent of classrooms with one or more computers connected to Internet	60%	60%	60%
Dropout rate			6.9%
Attendance rate	93.5%	93.5%	91.7%
Serious discipline problems/year	3	7	9

Program Elements and Components: What They Are and Why They Are Used

For the *The Oregon Quality Education Model* to be a useful tool for policy makers and educators, it must identify spending at a level of detail that allows one to see how schools spend their money and also allow the effects of increases and decreases in funding to be evident.

The program *elements* and *components* seek to provide this level of detail.

An **element** is defined as a set of functions or activities that are important to the school's ability to offer an instructional program, e.g., supplies, books and materials.

Components are subsets of elements, in this example, texts, consumables, classroom sets, classroom materials and equipment, copying, media center materials, etc. Components allow elements to be broken into smaller, more understandable parts to better reflect how funds are distributed.

The program *elements* and *components* were identified by subcommittees during an exhaustive eighteen-month process and were included based on their importance to the school's overall instructional program.

Program Elements and Components: How Costs Were Calculated

The costs for each element and component were calculated from the following five sources:

1) Statewide Database Initiative Project results from pilot schools

2) Research on effective educational practices

3) Data from the Oregon Department of Education

4) Data from Oregon education professional associations (e.g., Confederation of Oregon School Administrators, Oregon School Employees Association, Oregon Education Association)

5) Experts from Oregon school districts and schools. These sources were used in developing certain assumptions about Prototype Schools and how they should best be organized and funded.

In addition, the following resources were used:

- Preliminary results from the Statewide Database Initiative Project provided all the information on central expenditures, those outside the school building.
- Research on effective educational practices helped determine assumptions about optimum class size and additional time needed to bring students to standard.
- Oregon Department of Education data was used in calculating enrollment figures, in developing Prototype School assumptions, and in determining average salaries.

- The Confederation of Oregon School Administrators and the Oregon School Employees Association provided data on average salaries for administrators and support staff, respectively.
- Experts from Oregon schools, including members of the Council, provided information on specific school functions and costs in areas for which data was not well enough developed. In addition, these experts reviewed the model at various points to ensure a correspondence between the model and the ways schools actually function.

Explanation and Assumptions: What They Are and Why They Were Used

The model contains two additional columns to provide greater understanding of how each number was derived and what it represents. The **Explanation** column provides additional detail on how a number was calculated. The **Assumptions** column contains information that can be changed to adjust the cost of the program element or component related to that assumption. Assumptions were derived from the same five sources used for the element and component costs.

Special Education Assumptions

The Oregon Quality Education Model assumes a new method of allocating special education costs. In this method, certain categories of high-cost special education students are identified as being beyond the ability of local districts to fund, and requires the state to pay their actual expenses out of a centralized fund. For all other special education students, the Prototype Schools operate programs for them out of the resources provided in the model, which makes certain assumptions about the number of special education students present at the schools and the staff and resources available to serve them.

The model also assumes the existence of *Family Resource Centers*, intergovernmental service centers funded and staffed by a variety of children and family service agencies and designed to address the needs of families, not just the individual student.

The Oregon Quality Education Model

The Oregon Quality Education Model is variable. It can and will change over time as its components are examined and tested in the laboratory of the classroom. It can and will adapt to updated measurements of standards and performance. It can and will become more precise with usage.

COMPOSITION OF THE MODEL

The Oregon Quality Education Model is composed of:

- The 1991 Oregon Education Act as amended with its academic content, performance standards and assessment of student achievement;
- The four additional components of quality learning identified by the Council, which are appropriate class size, proper professional development for teachers and administrators, adequate duration of instruction time and sufficient operational support for implementation; and
- The seven developmental goals identified by the Oregon Board of Education.

Following is a more complete description of the components:

ACADEMIC CONTENT OR CURRICULUM

The academic content or curriculum for students in kindergarten through grade 12 includes the following disciplines:

1. **English** — reading, writing, speaking and listening, literature and media and technology
2. **Mathematics** — calculations and estimations, measurement, statistics and probability, algebraic relationships, geometry and mathematical problem solving
3. **Science** — unifying concepts and processes, physical science, life science, space science, history and nature of science, scientific inquiry, science and technology and science in person and social perspectives
4. **Social Sciences** — history, civics and government, geography, economics and social science analysis
5. **The Arts** — aesthetics and art criticism, historical and cultural perspectives and create, present and perform
6. **Second Languages** — communication, culture, connection to other disciplines
7. **Other content areas** — health education, physical education and technology

Performance Standards

The Oregon Department of Education has developed standards for student achievement for the six academic disciplines listed above. The content standards are the portion of the Common Curriculum Goals related to statewide assessment and to the Certificate of Initial Mastery (CIM) and Certificate of Advanced Mastery (CAM).

Local districts are to develop standards for the other content areas, thereby providing standards for all K-12 students in all academic areas.

The Certificate of Initial Mastery (CIM) will be awarded by local districts at approximately grade 10 to students who meet performance standards in the areas of English, mathematics, science, social sciences, arts, and second languages. The CIM begins with English and mathematics and will progress to science, social sciences, arts and second languages.

CIM students will also have opportunities to demonstrate their ability to learn, think, retrieve information, use technology, and work effectively as individuals and as individuals in group settings.

The Certificate of Advanced Mastery (CAM) will be awarded, also by local districts, at approximately grade 12 to students who meet Oregon grade 12 performance standards in English, mathematics, science, and social sciences, and grade 12 district performance standards in the arts and second languages.

Students must also participate in an endorsement area through work, community, and school-based learning. The six endorsement areas are (1) Arts and Communication, (2) Business and Management, (3) Health Services, (4) Human Resources, (5) Industrial and Engineering Systems, and (6) Natural Resource Systems.

Finally, CAM students must achieve career-related learning standards in personal management, problem solving, teamwork, communication, workplace systems, career development and employment foundations.

The Oregon Department of Education is currently developing content standards for the CAM.

Assessment

Students' achievement of standards is assessed by the Oregon Department of Education at grades 3, 5, 8, 10, and 12 in English, mathematics, science, and social sciences. There are no state tests in the arts or in second languages. Performance standards define the number, type, and minimum scores required on state and local assessments.

Components of Quality Learning

There are four important components of quality learning that the Council believes should be included in *The Oregon Quality Education Model*:

1. **Class Size** adequate to allow students to master standards and reach specified levels on assessments.
2. **Professional Development** for teachers and administrators to develop necessary skills to

implement state standards and improve student performance to specified achievement levels and to deliver the *The Oregon Quality Education Model* successfully to all children.

3. **Duration of Instruction Time** adequate to allow those students who need more time to master the standards the opportunity to do so.
4. **Operational Support** to implement *The Quality Education Model*, including instructional materials, guidance, and counseling, libraries, personnel administration, business and fiscal services.

Developmental Goals

The seven developmental goals identified by the Oregon Board of Education as stated in Oregon Administrative Rules 581-022-1021 (June, 1997). These goals are designed to prepare students to function in a rapidly changing world:

1. To insure that all students, regardless of linguistic background, culture, race, gender, capability, or geographic location, have access to a quality education in a safe, motivating environment;
2. To hold all Oregon students to rigorous academic standards and expect them to succeed;
3. To provide Oregon students with the opportunities to demonstrate their achievement in knowledge and skills;
4. To encourage parental and community involvement in their student's education;
5. To develop in Oregon students lifelong academic skills to prepare them for an ever-changing world;
6. To develop in Oregon students the core ethical values that our diverse society shares and holds important, including but not limited to: respect, responsibility, caring, trustworthiness, justice and fairness, and civic virtue and citizenship; and
7. To equip Oregon students with the knowledge and skills necessary to pursue the future of their choice and to prepare students to function effectively in various life roles.

The Effect of the Oregon Quality Educational Model on the School

The Oregon Quality Education Model is a goal, a vision of a school where all children will receive an education that will truly prepare them for success in the future. It embodies the recommendations from the Legislative Council on *The Oregon Quality Education Model* and its two-year effort to identify the elements of a quality education.

The model was not developed with attention to cost; it was developed with attention to quality.

The assumptions and components of the model are variable and can be modified as new research and data determines more precisely the keys to a quality education. Over time, the use of the model will help to define those keys.

What does a school patterned after *The Oregon Quality Education Model* look like? The following are examples of the effects **Full Implementation** of the model could have in an Elementary School, Middle School and High School:

ELEMENTARY SCHOOL:

- All-day kindergarten
- 20:1 pupil-teacher ratios at all grade levels
- Specialists for areas like art, music, P.E., second language or counseling (at each building's discretion)
- On-site instructional improvement/curriculum development support
- Additional time for students having trouble reaching standards
- Professional development time and resources for teachers and support staff to develop skills to enable most students to reach standards
- Resources to reimburse teachers for out-of-pocket expenses necessary to help students reach standards
- Adequate fund for building maintenance so that instructional funds do not have to be diverted to maintenance

MIDDLE SCHOOL:

- 29:1 class size maximum in core academic courses
- 1.5 extra teachers to provide extra options in math, English, science
- Additional time for students who are having trouble reaching standards including summer school
- One counselor per 250 students
- Adequate professional development resources to allow teachers to develop skills to teach to standards successfully and assess student work reliably
- On-site instructional improvement/curriculum development support
- Volunteer coordinator and community outreach worker
- Adequate campus security
- Alternative programs for special needs student
- Resources to reimburse teachers for out-of-pocket expenses necessary to help students reach standards
- Adequate fund for building maintenance so that instructional funds do not have to be diverted to maintenance

HIGH SCHOOL:

- 29:1 class size maximum in core academic courses
- 3 extra teachers, one each in math, English, science
- Additional time for students who are having trouble reaching standards including summer school
- Volunteer coordinator and community outreach worker
- One counselor per 250 students
- Adequate professional development resources to allow teachers to develop skills to teach to standards successfully and assess student work reliably
- On-site instructional improvement/curriculum development support
- School-to-work coordinator
- Adequate campus security
- Alternative programs for special needs students
- Resources to reimburse teachers for out-of-pocket expenses necessary to help students reach standards
- Adequate fund for building maintenance so that instructional funds do not have to be diverted to maintenance

THE COSTS OF THE MODEL

METHOD OF CALCULATION

The Oregon Quality Education Model is grounded on the concept of the school as the unit of analysis although funding is still to be distributed on a per-pupil basis. The model starts by designing three Prototype Schools with characteristics broadly reflective of Oregon schools.

It then uses the number of students in the final head count, what is commonly known as ADMr, to come up with a general figure for education costs at the school level. To these are added costs not easily allocated to school buildings, for example, high-cost special education students (those costing more than $22,500), which the model assigns to a state pool of revenue, rural/small schools in proportion to their weightings, poverty/distressed schools in proportion to their weightings, and proposed funds for school improvement. The totals are then divided by both ADMr (unweighted) and ADMw (weighted) figures to establish per-pupil costs that can be compared with current amounts.

The model produces a final overall number for the state education budget when the numbers for the Prototype Schools are divided to produce a per-pupil expenditure figure for each level that is then multiplied by the number of students in the state.

In this report, the model is used to generate different service levels. The various scenarios demonstrate the uses of the model as well as suggest the likely effects on schools of various funding levels.

Since the numbers the model produces are not yet precise, it must be used with caution until the precision of the numbers and assumptions upon which it is based can be refined. In the interim, it can be a useful tool for identifying effects of different funding increases. A tool like this can focus debates about school funding on the likely impact of changes in funding levels.

The intent of putting a price on the cost of a quality education is not necessarily to suggest that it must or can be achieved in one legislative session. It is to create a goal and to identify what it would cost to get there.

Costs Not Accounted For By The Model

The Role of the Education Service District (ESD). The model acknowledges the role the Education Service District (ESD) funding plays in the education of students but does not allocate those funds out to the school building level.

Federal Funds or Poverty Factor. The model also does not yet take into account federal funds nor is there a compensating factor for poverty. The Prototype Schools do not reflect the full range of diversity or special situations that exist in schools within the state. However, as *The Oregon Quality Education Model* is used over time, it will be refined to more accurately reflect the general categories in Oregon's schools.

Capital Costs. The model also does not include capital costs that would be associated with implementation of the model. Lack of adequate space will be a real issue in many districts that do not currently have the capacity to lower class size by adding teachers who would occupy classrooms the district does not have. If the state were to expect every class in Oregon to be at the average cited in the full implementation model, the capital costs associated with this move would need to be considered. Absent such a consideration, the model currently operates under the assumption that each district will decide how best to employ the resources that would be available with phased or full implementation of the model in ways that best achieve the goals of the OQEM in the context of the local district.

Two Approaches to Implementing The Model

The goal for the Prototype Schools is that 90% of students in those schools achieve the state-mandated standards, with the remaining 10% making significant progress to be as near to reaching the standards as possible, when the model's tangible and intangible assumptions are present.

It is must be clearly understood that the goal of 90% of students achieving standards is based on the availability of the programs and resources as outlined in the model, *not within the context of the current system.*

Because students learn at different rates and because some students have extenuating circumstances, e.g., a child who moves to Oregon in the fifth grade with no prior preparation for the CIM benchmark testing or a child who has profound special needs, the model anticipates that approximately 10% of students will achieve standards at a slower pace.

A. Full Implementation of the Model

Full Implementation of *The Oregon Quality Education Model* is designed to enable all Oregon students to move to required performance levels. All Oregon schools would be expected to demonstrate rapid, sustained improvement in student scores on state assessments, performance tasks, and work samples until 90 percent are at benchmark or receive the CIM with the remaining 10 percent making significant progress to be as near to reaching the standard as possible.

While the amount of time it will take each school to reach this level may vary, the model assumes all schools are able to reach the performance goal of 90 percent at benchmark/CIM and the remaining 10 percent making significant progress. Therefore, any school that was not making progress or reaching the goal would be assumed to be at variance with the assumptions of the model — either tangible or intangible assumptions — that are the basis for student learning.

When schools are not making adequate progress toward improved student performance, the state would investigate the reasons for the lack of goal attainment by the school and would respond accordingly after analyzing the reasons the school did not meet the target performance levels.

B. Phased Implementation of the Model

A second option is **Phased Implementation**. This level acknowledges the challenges in implementing the overall goals of *The Oregon Quality Education Model* while still pursuing the larger vision of full implementation. To implement the total vision in one biennium would be a tremendous challenge — both to Legislators and to schools. The Phased Implementation budget provides insight into how both short-term and long-term improvement can be achieved by phasing in elements of the model in a way that allows schools to adapt. This option decreases the amount of money needed during the next biennium to begin implementing *The Oregon Quality Education Model*, while still allowing full implementation at some levels. This enables the model to be fully tested and requires schools to respond to the challenge of dramatically increasing student performance.

Under the Phased Implementation scenario, resources are initially focused at the primary level, lowering class sizes in kindergarten and grades 1-3 to a pupil-teacher ratio of 20:1 and eventually instituting full-day kindergarten. This strategy acknowledges the importance of early intervention and establishing literacy and numeracy as the foundations of further learning.

Phased Implementation also demonstrates how critical resources at all other grade levels can be provided to train teachers and give those students who need it most the extra time to reach benchmark standards. This version also includes more counselors in secondary schools.

The Phased Implementation plan allows today's students to benefit by having well-trained teachers and extra time if they need it to meet standards, while at the same time

schools prepare a cohort of students to move through the system meeting benchmark standards at a higher level.

It is important to note that some districts may currently be in a fiscal position that would preclude them from making the type of progress described in the Phased Implementation model during the first biennium. However, if the Phased Implementation proceeded to its conclusion, all districts would be in a position to enable the vast majority of students to reach standard.

The Oregon Quality Education Model would then be phased in gradually, with funding of its recommendations proceeding in the following fashion:

2001-2002: Grades 4-5

2003-2005: Grades 6,7 8

2005-2007: Grades 9, 10

2007-2009: Grades 11, 12

As the cohort of students now in first grade moves through the system, schools would be expected to enable approximately 90 percent of these students to meet benchmark standards, resulting in a CIM attainment rate of approximately 90 percent in 2007, with the remaining 10 percent making significant progress to be as near to reaching the standard as possible. Some schools would have legitimate reasons for not being able to attain these targets, but the expectation would be that the vast majority of schools would reach the goal.

Following is a possible timeline for Oregon students' achievement of standards:

TIMELINE	BENCHMARK	% MEETING STANDARDS
2000-01		
2001-02		
2002-03	3RD GRADE	90%[2]
2003-04		
2004-05	5TH GRADE	90%[2]
2005-06		
2006-07		
2007-08	8TH GRADE	90%[2]
2008-09		
2009-10	10th Grade	90%[2]

[2]The model represents educational programs that can reasonably be assumed to enable 90% of students to achieve state standards and ensure that the remaining 10% are making significant progress to be as near to reaching the standards as possible.

What does a school patterned after a **Phased Implementation** of *The Oregon Quality Education Model* look like? The following are examples of the effects Phased Implementation of the model could have in an Elementary School, Middle School and High School:

ELEMENTARY SCHOOL:

- 20:1 class size in Kindergarten, grades 1 and 2 beginning first year of biennium.
- 20:1 class size in grade 3 during second year of biennium.

MIDDLE SCHOOL AND HIGH SCHOOL:

- Additional time for students who are having trouble reaching standard
- Professional development time and resources for teachers and support staff to develop skills to enable most students to reach standards
- Pupil/counselor ratio recommended by accrediting agencies (250:1).

The Oregon Example: Costs of a Quality Education

This section of the report provides a summary of the costs for Full Implementation and Phased Implementation of *The Oregon Quality Education Model* in Oregon.

Following the summary is a detailed description in matrix form of the Elements, Components, Costs and Assumptions for:

FULL IMPLEMENTATION (OREGON)

- Elementary School
- Middle School
- High School

PHASED IMPLEMENTATION (OREGON)

- Elementary School
- Middle School
- High School

COST SUMMARY:

COSTS FOR FULL IMPLEMENTATION OF THE OREGON QUALITY EDUCATIONAL MODEL (OREGON)

Level	Per Pupil[1]	ADMr	Cost 99-00[2,3]
Elementary	$6,569	234,969	$1,543,593,082
Middle	6,288	127,869	804,046,674
High School	6,851	153,805	1,053,670,891
Total Prototype Schools[4]	6,853	516,643	3,540,764,383
ADD: High Cost Special Education Students			30,000,000
GRAND TOTAL - 1999-2000			$3,570,764,383[5]
Per-pupil Cost, 1999-2000, ADMr (unweighted)			6,911
Per-pupil Cost, 1999-2000, ADMw (weighted)		618,544	5,773
Amount above or below Governor's Proposed Budget (99-00 only)			572,364,383
Amount above Governor's Proposed Budget (Biennium)			1,156,176,055
Governor's budget with Full OQEM Implementation			**$5,654,176,055[6]**

[1] Adjusted from Oct. 1 enrollment to ADMr with kindergarten at half-time.

[2] 4.1% inflation factor from 98-99 to 99-00 (compensates for using 98-99 numbers)

[3] Expenditures include K-12 supported by state general fund and local property tax but do not include ESD support

[4] Total is multiplied by inflation factor, therefore per pupil is not comparable to average of above totals.

[5] Includes local property tax and state general fund revenues.

[6] Two-year total — Does not include local property tax revenues.

COST SUMMARY:

COSTS FOR PHASED IMPLEMENTATION OF THE OREGON QUALITY EDUCATION MODEL (OREGON)

LEVEL	PER PUPIL[1]	ADMR	COST 99-00[2,3]
Elementary	$5,862	234,969	$1,377,369,202
Middle	5,840	127,869	746,723,526
High School	5,998	153,805	922,566,635
Total Prototype Schools[4]	6,139	516,643	3,171,572,397
ADD: High Cost Special Education Students			30,000,000
GRAND TOTAL — 1999-2000			$3,201,572,397
Per-pupil Cost, 1999-2000, ADMr (unweighted)			6,197
Per-pupil Cost, 1999-2000, ADMw		618,544	5,176
Amount above or below Governor's Proposed Budget (99-00 only)			203,172,397
Amount above Governor's Proposed Budget (Biennium)[5]			457,408,242
Governor's budget with Full OQEM Implementation			**$4,955,408,242**

[1] Adjusted from Oct.1 enrollment to ADMr with kidergarten at half time.

[2] 4.1% inflation factor from 98-99 to 99-00 (compensates for using 98-99 numbers)

[3] Expenditures include K-12 supported by state general fund and local property tax but do not include ESD support.

[4] Total is multiplied by inflation factor, therefore per pupil is not comparable to average of above totals.

[5] Includes additional $47,000,000 in second year to fund full-day kindergarten.

FULL IMPLEMENTATION

The Oregon Quality Education Model
Elementary School
Costs for one year - 340 students

Program Element	Component	FTE	Component Cost	Explanation/ Assumptions	Comments
Core staff	Kindergarten	2.00	115,654	K=40: 2 FTE @ 20:1 with full day Kindergarten.	Average teacher's salary plus full benefits - 98-99
	1-3	9.00	520,444	1-3=180: 9 fte @ 20:1	57,827
	4-5	5.00	289,136	4-5=120: 5 fte @ 20:1	Salary = $41,937 for 97-98. Benefit rate = 34.2%. 98-99 Salary increase = 2.275%
Program staff	Music, PE, art, media, 2nd lang., reading specialist	4.50	260,222	Schools can make choices among these. Assumes second language instruction as one choice	
	ESL	0.50	28,914	Assumes 5% ESL (17 students)	Not a self-contained program
Special education staff		1.50	86,741	Includes itinerant services @ .25. Assumes high-cost students are funded directly from the state.	Federal and ESD contributions result in more funds being actually available.
Instructional improvement		0.50	28,914	Curriculum Development specialist to help teachers teach to standards, administer assessments, score work samples.	
Instructional support staff assistance	Classified	5.00	99,308	Spec ed,, records clerk, parent involvement, playground supervisor. School has discretion to distribute support staff as it deems most effective	Average hourly rate = $10 per hour @ 8 hours per day @ 185 days per year. Benefit rate = 34.2%
	Secretary	1.00	27,055		$12 per hour @ 8 hours per day @ 210 days. Benefit rate = 34.2%
Administrative accountability	Principal	1.00	83,978	Cost from COSA salary survey- salary and fringe benefits	Average salary = $62,577 from COSA survey. Benefit rate = 34.2%
Computer hardware/software	Hardware including student and administrative		17,000	Purchases 20% new computers per year. 17 computers @ $1000.	6 students/computer, 1 computer/instructional & administrative staff
	Software		5,100	Each new machine licensed software from replacement machine plus $150/machine	$150 per new computer = $2,550. Software for existing computers = $2,550.
Supplies, books, materials	Texts, consumables, classroom sets		20,400	Some schools do not use texts. Funds could be redirected to school-produced materials	$60 per student

Continued on the next page...

