

| Topic Description | Discussion Notes |
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| <p>1. Welcome & Introductions</p> <p><i>(Colt Gill)</i></p> <p>45 min.</p> | |
| <p>Break</p> <p>5 min.</p> | |
| <p>2. Group Agreements: Small Group Breakouts</p> <p><i>(Carmen Urbina)</i></p> <p>20 min.</p> | <p>Small groups wanted a couple of things noted: Holding meeting during work hours is problematic for participation for many. Like the transparency of data process. Add to group agreements – past discussions are not being re-hashed. This is a new conservation. Also focus on BIPOC students should be added to agreements. Some members cannot leave positionality behind - They are on the group by virtue of their position representing a group. Other members should not assume that when they speak they are speaking for entire organization. Many members have multiple identifies and viewpoints.</p> |
| <p>3. Overview of Legislation and Process</p> <p><i>(Cindy Hunt)</i></p> <p>30 min.</p> | <p>The legislature is asking for information. Q: Who is responsible for developing; is that the researcher or the Advisory group? R: It would be both, working together. The Advisory group would also have inquiries. We will give a clear picture of what they will research. We will have to follow the contract. We will do a national search that does include Oregon researchers. If members are aware of specific researchers, we welcome that input. But don't have individual direct conversations with researchers.</p> <p>Q: Are the researchers to be from a national search so they have the experience outlined? R: Yes, it will be. Ed Northwest and RELs from other regions may also be interested. ECO Northwest has also done this type of work before. We will be sure to inform ECO Northwest, Ed Northwest and other researchers of the opportunity.</p> |

4. State School Fund Overview

(Mike Wiltfong)

30 min.

Q: I'm wondering why this committee should spend time on "adequacy" when that's not the focus of the budget note (thus the charge of this committee) AND the state has established the quality education commission to dive deeper into adequacy.

(Question on why adequacy is being discussed.)

R: The QEC handles that; this is background to ensure all understand the impact of adequacy and how the conversation can change.

Q: It would be helpful to get some of the history focus on the weights (equity) portion. Have those changed/been revisited over time?

In the vein of centering race and culture, what is the history of specific funding for communities of culture? Allocations for staff, curriculum, and activities for BIPOC students?

R: Demographics, rather than race, are being used to address needs. Slide 36 has a list of the current weights. Most, if not, all have existed since 1991.

Q: I do want to name the equity issue that was presented in the previous slide. Districts need resources to afford experienced teachers but it sounds like the formula also pulls resources from districts with less experienced teachers who may need extra support.

I would like to ask if districts that have brought in more diverse teachers are seeing a dip in SSF allocations because of the teacher experience factor calculation.

R: (According to state data, about 2/3 of BIPOC teachers were hired in the last few years, so the experience factor would be lower.)

Observation: Focus on centering race rather than generalizations.

Q: Is local revenue or local options included?

R: Local options do not typically come in to this. Sometimes assessors look at it to make sure they stay under these caps.

Q: Can we ensure that information is disaggregated by race to understand the intersection and the rate BIPOC students are being identified for special education services?

Can we also add a calculation of how many IEP/SPED weights would be in the formula without the cap/waiver...to help illustrate the gap between the number of students identified with special education needs compared to the formula funding weights allocated for those students...and disaggregated for BIPOC students?

R: A note has been made of your request for additional information regarding the teacher experience factor and BIPOC teachers.

Q: Can we also add a calculation of how many IEP/SPED weights would be in the formula without the cap/waiver...to help illustrate the gap between the number of students identified with special education needs compared to the formula funding weights allocated for those students...and disaggregated for BIPOC students?

R: Your request is noted.

Observation: Conversation about needs of BIPOC students specifically and avoid generalizing.

Q: How has SAIPE report suspension for last year impacted your formula? How does the Pandemic impact the formula?

R: We will be working with our federal partners to see what data we can get.

Q: Curious about SSF formula and Student Investment formula, and would like clarity on relationship between the formulas.

Is there a way for our researchers to access student demographic information? We have quality student demographic information going back to 1996.
R: Small rural schools could be looked at as well.

5. Essential Questions: Overview and Small Group Breakouts

(Ben Bowman)

20 min.