FULL IMPLEMENTATION			*The Oregon Quality Education Model* Elementary School *Costs for one year - 340 students*		
Program Element	Component	FTE	Component Cost	Explanation/ Assumptions	Comments
Supplies, books, materials	Texts, consumables, classroom sets		20,400	Some schools do not use texts. Funds could be redirected to school-produced materials	$60 per student
	Classroom materials & equipment		38,420	Includes video, tvs for classes, globes, maps, science equipment, etc.	$113 per student
	Copying		8,568	Classroom-related, administrative	1680 copies per student @ $.015 per copy
	Media center materials		4,080	Library books, reference materials, subscriptions	$12 per student
Professional training & development	10 days	19.50	39,000	$200 per diem-District/school discretion on how this is utilized. Can be extended contracts, stipends, substitute costs.	Schools will use a combination of extended contract, stipends, per diem to compensate teachers
	Materials, Travel,		4,950	$225 per person	
	Consultants				
	Support staff-10 days	1	1,000	$100 per day/10 days	
Additional instructional time for students to achieve standards	Certified		12,600	60 students - 4wks summer schl:1/2 days- 3 FTE 1 wk full-time preparation and 4wks 1/2 teaching @ $280/day	Summer school and extra time will be focused on students with most need and motivation, not available to all students.
	Additional time		13,600	Saturday school, after school programs, tutoring	
	Classified		1,500	1 FTE 1 wk preparation and 4wks 1/2 time school @ $100/day	
	Supplies		1,200	$20 per student	
Centralized support costs: Centralized costs distributed to each building	Food services		0		Assumes self-supporting food services program
	Student transportation		81,940	$241 per student	
	Technology services		32,300	Computer networks, telephones, voice mail - $95 per student	

Continued on the next page...

FULL IMPLEMENTATION			*The Oregon Quality Education Model* Elementary School *Costs for one year - 340 students*		
Program Element	Component	FTE	Component Cost	Explanation/ Assumptions	Comments
	Operation, plant maintenance		119,000	Custodian, maintenance staff, utilities, security system - $350 per student	
	Other support services		20,060	Warehouse, courier service, community facilities (pool, library) - $59 per student	
	Centralized special education		35,700	Self-contained schools, other students who are not served at the building level - $105 per student	
District administrative overhead	Executive administration: Board of Education, superintendent		20,740	$61 per student	
	Business & Fiscal Services		24,140	$71 per student	
	Personnel Services		21,760	$64 per student, includes district supplemental retirement incentives	
	Public Information		4,080	$12 per student	
Total school cost:			1,858,228		
Total per pupil cost (not comparable to ADMw):			5,465	This number is not comparable to current average per-pupil figures. It does not take into account weighting factors, average daily membership, or other components of current per-pupil measures. The number reflects the cost of this school only and will be different for other schools. It is not a number that can be used for allocating funds to individual schools and should not be viewed as a target figure for individual schools.	

FULL IMPLEMENTATION

The Oregon Quality Education Model
Middle School
Costs for one year - 500 students

Program Element	Component	FTE	Component Cost	Explanation/ Assumptions	Comments
				97-98 average salary = $42,741, increased by 2.75% for 98-99. Benefit rate = 34.2%. Average salary assumes COLA increase for 98-99 with lower salaries of new hires balancing cost increase of step increases.	Assumes teachers teach 6 of 7 classes in a day. Assumes students are taking classes each period)
Core staffing	English, math, science, social sciences, second languages, the arts	17.00	1,001,908	Each student takes English, math, science, social science, second lang (at least 1 yr), arts (at least 1 yr)	
	Additional .5 teacher in math, English, science	1.50	88,404		
	ESL	0.50	29,468	25 students, 1 period/day	20:1 ratio, 1 period/day (assumes decreasing time in ESL over 4 years)
	Additional course staffing	4.00	235,743	Electives such as P.E., health, computers	Students take 6 core courses/1 elective per day
	Licensed academic support staff	1.00	58,936	Library media	
	Special education staffing	2.50	147,339	60 spec. ed. students. Teachers teach 5 of 8 classes to allow time for paperwork, IEP meetings	Itinerant services for areas like speech pathologist, school psychologist @ .50. Includes Medicare offset.
	Alternative ed. program	0.50	29,468		
Counseling		2.00	117,872	Run student support groups, family liaison, crisis intervention, peer mediation, drug & alcohol, some academic advising	1:250 as per accreditation guidelines
Instructional improvement		1.00	58,936	Curriculum Development specialist to help teachers teach to standards, administer assessments, score work samples plus release periods for 5 other teachers to help departments	1:250 as per accreditation guidelines
Instructional support staff assistance	Special ed.	1.50	29,792	Average hourly rate = $10 per hour @ 8 hours per day @ 185 days per year. Benefit rate = 34.2%	

Continued on the next page...

FULL IMPLEMENTATION

The Oregon Quality Education Model
Middle School
Costs for one year - 500 students

Program Element	Component	FTE	Component Cost	Explanation/ Assumptions	Comments
	Principal's secretary	1.00	33,496	$12 per hour @ 260 days per yr	
	Attendance	1.00	19,862	$10 per hour @ 185 days per yr	
	School nurse	0.50	29,468	Licensed staff rate	
	Additional support	1.00	19,862	$10 per hour @ 185 days per yr	
	Community outreach	1.00	23,619	$10 per hour @ 220 days per yr	
	Volunteer coordinator	1.00	23,619	$10 per hour @ 220 days per yr	
	Media center assistant	1.00	23,619	$10 per hour @ 220 days per yr	
	Campus monitor	2.00	39,723	$10 per hour @ 185 days per yr	
	Receptionist	1.00	19,862	$10 per hour @ 185 days per yr	
Administrative accountability	Principal	1.00	99,850	$74,402 annual salary from COSA salary survey. Benefit rate = 34.2%	
	Assistant principal	1.00	85,779	$63,919 annual salary COSA salary survey. Benefit rate = 34.2%	
	Teacher leadership		18,000	Department chairs, lead teachers	
Computer hardware/ software	Hardware including student and administrative		21,000	Purchases 20% new computers per year (16 student, 5 staff) @ $1000 per computer	6 students/computer, 1 computer/instructional & administrative staff
	Software		3,150	Each new machine licensed software from replacement machine plus $150/machine	
Supplies, books, materials	Texts, consumables, classroom sets		30,000	$60 per student	

Continued on the next page...

FULL IMPLEMENTATION

The Oregon Quality Education Model
Middle School
Costs for one year - 500 students

Program Element	Component	FTE	Component Cost	Explanation/ Assumptions	Comments
	Classroom materials, all equipment, supplies		63,000	Includes video, tvs for classes, globes, maps, science equipment, etc. $126 per student	
	Copying		10,500	Classroom-related, administrative. $21 per student	1400 copies per student @ .015 per copy
	Media center materials		9,000	Library books, reference materials, subscriptions. $18 per student	
	Teacher reimbursement of materials purchases		5,000	Out-of-pocket teacher expenses for materials/supplies. $10 per student	Average of $10/student
Extra-curricular activities	Extracurricular expenditures		78,500	Clubs, drama, debate, newspaper, FFA, athletics. $157 per student	From the Database
Professional training & development	Teacher professional development related to standards and assessments	30.00	60,000	$200 per diem District/school discretion on how this is utilized. Can be extended contracts, stipends, substitute costs.	10 days per licensed staff
	Materials, Travel,		6,750	$225 per licensed staff	
	Consultants		1,000		
	Instructional support staff-10 days		1,500	$100 per day	
Additional instructional time for students to achieve standards	Licensed		27,300	100 students - 4wks summer schl:1/2 days-6.5 FTE, 1 wk full-time preparation and 4wks 1/2 days teaching @ $280/day @ 15:1	
	Classified		1,500	1 wk full-time preparation and 4wks 1/2 days @ $100/day	
	Supplies		1,200	$12 per student	
	Other activities		40,000	Saturday school, tutoring, after school programs	100 students
Centralized support costs: Centralized costs distributed to each building	Food services		0		

Continued on the next page...

FULL IMPLEMENTATION			*The Oregon Quality Education Model* Middle School *Costs for one year - 500 students*		
Program Element	Component	FTE	Component Cost	Explanation/ Assumptions	Comments
	Student transportation		115,500	$231 per student	
	Technology services		47,500	Computer networks, telephones, voice mail. $95 per student	
	Operation, maintenance		201,000	Custodian, maintenance staff, utilities, security system, roof repair, general upkeep. $402 per student	
	Other support services		29,500	Warehouse, courier service, community facilities (pool, library). $59 per student	
	Centralized special education		52,500	Self-contained schools, other students who are not served at the building level. $105 per student	
District administrative overhead	Executive administration (Board of Education, superintendent)		30,500	Average figures from Database Pilot Project. $61 per student	
	Business & Fiscal Services		35,500	$71 per student	
	Personnel Services		32,000	$64 per student	
	Public Information		6,000	$12 per student	
Total school cost:			3,144,025		
Total per pupil cost:			6,288	This number is not comparable to current average per-pupil figures. It does not take into account weighting factors, average daily membership, or other components of current per-pupil measures. The number reflects the cost of this school only and will be different for other schools. It is not a number that can be used for allocating funds to individual schools and should not be viewed as a target figure for individual schools.	

FULL IMPLEMENTATION

The Oregon Quality Education Model
High School
Costs for one year - 1000 students

Program Element	Component	FTE	Component Cost	Explanation/ Assumptions	Comments
				97-98 average salary = $42,741, increased by 2.75% for 98-99. Benefit rate = 34.2%. Average salary assumes COLA increase for 98-99 with lower salaries of new hires balancing cost increase of step increases.	Assumes teachers teach 3/4 of classes in a day (3 of 4 or 6 of 8). Assumes students are taking 7 of 8 classes at 9 and 10 and 6 of 8 at 11 and 12)
Core staffing	English, math, science, social sciences, second languages, the arts	37.60	2,215,985		Each student takes 4 English, 4 math, 4 science, 4 social science, 3 second lang., 2 arts, 181 classes, 29:1 ratio, 37.6 FTE
	Additional teacher in math, English, science	3.00	176,807	To provide smaller classes in these areas to develop key literacy, numeracy, scientific reasoning skills	Each school to decide how best to deploy extra resources
	ESL	0.50	29,468	50 students, 1 period/day	20:1 ratio, 1period/day (assumes decreasing time in ESL over 4 years)
	Additional course staffing	8.40	495,061	Additional class in core area, plus P.E., health, Professional/ Technical, business, home ec., building technology coordinator	Students taking average 5 electives over 4 years
	Licensed academic support staff	1.00	58,936	Library media	
	Special education staffing	3.75	221,009	120 spec. ed. students. Teachers teach 5 of 8 classes to allow time for paperwork, IEP meetings	Itinerant services for areas like speech pathologist, school psychologist @ .75. Includes Medicare offset.
	Additional special student programs	2.50	147,339	Alternative ed., teen parent, adjudicated students, home tutors	
	Counseling	4.00	235,743	Run student support groups, family liaison, crisis intervention, peer mediation, drug & alcohol, some academic advising	1:250 as per accreditation guidelines
Building support staff- Instruction		1.00	58,936	Curriculum Development specialist to help teachers teach to standards, administer assessments, score work samples plus release periods for 5 other teachers to help departments	

Continued on the next page...

FULL IMPLEMENTATION

The Oregon Quality Education Model
High School
Costs for one year - 1000 students

Program Element	Component	FTE	Component Cost	Explanation/ Assumptions	Comments
Instructional support staff assistance	Support staff for Alternative ed., teen parent	1.50	35,429	Average hourly rate = $10 per hour @ 8 hours per day @ 220 days per year. Benefit rate = 34.2%	School is free to distribute these support positions in whatever configuration is most consistent with achieving higher standards at that school
	Special ed.	2.00	39,723	Classified- 1 spec ed, 1 records clerk. $10 per hour @ 185 days per yr	
	Principal's secretary	1.00	33,496	$12 per hr @ 260 days per yr	
	Counseling office	1.00	23,619	$10 per hr @ 220 days per yr	
	School-to-work coordinator	1.00	23,619	$10 per hr @ 220 days per yr	
	Registrar	1.00	27,914	$10 per hr @ 260 days per yr	
	Attendance	1.00	27,914	$10 per hr @ 185 days per yr	
	Community outreach	1.50	19,862	$10 per hr @ 185 days per yr	
	Departmental support	2.00	39,723	$10 per hr @ 185 days per yr	
	Bookkeeper	1.00	27,914	$10 per hr @ 260 days per yr	
	Volunteer coordinator	1.00	23,619	$10 per hr @ 220 days per yr	
	Nurse	1.00	58,936	Licensed staff rate	
	Health clerk	0.50	9,931	$10 per hr @ 185 days per yr	
	Media center assistant	1.00	23,619	$10 per hr @ 220 days per yr	
	Receptionist	1.00	19,862	$10 per hr @ 185 days per yr	
	Campus monitor	3.00	59,585	$10 per hr @ 185 days per yr	

Continued on the next page...

FULL IMPLEMENTATION

The Oregon Quality Education Model
High School
Costs for one year - 1000 students

Program Element	Component	FTE	Component Cost	Explanation/ Assumptions	Comments
Administrative accountability	Principal	1.00	105,556	$78,656 annual salary from COSA salary survey. Benefit rate = 34.2%	
	Assistant principals	2.00	182,134	$67,859 annual salary COSA salary survey. Benefit rate = 34.2%	
	Athletic director	0.50	83,204	$62,000 annual salary COSA salary survey. Benefit rate = 34.2%	
	Teacher leadership		52,000	Department chairs, lead teachers	
Computer hardware/ software	Hardware including student and administrative		45,000	Purchases 20% new computers per year (32 student, 10 staff, 3 office) @ $1000 per computer	
	Software		6,750	Each new machine licensed software from replacement machine plus $150/machine	
Supplies, books, materials	Texts, consumables, classroom sets		75,000	$75 per student	
	Classroom materials, all equipment, supplies		159,000	Includes video, tvs for classes, globes, maps, science equipment, etc. $159 per student	
	Copying		22,000	Classroom-related, administrative. $22 per student	
	Media center materials		34,000	Library books, reference materials, subscriptions. $34 per student	
	Teacher reimbursement of materials purchases		10,000	Average of $10 per student	
Extra-curricular activities	Coaching	37.0	180,005	Average coaching stipend of $4865 including benefits	
	Other extracurricular sponsors	8.0	38,920	Clubs, drama, debate, newspaper, FFA, DECA, FBLA @ $4865 per stipend	
	Athletic event-related expenses		0	Transportation, referees, uniforms, event supervision, league fees	Athletic participation & gate receipts fee cover costs
Professional training & development	Teacher professional development related to standards and assessments	57.8	115,500	$200 per diem- District/school discretion on how this is utilized. Can be extended contracts, stipends, substitute costs.	10 days each for all licensed staff or other combinations at school's discretion.

Continued on the next page...

FULL IMPLEMENTATION

The Oregon Quality Education Model
High School
Costs for one year - 1000 students

Program Element	Component	FTE	Component Cost	Explanation/ Assumptions	Comments
	Materials, Travel,		12,994	$225 per staff member	
	Consultants		3,000		
	Instructional support staff-10 days		3,500	$100 per day	Training focused on special ed. support staff.
Additional instructional time for students to achieve standards	Licensed	3.0	54,600	200 students - 4wks summer schl:1/2 days- 13 FTE, 1 wk full-time preparation and 4wks 1/2 days teaching @ $280/day @ 15:1	
	Classified	2.0	3,000	1 wk full-time preparation and 4wks 1/2 days @ $100/day	
	Supplies		4,000	$20 per student	
	Other activities		80,000	Saturday school, tutoring, after school programs @ $400 per student	200 students
Centralized support costs: Centralized costs distributed to each building	Food services		12,000	$12 per student	In many districts this is run on a break-even basis
	Student transportation		231,000	High school transportation is state-mandated unless district receives a waiver. $231 per student	
	Technology services		95,000	Computer networks, telephones, voice mail, student records, administrative computing services. $95 per student	
	Operation, maintenance of plant		402,000	Custodian, maintenance staff, utilities, security system, roof repair, general upkeep. $402 per student	
	Other support services		59,000	Warehouse, courier service, community facilities (pool, library) $59 per student	
	Centralized special education		105,000	Self-contained schools, other students who are not served at the building level. $105 per student.	
District administrative overhead	Executive administration (Board of Education, superintendent)		61,000	Average figures from Database Pilot Project. $61 per student	

Continued on the next page...

FULL IMPLEMENTATION			*The Oregon Quality Education Model* High School *Costs for one year - 1000 students*		
Program Element	Component	FTE	Component Cost	Explanation/ Assumptions	Comments
	Business & Fiscal Services		71,000	$71 per student	
	Personnel Services		64,000	$64 per student	
	Public Information		12,000	$12 per student	
Total school cost			6,508,159		
Total per pupil cost			6,508	This number is not comparable to current average per-pupil figures. It does not take into account weighting factors, average daily membership, or other components of current per-pupil measures. The number reflects the cost of this school only and will be different for other schools. It is not a number that can be used for allocating funds to individual schools and should not be viewed as a target figure for individual schools.	

PHASED IMPLEMENTATION

The Oregon Quality Education Model
Elementary School
Costs for one year - 340 students

Program Element	Component	FTE	Component Cost	Explanation/ Assumptions	Comments
Core staff	Kindergarten	1.00	57,827	Phases in full day Kindergarten over two years = 40 students: 1 FTE @ 20:1 in 99-00; 2 fte @ 20:1 in 00-01	57,827
	1-3	8.00	462,617	1-3=180@ 24:1 in 99-00; 20:1	Note: Pupil-teacher ratio in third grade drops in 00-0. FTE in 00-01= 9.0
	4-5	4.50	260,222	4--5=120 @ 27:1	Salary = $41,937 for 97-98. Benefit rate = 34.2%. 98-99 Salary increase = 2.275%
Program staff	Music, PE, art, media, 2nd lang., reading specialist	4.00	231,309	Schools can make choices among these. Assumes second language instruction as one choice	
	ESL	0.50	28,914	Assumes 5% ESL (17 students)	Not a self-contained program
Special education staff	41 special ed. students	1.50	86,741	Includes itinerant services @ .25. Assumes high-cost students are funded directly from the state.	Federal and ESD contributions result in more funds being actually available.
Instructional support staff assistance	Classified- spec ed,, records clerk, media center playground supervisor. Average hourly rate X hours/year. From OSEA.	5.00	99,308	Spec ed,, records clerk, parent involvement, playground supervisor. School has discretion to distribute support staff as it deems most effective	Average hourly rate = $10 per hour @ 8 hours per day @ 185 days per year. Benefit rate = 34.2%
	Secretary	1.00	27,055		$12 per hour @ 8 hours per day @ 210 days. Benefit rate = 34.2%
Administrative accountability	Principal	1.00	83,978	Cost from COSA salary survey- salary and fringe benefits	Average salary = $62,577 from COSA survey. Benefit rate = 34.2%
Computer hardware/software	Hardware including student and administrative		12,500	Purchases new computers on a 7 year replacement cycle. 12 computers per yr	6 students/computer, 1 computer/instructional & administrative staff
	Software		2,720	Each new machine licensed software from replacement machine plus $150/machine	$150 per new computer = $1800. Software for existing computers = $920

Continued on the next page...

PHASED IMPLEMENTATION

The Oregon Quality Education Model
Elementary School
Costs for one year - 340 students

Program Element	Component	FTE	Component Cost	Explanation/ Assumptions	Comments
	Classroom materials & equipment		38,420	Includes video, tvs for classes, globes, maps, science equipment, etc.	$113 per student
	Copying		8,568	Classroom-related, administrative	1680 copies per student @ $.015 per copy
	Media center materials		4,080	Library books, reference materials, subscriptions	$12 per student
	Teacher reimbursement of materials purchases		3,400	Out-of-pocket teacher expenses for materials/supplies @ $10 per student.	Reflects actual current average contribution of teachers- would not be given to each teacher as an individual budget.
Professional training & development	Teacher professional development related to standards and assessments- 10 days	22.50	45,000	$200 per diem- District/school discretion on how this is utilized. Can be extended contracts, stipends, substitute costs.	Schools will use a combination of extended contract, stipends, per diem to compensate teachers
	Materials, Travel,		4,950	$225 per teacher	
	Consultants				
	Support staff-10 days	2.5	2,500	$100 per day	
Additional instructional time for students to achieve standards	Certified		12,600	60 students - 4wks summer schl:1/2 days- 3 FTE 1 wk full-time preparation and 4wks 1/2 teaching @ $280/day	Summer school and extra time will be focused on students with most need and motivation, not available to all students.
	Classified		1,500	1 FTE 1 wk preparation and 4wks 1/2 time school @ $100/day	
	Supplies		1,200	$20 per student	
Centralized support costs: Centralized costs distributed to each building	Food services	0			Assumes self-supporting food services program
	Student transportation		81,940	$241 per student	
	Technology services		32,300	Computer networks, telephones, voice mail - $95 per student	

Continued on the next page...

PHASED IMPLEMENTATION			*The Oregon Quality Education Model* Elementary School *Costs for one year - 340 students*		
Program Element	Component	FTE	Component Cost	Explanation/ Assumptions	Comments
	Operation, plant maintenance		136,680	Custodian, maintenance staff, utilities, security system - $402 per student	
	Other support services		20,060	Warehouse, courier service, community facilities (pool, library) - $59 per student	
	Centralized special education		35,700	Self-contained schools, other students who are not served at the building level - $105 per student	
District administrative overhead	Executive administration: Board of Education, superintendent		20,740	$61 per student	
	Business & Fiscal Services		24,140	$71 per student	
	Personnel Services		21,760	$64 per student, includes district supplemental retirement incentives	
	Public Information		4,080	$12 per student	
Total school cost:			2,082,483		
Total per pupil cost (not comparable to ADMw):			6,125	Costs are estimated for 98-99 based on October 1st student enrollment.This number is not comparable to current average per-pupil figures. It does not take into account weighting factors, average daily membership, or other components of current per-pupil measures. The number reflects the cost of this school only and will be different for other schools. It is not a number that can be used for allocating funds to individual schools and should not be viewed as a target figure for individual schools.	

PHASED IMPLEMENTATION

The Oregon Quality Education Model
Middle School
Costs for one year - 500 students

Program Element	Component	FTE	Component Cost	Explanation/ Assumptions	Comments
				97-98 average salary = $42,741, increased by 2.75% for 98-99. Benefit rate = 34.2%. Average salary assumes COLA increase for 98-99 with lower salaries of new hires balancing cost increase of step increases.	Assumes teachers teach 6 of 7 classes in a day. Assumes students are taking classes each period)
Core staffing	English, math, science, social sciences, second languages, the arts	17.00	1,001,908	Each student takes English, math, science, social science, second lang (at least 1 yr), arts (at least 1 yr) plus extra sections in core academic areas	
	ESL	0.50	29,468	25 students, 1 period/day	20:1 ratio, 1 period/day (assumes decreasing time in ESL over 4 years)
	Additional course staffing	4.00	235,743	Electives such as P.E., health, computers	Students take 6 core courses/1 elective per day
	Licensed academic support staff	1.00	58,936	Library media	
	Special education staffing	3.00	176,807	60 spec. ed. students. Teachers teach 5 of 8 classes to allow time for paperwork, IEP meetings	Itinerant services for areas like speech pathologist, school psychologist @ .50: Includes Medicare offset.
Counseling		2.00	117,872	Run student support groups, family liaison, crisis intervention, peer mediation, drug & alcohol, some academic advising	1:250 as per accreditation guidelines
Instructional support staff assistance	Special ed.	2.00	39,723	Average hourly rate = $10 per hour @ 8 hours per day @ 185 days per year. Benefit rate = 34.2%	
	Principal's secretary	1.00	33,496	$12 per hour @ 260 days per yr	
	Attendance	1.00	19,862	$10 per hour @ 185 days per yr	
	Additional Support	3.00	59,585	$10 per hour @ 185 days per yr	
	School nurse	0.50	29,468	Licensed staff rate	

Continued on the next page...

PHASED IMPLEMENTATION

The Oregon Quality Education Model
Middle School
Costs for one year - 500 students

Program Element	Component	FTE	Component Cost	Explanation/ Assumptions	Comments
	Media center assistant	1.00	23,619	$10 per hour @ 220 days per yr	
	Receptionist	1.00	19,862	$10 per hour @ 185 days per yr	
	Campus monitor	1.00	19,862	$10 per hour @ 185 days per yr	
Administrative accountability	Principal	1.00	99,850	$74,402 annual salary from COSA salary survey. Benefit rate = 34.2%	
	Assistant principal	1.00	85,779	$63,919 annual salary COSA salary survey. Benefit rate = 34.2%	
	Teacher leadership		18,000	Department chairs, lead teachers	
Computer hardware/ software	Hardware including student and administrative		21,000	Purchases 20% new computers per year (16 student, 5 staff) @ $1000 per computer	6 students/computer, 1 computer/instructional & administrative staff
Computer hardware/ software	Software		3,150	Each new machine licensed software from replacement machine plus $150/machine	
Supplies, books, materials	Texts, consumables, classroom sets		30,000	$60 per student	
	Classroom materials, all equipment, supplies		63,000	Includes video, tvs for classes, globes, maps, science equipment, etc. $126 per student	
	Copying		10,500	Classroom, administrative. $21 per student	1400 copies per student @ .015 per copy
	Media center materials		9,000	Library books, reference materials, subscriptions. $18 per student	
Extra-curricular activities	Extracurricular expenditures		78,500	Clubs, drama, debate, newspaper, FFA, athletics. $157 per student	From the Database
Professional training & development	Teacher professional development related to standards and assessments	27.50	55,000	Extended contracts, planning retreats, teacher releases, stipends, substitutes. $200/day/10 days/ 27.5 licensed staff	

Continued on the next page...

PHASED IMPLEMENTATION			*The Oregon Quality Education Model* Middle School *Costs for one year - 500 students*		
Program Element	Component	FTE	Component Cost	Explanation/ Assumptions	Comments
	Materials, Travel		2,888	$105 per staff member	
	Consultants		1,000		
	Instructional support staff-10 days		2,000	$100 per day	
Additional instructional time for students to achieve standards	Licensed		27,300	100 students - 4wks summer schl:1/2 days-6.5 FTE, 1 wk full-time preparation and 4wks 1/2 days teaching @ $280/day @ 15:1	
	Classified		1,500	1 wk full-time preparation and 4wks 1/2 days @ $100/day	
	Supplies		1,200	$12 per student	
	Other activities		20,000	Saturday school, tutoring, after school programs	100 students
Centralized support costs: Centralized costs distributed to each building	Food services		0		
	Student transportation		115,500	$231 per student	
	Technology services		47,500	Computer networks, telephones, voice mail. $95 per student	
	Operation, maintenance of plant		175,000	Custodian, maintenance staff, utilities, security system, roof repair, general upkeep. $350 per student	
	Other support services		29,500	Warehouse, courier service, community facilities (pool, library). $59 per student	
	Centralized special education		52,500	Self-contained schools, other students who are not served at the building level. $105 per student	
District administrative overhead	Executive administration (Board of Education, superintendent)		30,500	Average figures from Database Pilot Project. $61 per student	

Continued on the next page...

PHASED IMPLEMENTATION			*The Oregon Quality Education Model* Middle School *Costs for one year - 500 students*		
Program Element	Component	FTE	Component Cost	Explanation/ Assumptions	Comments
	Business & Fiscal Services		35,500	$71 per student	
	Personnel Services		32,000	$64 per student	
	Public Information		6,000	$12 per student	
Total school cost:			2,919,877		
Total per pupil cost:			5,840	This number is not comparable to current average per-pupil figures. It does not take into account weighting factors, average daily membership, or other components of current per-pupil measures. The number reflects the cost of this school only and will be different for other schools. It is not a number that can be used for allocating funds to individual schools and should not be viewed as a target figure for individual schools.	

PHASED IMPLEMENTATION

The Oregon Quality Education Model
High School
Costs for one year - 1000 students

Program Element	Component	FTE	Component Cost	Explanation/ Assumptions	Comments
				97-98 average salary = $42,741, increased by 2.75% for 98-99. Benefit rate = 34.2%. Average salary assumes COLA increase for 98-99 with lower salaries of new hires balancing cost increase of step increases.	Assumes teachers teach 3/4 of classes in a day (3 of 4 or 6 of 8). Assumes students are taking 7 of 8 classes at 9 and 10 and 6 of 8 at 11 and 12)
Core staffing	English, math, science, social sciences, second languages, the arts	35.00	2,062,752		Each student takes 4 english, 4 math, 4 science, 4 social science, 3 second lang., 2 arts, 181 classes, 29:1 ratio, 37.6 FTE
	ESL	0.50	29,468	50 students, 1 period/day	20:1 ratio, 1 period/day (assumes decreasing time in ESL over 4 years)
	Additional course staffing	7.00	412,550	Additional class in core area, plus P.E., health, Professional/ Technical, business, home ec., building technology coordinator	Students taking average 5 electives over 4 years
	Licensed academic support staff	1.00	58,936	Library media	
	Special education staffing	3.00	176,807	120 spec. ed. students. Teachers teach 5 of 8 classes to allow time for paperwork, IEP meetings	Itinerant services for areas like speech pathologist, school psychologist @ .75. Includes Medicare offset.
	Additional special student programs	2.00	117,872	Alternative ed., teen parent, adjudicated students, home tutors	
Counseling	Additional special student programs	4.00	235,743	Run student support groups, family liaison, crisis intervention, peer mediation, drug & alcohol, some academic	
Instructional support staff assistance	Support staff for Alternative ed., teen parent	1.50	35,429	Average hourly rate = $10 per hour @ 8 hours per day @ 220 days per year. Benefit rate =	
	Special ed.	2.00	39,723	Classified- 1 spec ed, 1 records clerk. $10 per	
	Special ed.	2.00	39,723	Classified- 1 spec ed, 1 records clerk. $10 per hour @ 185 days per yr	

Continued on the next page...

PHASED IMPLEMENTATION

The Oregon Quality Education Model
High School
Costs for one year - 1000 students

Program Element	Component	FTE	Component Cost	Explanation/ Assumptions	Comments
	Principal's secretary	1.00	33,496	$12 per hr @ 260 days per yr	
	Counseling office	1.00	23,619	$10 per hr @ 220 days per yr	
	Registrar	1.00	27,914	$10 per hr @ 260 days per yr	
	Attendance	1.00	19,862	$10 per hr @ 185 days per yr	
	Departmental support	1.00	19,862	$10 per hr @ 185 days per yr	
	Bookkeeper	1.00	27,914	$10 per hr @ 260 days per yr	
	Nurse	1.00	58,936	Licensed staff rate	
	Health clerk	0.50	9,931	$10 per hr @ 185 days per yr	
	Media center assistant	1.00	23,619	$10 per hr @ 220 days per yr	
	Receptionist	1.00	19,862	$10 per hr @ 185 days per yr	
	Campus monitor	2.00	39,723	$10 per hr @ 185 days per yr	
Administrative accountability	Principal	1.00	105,556	$78,656 annual salary from COSA salary survey. Benefit rate = 34.2%	
	Assistant principals	2.00	182,134	$67,859 annual salary COSA salary survey. Benefit rate = 34.2%	
	Athletic director	0.50	83,204	$62,000 annual salary COSA salary survey. Benefit rate = 34.2%	
	Teacher leadership		52,000	Department chairs, lead teachers	
Computer hardware/ software	Hardware including student and administrative		45,000	Purchases 20% new computers per year (32 student, 10 staff, 3 office) @ $1000 per computer	6 students/computer, 1 computer/instructional & administrative staff
	Software		6,750	Each new machine licensed software from replacement machine plus $150/machine	
Supplies, books, materials	Texts, consumables, classroom sets		75,000	$75 per student	
	Classroom materials, all equipment, supplies		159,000	Includes video, tvs for classes, globes, maps, science equipment, etc. $159 per student	

Continued on the next page...

PHASED IMPLEMENTATION

The Oregon Quality Education Model
High School
Costs for one year - 1000 students

Program Element	Component	FTE	Component Cost	Explanation/ Assumptions	Comments
	Classroom materials, all equipment, supplies		159,000	Includes video, tvs for classes, globes, maps, science equipment, etc. $159 per student	
	Copying		22,000	Classroom-related, administrative. $22 per student	1467 copies per student @ .015 per copy
	Media center materials		34,000	library books, reference materials, subscriptions. $34 per student	
Extra-curricular activities	Coaching	37.00	180,005	Average coaching stipend of $4865 including benefits	
	Other extracurricular sponsors	8.00	38,920	Clubs, drama, debate, newspaper, FFA, DECA, FBLA @ $4865 per stipend	
	Athletic event-related expenses		0	Transportation, referees, uniforms, event supervision, league fees	Athletic participation & gate receipts fee cover costs
Professional training & development	Teacher professional development related to standards and assessments- 10 days	38.5	77,000	Extended contracts, planning retreats, teacher releases, stipends, substitutes. $200 per diem	
	Materials, Travel,		5,688	$125 per staff member	
	Consultants		3,000		
	Instructional support staff-10 days	3.5	3,500	$100 per day	
Additional instructional time for students to achieve standards	Licensed	3.0	54,600	200 students - 4wks summer schl:1/2 days-13 FTE, 1 wk full-time preparation and 4wks 1/2 days teaching @ $280/day @ 15:1	
	Classified	2.0	3,000	1 wk full-time preparation and 4 wks 1/2 days @ $100/day	
	Supplies	2.0	4,000	$20 per student	
	Other activities	2.0	30,000	Saturday school, tutoring, after school programs @ $150 per student	200 students

Continued on the next page...

PHASED IMPLEMENTATION			*The Oregon Quality Education Model* High School *Costs for one year - 1000 students*		
Program Element	**Component**	**FTE**	**Component Cost**	**Explanation/ Assumptions**	**Comments**
Centralized support costs: Centralized	Food services		12,000	$12.00 per student	In many districts this is run on a break-even basis
	Student transportation		231,000	High school transportation is state-mandated unless district receives a waiver. $231 per stu-	
	Technology services		95,000	Computer networks, telephones, voice mail, student records, administrative computing services. $95 per student	
	Technology services		95,000	Computer networks, telephones, voice mail, student records, administrative computing services. $95 per student	
	Operation, maintenance of plant		350,000	Custodian, maintenance staff, utilities, security system, roof repair, general upkeep. $350 per student	
	Other support services		59,000	Warehouse, courier service, community facilities (pool, library) $59 per student	
	Centralized special education		105,000	Self-contained schools, other students who are not served at the building level. $105 per student.	
District administrative overhead	Executive administration (Board of		61,000	Average figures from Database Pilot Project. $61 per student	
	Business & Fiscal Services		71,000	$71 per student	
	Personnel Services		64,000	$64 per student	
	Public Information		12,000	$12 per student	
Total school cost:			5,698,373		
Total per pupil cost:			5,698	This number is not comparable to current average per-pupil figures. It does not take into account weighting factors, average daily membership, or other components of current per-pupil measures. The number reflects the cost of this school only and will be different for other schools. It is not a number that can be used for allocating funds to individual schools and should not be viewed as a target figure for individual schools.	

Phased Implementation: Specific Funding Options

1. Fund full implementation of the model at K through 3 during this biennium.
2. Next biennium, continue funding K-3 and add grades 4 and 5.
3. Continue adding two grade levels each biennium until model is fully implemented.
4. In the interim, fund two elements of the model for all schools:
    - Additional instruction time for students to achieve standards
    - Professional training and development

This will allow students currently in the system to receive improved instruction during the phase-in period.

Oregon schools would be expected to demonstrate significant, sustained improvement until the goal of 90 percent of students at standards was reached, while ensuring that the remaining 10 percent are making significant progress to be as near to reaching the standard as possible. In many cases, it would not be unrealistic to expect schools to reach the 90 percent level for each grade of the fully funded cohort as the cohort moved through the school.

Technical Manual: Using the Oregon Quality Education Model

The Oregon Quality Education Model has been developed in the context of the Oregon education environment. This section provides an explanation of the calculations, formulas and data sources for the elements and components of the model's Prototype Schools.

The Oregon Quality Education Model can also be a valuable tool for use by other states in determining proper education funding levels and linking that funding to performance. The assumptions, components, elements and fiscal formulas of the Oregon model can be modifed to fit other educational environments.

TECHNICAL MANUAL: THE OREGON QUALITY EDUCATION MODEL

CALCULATIONS, FORMULAS AND DATA SOURCES FOR ELEMENTS AND COMPONENTS OF THE OREGON QUALITY EDUCATION MODEL PROTOTYPE SCHOOLS

GENERAL ASSUMPTIONS

Baseline costs and inflation factor: All costs are based on figures for the 1998-99 school year. An inflation factor of 4.1% is applied to the total cost estimates to arrive at a total budget figure for 1999-2000. The 4.1% figure included inflation, enrollment growth and the PERS increase.

Funds contained in the model: The model contains only state school fund formula dollars, including local property tax revenues. It does not include federal funds, ESD funds, revenue bond dollars or other sources outside the state school fund formula.

EXPLANATION OF FULL IMPLEMENTATION MODEL FORMULAS

Element or Component	Data Source	Explanation
Core Licensed Staff	Salary: Oregon Department of Education Finance Department Payroll costs and fringe benefits: Database Inititative Project pilot districts average. 1998-99 Increase: Confederation of School Administrators (COSA) salary survey.	*Elementary:* Takes average teacher salary from 1997-98, multiplies it by a payroll cost and fringe benefit rate of 34.2%, then increases the amount by 2.75% for 1998-99. *Middle and High:* Same Assumptions as elementary with slightly higher average salary (from state averages). NOTE: Calculations assume that costs of step and increment will be cancelled out by number of new teachers who will be hired to replace retiring teachers near or at top of salary schedule.

Class Size	Quality Education Model Recommendation	*Elementary:* Divides 340 students by 20 *Middle:* Core classes capped at 29 *High:* Core classes capped at 29
ESL Staffing Ratio	Expert Recommendation	Assumes students are not self-contained in ESL program
Special Education Staffing	Expert Recommendation	Assumes possible additional services provided by ESD and federal funds outside the model
Instructional Support Staff - School Secretary	Average from representative Database Initiative Project pilot districts	Takes average hourly rate of $12/hour, multiplies by 8 hours/day, by 210 days, and by payroll cost and fringe benefit rate of 34.2%
Administrative Accountability, Principal, Assistant Principal salary	COSA Administrator Survey	Includes salary and payroll costs and benefits at 34.2%
Teacher Leadership	Extra-duty pay based on current practices in large districts	Includes department chairs, lead teachers, extended contracts hourly pay for teachers above contract
Computer Hardware	Quality Education Model Recommendation Market prices/Expert Recommendation	6 students per computer, 1 computer per instructional and office support staff 340 students divided by 6 divided by 5 = 11 computers/year for students. 22 teachers, 3 support staff, principal, itinerants divided by 5 = 6, times$1000/computer
Computer Software	Market prices/Expert Recommendation	$150 per each new machine plus equivalent for each existing machine
Supplies, Books, Materials:Books, Consumables, Classroom Sets	Extrapolation of 1988 text costs to 1999 with CPI multiplier. Based on Eugene, Oregon 4J School District survey of actual true costs	$60/student

Supplies, Books, Materials: Classroom materials & Equipment	Extrapolation of 1988 test costs to 1999 with CIP multiplier. Based on Eugene, Oregon 4J School District survey of actual true costs	$113/ student. Includes video, TV's, overhead projectors, science equipment
Supplies, Books, Materials: Copying	Average cost of actual costs from Eugene and Portland, Oregon Public Schools	1680 copies/student @ .015/copy. Includes machine costs plus paper
Supplies, Books, Materials:Media Center	Extrapolation of 1988 text costs to 1999 with CPI multiplier. Based on Eugene 4J survey of actual true costs	$12/student. Includes library books, reference materials, subscriptions
Supplies, Books, Materials:Teacher reimbursement of materials purchased	Expert Recommendation	$10/student. Not an individual account for each teacher. Can be used only for materials directly related to augmenting learning related to standards
Professional Training & Development: Licensed Staf	$280 average per diem (average salary, payroll costs less benefits divided by 191 days) Statewide minimum substitute salary of $116/day plus 11% payroll costs	$200/day. Cost reflects an averaging between $130/day for substitute and $280/day for teacher per diem rate. Assumes a combination of activities such as extended contract, release days and varying rates of participation by each teacher
Professional Training & Development: Support Staff	Expert recommendation based on previous experience with 2020 and Goals 2000 grants from Oregon Department of Education Office of Curriculum, Instruction, Field Services	Limited to support staff who provide instructional assistance directly to students. $10/hour plus payroll costs.
Additional Instructional Time:Licensed Staff	Expert recommendation from results of existing summer school and after school programs	$280 average per diem (average salary, payroll costs less benefits divided by 191 days). 60 students for 4 weeks of half-day summer school. 3 licensed staff, 1 week full-time preparation, 4 weeks half-time instruction.

Additional Instructional Time:Classified Staff	Expert recommendation from results of existing summer school and after school programs	Direct support to students in summer school
Additional Instructional Time: Supplies	Expert recommendation based on Portland Public Schools current summer school costs	$20/student. Assumes use of existing supplies, materials, books where possible
Centralized Support Costs: Student Transportation	Database Initiative Project pilot districts average cost referenced against actual state costs	Includes all transportation costs included in funding formula @ 100% of cost.
Centralized Support Costs: Technology Services	Database Initiative Project pilot districts average cost adjusted to reflect deferred needs	Includes district central computing services, voice mail, all telephone charges, building networks, staff support for all technology systems, repairs
Centralized Support Costs:Operation, Plant Maintenance	Database Initiative Project pilot districts average cost adjusted to reflect deferred needs	Includes regular maintenance, non-bondable costs, including all facilities repairs and improvements.
Centralized Support Costs: Other Support Services	Database Initiative Project pilot districts average cost adjusted to reflect deferred needs	Self-contained schools, other students who are not served at the building level including alternative education, home tutors - $105 per student.
Centralized Special Education Services	Expert Recommendation	Special education programs not housed at individual schools
Executive Administration: Board of Education, Superintendent	Database Initiative Project pilot districts average costs	Includes superintendent, board of education, centralized curriculum support, personnel, all other centralized administrative costs.
Business and Fiscal Services	Database Initiative Project pilot districts average costs	
Personnel Services	Database Initiative Project pilot districts average costs	Includes district supplemental retirement incentives
Public Information	Database Initiative Project pilot districts average costs	

Next: Measuring Performance and Tracking Accountability

The Oregon Quality Education Model describes the resources and conditions that might reasonably be associated with increased levels of student performance. However, effective application and use of the model requires the ability to measure that performance and hold schools accountable for improved performance.