Group 1: Ben facilitated

- What questions do you have about this budget note and committee?
 - In terms of BIPOC students, we have ELL weights for state funds as well as federal funds. Indigenous students, there is funding at some level. To me, it is polarizing to say “because you are of this race, you get a higher weight”. That is problematic. What does it cost to educate a Black person vs. a Hawaiian person vs. a Mexican person? That is what is going on in my mind.
 - LaGrande has 18% of its students on IEPs -- we are severely underfunded there. That is an equity problem.
 - Rural schools -- typically less staff, fewer programs, fewer educational opportunities, less travel, more transportation issues, lower paid teachers. The issue could be much bigger.
 - Question on the researchers: are they going to try to find people who have done research on states similar to ours? It’s important that they have that lens when selecting.
 - The Policy and Budget Analyst’s presentation was about allocation. The budget note question was about spending. It will be interesting to see how we measure that and how districts spend money -- and how do we determine the effectiveness of that spending?
 - The SIA is definitely far more targeted. That is a nice vehicle that already exists for any targeted need in a school district.
 - Agreed that selecting the researcher will be critical. What is the committee’s role in the selection process? Will committee be just be informed, or will the committee have a role?
 - After the first two meetings, will the researcher present preliminary results and then the committee will discuss?
 - The nature of the meetings as “public meetings” may be limiting our conversations and preventing folks from sharing.
 - Carve-outs: what if we had a carve-out like the SIA for BIPOC students with parameters that we like that remove obstacles and create more opportunities? Could align with the current system.

- What goals or hopes do you have for our work together?
 - Listen, learn, and influence. Rural areas don’t have the equal opportunities -- there are a lot of things different here, and I would like those to be understood and accounted for, even if nothing changes.
 - Smaller districts don’t have people in place to support greater accountability needs/desires. That has to be accounted for.
 - Thinking about all of the other ways in which zip codes account for the ways schools are funded. School facilities,

bonds, local options -- if you separate these, the solution is inherently inequitable.

- I bet if you look at average age of facilities and HVAC systems, rural schools are older or don't have them. A lot of not-standard systems.
- I hope we come up with good solutions that work well and meet the needs.
- I'm curious about how the findings are going to translate to change. This has probably been studied before -- everyone is aware of the problem, but depending on findings, how will that translate to change.

Group 2: Carmen facilitated

- What questions do you have about this budget note and committee?
- What goals or hopes do you have for our work together?

Summary:

Appreciation for the time to ground everyone:

1) Alignment of language, 2) Intention and transparency, 3) Working in small groups-feeling safe, 4) Understanding historical perspective and impacts, 5) Deconstruction how the formula was built, 6) Good level set and it was not calibrated to the charge of the committee

Future Recommendations:

1. The budget note question was about spending not allocation, even though there was an understanding that this meeting was leveling knowledge and understanding.
2. Facilitators need to focus on "BIPOC/TRIBAL" needs.
3. Do not confuse ELL/SPED/ etc. as meeting the intent of the Budget Note and charge of this committee. This was considered as a "DETOUR"; we understand the intersectionality and we cannot generalize.
4. Rural Districts need to be part of the conversation with a BIPOC/TRIBAL needs/lens. Let's not detour the conversation. Maybe this needs to be clarified.
5. HB3499: What have we learned about spending patterns from this body of work? Did ODE actually implement the review of spending patterns for this bill? Did ODE hold any level of accountability? Can ODE share this information and learning?
6. Clarify that part of the charge is to how districts are spending school funds and identify patterns.
7. Designing the scope and sequence is very important- \$ to student
 - a. This is asking us to look at the spending and we need to chase it to the end of the questions.
 - b. Caution: It is not an outcome formula and we need to guide it

c. Status quo: Here it is and we need to understand the outcome

8. Teacher Experience Factors:

- a. Let's tease it out, this is part of the formula- is this aligned with ODE's Equity, Racial Equity and Anti-racist lens?
- b. Is this aligned with the values of the EAC?
- c. Is this aligned with the recommendation of the Equity Report? Research tells us that BIPOC/Tribal educators have less time in the systems, are placed in challenging assignments, and are asked to do more work.
- d. What is the impact of the Minority Educators Act on Funding?
- e. Districts that have hired more diverse teachers, have they seen a dip in funding?

9. Student Success Act: with the different student success plans, they are relevant to the conversation. And those need to be part of the scope.