In this section, the critical tools for accountability and possible governance strategies for the use of those tools are identified. With the tools emerging, Oregon is poised to create a high-performance K-12 system that is accountable for producing the best possible quality education program at the lowest possible cost.

Measuring Performance

Over the course of the last decade, the state has crafted a system that allows comparisons among schools along several important dimensions.

The Database Initiative Project

The initiation of the Database Initiative Project by the Oregon Department of Education has placed the state in an excellent position to accurately collect, analyze and report financial and non-financial data. Launched in 1997 as a pilot project involving sixteen school districts and intended for statewide usage, the Database Project, using a uniform chart of accounts, tracks school expenditures and other school statistics by function. For the first time, the state is able to collect data from its school districts that is consistent, comprehensive and comparable. Many school districts still maintain independent accounting systems but all are now required to report information to the state in a uniform format. By next biennium (1999-2000), comparative data, i.e, how dollars are spent to support student learning, from all Oregon schools will be available.

Equalization of Funding

In addition, with funding equalization nearly fully phased in, districts each now have approximately the same per-pupil funding (though, in practice, districts may distribute these funds to schools differently and the statewide funding distribution formula, in recognizing differences in the weightings of students, does not fund each student at precisely the same level.)

Standardized Testing and Assessment

Finally, Oregon has fully established content standards for math, English (including reading, literature and writing), science and social sciences (including geography, history, civics and economics.) Assessments that gauge achievement of the standards are already in place statewide in math and English. Science assessments are in the final stages of piloting, and social science assessments are in their initial stages. By the next biennium the Legislature will have available to it extensive data on individual school performance, allowing comparisons between schools. Over time, the data will allow longitudinal comparisons that gauge the progress of individual schools.

Tracking Accountability

Using *The Oregon Quality Education Model* and the other tools of measurement established in the state, it is possible to develop estimates of the amount of money necessary to reach desired performance levels as well as measure the level of performance achieved.

As the state begins appropriating revenues for education based on presumed performance, the need for some sort of accountability process is needed. *What happens when schools do not meet the performance levels that have been assumed and for which the state has budgeted?*

This issue is a complex one, in part, because the factors influencing student performance are diverse and the model's predictive value will need to be refined with usage over time. However, comparisons and judgments would seem inevitable, which makes it critical to develop a system for comparison that is fair and equitable.

A New State Role

First, as new tools are developed, it must be recognized that the role of the state in relationship to districts is fundamentally changing. In the past, any state intervention tended to focus on regulation and requirements. Under the new model, the focus is on holding schools accountable for performance results and giving individual school and school districts greater flexibility in achieving results. Schools are expected in the future to be more diverse in how they develop programs, yet more similar in terms of delivering high performance results for all students.

In this context, the critical role for state government will be to identify the practices schools are applying to improve learning and to encourage schools to learn from each other what works and does not work. The database and the common assessment system are critical tools for this responsibility.

The second and more complex role for the state is how it ensures accountability. In the past, accountability was achieved through regulation. There are a wide range of alternatives used throughout the country in response to the issue of accountability. Examples include rewards or penalties based on performance, intervention through state teams, and competition and choice through the involvement of outside contractual services. Any of these or a combination can be applied.

Preserving Local Control

Local control is an almost hallowed tradition in Oregon school districts. The goal of an accountable, efficient, high-performance school system is not to diminish that local control but, in critical ways, change its emphasis. School boards will need to focus their districts on doing best that which the state cannot do—ensuring that the program at each school is effectively enabling students to meet state-defined standards by providing the educational program most appropriate for that community. Local boards of education will need to become expert at analyzing and reflecting upon performance data from each school within the district, at working with staff to allocate resources appropriately in the ways most likely to improve student performance, and ensuring each school is staffed with the most capable and competent adults available. This redefined relationship with the state helps direct all stakeholders to learning and student achievement.

A Partnership for Accountability

In the final analysis, schools exist to meet the needs of children within a framework created by the state. *The Oregon Quality Education Model* is but one element of a multidimensional system of policies and procedures that, when properly aligned, can send consistent messages to teachers, principals, superintendents, boards of education, parents, lawmakers and the larger community.

This system is the means by which the taxpayer can be assured that the amount of money being spent on education is appropriate, and that schools are operating in a way to maximize the efficiency and effectiveness of those dollars. Schools will show continuous improvement and those that are unable to do so can be identified and given a diagnosis of their problems. Local involvement and ownership of schools is to be retained, and the state would intervene further only when the welfare of students required it.

Currently, a system for assessing the effectiveness of public school districts is contained in Oregon law. (ORS 329.085, 329.095, 329.105, 329.115)

Combining this system with the information provided through the use of *The Oregon Quality Education Model*, the following recommendations are offered:

1. The Standards for Success

While performance on state tests certainly is one measure of success in schools, there are others. *The Oregon Quality Education Model* acknowledges the complexity of school success by including a wide range of assumptions, tangible and intangible (see page 31-34 for description), for each Prototype School. These assumptions form the basis for a quality improvement rating for each school.

The Oregon State Board of Education, which is required to establish standards for district effectiveness, should include standards for student performance, standards for school performance and standards for student accessibility to educational opportunities. The components considered in establishing standards should include but not be limited to:

- Student scores on the benchmark tests
- Growth rates on student assessment scores

- Dropout rates
- Attendance rates

At least once every five years, the Board should review existing standards and, after public hearings and consultation with local school officials, make appropriate revisions.

2. District Improvement Plans

Oregon law also requires schools districts and schools to conduct self-evaluations and update their local District Improvement Plans every two years. In establishing a District Improvement Plan, districts are to:

- Review demographics, student performance, student access to and utilization of education opportunities and staff characteristics.
- Involve the public in the setting of school's goals, through a communications process that involves parents, students, teachers, school employees and community representatives.
- Include district efforts to achieve local efficiencies and efforts to make better use of resources, e.g., use of magnet schools, energy programs, public and private partnerships, staffing and other economies.
- Include programs and policies for the development of a safe educational environment.
- Include short-term and long-terms plans for staff development.
- Make the District Improvement Plan available to the public.

The Legislative Council on *The Oregon Quality Education Model* recommends that the District Improvement Plan include the following:

- Drop out rate and measures taken to reduce this rate.
- Percentage of students, school by school, meeting the standards in the district, broken down by SES indicators as well as other demographic factors.
- Percentage of students, school by school, reaching the standards and how the average test scores of the students have changed over the last three years, broken down by SES indicators, other demographic factors, and distribution by quartiles.
- Steps and measures taken to help students meet the new standards, including amount of remediation available to students requiring additional help, with specific targets and timelines.
- Identification of the resources the district determines it lacks or needs to achieve the goals and timeline it has set forth to reach the standards.
- Performance and improvement of special education and ESL students.

3. Tracking Performance

Under state law, the Oregon State Board of Education is required to assess the effectiveness of each public school district. Specifically, the Superintendent of Public Instruction is required to:

- Collect data and produce annual school and district performance reports containing information on demographics, student performance in schools, student access to education opportunity and staff characteristics, and a concise budget report including revenue and expenditures. The statewide implementation of the Database Initiative Project will make this possible for the first time.
- Notify the public and the media by September 30th of each year as to the availability of school and district performance reports at school districts and Department of Education offices.
- Issue an *Oregon Report Card* prior to January 30th of each year, on the state of the public schools for the purpose of monitoring trends and progress among school districts. Specifically, this report is to include:

    1) Demographic information on public school children in Oregon.
    2) Information pertaining to student achievement, including statewide assessment data, graduation rates and dropout rates, and progress toward achieving Oregon's education benchmarks.
    3) Information pertaining to special program offerings.
    4) Information pertaining to the characteristics of the school and school staff, including assignment of teachers, experience of staff and the proportion of minorities and women represented on the teaching and administrative staff.
    5) Budget information, including source and disposition of school district operating funds and salary data.
    6) Examples of exemplary programs, proven practices, programs designed to reduce costs or other innovations in education being developed by school districts in Oregon that show improved student learning.

In addition, districts are required to:

- Allow educators and local citizens to determine and share successful and unsuccessful school programs.
- Allow educators to sustain support for reforms demonstrated to be successful.
- Recognize schools for their progress and achievements.
- Facilitate the use of educational resources and innovations in the most effective manner.

WHEN STANDARDS ARE NOT MET: THE RESPONSIBILITY OF THE STATE

Under Oregon Law, the Oregon State Board of Education is required to provide ongoing technical assistance for school districts in the development and implementation of their *District Improvement Plans.*

The Legislative Council on *The Oregon Quality Education Model* makes the following additional recommendations:

- The Oregon Department of Education should conduct diagnostic reviews to determine the quality and improvement of each school in the state. The Department of Education should also develop means to make appropriate comparisons among schools to determine relative growth and achievement, as well as scales to determine absolute achievement in terms of the number and percent of students meeting state standards. The quality review should also take into account other factors contained in *The Oregon Quality Education Model*, including key intangibles. This report should be transmitted to the local board of education for review. Each board of education will then be responsible for improvements as needed.

- The Oregon Department of Education should provide resources as requested to help schools improve, including information on best practices, Oregon schools to visit for examples of successful practices, and more detailed suggestions on improvements. However, the responsibility for school improvement will lie with the local school board and superintendent. The state will provide information, identify useful resources, and facilitate effective change processes, as requested. Schools and districts that prove unable or unwilling to improve will be subject to a full quality review designed to ensure that students at those schools and in those districts receive the best opportunity for a successful education.

- The Board of Education should establish a program for recognition of schools that outperform comparable schools or demonstrate sustained, significant gains in student achievement of benchmarks.

- A non-partisan Advisory Group should be appointed by the Governor between legislative sessions to review *The Oregon Quality Education Model* and update the elements, components, characteristics, and tangible and intangible assumptions of the three Prototype Schools. *The Oregon Quality Education Model* Advisory Group shall include practicing superintendents, school board members, principals, teachers who are currently engaged in teaching the CIM and CAM and business leaders. In addition, this Board shall have bi-partisan legislative representation from both the House and Senate with the percentage of sitting legislators not to exceed 20% of the entire board membership. Staffing of the Advisory Board should be provided by the Oregon Department of Education. The review of *The Oregon Quality Education Model* to be conducted by the Advisory Board should include consideration of information generated by the database on the performance of Oregon

schools and a thorough investigation of best educational practices nationally. The goal of this review will be to refine the Prototype Schools so that they represent the most effective and efficient examples of how to achieve the multiple educational goals outlined in *The Oregon Quality Education Model* for the least cost to the state. These revised Prototype Schools will be presented to the State Board of Education, the Legislative Interim Committees and to the Governor and Legislature for their consideration in deriving the state school budget.

Making the Model Law: Proposed Legislation

The following proposed legislation is recommended by the members of the Legislative Council on *The Oregon Quality Education Model*:

THE OREGON QUALITY EDUCATION ACT

LEGISLATIVE INTENT:

It is the intent of the Oregon Legislative Assembly that:

1. *The Oregon Quality Education Model* be employed as a tool to provide legislators and the public a way to link school funding to student performance.
2. The Governor, in his biennial budget, shall use the model in the development of his recommended appropriations to the K-12 State School Fund.
3. The Legislature shall use the model in determining the cost for achieving the K-12 state performance standards and provide clear performance level expectations based on the amount of funding provided.
4. School districts shall have and maintain the flexibility to develop their own programs to achieve the performance expectations established by the Legislature and to meet additional locally determined educational goals.

SECTION 1.

1. In the Governor's Recommended State School Fund Budget to the Legislative Assembly, there shall be performance expectations on statewide assessments and other measures established in conjunction with the funding level proposed.
2. The Governor's Recommended State Fund Budget shall describe what is possible in individual Oregon schools in terms of staffing levels, remediation, professional development, maintenance and other measures of a quality school at the funding level established.

SECTION 2.

1. The Legislature shall include in its adopted school fund budget an estimate of what prototype elementary, middle and high school budgets may look like at the funding level established and shall create Prototype School performance targets for the percentage of students achieving standards at each grade level.

SECTION 3.

1. The Oregon Department of Education shall create a database to capture the budget, socioeconomic and performance information on individual schools statewide in a common format that is easily accessible to the public. The cost elements shall match those recommended by the Governor and adopted by the Legislature.

2. The Oregon Department of Education shall encourage the use of the database as a tool for the consolidated school improvement process.

Glossary

ADMR

Resident Average Daily Membership. Year-to-date average of daily student enrollment as of June 30th for students residing in the district. Some resident students may attend school in another district. Kindergarten students are counted as half-time students.

ADMW

Weighted Average Daily Membership. Year-to-date average of daily student enrollment as of June 30th for students residing within the district (ADMr) adjusted to reflect student weightings as defined by the statewide funding formula. Kindergarten students are counted as half-time students. (For complete explanation of weighting, see Appendix B)

CERTIFICATE OF ADVANCED MASTERY (CAM)

An award given to students who have met 12th grade standards on state tests and classroom assignments in English, mathematics, science, social sciences (history, civics, geography and economics), the arts and a second language and who have met career-related learning standards. Beginning in 2005, Oregon students will have the opportunity to earn their CAM, which indicates that they have satisfied Oregon's educational requirements.

CERTIFICATE OF INITIAL MASTERY (CIM)

An award given to students who have met 10th grade standards on state tests and classroom assignments in English, mathematics, science, social sciences (history, civics, geography and economics), the arts and a second language. Oregon students will first have the opportunity to earn the CIM in English and mathematics in 1999 followed by requirements in science, social sciences, the arts and a second language.

CLASSIFIED STAFF

School employees who support licensed personnel, including instructional assistants, clerical staff, bus drivers, custodians, maintenance and food service workers.

CLASSROOM SET

A set of textbooks for use only in the classroom.

COMPONENTS (OF THE MODEL)

A component is a subset of an element, allowing elements of *The Oregon Quality Education Model* to be broken down into smaller parts, e.g., classroom sets, copying, media center materials, etc.

Confederation of Oregon School Administrators (COSA)

Founded over 20 years ago, the Confederation of Oregon School Administrators serves as the umbrella organization for four separate groups associations, each with its own elected governing body and appointed committees: Oregon Association of Central Office Administrators (OACOA), Oregon Association of School Executives (OASE), Oregon Association of Secondary School Administrators (OASSA) and Oregon Elementary School Principals Association (OESPA). COSA's offices are located in Salem, Oregon.

Database Initiative Project

In response to state legislation passed in 1997, the Oregon Department of Education developed a uniform budget and accounting system for school districts and education service districts that allows for valid comparisons of expenditures among schools and school districts. The Database Initiative Project is a pilot program using this new accounting system to collect and report detailed school-level data for fifteen Oregon school districts and one Education Service District. Intended to be expanded statewide in the 1990-00 biennium, the database will provide information on spending, staffing, school processes, student performance and demographics.

Education Service District (ESD)

Oregon is divided into regional Education Service Districts formed to assist the State Board of Education in providing state level services, to deliver essential support services to schools districts so that districts meet state standards and comply with state laws, and to respond to district needs. Education Service Districts work to promote interorganizational cooperation in their regions and offer expertise and specialized resources that few school districts can provide on their own.

Elements (of the Model)

An element of *The Oregon Quality Education Model* is a set of functions or activities that are important to the school's ability to offer instructional programs, e.g., supplies, teaching staff, administrative support.

English as a Second Language (ESL)

ESL students are those students whose first language is other than English and who need additional assistance in order to be successful in Oregon classrooms.

Family Resource Center

A centralized location of several government and/or non-profit and/or for-profit social agencies organized to address the needs of families as well as individual students so that services are more accessible.

FTE

Full-time Equivalent staff. One FTE is defined as a regular staff position scheduled to work eight hours per day.

LICENSED STAFF

Instructors certified by the Oregon Teachers Standards and Practices Commission.

MEASURE 5

Property tax limitation passed by Oregon's voters in November 1990, limiting local property taxes for schools to $5 per $1,000 of real market value.

MEASURE 47

Property tax limit passed by Oregon voters in November 1996 based on assessed value, rolling taxes back to 1995-96 levels less 10% and capping future increases by 3% annually.

MEASURE 50

Initiative referred by Legislature and approved by voters to clarify and implement Measure 47.

OCTOBER 1 ENROLLMENT

Count of all students enrolled in districts as of October 1st of each year with kindergarten students counted as full-time.

OPERATING BUDGET

Plans of current expenditures and the proposed means of financing them. The annual operating budget is the primary means by which most of the financing acquisition, spending and service delivery activities of a government are controlled. The use of annual operating budgets for Oregon's school districts is required by law.

OREGON EDUCATION ACT FOR THE 21ST CENTURY

Passed by the state Legislature in 1991, Oregon's education reform act — The Oregon Education Act for the 21st Century — called for a dramatic rise in student achievement by raising expectations for students, focusing curriculum and instruction on higher standards built on the basics, holding students accountable for achieving the standards through assignments and tests, using the community as a learning resource, and building new partnerships among schools, parents, employers and communities. See Glossary definitions for Certificate of Initial Mastery (CIM) and Certificate of Advanced Mastery (CAM).

Oregon School Employees Association

The Oregon School Employees Association is an independent union representing classified employees in Oregon school districts, community colleges, education service districts and park and recreation districts. OSEA is the major statewide advocate of classified employees and is headquartered in Salem, Oregon.

Proficiency-based Admission Standards System (PASS)

The Oregon University System (the state's seven public universities) have developed a set of proficiencies that will eventually be required for admission. These proficiencies are aligned with the standards and assessments of the Oregon Education Act for the 21st Century, including the Certificate of Initial Mastery (CIM) and the Certificate of Advanced Mastery (CAM). Teachers from fifty Oregon high schools are currently working with university staff to refine this system.

Performance-based Standards

Based on the premise that using standards and assessment can increase student performance, Oregon's education reform act — The Oregon Education Act for the 21st Century — establishes statements of what students should know and be able to do as a result of their schooling which are referred to as performance-based standards.

PERS

The Public Employees Retirement System in Oregon was formed in 1946 to enable public employers to provide employees with retirement benefits as part of the state's compensation package. PERS is the retirement program for approximately 95% of the Oregon's state and local government employees including all state agencies and public school districts.

Prototype Schools

Three hypothetical schools — elementary, middle and high — that, collectively, capture all the expenses in the K-12 system and that, when multiplied by the number of students in the state, produce an overall budget figure. The programs at these schools are designed to produce specified levels of student performance. Each school has certain characteristics defined for it along with a number of tangible and intangible dimensions. It is assumed that if the specified program is offered and the assumptions regarding characteristics and intangibles are met, the prescribed level of student performance will result.

State School Fund

The major appropriation of state support for Oregon public schools, distributed to school districts on a per-student basis using a statewide funding formula. (See Appendix A)

Bibliography

The bibliography groups citations into categories that helped form the basis for the structure of the model and many of the specific elements in the model. The citations listed provide both rationale and justification for basic assumptions, specific elements and dimensions of the model, and the linkage between the model and the assumed level of student achievement that result when the model is implemented. The bibliography references provide justification for both tangible and intangible dimensions of the model, since each is equally important to achieving the model's assumed levels of performance. While some references are clearly more important than others in supporting the model's assumptions, the bibliography does not distinguish relative influence of each source on overall model development.

Linkage Between Resources and Student Achievement

Biddle, Bruce J. (1997). Foolishness, Dangerous Nonsense, and Real Correlates of State Differences in Achievement. Phi Delta Kappan. 79(1), 8-13.

Bracey, Gerald W. (1995 November). Debunking the Myths About Money for Schools. Educational Leadership. 53(3), 65-69.

Burtless, Gary (Ed.). (1996). Does Money Matter?: The Effect of School Resources on Student Achievement and Adult Success. Washington D.C.: Brookings Institution Press.

Conn, W. Lance (1995). Funding Fundamentals: The Cost/Quality Debate in School Finance Reform. West's Education Law Quarterly. 4(1), 123-39.

Froese, Victor (1997, July 6-11). The Relationship of School Materials and Resources to Reading Literacy: An International Perspective. Paper presented at the annual conference of the International Association of School Librarianship, Vancouver, British Columbia, Canada.

Lockwood, Robert E. & James E. McLean (1997). Twenty-five Years of Data on Educational Funding and Student Achievement: What Does It Mean? Educational Research Quarterly. 21(2), 3-11.

McNamara, Kevin T. & Brady J. Deaton. (1985 February). Educational Expenditures and Education Measures. Paper presented at the annual conference of the Southern Agricultural Economics Association, Biloxi, MS.

Murnane, Richard & Frank Levy (1996). Evidence from Fifteen Schools in Austin, Texas. In Burtless, Gary (eds.), Does Money Matter? The Effects of School Resources on Student Achievement and Adult Success. (93-96). Washington, D.C.: Brookings Institution.

O'Neil, John & et al. (1994), November 9-11). The States Where Money Has Been Shown To Make A Difference in School Achievement. Paper presented at the annual conference of the Mid-South Educational Research Association, Nashville, TN.

Picus, Lawrence O. & James L. Watenbarger (Eds.). (1995). Where Does the Money go? Resource Allocation in Elementary and Secondary Schools. Thousand Oaks, CA: Corwin Press.

Wenglinsky, Harold (1997). How Money Matters: The Effect of School District Spending on Academic Achievement. Sociology of Education. 70(3), 221-37.

Wood, R. Craig (1998). Does Money Matter? Finance. American School Board Journal. 185(1), 40-41.

School as Unit of Analysis and Prototype Schools as Unit of Design

Lee, Valerie E. & Julia B. Smith (1993). Effects of School Restructuring on the Achievement and Engagement of Middle-grade Students. Sociology of Education. 66(3), 164-186.

Lee, Valerie E. & Julia B. Smith (1994, Fall). High School Restructuring and Student Achievement: A New Study Finds Strong Links. Issues in Restructuring Schools. (7), 1-5, 16.

Levine, Daniel U. & Lawrence W. Lezotte (1990). Unusually Effective Schools: A Review and Analysis of Research and Practice. National Center for Effective Schools Research and Development, Madison, WI.

Lezotte, Lawrence W. & Joseph Passalacqua (1978). Individual School Buildings: Accounting for Difference in Measured Pupil Performance.

Mortimore, P., P. Sammons, L. Stoll, D. Lewis, & R. Ecob (1988). School Matters: The Junior Years. Wells: Open Books. Reprinted (1994): London: Paul Chapman.

Mortimore, Peter & Pam Sammons (1987, September)). New Evidence on Effective Elementary Schools. Educational Leadership. 45(1), 4-8.

Newmann, Fred M. & Gary G. Wehlage (1995). Successful School Restructuring. Madison, WI: Center on Organization and Restructuring of Schools and Wisconsin Center for Education Research.

Teddlie, Charles & Samuel Stringfield (1993). Schools Make a Difference. New York: Teachers College Press.

General Characteristics of the Model and Interaction Effects Among Elements

Cawelti, Gordon Ed (1995). Handbook of Research on Improving Student Achievement. Educational Research Service, Arlington, Va.

Cheng, Yin Cheong, et al. (1996, April 8-12). A Multi-level and Multi-criteria Perspective of School Effectiveness: A Case Study. Paper presented at the annual conference of the American Educational Research Association, New York, NY.

Conley, David T. (1997). Roadmap to Restructuring: Charting the Course of Change in American Education (2nd ed.). Eugene, OR: ERIC Clearinghouse on Educational Management.

Corbett, H. Dickson, Judith A. Dawson, & William A. Firestone (1984). School Context and School Change: Implications for Effective Planning. New York: Teachers College Press.

Fuhrman, Susan, et al. (1988). Research on Education Reform: Lessons on the Implementation of Policy. Teachers College Record. 90(2), 237-57.

Fullan, M. & Susan Stiegelbauer (1991). The New Meaning of Educational Change (2nd ed.). New York: Teachers College Press.

Fullan, Michael & Matthew Miles (1992, June). Getting Reform Right: What Works and What Doesn't. Phi Delta Kappan. 73(10), 745-752.

Lee, V. & J. B. Smith (1992). Effects of School Restructuring on the Achievement and Engagement of Middle-Grade Students. Madison, WI: Center on Organization and Restructuring of Schools.

Levine, Daniel U. & Lawrence W. Lezotte (1990). Unusually Effective Schools: A Review and Analysis of Research and Practice. National Center for Effective Schools Research and Development, Madison, WI.

Levine, Daniel U. & Lawrence W. Lezotte (1995). Effective Schools Research. In Handbook of Research on Multicultural Education. (525-47).

Lezotte, Lawrence W. (1997). Learning for All.

Logan-Woods, Josephine C. (1989). Class Size: The Bridge Between Diagnostic Information and Actions for School Improvement. Education and Urban Society. 21(2), 218-27.

Mortimore, Peter & Pam Sammons (1987, September). New Evidence on Effective Elementary Schools. Educational Leadership. 45(1), 4-8.

Purkey, S. & M. Smith (1983). Effective Schools: A Review. Elementary School Journal. 83, 427-452.

Rutter, M., B. Maughan, P. Mortimore, J. Ouston, & A. Smith (1979). Fifteen Thousand Hours: Secondary Schools and Their Effects on Children. Cambridge, MA: Harvard University Press.

Slavin, Robert E., et al. (1993). Preventing Early School Failure: What Works? Educational Leadership. 50(4), 10-18.

Stevens, Betty Ed (1985). School Effectiveness: Eight Variables that Make a Difference. Michigan State Board of Education, Lansing.

U.S. Department of Education (1987). What Works. Research about Teaching and Learning. Second Edition. Department of Education, Washington, DC. Office of Educational Research and Improvement (ED), Washington, DC.

Whole School Improvement Via Multiple Stategies for Improved Student Achievement

(1997). Nathaniel Hawthorne Elementary School: San Antonio, Texas. American Educator. 20(4), 9-16.

Conley, David T. (1997). Roadmap to Restructuring: Charting the Course of Change in American Education (2nd ed.). Eugene, OR: ERIC Clearinghouse on Educational Management.

Glennan, Thomas K., Jr. (1998). New American Schools after Six Years. Rand Corp., Santa Monica, CA.

Lee, Valerie E. & Julia B. Smith (1994, April). Effects of High School Restructuring and Size on Gains in Achievement and Engagement for Early Secondary School Students. Center on Organization and Restructuring of Schools, Madison, WI.

Louis, Karen Seashore & Matthew Miles (1990). Improving the Urban High School: What Works and Why. New York: Teachers College Press.

McHugh, Barbara & Susan Spath (1997). Carter G. Woodson Elementary School: The Success of a Private School Curriculum in an Urban Public School. Journal of Education for Students Placed at Risk (JESPAR). 2(2), 121-35.

Natale, Jo Anna (1995). Write This Down. American School Board Journal. 182(12), 16-20.

National Study of School Evaluation & Kathleen Ann Fitzpatrick (1997). School improvement : focusing on student performance. Schaumburg, IL

New American Schools Development Corp. (1997). Working towards Excellence: Results from Schools Implementing New American Schools Designs. New American Schools Development Corp.

Newmann, Fred M. & Gary G. Wehlage (1995). Successful School Restructuring. Madison, WI: Center on Organization and Restructuring of Schools and Wisconsin Center for Education Research.

Quellmalz, Edys S, Patrick M Shields, Michael S. Knapp and Educational Resources Information Center (U.S.). (1995). School-based Reform Lessons from a National Study : A Guide for School Reform Teams. Washington, DC: U.S. Dept. of Education, Office of Educational Research and Improvement, Educational Resources Information Center.

Sammons, P., J. Hillman, & P. Mortimore (1995). Key Characteristics of Effective Schools: A Review of School Effectiveness Research. London: Office for Standards in Education.

Schmoker, Michael J (1996). Results: the key to continuous school improvement. Alexandria, Va.: Association for Supervision and Curriculum Development.

Slavin, Robert E. & Olatokunbo S. Fashola (1998). Show me the evidence!: proven and promising programs for America's schools. Thousand Oaks, Calif: Corwin Press.

United States Department of Education, Office of Educational Research and Improvement. School Improvement Research Series: Series X, 1995-96. United States Department Of Education.

Systems Improvement for Improved Student Achievement

Binkowski, Kathleen, et al. (1995). A Qualitative Study of Higher and Lower Performing Elementary Schools.

Conley, David T. (1997). Roadmap to Restructuring: Charting the Course of Change in American Education (2nd ed.). Eugene, OR: ERIC Clearinghouse on Educational Management.

Lezotte, Lawrence W & Barbara C. Jacoby (1992). Sustainable school reform : the district context for school improvement. Okemos, Mich.: Effective Schools.

Murphy, Joseph & Philip Hallinger (1988). Characteristics of Instructionally Effective School Districts. Journal of Educational Research. 81(3), 175-81.

Sashkin, Marshall & John Egermeier (1993, October). School change models and processes: A review and synthesis of research and practice. U.S. Department of Education, Office of Educational Research and Improvement, ERIC Document Reproduction Service.

Extended Instruction Time

Adelman, Nancy E., M. Bruce Haslam, & Beverly A Pringle (1996). The uses of time for teaching and learning. Washington, D.C.: U.S. Dept. of Education, Office of Educational Research and Improvement, Office of Reform Assistance and Dissemination.

Barr, R. & R. Dreeben (1985). A Sociological Perspective on School Time. In Fisher, C. W. & D. C. Berliner (Eds.), Perspectives on Instructional Time. New York: Longman.

Berliner, David C. (1978). Allocated Time, Engaged Time and Academic Learning Time in Elementary School Mathematics Instruction.

Bloom, Benjamin (1974, August). Time and Learning. American Psychologist. 29(8), 682-688.

Epstein, Joyce L. & et al. (1996). Effects of Summer Home Learning Packets on Student Achievement in Language Arts in the Middle Grades.

Fredrick, Wayne & Herbert Walberg (1980, March/April). Learning as a Function of Time. Journal of Educational Research. 73(4), 183-194.

Green, Charles A. (1998). The Extended School Year Program Consolidated Report: Achievement Test Scores and Survey Findings. Detroit Public Schools, MI. Office of

Research, Evaluation, and Testing.

Jones, Helen (1995, April 28-30). Ninth Grade Repeaters—Why They Did Better in Summer School. Paper presented at the annual conference of the Multidisciplinary Conference on the Scholarship and Creativity of African Americans, Towson, MD.

Jones, John Hodge (1995, November). Extending School Hours: A Capital Idea. Educational Leadership. 53(3), 44-46.

Namboodiri, Krishnan, et al. (1993). Analyzing Distributions in School Effects Research: An Empirical Illustration. Sociology of Education. 66(4), 278-94.

Sanford, Julie P. & Carolyn M. Evertson (1982). Time Use and Activities in Junior High Classes. Texas Univ., Austin. Research and Development Center for Teacher Education.

Stockard, Jean & Maralee Mayberry (1992). Effective Educational Environments. Newbury Park, CA: Corwin Press.

Walberg, Herbert J. (1988, March). Synthesis of Research on Time and Learning. Educational Leadership. 45(6), 76-85.

Washington, Wanda (1998). Optional Extended Year Program. Feedback. Austin Independent School District, TX. Dept. of Accountability, Student Services, and Research.

Professional Development For Teachers and Administrators

Crowther, Sandee (1998). Secrets of Staff Development Support. Educational Leadership. 55(5), 75-76.

Evertson, Carolyn M., et al. (1985). Effective Classroom Management and Instruction: An Exploration of Models. Final Report.

Joyce, B. , B. Showers, & C. Rolheiser-Bennett (1987). Staff Development and Student Learning: A Synthesis of Research on Models of Teaching. Educational Leadership. 45(2), 11-23.

Joyce, Bruce & Beverly Showers (1980). Improving Inservice Training: The Messages of Research. Educational Leadership. 37(5), 379-85.

Joyce, Bruce & Beverly Showers (1988). Student Achievement through Staff Development. White Plains, NY: Longman Inc.

Joyce, Bruce & Emily Calhoun (Ed.). (1996). Learning Experiences in School Renewal: An Exploration of Five Successful Programs. Eugene, OR: ERIC Clearinghouse on Educational Management.

Odden, Allan (1990). Class Size and Student Achievement: Research-Based Policy Alternatives. Educational Evaluation and Policy Analysis. 12(2), 213-27.

Seaburn, Bonnie & Robert E. Sudlow (1987). Staff Development Implications of an Effective Schools Project. Spencerport Central Schools, N.Y.

Showers, Beverly, et al. (1987). Synthesis of Research on Staff Development: A Framework for Future Study and a State-of-the-Art Analysis. Educational Leadership. 45(3), 77-87.

Showers, Beverly (1990). Aiming for Superior Classroom Instruction for All Children: A Comprehensive Staff Development Model. Remedial and Special Education (RASE). 11(3), 35-39.

Vickery, Tom Rusk (1985). Excellence in an Outcome-Driven School District.

Class Size Reduction and Focus on Grades K-3

Achilles, Charles M. (1997). Small Classes, Big Possibilities. School Administrator. 54(9), 6-9,12-13,15.

Bennett, Susan (1987). New Dimensions in Research on Class Size and Academic Achievement. National Center on Effective Secondary Schools, Madison, WI.

Finn, Jeremy D. (1998). Class Size and Students at Risk. What Is Known? What Is Next? A Commissioned Paper. National Inst. on the Education of At-Risk Students (ED/OERI), Washington, DC.

Folger, John (1989). Lessons for Class Size Policy and Research. Peabody Journal of Education. 67(1), 123-32.

Glass, Gene V. & A. Graham Down (1979). Does Class Size Make a Difference? Instructor. 89(4), 22.

Glass, Gene V., et al. (1982). School Class Size: Research and Policy. Beverly Hills, CA: Sage Publications.

Glass, Gene V. & Mary Lee Smith (1978). Meta-Analysis of Research on the Relationship of Class-Size and Achievement. The Class Size and Instruction Project. Far West Lab. for Educational Research and Development, San Francisco, Calif.

Glass, Gene V. & Mary Lee Smith (1979). Meta-Analysis of Research on Class Size and Achievement. Educational Evaluation and Policy Analysis. 1(1), 2-16.

Goettler-Sopko, Sheree (1990). The Effect of Class Size on Reading Achievement.

Helmich, Edith & Leighton Wasem (1985). Class Sizes for Kindergarten and Primary Grades: A Review of the Research. Illinois State Board of Education, Springfield, Dept. of Planning, Research and Evaluation.

Institute on Education Reform, University of Kentucky (1995, August). The Implementation of Kentucky's Primary Program in 1995: A Progress Report. Kentucky Institute for Educational Research, Frankfort, Kentucky.

Jacobs, Roseanne (1987). The Effect of Class Sizes of 1:15, 1:25, and 1:25 Plus Full- Time Aide on Kindergarten Reading Readiness Achievement.

Mosteller, Frederick (1995). The Tennessee Study of Class Size in the Early School Grades.

National Education Association. (1986). Class Size. What Research Says About Series, Number 2. Data- Search Reports. National Education Association, Washington, D.C. Research Div.

National Institute on Student Achievement, Curriculum, and Assessment (1998). Reducing Class Size: What Do We Know? National Inst. on Student Achievement, Curriculum, and Assessment (ED/OERI), Washington, DC.

Olson, Lynn (1994, October 5). 'Dramatic' Rise in Ky. Test Scores Linked to Reforms. Education Week. 14(5), 13, 15.

Powell, Marjorie, et al. (1980). Assessment of Program Impact Through First Grade, Volume VI: Summary of Impact on Institutions, Teachers and Classrooms, Parents and Children. An Evaluation of Project Developmental Continuity. Interim Report X. High/Scope Educational Research Foundation, Ypsilanti, Mich.

Smith, William L., et al. (1986). Class Size and English in the Secondary School. ERIC Clearinghouse on Reading and Communication Skills, Urbana, Ill. National Council of Teachers of English, Urbana, Ill.

Wenglinsky, Harold (1997). How Money Matters: The Effect of School District Spending on Academic Achievement. Sociology of Education. 70(3), 221-37.

Whittington, Edward H., et al. (1985). Effects of Class Size on First-Grade Students. Spectrum. 3(4), 33-39.

Word, Elizabeth R., et al. (1990). The State of Tennessee's Student/Teacher Achievement Ratio (STAR) Project: Technical Report (1985-1990). Tennessee State Dept. of Education, Nashville. Tennessee State Univ., Nashville. Center of Excellence: Basic Skills.

Adequate Operational Support, Instructional Materials, Guidance and Counseling, Libraries, Personnel Administration, Business and Fiscal Services

Froese, Victor (1997, July 6-11). The Relationship of School Materials and Resources to Reading Literacy: An International Perspective. Paper presented at the annual conference of the International Association of School Librarianship, Vancouver, British Columbia, Canada.

Herr, Edwin L. (1982). Why Counseling? American Personnel and Guidance Association, Washington, D.C.

Johnson, Ralph H., et al. (1973). Evaluating Counselor Effectiveness Fact or Fallacy—Counselors Relate Equally Well to All Students. Minneapolis Public Schools, Minn. Dept. of Guidance Services.

Lance, Keith Curry, et al. (1990). The Impact of School Library Media Centers on Academic Achievement. Colorado State Dept. of Education, Denver. State Library and Adult Education Office.

Marchant, Maurice P., et al. (1984). Research into Learning Resulting from Quality School Library Media Service.

Murphy, Joseph & Philip Hallinger (1988). Characteristics of Instructionally Effective School Districts. Journal of Educational Research. 81(3), 175-81.

Namboodiri, Krishnan, et al. (1993). Analyzing Distributions in School Effects Research: An Empirical Illustration. Sociology of Education. 66(4), 278-94.

Poston, William K., Jr., et al. (1992). Making Schools Work: Practical Management of Support Operations. Successful Schools: Guidebooks to Effective Educational Leadership. Volume 7.

Wilson, Natalie Susan (1986). Counselor Interventions with Low-Achieving and Underachieving Elementary, Middle, and High School Students: A Review of the Literature. Journal of Counseling & Development. 64(10), 628-34.

Size of Prototype Schools

Eberts, Randall, Ellen Schwartz, & Joe Stone (1990, Second Quarter). School Reform, School Size, and Student Achievement. Economic Review (Federal Reserve Bank of Cleveland). 26(2), 2-15.

Lee, Valerie E. & Julia B. Smith (1993). Effects of School Restructuring on the Achievement and Engagement of Middle-grade Students. Sociology of Education. 66(3), 164-186.

Lee, Valerie E. & Julia B. Smith (1994, April). Effects of High School Restructuring and Size on Gains in Achievement and Engagement for Early Secondary School Students. Center on Organization and Restructuring of Schools, Madison, WI.

Stockard, Jean & Maralee Mayberry (1992). Effective Educational Environments. Newbury Park, CA: Corwin Press.

Williams, Davant T. (1990). The Dimensions of Education: Recent Research on School Size. Working Paper Series. Clemson Univ., SC. Strom Thurmond Inst. of Government and Public Affairs.

Teacher Content Knowledge

Book, Cassandra, et al. (1988). Teachers' Concepts of Reading, Reading Concepts Communicated during Instruction, and Students' Concepts of Reading. Research Series No. 190. Michigan State Univ., East Lansing. Inst. for Research on Teaching.

Brickhouse, Nancy W. (1989, March). Teachers' Content Knowledge about the Nature of Science and Its Relationship to Classroom Practice. Paper presented at the annual conference of the American Educational Research Association, San Francisco, CA.

Brophy, J. E. & T. L. Good (1986). Teacher Behavior and Student Achievement. In Wittrock, M. C. (Eds.), Handbook of Research on Teaching. New York: Macmillan.

Carroll, J.B. (1963). A Model of School Learning. Teachers College Record. 64, 723-733.

Brophy, Jere (1986, October). Teacher Influences on Student Achievement. American Psychologist. 41(10), 1069-1077.

Carpenter, Thomas P., et al. (1988). Teachers' Pedagogical Content Knowledge of Students' Problem Solving in Elementary Arithmetic. Journal for Research in Mathematics Education. 19(5), 385-401.

Fuller, Roberta Ann (1996, October). Elementary Teachers' Pedagogical Content Knowledge of Mathematics. Paper presented at the annual conference of the Mid-Western Educational Research Association, Chicago, IL.

Grossman, Pamela L. & Susan S. Stodolsky (1995, November). Content as Context: The Role of School Subjects in Secondary School Teaching. Educational Researcher. 24(8), 5-11.

Gudmundsdottir, Sigrun & Lee Shulman (1987). Pedagogical Content Knowledge in Social Studies. Scandinavian Journal of Educational Research. 31(2), 59-70.

Kim, Lori Yoonkyung (1993). Factors Affecting Student Learning Outcomes: A School-Level Analysis of the 1990 NAEP Mathematics Trial State Assessment.

Magnusson, Shirley, et al. (1994, March). Teaching Complex Subject Matter in Science: Insights from an Analysis of Pedagogical Content Knowledge. Paper presented at the annual conference of the National Association for Research in Science Teaching, Anaheim, CA.

Namboodiri, Krishnan, et al. (1993). Analyzing Distributions in School Effects Research: An Empirical Illustration. Sociology of Education. 66(4), 278-94.

Porter, Andrew & Jere Brophy (1988, May). Synthesis of Research on Good Teaching: Insights from the Work of the Institute for Research on Teaching. Educational Leadership. 45(8), 74-85.

Slater, R. O. & C. Teddlie (1992). Toward a Theory of School Effectiveness and Leadership. School Effectiveness and School Improvement. 3(4), 242-258.

Smith, Robin & Jane Lloyd (1995, March 31-April 3). "I'd Need To Do A Lot Of Reading Myself before Teaching This." How Do Primary Student Teachers Know What Science To Teach? Paper presented at the annual conference of the National Association for Research in Science Teaching, St. Louis, MO.

Parent Involvement

Bridge, R. G., C. M. Judd, & P R. Moock (1979). The Determinants of Educational Outcomes: The Impact of Families, Peers, Teachers, and Schools. Cambridge, MA: Ballinger.

Dornbusch, S. & P. Ritter (1988). Parents of High School Students: A Neglected Resource. Educational Horizons. 66, 75-87.

Epstein, Joyce & Henry Becker (1982). Teachers' Reported Practices on Parent Involvement: Problems and Possibilities. Elementary School Journal. 83, 103-114.

Epstein, Joyce (1995, May). School/Family/Community Partnerships: Caring for the Children We Share. Phi Delta Kappan. 76(9), 701-712.

Epstein, Joyce L. & John H. Hollifield (1996). Title I and School-Family-Community Partnerships: Using Research to Realize the Potential. Journal of Education for Students Placed at Risk (JESPAR). 1(3), 263-78.

Frymier, Jack (1992, November). Children Who Hurt, Children Who Fail. Phi Delta Kappan. 74(3), 257-259.

Johnson, Florence, Wilbur Brookover, & Jr. Farrell, Walter (1989, March). The Effects of Principals', Teachers', and Students' Perceptions of Parents' Role, Interest and Expectation for Their Children's Education on Student Academic Sense of Futility. Paper presented at the annual conference of the American Educational Research Association, San Francisco.

McCarthy, Jane & Suzanne Still (1993). Hollibrook Accelerated Elementary School. In Murphy, Joseph & Phillip Hallinger (Eds.), Restructuring Schooling: Learning from Ongoing Efforts. (63-83). Newbury Park, CA: Corwin Press.

Homework Focused on Standards

Austin, Joe Dan (1979). Home Work Research in Mathematics. School Science and Mathematics. 79(2), 115-21.

Druian, Greg, et al. (1987). School Improvement Research Series. Research You Can Use. Northwest Regional Educational Lab., Portland, Oreg.