Group 3: Tamara facilitated

- What questions do you have about this budget note and committee?
Appreciate overview of funding - but want more information to answer this question - and more information about why the budget note was needed/created in the first place. Is there an assumption one way or other? You were about ELL - but what percentage of students are BIPOC, same with special education; teachers with experience - want more information to understand the question and where we can with the question.

The Policy and Budget Analyst's presentation - this was a high level overview for today - and then we can bring more specific information at the next meeting

Address the factors (political) that brought about this budget note - is it because there is an issue, special interest, lack of understanding? Why did the people who formulate this come up with language?

Also the charge of findings - rather than recommendations - seems a little funny, waste of time.

The Policy and Budget Analyst's presentation - this is not the first time we have reviewed the SSF - this is maybe the fourth time. Oftentimes it comes down to not more money add so we won't change funding formula. The purpose may be to bring in researcher to provide a third party perspective of equity, regardless of adequacy. Again, many times the committee works

ends because there isn't interest in adding weights without additional resources. Without additional funding - it becomes a shifting. The heart of the question is also what is sustainable long term?

If we are serving certain students less - isn't the question how do we serve students better with the existing resources - isn't that what institutional racism all about? – OEA BIPOC teacher agrees. Oregon PTA representative - with White privilege - won't we have to take a loss to be make it more equitable? OEA BIPOC teacher - if you take a loss of revenue - does it make a better school system overall and this a universal benefit. OEA BIPOC teacher - the personal loss of privilege will make a better society overall.

I think this is why the Stand for Children representative brought of adequacy - why that is not relevant for this conversation.

How many weights in SPED would there be if not capped?
How many SPED students are also BIPOC?
How many BIPOC students?
How many BIPOC educators?

The Policy and Budget Analyst's presentation - there was discussion about the adequacy of funding - for example, to increase ELL from .5 to .6 - In the past, when discussing changing weights - adequacy has been in the conversations - but this does not always have to be the case.

It sounds like certain things are easy to identify - but it is more difficult to identify distressed students? How do we identify this?

Policy and Budget Analyst - we know that there was impact on the great recession - with an increase in IEPs - probably the pandemic will have the same impact. OEA BIPOC teacher - yes, not only with IEPs but free and reduced lunch, migration of students - within Oregon and nationally - this causes instability.

It is surprising how many families have moved to metro areas from the fire areas.

More students having to work, costs of housing has gone up so we have multiple families living under one roof.

And the equity of broadband - adequacy and just having in the home.

Policy and Budget Analyst: We are trying to work on connectivity and access needs.

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| | <p>Goals and hopes is to understanding better how BIPOC are impacted by the SSF formula.</p> <ul style="list-style-type: none"> • What goals or hopes do you have for our work together? <p>Group 4: Cindy facilitated</p> <ul style="list-style-type: none"> • What questions do you have about this budget note and committee? <ul style="list-style-type: none"> ○ Definition of terms in budget note, “impacts” “spending pattern” ○ Will you be sharing scoring grid for RFP ○ Budget note says school district. Does that include ESDs? ○ Can we differentiate between local option dollars and other dollars ○ Is there a difference between researcher and committee work (25 districts)? Some districts are having different understanding of communities with smaller number of BIPOC students ○ Systems questions, school boards vary from district to district, factor in the people (Newberg example), may be anomalies, will we factor in ○ Equity lens - is this a factor? Does it impact allocation? Will we look at it? About 30% of districts have adopted an equity lens but covers more than 30% of kids, larger districts have adopted. ○ 40-45 districts have small BIPOC numbers – how do we include, researcher question ○ Does the Constitution allow weights/funding based on race? <p>What goals or hopes do you have for our work together?</p> <ul style="list-style-type: none"> ○ 25 school districts with most BIPOC students should be identified for study. Districts with most BIPOC students have local options ○ Understanding of how some decisions are made but should not limit thinking to those constraints |
| <p>6. Closing & Next Steps (<i>Tamara Dykeman</i>) <i>10 min.</i></p> | <p>Next meeting: Thursday, Nov. 4, 2-5pm Topics include: Student-Level Expenditure Report Addressing Advisory Member Feedback RFP of the research component of the work</p> |

Next meeting date: 11/4/21