Finstad, Elaine (1987). Effects of Mathematics Homework on Second Grade Achievement. Sam Houston State University, TX.

Foyle, Harvey C. & Gerald D. Bailey (1988). Research. Homework Experiments in Social Studies: Implications for Teaching. Social Education. 52(4), 292-94,296-98.

Foyle, Harvey C. & Gerald D. Bailey (1986). High School Homework: Increasing Student Achievement. Illinois School Research and Development. 22(2), 71-77.

Jongsma, Eugene (1985). Research Views—Homework: Is It Worthwhile? Reading Teacher. 38(7), 702-04.

Natriello, Gary & Edward L. McDill (1986). Performance Standards, Student Effort on Homework, and Academic Achievement. Sociology of Education. 59(1), 18-31.

Paschal, Rosanne A., et al. (1984). The Effects of Homework on Learning: A Quantitative Synthesis. Journal of Educational Research. 78(2), 97-104.

Suydam, Marilyn N. (1985). Research Report: Homework: Yes or No? Arithmetic Teacher. 32(5), 56.

Townsend, Stacy (1995). The Effects of Vocabulary Homework on Third Grade Achievement.

Turvey, Joel S. (1986). Homework—Its Importance to Student Achievement. NASSP Bulletin. 70(487), 27-35.

Orderly Learning Environment

(1984). The Culture of an Effective School. Research Action Brief Number 22. ERIC Clearinghouse on Educational Management, Eugene, Oreg.

Brookover, Wilbur B., et al. (1996). Creating Effective Schools: An In-Service Program for Enhancing School Learning Climate and Achievement. Revised Edition. Holmes Beach, FL: Learning Publications, Inc.

Emmer, Edmund T. (1981). Effective Management in Junior High Mathematics Classrooms. Texas Univ., Austin. Research and Development Center for Teacher Education.

Evertson, Carolyn & Alene Harris (1992, April). What We Know About Managing Classrooms. Educational Leadership. 49(7), 74-78.

Evertson, Carolyn M., et al. (1985). Effective Classroom Management and Instruction: An Exploration of Models. Executive Summary of Final Report.

Freiberg, H. Jerome & et al. (1990). Turning around Five At-Risk Elementary Schools. Publication Series 91-8. School Effectiveness and School Improvement. 1(1), 5-25.

Principal Leadership

Conley, David & Paul Goldman (1994). Ten Propositions for Facilitative Leadership. In Murphy, Joseph & Karen Seashore Louis (Eds.), Reshaping the Principalship: Insights from Transformational Reform Efforts. (237-262). Newbury Park, CA: Corwin Press.

Conley, David, Diane Dunlap, & Paul Goldman (1992, Winter). The "Vision Thing" and School Restructuring. OSSC Report. 32(2), 1-8.

Greenblatt, R. B., B. S. Cooper, & R. Muth (1983, April). School Management and Effectiveness: Finding the Best Style. Paper presented at the annual conference of the American Educational Research Association, Montreal.

Gullatt, David E. & Brenda D. Lofton (1996). The Principal's Role in Promoting Academic Gain.

Hord, Shirley M. & Gene E. Hall (1984). Principals Use Research-Based Techniques for Facilitating School Effectiveness. Texas Univ., Austin. Research and Development Center for Teacher Education.

Leithwood, Kenneth, Doris Jantzi, & Alicia Fernandez (1994).Transformational Leadership and Teachers' Commitment to Change. In Murphy, Joseph & Karen Seashore Louis (Eds.), Reshaping the Principalship: Insights from Transformational Reform Efforts. (77-98). Newbury Park, CA: Corwin Press.

McEvoy, Barbara (1987). Everyday Acts: How Principals Influence Development of Their Staffs. Educational Leadership. 44(5), 73-77.

Murphy, Joseph & Karen Seashore Louis (Eds.). (1994). Reshaping the Principalship: Insights from Transformational Reform Efforts. Newbury Park, CA: Corwin Press.

Smith, W.F. & R.L. Andrews (1989). Instructional Leadership: How Principals Make a Difference. Alexandria, VA: Association for Supervision and Curriculum Development.

Terry, Paul M. (1996, August). The Principal and Instructional Leadership. Paper presented at the annual conference of the National Council of Professors in Educational Administration, Corpus Christi, TX.

Receptivity of Teaching Force to Change and to State Education Reform Program

Conley, David & Paul Goldman (1994). Ten Propositions for Facilitative Leadership. In Murphy, Joseph & Karen Seashore Louis (Eds.), Reshaping the Principalship: Insights from Transformational Reform Efforts. (237-262). Newbury Park, CA: Corwin Press.

Conley, David T., Paul Goldman, & Diane M. Dunlap (1993, Spring). Radical State Legislation and School Restructuring: Oregon Educators' Reactions to the Oregon Educational Act for the 21st Century. OSSC Report. 33(3), 1-13.

Conley, David T., Paul Goldman, & Diane M. Dunlap (1993, April 14). Radical State Legislation as a Tool for Fundamental Educational Reform and Restructuring: Reactions from the Field to Oregon's H.B. 3565. Paper presented at the annual conference of the American Educational Research Association, Atlanta, GA.

Goldman, Paul & David Conley (1994, April 4). School Responses to State-Level Restructuring Legislation. Paper presented at the annual conference of the American Educational Research Association, New Orleans.

Goldman, Paul & David Conley (1994, Fall). One More Year Down The Road to Restructuring: Oregon Educators' Reactions to the Oregon Educational Act for the 21st Century. OSSC Report. 35(1), 1-24.

Greenblatt, R. B., B. S. Cooper, & R. Muth (1983, April). School Management and Effectiveness: Finding the Best Style. Paper presented at the annual conference of the

American Educational Research Association, Montreal.

Gullatt, David E. & Brenda D. Lofton (1996). The Principal's Role in Promoting Academic Gain.

Hord, Shirley M. & Gene E. Hall (1984). Principals Use Research-Based Techniques for Facilitating School Effectiveness. Texas Univ., Austin. Research and Development Center for Teacher Education.

Leithwood, Kenneth, Doris Jantzi, & Alicia Fernandez (1994).Transformational Leadership and Teachers' Commitment to Change. In Murphy, Joseph & Karen Seashore Louis (Eds.), Reshaping the Principalship: Insights from Transformational Reform Efforts. (77-98). Newbury Park, CA: Corwin Press.

McEvoy, Barbara (1987). Everyday Acts: How Principals Influence Development of Their Staffs. Educational Leadership. 44(5), 73-77.

Murphy, Joseph & Karen Seashore Louis (Ed.). (1994). Reshaping the Principalship: Insights from Transformational Reform Efforts. Newbury Park, CA: Corwin Press.

Smith, W.F. & R.L. Andrews (1989). Instructional Leadership: How Principals Make a Difference. Alexandria, VA: Association for Supervision and Curriculum Development.

Terry, Paul M. (1996, August). The Principal and Instructional Leadership. Paper presented at the annual conference of the National Council of Professors in Educational Administration, Corpus Christi, TX.

Focused, Collaborative Organizational Environment and High Teacher Efficacy

Corcoran, Thomas & Margaret Goertz (1995). Instructional Capacity and High Performance Schools. Educational Researcher. 24(9), 27-31.

Hoy, Wayne & Anita Woolfolk (1993, March). Teachers' Sense of Efficacy and the Organizational Health of Schools. The Elementary School Journal. 93(4), 355-372.

Hoy, Wayne & Anita Woolfolk (1993, March). Teachers' Sense of Efficacy and the Organizational Health of Schools. The Elementary School Journal. 93(4), 355-372.

Louis, Karen Seashore (1992). Restructuring and the Problem of Teachers' Work. Chicago: The University of Chicago Press.

Pink, William T. (1983, April 11-15). Instructional Leadership: The Role of the Administrative Team and Student Achievement. Paper presented at the annual conference of the American Educational Research Association, Montreal, Quebec, Canada.

Rosenholtz, Susan (1989). Workplace Conditions That Affect Teacher Quality and Commitment: Implications for Teacher Induction Programs. The Elementary School Journal. 89(4), 421-440.

Slavin, Robert (1987). A Theory of School and Classroom Organization. Educational Psychologist. 22, 89-108.

Adaptive, Innovative Environment

McLaughlin, Milbrey (1990, December). The RAND Change Agent Study Revisited: Macro Perspectives and Micro Realities. Educational Researcher. 19(9).

Newmann, Fred M. & Associates (1996). Authentic Achievement: Restructuring Schools for Intellectual Quality. San Francisco: Jossey-Bass.

Newmann, Fred M. & Gary G. Wehlage (1995). Successful School Restructuring. Madison, WI: Center on Organization and Restructuring of Schools and Wisconsin Center for Education Research.

Newmann, Fred M. (Ed.). (1992). Student Engagement and Achievement in American Secondary Schools. New York: Teachers College Press.

Zigarelli, Michael A. (1996). An Empirical Test of Conclusions from Effective Schools Research. Journal of Educational Research. 90(2), 103-10.

Additional Sources

American Society for Training & Development. (1995). 1995 Training Statistics.

Applegarth, Boyd. (Spring 1990). Defining A Standard Education For Oregon Students. Salem, Oregon: Oregon Department of Education.

Bell, Julie Davis and Terry Whitney. (March 1998). A for Adequate, F for Funding. State Legislatures.

Center for the Future of Children, The David and Lucile Packard Foundation. (Winter 1997). The Future of Children - Financing Schools. Los Altos, California: Center for the Future of Children, The David and Lucile Packard Foundation.

Columbia University Education Law Review. Connecticut, Indiana, Minnesota, Missouri, North Carolina.

Cotten, Kathleen. (1995 May). Effective Schooling Practices: A Research Synthesis 1995 Update. Portland, Oregon: Northwest Regional Educational Laboratory.

Dickson, Lou Ann S. and Gail Sexton. (1996 May). Class Size Redux: The Effects of Reducing Class Size in K-6, Class Size Report. Redmond, Oregon: Redmond School District 2J.

Education Commission of the States. (1997). Transforming the Education System: The 1997 Education Agenda. Denver, Colorado: Education Commission of the States.

Ellis, Thomas I. (1984). Extending the School Year and Day. ERIC Clearinghouse on Educational Management: Eric Digest, Number Seven.

Governor's Task Force on School Improvement. (1996, October). Report on Oregon's Progress in Implementing CIM and CAM Achievement Standards and Related Measures to Transform the K-12 School System. Salem, Oregon: State of Oregon.

Greater Albany Public School District. (1996, December). Education Assurance Plan. Albany, Oregon: Greater Albany Public School District.

Kearney, C. Philip. (1994, March). The Dark (or the Light) Side of the Moon? A Symposium on Michigan's Current Crisis in School Finance. Prepared for the 1994 Conference of the American Education Finance Association. Michigan: State of Michigan House of Representatives.

Management Analysis & Planning Associates, L.L.C. (1996, December). Leading Oregon's Education Reform: A Progress Report on the Evaluation of the Oregon State Department of Education. Berkeley, California: Management Analysis & Planning Associates, L.L.C.

Marshall, Richard. (1995, January). Oregon School Expenditures — What Have We Done, Where Are We Going? Report to the 1995 Oregon Legislative Assembly. Salem, Oregon.

National Conference of State Legislatures. (1996). Education Partners - Working Papers. The Relationship Between Educational Expenditure and Student Achievement: When Does Money Matter? Denver, Colorado: National Conference of State Legislatures.

National Conference of State Legislatures. (1997, August). Teacher Policy.

Oregon Association of School Executive School Funding Coalition. (1998, June). School Improvement Fund - Recommendations for the 1999-2001 Budget. Salem, Oregon: Confederation of Oregon School Administrators.

Oregon Association of School Executives School Funding Coalition for the Governor's Quality Education Work Group. (1997, January). Keys To A Quality Education — Executive Summary. Salem, Oregon: Confederation of Oregon School Administrators.

Oregon Business Council. (1997, April). Great Schools At Reasonable Costs: The Oregon Business Council Position of School Funding. Portland, Oregon: Oregon Business Council.

Oregon Department of Education Task Force. (1993, January). Extended School Day/Year. Salem, Oregon: Oregon Department of Education.

Oregon Department of Education. (1997, January). Dropout Rates in Oregon High Schools, 1995-1996, State Summary Report. Salem, Oregon: Oregon Department of Education.

Oregon Department of Education. (1997, January). Teacher Support — Oregon Standards. Salem, Oregon: Oregon Department of Education.

Oregon Education Association. (1997). Quality Teaching and Learning in 21st Century Schools. Portland, Oregon: Oregon Education Association.

Oregon Education Media Association Ad hoc Committee. (1997). Oregon Information Literacy Guidelines. Salem, Oregon: Oregon Educational Media Association.

Oregon League of Women Voters. (1999, January). K-12 School District Financing. Salem, Oregon: League of Women Voters Education Fund.

Oregon State Board of Education. (1997, March). Certificate of Advanced Mastery Progress Report. Report to the Oregon Legislative Assembly. Salem, Oregon: Oregon State Board of Education.

Public Schools.

Southeastern Regional Vision for Education. (1995). Does Class Size Make A Difference? Recent Findings from State and District Initiatives.

Speakman, Sheree T. and Bruce S. Cooper, Hunt C. Holsomback, Jay F. May, Robert A. Sampieri and Larry Maloney. (1997, Spring). The Three R's of Education Finance Reform: Re-thinking, Re-tooling and Re-evaluating School Site Information. Journal of Education Finance.

State of North Carolina. The Excellent Schools Act.

Teachers Standards and Practices Commission. Continuing Professional Development Forms and Procedures. Salem, Oregon.

Teachers Standards and Practices Commission. Report on Regional Hearings on Continuing Professional Development. Salem, Oregon.

The Center for Education Reform. (1997). School Reform in the United States — State by State Summary. Washington, D.C.: The Center for Education Reform.

Whitney, Terry N. and Deborah A. Verstegen. (1997, June). State School Finance Litigation: A Summary and an Analysis. National Conference of State Legislatures.

Worrell, William K. (1997, March). Defining Basic Education. Report to the House Education Committee, Oregon Legislative Assembly.

Appendices

APPENDIX A:

DESCRIPTION OF OREGON SCHOOL FUNDING FORMULA

[Source for the following description is the League of Women Voters of Oregon Education Fund report entitled K-12 School District Financing, published January 1999.]

In Oregon, the primary sources for school funding are the general fund (primarily income taxes), local property taxes, and lottery funds. Shifts in the economy result in changes in the amount of general fund money available for all state-funded activities, including schools. Local property taxes, which are now a much smaller portion of school funding, are relatively stable. Voters approved use of the lottery funds for education in 1995. In 1998, voters approved dedicating 15% of lottery revenues to parks and salmon, reducing the amount available for education.

Equalization. The Legislature now determines the amount of state funds available to K-12 schools using the following equalization formula:

STATE SCHOOL FUND EQUALIZATION FORMULA

[State School Fund Grant + Local Revenue] **General Operating Revenue** = [Students (ADMw) X $4,500 Target adjusted by Teacher Experience] **General Purpose Grant** + [Transportation Grant + Facility Grant] **Transp. Grant - (Begins 1999-00)**

Equalization is the process used to attempt to distribute resources equitably among Oregon's K-12 school districts. This does not mean that all districts get the same funding per student. Districts face different costs that may justify different funding levels. Thus, defining equity is to some extent a matter of policy about which reasonable people could, and do, disagree. Each district is allocated funding consisting of a general purpose grant, a transportation grant and a facility grant. (The facility grant is scheduled to begin in 1999-2000.)

Number of Students. Student count is measured by average daily attendance rather than enrollment on some given date. Extra weight is assigned to students in special categories such as special education or English as a second language. Extra weights are also assigned to small schools distant from other schools, and an adjustment is made based on the proportion of students in poverty as measured by the 1990 census.

General Purpose Grant. Once the student count is derived, each district begins with the same general purpose grant per student, from a combination of state and local revenues. The target amount of the grant was arbitrarily set at $4,500 per student. The basic amount is adjusted to take into account the level of teacher experience (because most salary schedules recognize experience with higher pay) and the total funds budgeted for schools.

Transportation Grant. Next, the formula adds a transportation grant equal to 70% of approved transportation costs. These costs vary with the geography of each school district. Urban districts

where many students walk to school have much lower costs than most districts in rural Oregon. At the extremes in 1997-98, 23 larger districts and a few small ones had transportation costs of less than $225 per student while nine small districts in Eastern Oregon had costs of over $2,000 per student.

Facility Grant. A facility grant is scheduled to be added to the formula in the 1999-2000 school year. This grant, if funded, will help districts equip new schools by providing 6% of the district's costs, not including land, for new buildings, additions, and portable classrooms. Except for the new grant, capital costs remain the responsibility of local school districts. New buildings and additions are funded by bond measures approved by district voters.

Phasing in Equalization. The equalization formula was gradually phased in after the passage of Measure 5. If the 1991 Legislature had implemented the equalization formula immediately for all districts, those districts that have historically spent higher amounts per student would have experienced sharp reductions in revenue. Instead since, 1995, the Legislature has constrained the loss in revenue for these districts with flat funding or stop-loss formulas. Additional state revenue allocated to schools has been used to bring up the funding of districts that previously had low per pupil expenditures using the equalization formula. Over time, more and more districts have become equalization districts, that is, districts funded according to the equalization formula. In 1992-93, funding for 71% of Oregon's students was provided through the equalization formula. By 1998-99, that had increased to 92%.

APPENDIX B:

REPORT AND RECOMENDATIONS OF THE CLASS SIZE WORK GROUP

WORK GROUP CHARGE:

Research and recommend class sizes at various grade levels, K-12, that will support increased learning at various developmental stages of a child's life. Take into consideration variables that will affect the class room environment which may require more flexible class size recommendations, such as student populations. Report on necessary funding to achieve class size recommendations.

ENVIRONMENTAL FACTORS:

No state/federal requirements. Physical facilities are a factor.

RECOMENDATIONS:

- Meeting state standards and offering a quality education as defined by the community are the goals recognized by the work group. Large class sizes can hamper achievement of goals especially at K-3 levels.
- Class size is one component of a quality education and should be weighed with other factors. The public also values music, physical education, second languages, and specialized personnel. With inadequate resources, class size is not necessarily more important than these other values.
- Small class size is especially critical in the lower grades where failures, such as in acquiring reading ability, follow the student and engender more failure. Therefore, the Work Group recommends class sizes of 20 students or less for grades K-3. Current research demonstrates greatly improved student performance for class sizes under 20 students at these grade levels. Studies also demonstrate that class size greater than 30 students is detrimental to learning.
- Ideal student-to-teacher ratios will vary by grade level, subject, school and district. At the 6th grade, middle and high school levels, provide a student-too-professional staff ratio sufficient to maintain average class sizes below 30.
- The Work Group recognizes that some variables impacting student performance cannot be measured without difficulty, such as volunteers, and distance learning opportunities. Also, inferences drawn from statistics do not tell the whole story.

In addition, the Class Size Work Group recommends that the data collected for the Database Initiative Project relative to class size specifically track the following information:

DATA BY INDIVIDUAL CLASSROOM:

1) How many students are in the class as of October 1 (grades K-5 only)?

2) What is the licensed teacher-to-student ratio (grades 6-12 only)1?

3) What is the subject taught (secondary classes only)?

4) How many students are receiving instruction in the specialty subject?

5) How many students have Individual Education Plans?

6) How are special education students instructed? Include number mainstreamed and number pulled out for special classes.

7) How many English as a Second Language Students?

8) How many low socio-economic students (as measured by participation in free lunch program)?

9) What is the teacher experience, measured in years of teaching?

DATA BY SCHOOL BUILDING:

1) Number of teachers continuing professional development

2) Number of pre-school and after-school education programs

3) Total facility enrollment capacity:

   How many classroom are in the building?

   How many additional class rooms (e.g.,) portables can be accommodated?

4) How many classrooms have necessary phone jacks and electrical outlets for Internet connection? How many do not?

5) How many kindergarten classroom are available?

   Number of half-time rooms?

   Number of full-time rooms?

6)How many of the following professional support staff?

   Nurse

   Reading Specialist

   Counselor

   Special Education Teacher

   Vice Principal

---

[1]Gathering statistical data for 6th grade may prove problematic in that 6th grade may be in either elementary or middle school. The work group believes 6th grade is more property included with the higher grades due to the 8th grade benchmark.

Speech Therapist

Media Specialist

Math Specialist

Subject Matter Supervisor

Teachers for Vision Impaired

Teachers for Hearing Impaired

School Psychologist

Child Development Specialist

Social Worker

Personnel for Disabilities-related Services

SUPPORTING RESEARCH/RESOURCES:

Best Practices. Portland Public Schools. 1996, December.

Dickson, Lou Ann S. and Sexton, Gail. "Class Size Redux: The Effects of Reducing Class Size in K-6," Class Size Report, Redmond School District 2J. 1996, May.

Confederation of School Administrators. Keys To A Quality Education. 1997, January.

Southeastern Regional Vision for Education. Does Class Size Make A Difference? Recent Findings from State and District Initiatives. 1995.

APPENDIX C:

REPORT AND RECOMMENDATIONS OF THE OPERATIONAL SUPPORT WORK GROUP

WORK GROUP CHARGE:

Provide full inventory of all operational support items which must be funded in order to prove a safe, clean, secure learning environment. Prioritize inventory in relations to student achievement of education standards. Attach funding recommendations to inventory.

RECOMMENDATIONS:

- Replace Special Education Factor in State School Funding formula with a system that allows districts access to a common pot of money for special education students requiring extraordinary care.
- Change bond laws to allow bonds for specific facility needs.
- State testing follow-up to be district, not classroom, responsibility.
- Database maintenance to be responsibility of district staff and should not take classroom assistants from classrooms.
- Data base to provide cumulative year-by-year accounting by (a) student, (b) school, (c) district, and (d) statewide by program. This accounting is to be directly related to progress made in seeing each student achieve the CIM standards.

The Work Group determined that all categories listed below are necessary for operational support. The lists within each category are not exhaustive but intended to be representative.

COSTS:

1. ADMINISTRATIVE ACCOUNTABILITY

Administrators

% FTE by building

Business and fiscal services personnel

Trained curriculum and teaching personnel

Accountability instruments

Student assessment costs

Testing administration costs

2. BUILDINGS

- Maintenance Personnel (%FTE by building)
  - Custodial Administrators
  - Custodial Workers
- Maintenance Facilities and Grounds Upkeep
  - Parts/Service Infrastructure Upkeep
  - Equipment Maintenance
  - Vandalism Fund
  - Utilities/Garbage Services
- Student Security
  - Staff
  - Other Security Devices
- Portable Structures
- Property purchases required, but not covered in bond funding
- Furniture
- Auditorium/Gymnasium Upkeep
- Wiring for Technology Links to State System
- Special Area Requirements
  - Seismic Updates
  - ADA Updates
  - Asbestos Abatement
  - HVAC
- New Technology for buildings
  - Wiring Intercoms

3. FOOD SERVICE

- Cooks, servers, prepares or contract costs for these services
- Cafeteria supplies/ replacements or contracts costs for these services

4. TRANSPORTATION

Drivers or contract costs for these services, including for alternative placement of students to enable them to meet benchmarks/CIM standards.

Fuel, including Academic programs (field trips, etc.)

Maintenance or contract costs for these services

Administrative Personnel

Bus Maintenance/replacement

Facilities/Bus Barn

Vandalism Repair Fund

5. TEXTBOOKS

Personnel required for district adoption process (%FTE by bldg.)

Textbooks available for all students in all subjects applicable

Loss/damage/replacement costs

Consumables

Paperback Class sets of individual titles

6. CLASSROOM SUPPLIES

Globes, maps, calculators and math manipulatives, overhead screens and pens, chalk, butcher paper, science models, student project materials, bulletin board materials, typewriters, etc.

7. PRINTING

Printshop Personnel (%FTE)

Paper and Supplies

Equipment maintenance costs

Copying budgets for Classroom Teachers

Copying Budgets for Student Projects

Copying Budgets for district staff manuals

Copying Budgets for school-to-parent communications

Computer printing costs

Community communications

8. Media Center/Library

- Library Personnel (%FTE by bldg.)
- New Acquisitions
  - Periodicals
  - Books
  - Videos
  - Computer Software
  - CD ROMS
  - Other Media Equipment
  - Replacements of Lost/damaged materials
  - Ongoing support purchases for academic CIM standards
- Media Equipment Maintenance Repair
  - Slide, Overhead Film and Opaque Projectors
  - VCR's and Video cameras
  - Tape Recorders

9. Technology

- Personnel/Technology Specialist (%FTE by bldg.)
- Equipment
  - Computers
  - Cable
  - Telephone lines
- Satellite charges for advanced courses in areas lacking specialized personnel
- Database Implementation/Maintenance - One time expenditures
- On-line costs
- Voice-mail for Teachers
- Staff Training
- Year 2000 Costs

10. Support Staff

- Personnel (%FTE Bldg)
  - Career/Guidance Counselors
  - Educational Assistants
  - Nurses
  - Speech Therapists
  - ESL Specialists
  - Psychologists
  - Volunteer Coordinators
- District Office Support Personnel
- Community Communication Personnel
- School Board Support Costs
- Site Council Costs

11. Special Education

- Certified Personnel
- Special Education Assistants (%FTE by bldg)
- Student specific modifications

12. Other Programs

- School To Work
- Alternative Education
  - Home Schools
  - School within a School
  - Alternative Schools
- Vocational Education Programs

13. Student Activities

- DECCA
- Debate Teams/Speech

FFA

Yearbook

Theater

Clubs

Journalism/Newspaper

14. Student Sports

Coaches

Assistants

Uniforms

Equipment

Field/Court Upkeep/Maintenance

15. District Insurance

16. Debt Service

17. Contingency Funds

APPENDIX D:

REPORT AND RECOMMENDATIONS OF THE PROFESSIONAL DEVELOPMENT WORK GROUP

WORK GROUP CHARGE:

Determine what professional development and training is needed to ensure that teachers are prepared to implement *The Oregon Quality Education Model* and remain equipped to teach in a changing world.

ENVIRONMENTAL FACTORS/CURRENT STATE OF THE ISSUE:

Preservice - Training of Teacher and Administrators in Oregon

Teachers education programs are developed by universities according to specifications of the Teacher Standards & Practices Commission. K-12 student successes with current measures suggest the system is sound.

Preservice - Training of Teachers and Administrators Outside Oregon

Approximately 50% of new teachers employed in Oregon each year are educated in other states. Given Oregon's uniquely high academic standards, the question to be answered is: In the future, will teachers trained in other states be adequately prepared to teach in Oregon?

Credential Requirements - Basic and Standard (1965-1999)

Basic licenses are issued upon completion of a bachelors degree plus one additional year of training. Applicants must also submit to a criminal history check and fingerprinting. Standard licenses require completion of a master's degree.

Credential Requirements - Initial and Continuing (beginning 1999)

Degree and criminal history requirements are similar. There is a clear focus toward developmental levels of children and other elements of school reform. Requirements include many more practical, direct experiences.

Inservice - Training of Teachers and Administrators Employed in the Field as Required by Individual Districts

There are no adopted state requirements for inservice training of staff. Traditionally, schools have three to five days of training prior to the beginning of each school year, release days for completing report cards and parent conferences, and participation in one state-wide training day. Most districts make available some resources to allow individual staff members to attend conferences or workshops. Participation and district support are voluntary.

Inservice-Training of Teachers and Administrators Employed in the Field as Required to Continue Licensure

Effective January 2001, all teachers (except those licensed prior to 1965) will need to report continued professional growth to be eligible for renewal. Educators may complete an individual plan developed in cooperation with their supervisor or other advisor, or they may participate in a district staff development plan.

RECOMMENDATIONS:

- Increase and improve professional development of teachers and administrators.
- Emphasize training in two areas: (1) Teacher preparedness to teach in a standards-based system and (2) Teacher skills with technology and telecommunications. The Superintendent of Public Instruction is to work with the education community and related experts to identify appropriate standards for all teachers to effectively teach in an outcome-driven system and to effectively incorporate technology and telecommunications into their instructional routines.
- Link inservice training directly to established state benchmarks. The state's obligation is to ensure an on-going process to achieve those standards. Other training that may be very important to address other critical issues is to take place from other funding sources.
- Ensure that inservice training directly supports local district strategies to achieve benchmarks. District and regional/state issues are significantly more distant from students and, therefore, should be in a supporting, rather than lead, role.

COST ISSUES:

The cost factor proposed by the Governor's Quality Education Work Group is 4% of the general fund budget. By current standards that is $80 million per year. Expressed in a per teacher amount, it is $2500 per teacher. Spending should be allocated as follows: 63 1/2% at the site level, 25% at the district level, and 12 1/2% at the regional/state level.

Proposed legislation for implementation of the above:

(1) To correct regulations not supportive of the individual school site as the center of activity.

(2) To require sites, districts and the regional/state levels to write, maintain and implement logical, step-by-step staff devilment plans tied to benchmarks.

(3) To fund only those activities with spending allocated as described above.

SUPPORTING RESEARCH/RESOURCES USED:

American Society for Training & Development. 1995 Training Statistics.

National Conference of State Legislature. Teacher Policy. (1997, August).

The Excellent Schools Act. North Carolina.

Columbia University Education Law Review, Connecticut, Indiana, Minnesota, Missouri, North Carolina.

Continuing Professional Development Form and Procedures. Teachers Standards & Practices Commission.

Report on Regional Hearing on Continuing Professional Development. Teachers Standards & Practices Commission.

Keys to a Quality Education. The Governor's Quality Education Work Group.

APPENDIX E:

REPORT AND RECOMMENDATIONS OF THE DURATION OF INSTRUCTION TIME WORK GROUP

WORK GROUP CHARGE:

To propose a plan to provide optimum instruction time to Oregon students to enable them to achieve the standards of performance required by The Oregon Quality Education Model.

ENVIRONMENTAL FACTORS:

- Increased academic requirements and standards of performance for students.
- Declining financial resources available to schools.
- The Oregon Legislature determines the nature of the Oregon Education Act and authorizes the majority of financial resources to schools.

DISCUSSION:

Strong leadership, high quality teachers, time to teach and motivate students are keys to students' ability to achieve Oregon's educational standards. This proposal will focus on the duration of instruction time for students, but recognizes that part of the need for additional time is to allow teachers and administrators to enhance their professional skills and knowledge.

Before a case can be made for additional instructional time for students to achieve new and higher educational standards, educators must utilize existing time efficiently and effectively. Effective School Research cites what schools can do and are doing to utilize existing time properly. Several examples follow:

TEACHERS:

a. Allocate time to different content areas based on district and school goals.

b. Keep noninstructional time to a minimum by beginning and ending lessons on time, keeping transition times short and managing classrooms so as to minimize disruptive behavior.

c. Set and maintain a brisk pace for instruction that remains consistent with thorough learning. They introduce new objectives quickly and provide clear start and stop cues to pace lessons according to specific time targets.

d. Ask focused questions, provide immediate feedback and correctives, and engage students in discussion and review of learning material.

e. Maintain awareness of the rest of the class when working with individuals or small groups and take action as necessary to keep all students on task.

f. Present learning activities at a level that is neither too easy nor too difficult for the majority of students, making adaptations to serve the needs of faster and slower learners.

g. Keep seatwork activities productive through careful preparation, active supervision, and provision of assistance to students in such a way that others are not disturbed.

h. Encourage students to pace themselves. If students do not finish during class, teachers request that they work on lessons before or after school, during lunch or at other times so they keep up with what is going on in the class.

i. Work with slower learners to reduce the amount of time needed for learning, e.g., by teaching them effective study skills, nemonic devices, etc.

j. Give short homework assignments to elementary students to build good study habits and longer (45-120 minute) assignments to secondary students to reinforce learning. They check homework for completion and to diagnose learning needs, but do not generally assign grades.

ADMINISTRATORS AND TEACHERS:

a. Schedule school events so as to avoid disruption of learning times.

b. Emphasize the importance of protecting learning time when interacting with each other and with parents and students.

c. Allocate school time for various subjects based on school and district goals and monitor time use to make certain allocations are followed.

d. Organize the school calendar to provide maximum learning time. They review potential new instruction programs and school procedures for their likely impact on learning time prior to adoption.

e. Keep unassigned time and time spent on noninstructional activities to a minimum during the school day; then keep loudspeaker announcements and other administrative intrusions brief and schedule them for minimal interference with instruction.

f. Ensure that the school day, classes, and other activities start and end on time.

g. Participate in inservice to improve their skills in making appropriate time allocations, managing students' behavior, and increasing student time on task.

h. Keep student pull-outs from regular classes to a minimum for either academic or nonacademic purposes, and monitor the amount of pull-out activity.

I. Provide extra learning time outside of regular school hours for students who need or want it.

j. Establish and enforce firm policies regarding tardiness, absenteeism, and appropriate classroom behavior to maximize instructional time.

High quality teachers and administrators affect the above practices as part of the normal professional execution of their duties. The Work Group believe that in recent months and years, as education standards have increased and financial resources have declined, Oregon educators have revisited ways to make better use of instruction time. Wise use of time needs to be a constant factor in the management of a school or classroom and in student learning.

THE CURRENT STANDARDS FOR REQUIRED INSTRUCTION TIME ANNUALLY ARE:

GRADES	HOURS
9-12	990
4-8	900
1-3	810
K	405

The Oregon Education Act for the 21st Century (HB3565) called for the school year to be lengthened incrementally by hours to the equivalent of 220 days by the 2010 school year. The Oregon Department of Education recommended to the 1995 Oregon Legislature implementation of HB3565 with the understanding that the focus on additional time would be coupled with a redefinition of the use of time itself. However, the 1995 Legislature dropped the requirement for an increase in instructional time. The Work Group understands the rejection was due primarily to cost and opposition to a longer year for some members of the lay and professional community.

Oregon education finds itself in an extremely difficult and unique situation. The Oregon law, framed within the Oregon Education Act for the 21st Century, which is now being implemented in schools throughout the state, requires significantly higher standards of student achievement than before the ACT. Preliminary informal indicators of current student performance lead some educators to believe that if tests in mathematics, reading, writing and science were given today and the scores averaged, 30-40% of the students would meet standards. Individual students who could meet standards in all four subject areas would be in the neighborhood of 20-30%. If work samples were added to the requirements today, it is suggested that 90% of the students would not be able to meet Oregon's standards in each of the above subject areas and the work samples. The above estimates are not scientific findings, obviously, but they do represent the thinking of some knowledgeable school administrators.

Those close to education understand the dilemma: standards for student performance are rising while financial resources are in decline or not keeping pace with increasing needs of the students.

RECOMMENDATIONS:

The Work Group believes the Oregon Education Act for the 21st Century is sound and the Oregon Department of Education was correct in its recommendation to the 1995 Legislature. The Work Group also believe that an increase in the duration of instruction time is necessary for students to achieve Oregon's new standards. Also there is consensus in the research that additional time for instruction will contribute to improved academic performance. A few students may not need the

additional time, but the large majority of students will find the effective use of additional time essential to the educational achievement of Oregon's new educational standards.

There is agreement that additional instruction time should not be viewed as more time to teach and learn in the same old way. Schools should determine how best to use additional time to meet state and local goals. The local school boards and staffs should decide how time is to be utilized; the state should require and fund most of the additional time.

It should be noted that some research suggests caution in expecting too much increase in student achievement as a result of lengthening the school year. Ellis reports the correlation between time and achievement is far slighter than expected and suggests that the quality of time spent in learning is more important than the quantity. He states that administrators should strive to reduce the amount of school time that is either lost or diverted to noninstructional activities before extending the school day or year. He also reports that the costs of extending school time are disproportionate to any resulting instructional gains.

Recognizing Oregon's dilemma and acknowledging research which supports extending the duration of instructional time to improve student academic performance, the Work Group offers a proposal to extend the school year.

To date, most of the discussion regarding the use of time in schools and meeting standards of performance has focused on adding time to the school day/year or eliminating activities and instruction not directly related to the core academic courses which lead to success in meeting the standards.

The Work Group proposes that seven weeks be added to the school year by offering instruction from the 4th week of June through the 1st week of August for an approximate 19% increase in instructional time.

There have been a number of approaches to providing instruction during the summer months or developing a year-round schedule. All of the approaches were designed to address student needs and or/utilize classroom space more efficiently.

This proposal adds and uses time in a different way than most proposals while avoiding the political problems of eliminating activities and services currently provided which are considered important to the school's mission. This is not to suggest that schools should not continually review the worth of programs and services and make appropriate changes, but it does acknowledge that most, if not all, services offered within a school setting were developed to meet certain community or student needs and that eliminating the service will not eliminate the need.

This proposal is different from most others in that it would make attendance at summer school optional on the part of students. Districts, however, would be required to offer summer school which would be funded by a combination of state support and tuition charges. Some schools may elect to increase the length of the school day for some students during the fall, winter and spring months and then offer fewer than seven weeks of summer school, but the result would be the same of increasing the duration of instruction time by approximately 19%.

The key components of the proposal to extend the school year into the summer months are:

1. All district licensed staff would be employed on a 12-month basis. (There might be a small number of exceptions approved by the school board, but the idea is to have the

professional staff engaged during 11 months of their 12-month contract.) A specified number of vacation days would be provided at the traditional school breaks — Thanksgiving, winter, spring, June and August.

2. All students who were one year or more below benchmark in reading, mathematics and writing skills, science and social studies, would be provided tuition-free access to programs in those subject areas and other areas in the future as the additional standards become operative, e.g., arts, languages.

3. Students who are "on schedule' to reach the educational standards may take selected courses (language, health, music, keyboarding, etc.) to allow more time in the traditional year, but would pay tuition or such courses. Some high school courses would be offered in three consecutive summer sessions rather than in two semesters of a traditional school year. Offering such options would expand the opportunities for additional academic courses for some students, would allows some to spend more time on the same course (two years of algebra for example) and permit some to complete graduation requirements on a faster schedule than others.

4. Teachers would (1) teach, (2) develop their professional skills and knowledge through private sector internships, university studies, district conducted seminars, etc., (3) work on meaningful district projects such as designing curricula, reviewing textbooks and instruction materials and interacting with colleagues to exchange ideas and develop strategies for instruction, etc., or (4) plan and implement with the community joint school/community service projects and participate in abbreviated "sabbatical" leaves. The rotation or combination summer assignments would be modified by student enrollment levels. If necessary, the teaching load could be partially supported by para-professionals, the use of non—licensed professionals from the private sector or older student employed as tutors. The objective of the rotation of the summer assignments would be to provide time away from the classroom for teachers to focus on new curriculum or teaching methods, the expanding base of knowledge in their respective teaching fields and their personal growth as teachers.

This proposal offers several advantages over the traditional school year with a summer vacation:

1. The focus is on preparing students to meet Oregon's education standards.
2. Teachers and administrators are a trained professional resource of the community which would be better utilized on a year-round basis.
3. Students would be provided increased opportunities for elective courses as well as core academic courses.
4. Students needing additional instructional time to meet the high standards for the Certificates of Initial and Advanced Mastery would have access to such instruction.
5. The regression in learning which occurs during an absence from formal instruction would be reduced. (There is some evidence that students from low-income families are

more likely to be below grade level in their academic progress. The availability of tuition free summer school sessions would serve students who have the highest potential for skill and knowledge regression during a long summer break.)

6. Teachers would have time to focus on professional activities and learning experiences envisioned in the continued professional development requirement which becomes effective in 2001.
7. Parents who wish to have their children in non-school activities or take an extended trip during the summer months would be able to do so without interrupting a child's regular school sequence.
8. Students over sixteen years of age who are "on schedule" and need or want to work during the summer months could do so without interrupting their progress toward graduation.
9. Summer daycare needs of parents would be reduced for children qualifying for tuition-free schooling as well as for those wishing to tuition their children to summer session as an option to traditional daycare facilities. (This item is not an educational issue. It is included here because it involves students and parents and is connected to the proposal.)

The issue of lengthening the school year immediately raises the question of costs. This proposal will require significant additional resources because education is a labor intensive enterprise. The large majority of expenditures in a school budget are personnel related: (1) salaries and benefits, (2) length of work year, and (3) staff training. A significant increase in any one of the three components raises the cost of education significantly.

However, the proposal creates opportunities for additional funding through tuition because attendance is optional. Additional instructional time could also be phased in as the additional resource question is addressed. The summer session could be a four-week or six-week session but the Work Group believes a seven-week session is eventually needed. The number of students served could be limited initially and expanded as resources, both public and private, are identified. The number of teachers on twelve-month contracts could also be limited and expanded as resources become available.

BIBLIOGRAPHY:

Abdal-Haqq, Ismat. (1996, October). Making Time for Teacher Professional Development, ERIC Digest.

Anderson, Julia. (1994, March). Alternative Approaches to Organizing the School Day and Year, School Administrator.

Aronson, Julie Z. (1995, February). Stop the Clock: Ending the Tyranny of Time in Education. Policy Perspectives on Time and Learning, ERIC Document Service ED 381895.

Cotton, Kathleen. (1995). Effective Schooling Practices: A Research Synthesis 1995 Update. Portland, Oregon: Northwest Educational Regional Library.

Dlugosh, Larry L. (1994, April). Quality Schools and the Myth of the Nine-month School Year. Paper presented at the Annual University of Oklahoma National Conference on Creating the Quality School, ERIC Document Service ED375507.

Ellis, Thomas I. (1984) Extending the School Year and Day. ERIC Clearinghouse on Educational Management: ERIC Digest No. Seven.

Fowler, Donna. (1995, Spring). Time on Our Side. American Educator.

Jones, John Hodge. (1995, November). Extending School Hours: A Capital Idea,. Educational Leadership.

Kane, Cheryl M. (1994, September). Prisoners of Time: Research. What We Know and What We Need To Know. ERIC Document Service ED378685.

Oregon Association of School Executive School Funding Coalition. (1997, January). Keys to a Quality Education. A report prepared for the Governor's Quality Education Work Group.

Oregon Department of Education. (1993, January). Extended School Day/Year. Task Force Report.

Shields, Carolyn M. (1996, January). Year-round Education: Is it Worth the Hassle? Paper presented at the University of British Columbia Square Lecture Series. ERIC Document Reproduction Service ED392136.

APPENDIX F:

REPORT AND RECOMMENDATIONS OF THE IMPLEMENTATION WORK GROUP
(FROM THE REPORT OFFERED DECEMBER 1997)

WORK GROUP CHARGE:

To identify the framework within which *The Oregon Quality Education Model* is to be developed and determine key policy issues relating to its implementation.

DISCUSSION:

The Challenge

1. The Legislature now is in charge of setting school funding levels. The 1999 Legislature needs to set a funding level and distribution formula for K-12 education. Before Measure 65, the state supplemented local dollars, and individual districts determined ultimate budgets through adjustments to property taxes. Since measure 5, local districts have no flexibility for improving infrastructure through bonding. The Legislature sets the budgets for schools.

2. New decision-making tools are needed for a new responsibility. The Legislature lacks adequate tools for making a decision on school budgets. It does not really know how dollars are spent today and whether they are being wisely spent. For example, the budget process doesn't serve up basic information on overheads, class sizes, teacher and administrative salaries or other budget information. As a result, the total school budget is based more on dollars available in the general fund than on an assessment of the dollars required to meet educational objectives.

3. The budget needs to be tied to performance. The current budget process makes no tie to school performance. While the state has developed a comprehensive assessment system to evaluate school building and school district performance against educational standards, the budget process is not tied to those standards. Concurrently, the Legislature is setting much higher education performance standards (through the Education Act for the 21st Century) even while it has been reducing school budgets. It has not formally reconciled those two policy directions.

The Challenge to the 1999 session: Can the Legislature develop a more rational process which links school budgets to expectations for school performance?

Proposed Outline of Report to the Legislature

1. Statement of the problem: Tying budgets to performance.

2. How dollars are spent today:

   - By broad categories (administrators, teachers, school lunches, textbooks, etc.)
   - By jurisdiction (State Department, ESDs, District Offices, school buildings.)
   - By special needs students
   - Overhead
   - Funding trends
   - Trends in individual districts

3. Performance of Schools.

   - Description of state assessment system
   - Description of CIM and CAM requirements
   - Performance trends at 3rd, 5th, 8th and 10th grades
   - Comparisons among districts and schools
   - Comparisons of goals with performance
   - Identification of programs currently offered that are not included in Oregon standards, e.g., sports, personal finance, etc.
   - Identification of subjects included in standards that currently are not universally offered, e.g., second languages, etc.

4. Connecting Performance and Funding (the model)

   - Description of performance model
   - Implications for what would be different
   - "Thorny" Issues:
   - Different students will have widely different costs to meet standards.
   - Different schools will have widely different costs to meet standards.
   - Popular curriculum is not directly tied to standards.
   - What happens when schools don't perform well against standards?
   - How expectations are to be set — how will budgets and performance be tied?
   - Given the wide range of strategies for achieving results, how does the state decides what school model to fund?

- What is the governance structure around which a performance model will be applied?
- Resolution of the thorny issues.

5. Vision for Performance-based Governance in Oregon

Choices for design model:

- School based contracts
- District wide contracts
- Allocation of dollars to categories, which state controls.
- Question: What happens when expectations aren't met?
- Recommendations

6. 1999 Session: Transition to a performance based system

- Toward comparative cost information
- Toward comparative school performance
- Statement of philosophy
- Distribution formula

7. Specific issues that need to be resolved:

- Special Education
- Allocation formula
- Cost of living
- Transportation
- Change in special education
- Change for socio-economic categories
- Change for performance commitments
- Which requirements are the state willing to waive to facilitate school's achievement of performance objectives?

To what degree will state prescribe:

- Salary schedules
- Budgets for professional development
- Budgets for technology and textbooks
- Class size

Key Points for Discussion

The Work Group surfaced the following principles, or key points, which are presented for information and discussion, not as specific solutions:

1. The school is the proper unit of analysis for effectiveness even though performance data is reported on a per-student basis. Schooling is a cumulative process, not a series of isolated "treatments" as in a medical model. Furthermore, many ancillary services exist on the school level, not the individual class level, e.g., counselors, media specialists, etc.
2. Schools are ecological units and the attempt to identify all data points in terms of discrete services will overlook many important facets and potential economies that are apparent when the school is considered as an ecological, e.g., material retaught but labeled as "new," failure rates, lack of exchange of accurate data on student knowledge and skill among teachers.
3. Schools are inherently different and vary considerably. Performance funding will have to address these differences at some point. The goal of performance funding is to encourage local control and diverse educational models. Schools are likely to become more varied rather than more similar.
4. Special education may require its own separate performance funding model that clearly focuses on the degree to which students meet a specified subset of all standards, not how much they improve year to year.
5. One of the dangers of specifying current practice as the basis for all data points is the tendency to institutionalize the current model as the only legitimate model at exactly the same time that it is clear that alternative structures may be necessary.
6. The goal of a performance-funding model may require a number of years to achieve; however, something must be devised for the next legislative session that indicates in concrete terms the intent to move toward performance funding and that causes schools to acknowledge this as a fundamental policy shift in the making.
7. The entire educational enterprise will eventually have to be reoriented toward performance for a performance-based funding model to have the desired effects. In other words, if most of the funding goes into categories that are independent of student performance, the system will not have much internal capacity to adapt resource distribution to enhance student performance.

Suggestions: The Governance Model

Version I - Performance-based Model - Tight incomes, flexible delivery

1. The state sets performance expectations for what it expects students to know.
2. The state allocates dollars sufficient for students to be able to reach those standards.
3. For students, families, classrooms, school buildings, schools districts committing to meet

standards, the state waives other requirements such as seat-time, specific curriculum, attendance, etc.

4. State has authority to intervene if performance requirements are not met.
5. The student or school can spend state dollars on other educational experiences, as long as performance requirements are met.
6. Individuals or individual schools can raise dollars beyond state dollars, as long a state dollars are targeted to meeting essential standards (local options, voluntary or local voter approved?)
7. State monitors practices of individual schools, and highlights high-performers for others to emulate.

Version II - Performance-based Model - Centrally Driven Inputs to Achieve Results

1. State defines performance expectations.
2. With assistance from districts, state determines critical inputs to achieve standards.
3. State budget earmarks funds for specific needs such as professional development, technology, textbooks and class-size reduction. Districts draw on these funds from the state, and can use them for no other purposes, or the state directly allocates funding, which can be used by individual districts.
4. State doesn't change its requirements to districts much; monitors performance with districts.

"Straw Man Budget Proposal

Step 1.

- Establish base budget.
- Adjust for inflation and enrollment growth.
- Review current operations to determine class sizes and service support at current budgets. Use budget model to help legislators understand what services we are buying at this level, and to understand differences among districts.
- Consider adjustments for differences in cost of doing business and for special education.
- Review performance at grades 3, 5, 8 and 10, including percentage meeting standards, and average test scores.
- Review variation in test scores among school buildings, adjusted by socio-economics.
- Establish performance goals - both in terms of percentages meeting standards and overall test score averages.

Step 2.

With base established, develop a set of performance improvement options. For example:

THE INITIAL "CERTIFICATE OF INITIAL MASTERY" - PRE-K THROUGH 3:

1. Take 15 randomly selected elementary schools across the state within a band of average socio-economic characteristics. For grades K-3, review program offering today, including:
    - Availability of head-start
    - Availability of full day kindergarten
    - Average class size/full time instructor
    - Teacher aids and other assistance
    - Other curriculum offering (music, PE, etc.)
    - Counseling and other support services
2. Review school test scores performance.
3. Identify additional steps required for schools to bring 95% of students to 3rd grade reading, writing and math standards by no later than mid-year of 4th grade.
4. Establish a budget for those services, including, base-line level for teacher salaries, and principal overhead. Compare that budget with current budget.
5. Add additional dollars for lower socio-economic categroeies schools, drawing on federal fund as as well as making adjustments to state formula. Compare with current budget.
6. Figure out how to deal with special education as a separate line item.
7. Adjust total K-12 budget by the amount necessary to fund this initiative.
8. Give Board of Education authority to sign contracts with districts, granting those additional dollars only after a performance contract has been signed to meet the benchmark outcomes. As part of the outcome, the district (or school building) can seek waivers of process requirements. Districts will see a deduction by 50 percent of the additional allocation in the 2001 biennium for every school building that does not meet the benchmark target.

Expected results: Kids entering 4th and 5th grades ready to take on subject area curriculum.

SUMMER SCHOOL INITIATIVE

1. For students not meeting standards at 5th, 8th or 10th grade, offer summer school classes to help catch up in critical areas.
2. Budget for expected level of participation.

3. Set performance goals for curriculum in meeting scores.
4. For schools at threshold performance without summer school programs, allow them to use the funds for regular curriculum work.

Teacher/Administrator Professional Development Initiative

1. Establish measurable standards for what administrators and teachers need to know to teach a standards-based curriculum.
2. Establish goals for percentage of workforce meeting standards.
3. Create a pot of money for districts committed to meeting established targets.

APPENDIX G:

REPORT AND RECOMMENDATIONS OF THE SPECIAL EDUCATION WORK GROUP

VISION:

"The best that can be imagined in five years for special education in Oregon."

In five years, special education in Oregon will be characterized by treatment, family support and individualized educational support at the school site. Appropriate support and staff development are available to classroom teachers to accommodate special needs students. Funding is based upon identified need and handicapping condition with no artificial constraints.

CORE BELIEFS

We believe that...

- Prevention should be as much a part of the programs as remediation.
- Special education students should be given the opportunity to meet the benchmark standards.
- Early identification and intervention should be an emphasis.
- A model program has early identification and intervention.
- Special education students should transition to regular education in high percentage.
- The needs of all students are important. The support for special education students should not be at the expense of regular education students.
- Teachers are at their limits.

Note: Prevention could be a program component (?)

THE SPECIAL EDUCATIONAL MODEL

The special education model has a number of components. The Model and Funding Strategy are the central elements of this proposal.

1. Model I: The Family Resource Concept
    - The school is the center for all student support services (treatment, family education and support, student education).
    - This would be an intergovernmental agreement that focuses on an interagency center.

- The center could included representatives from employment, AFS, mental health, the school, and CSF to provide technical support and fiscal support.

II. Model II: Regional Programs

- Fully funded regional programs would serve the educational needs of high-cost, low-incidence disabled students.
- These regional programs would be fully funded by the State based on the caseload and the service level in the original legislation.
- Autistic students would then be moved from consultation service to direct service.
- Medically fragile students would also be served by regional programs.
- Funding for the regional programs is based on identified needs and handicapping conditions.
- The state would carefully monitor these programs.

III. Funding Strategy

- Low-cost, High-Incidence Students Served by the Family Resource Center
- he existing double weight formula would generate the revenue for low-cost, high-incidence students with disabilities.
- The 11% cap would be removed. District receives 100% funding for students whom districts proclaim they can justify.
- These students would be served at he Family Resource Center (note above).

High-Cost, Low-Incidence Students Served by Regional Programs

- Fully funded regional programs would serve the educational needs of highest-cost, low-incidence disabled students.
- Regional programs would be fully funded based on the caseload and the service level in the original legislation.
- Autistic students would then move from consultation service to direct service.
- Medically fragile students served by regional programs.

Other Elements

- Talented and Gifted (TAG):
- Talented and gifted programs would be funded by the state.
- Funding is based on the number of students served in the district.

- If the district identifies a TAG student they must serve that student.
- The state would provide $50.00/year for each talented and gifted student receiving services.
- A rainy day fund would also be made available to districts on application when expenditures for special education exceed the formula.
- Board and youth care centers would be added to the long-term care and treatment fund.

IV. In Classroom Support (Inclusion and Supported Education)

Appropriate support and professional development are available for classroom teachers to accommodate special needs students.

- Includes classified staff (education assistants), support, technology as necessary and individualized programs.

APPENDIX H:

REPORT AND RECOMMENDATIONS OF THE LOCAL VS. STATE SALARY SCHEDULE WORK GROUP

[NOTE: This Work Group examined the issue of state-wide collective bargaining and its potential advantages and disadvantages to Oregon's educational system, in particular the impact on local control. Following is their Preliminary Report which was provided to the full Council in February 1999 with the recommendation that the matter be given further study.]

ISSUE:

Would Oregon's education process benefit from the establishment of a state salary schedule for teachers?

What changes could be made in the current bargaining system so that it would correlate with student achievement?

DISCUSSION:

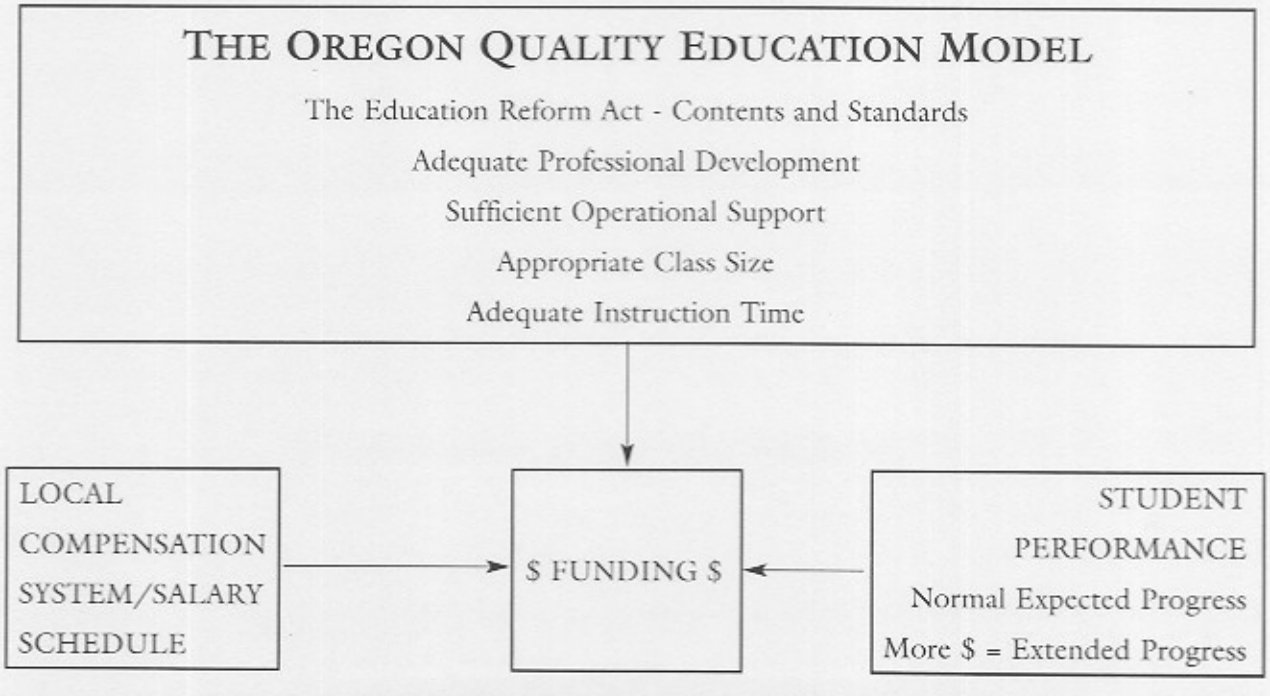
- Primary concern with the establishment of a state salary schedule similar to the State of Washington is the potential for loss of local control. Many believe it is critical to retain bargaining at the local level, in spite of the challenges — and, in some cases, strife — it creates for school districts.
- Because the state now funds 70% of education, it has a greater responsibility to monitor how education dollars are used and to encourage accountability.
- There is no evidence that a salary schedule — state or local — has any relationship to student performance. It is simply a convenient administrative method with which to compensate teachers.
- Experience — which, in general, develops better teachers who receive higher pay — does track to student performance. However, moving across the salary schedule does not necessarily mean one is a better teacher. There are great teachers not being adequately recognized monetarily because they haven't made it to the high end of the salary schedule yet.
- From the union standpoint, the purpose of collective bargaining is not to directly improve students but to strengthen the position of union members. This is an expected and understandable goal. However, the range of bargaining issues includes areas that directly affect the teaching environment, e.g., student discipline and special education issues.
- Merit pay has not proven to be a successful nor popular approach.
- Approximately 85% of a typical school district's budget is salaries and benefits. State collective bargaining of salaries would leave districts with few "chips" to bargain other contract issues.

- The Oregon Education Association is amenable to some form of performance ranking and/or incentive system — e.g., Governor Kitzhaber's incentive "menu" — but considers overall inadequate funding as the biggest obstacle. Once the basic funding issue is resolved, teachers will be much more receptive to accountability for student performance.
- Some sort of performance ranking is key to a good financial model.

SUGGESTIONS:

- The preservation of local control is critical to a vibrant, innovative educational system. In spite of the fact that the state now provides 70% of the funding to the school districts, the state should not convert to a state-wide salary schedule or to a state-wide collective bargaining system.
- As part of *The Oregon Quality Education Model*, all locally bargained salary agreements should include a Performance Measurement System, designed and administered at the school district level by administrators, teachers, and school boards. The performance incentives may result in increased compensation for performance of schools, departments, classrooms, and/or individuals or other groups as determined by the district. Districts would develop their performance measurement systems during the 1999-01 biennium and implement in 2001. Legislature would allocate certain percentage (5%?) of education funds for accountability.
- Teachers must be a engaged in the development of the Performance Measurement System in their school district if it is to be successful.

The following schematic demonstrates the integration of a Performance Measurement System into *The Oregon Quality Education Model*:



APPENDIX I:

REPORT AND RECOMMENDATIONS OF THE COST OF LIVING WORK GROUP

[NOTE: This Work Group examined the issue of a regional cost of living differential depending on special needs in certain areas, for example, a large urban areas such a Portland, and how it may or may not affect the equity of the state's school funding distribution formula. Following is their Preliminary Report which was provided to the full Council in January 1999 with the recommendation that the matter be further researched.]

ISSUE:

Is a dollar in one district the same as a dollar in another district?

Does the distribution formula need to be adjusted to meet a

Cost differential?

DISCUSSION:

- The state school funding distribution formula was developed in 1991 and has had no significant review or revision since.
- Prior studies — including the COSA Study of May 1997, the Senate Revenue Study of 1995 and all other studies performed by Management Analysis & Planning Associates, L.L.C. in other states — would indicate that the costs, particularly teacher costs, in an urban market are higher. All private and public labor costs, including teachers, tend to be higher. Student-teachers ratios are higher.
- In non-urban areas, teacher shortages are distinct challenge, particularly in Math, Science, Special Ed and second languages. There may be some evidence that salaries in non-urban areas are rising. COSA believes that this gap is narrowing.
- Portland asserts that it is the key urban area affected by the cost of living issue. It is a highly competitive market and the school board does not have the latitude to bargain below that market. Currently, it is compensating for this differential with private money, selling property, etc.
- At this date, COSA's member districts would not be in agreement on this issue. Best guess: 40% support validity of cost of living differential, 60% do not.

SUGGESTIONS:

If, in fact, a cost of living factor requires an adjustment of the distribution formula as is done in some other states, the following suggestions are offered:

- Consider weighting based on level of staff experience
- Consider weighting poverty at a higher rate. Current rate of .25 poorly substantiated.
- Do intensive labor market analysis:
  Where did new college grads apply?
  How many teachers did a school district make offers to and lost?
  Of those that were lost, how many went to other school districts and why?
- Require thorough review of the current school funding distribution formula by statute.

Sample Matrix Showing Cost Differential
Hypothetical Elementary School

	Rural	Valley	Metro
Low SES	6500	6800	7000
Middle SES	5500	5800	6000
High SES	5000	5300	5500

APPENDIX J:

REPORT AND RECOMMENDATIONS OF THE EDUCATION SERVICE DISTRICT (ESD) WORK GROUP

[NOTE: This Work Group examined the significant contribution of Education Service Districts to school districts and reviewed the method through which ESDs are funded. Following is their Preliminary Report which includes the recommendation that a Task Force be appointed with both ESD and local school leadership represented and facilitated by the Oregon Department of Education with the goal of linking ESDs to The Oregon Quality Education Model and the Oregon Education Act for the 21st Century. In addition, the Work Group strongly recommended that the state move toward equalization of funding for all ESDs.]

MISSION OF THE ESD:

Education service districts assist school districts and the State of Oregon in achieving Oregon's education goals by providing equitable educational opportunities for all Oregon public school students. Education Service Districts:

- Provide leadership and service, not regulation.
- Collaborate and cooperate with other ESDs, school districts and the Oregon Department of Education in providing a quality education for all students.

DISCUSSION:

Services provided by ESDs vary but most all include services related to special education. In addition, ESDs have been assigned more responsibilities related to technology and to teacher inservice related to school reform and assessments. They have developed the off-year assessment which school districts are beginning to use as a supplement to the state tests.

The most significant issue facing the state relative to ESDs is the equalization of funding. Current funding represents a wide disparity. This is critical because the dollars flowing to ESDs provide services to K-12 school districts. The more dollars a local ESD receives, the less the local districts need to spend on special services.

ESDs receive revenue from many sources — property taxes, state property tax replacement, contracts, grants and other sources. The current ESD formula is based solely on imposed property taxes. After 1999, ESDs have no funding formula in place which means the Legislature must address this issue immediately. Any formula proposal, even a temporary one that is "moving toward "equity, has an explicit or implicit standard of equity. It could be as simple as equal revenue per student or be a complex formula. The task of crafting an ESD formula is complicated because it must work with the K-12 formula to achieve equity while, at the same time, recognize that each ESD offers a different service mix and has a different working relationship with their K-12 districts.

KEY QUESTIONS:

- What are the responsibilities of ESDs in implementing Oregon school reform?
- How shall ESD funding support these responsibilities?
- Should a new funding model be constructed to provide services using the current resolution process? If so, should it be based on $/student?
- What incentives, if any, are appropriate to encourage use of ESDS to achieve local scale economies?
- What incentives, if any, are appropriate to encourage use of ESDs to offset local scale diseconomies?
- What is the appropriate ESD role in serving high incidence/low cost special education children?
- What is the appropriate ESD role in serving low incidence/high cost special education children.
- If ESDs are not going to continue providing direct service to children, do they need to be reorganized into fewer regions?
- If ESDs are going to continue providing direct services to children, are incentives or other methods needed to encourage cooperation among ESDs to form multi-regional approaches to administrative services?
- How can equity be defined in terms of services/student?
- Under what conditions should equity be defined by dollars/student and under what conditions should it be defined by services/student?
- How does Oregon move from the current ESD structure to the desired structure that is compatible with The Oregon Quality Education Model?

RESOURCES:

Report from Legislative Revenue Office. ESD Formula Options. (1998, September).

APPENDIX K:

SUMMARY OF GOVERNOR'S PROPOSED EDUCATION BUDGET - 1999-01

[NOTE: The following summary of Governor's John Kitzhaber's 1999-01 K-12 Education Budget is extracted from the transcript of his public statement on school funding given March 15, 1999.]

TOTAL K-12 BUDGET PROPOSED FOR THE 1999-01 BIENNIUM - $4.95 BILLION

Proposed Short-term Revenue Plan:

- Invest the kicker in the school budget.
- Increase the contribution from the Common School Fund by no less than $40 million
- Direct $70 million from the tobacco settlement to the Oregon Health Plan and used the general fund savings for schools.
- Impose a one-time 2% increase in the tax rate on corporate income from 6.6% to 8.8% to sunset in two years.