

State School Fund Advisory Committee

Thursday, November 4, 2021
2 pm to 5 pm

Virtual Community

1. **Keep camera on (unless you need to step out or you have bandwidth challenges). It's tough to build community if we can't see each other!**
2. **Be aware of your background / surroundings to minimize distractions to others. Children and pets are always welcome!**
3. **Mute your microphone when not speaking.**

Today's Agenda

01

.....• **Welcome**

02

.....• **Group Agreements**

03

.....• **Summary of Feedback**

04

.....• **Student & Educator Demographics**

05

.....• **School-Level Expenditure Report**

06

.....• **Researcher Contract**

07

.....• **Closing & Next Steps**

The committee was created by a Budget Note from [HB 5006](#)

A one-time \$500,000 General Fund appropriation was approved for a study of the impacts of State School Fund spending and to determine if this spending pattern results in disparities between students who are black, indigenous or people of color (BIPOC) and those who are not BIPOC students.

The Oregon Department of Education will award a contract to an experienced researcher who has done research on exploring and modeling education finance policy and practice including research on the effects of fiscal policies and implications on resources at the school and classroom levels. The researcher awarded the contract should have completed at least one multi-year study of weighted student funding. The Department is to provide support and data for the researcher(s).

The Department should also appoint an advisory committee with representatives from various educational advocacy and community groups with experience working with historically underserved students. This committee is to review variations in school level spending across multiple types of expenditures across 25 school districts, and to review the proportion of diverse teachers and students.

The Department is to submit a report with the results and findings of the study and advisory committee by December 15, 2022.

Proposed Group Agreements

- **Leave positionality behind:** We come to this team as equals, we strive to bring our perspectives and knowledge forward while leaving our positional power behind.
 - *Clarification: This does not mean we leave behind the organization or people that we represent. It means we all show up in this conversation with equal voices, regardless of our “rank” or title.*
- **Stay engaged:** Staying engaged means “remaining morally, emotionally, intellectually, and socially involved in the dialogue”. Setting our email and phones to the side in critical conversations.
- **Speak your truth and hear the truth of others:** This means being open about thoughts, feelings, and what you think you know and not just saying what you think others want to hear. It also means listening closely to others and trying to understand their perspective without forming your next thought or response in your mind.
- **Expect and accept non-closure:** This agreement asks participants to “hang out in uncertainty”, rumble with problems, and not rush to quick solutions, especially in relation to racial understanding, which requires ongoing dialogue.

Proposed Group Agreements

- **Experience discomfort:** This norm acknowledges that discomfort is inevitable, especially, in dialogue about equity (race, ethnicity, disability, gender, sexual orientation, privilege, etc.), and that participants make a commitment to bring issues into the open. It is not talking about these issues that create divisiveness. The divisiveness already exists in the society and in our schools. It is through dialogue, even when uncomfortable, the healing and change begin.
- **Commitment to building our trust:** All members hold trust or faith with one another to lead with integrity around our decisions. This also means when there is disagreement, discomfort, and hurt that our commitment is to care-front one another with.
- **All data and information requests will be made through advisory committee facilitators and not directly to ODE staff and results of that request will be shared with the entire committee.**

Proposed Group Agreements

New Agreements for Consideration

- **Starting fresh:** While we acknowledge that conversations around the State School Fund have happened for many years, this Advisory Committee is a new conversation and a new opportunity. We agree to let go of any “baggage” from previous conversations and not to rehash old arguments because we know that this gives us the best chance to forge consensus and agreement.
- **Focus on BIPOC and Tribal students:** The legislative charge of this Advisory Committee is to focus our work on BIPOC and Tribal students. We agree to center the impacts of BIPOC and Tribal students in reports to this committee and discussions among members.
- **Get caught up:** If a member misses a meeting of the Advisory Committee, that member will take personal responsibility to read all materials from the previous meeting and reach out to ODE facilitators as needed to catch up.

Proposed Group Agreements

Small Group Discussions

- What questions do you have about these agreements?
- What else do we need? Do these agreements enable your full participation?
- Fist to Five Protocol

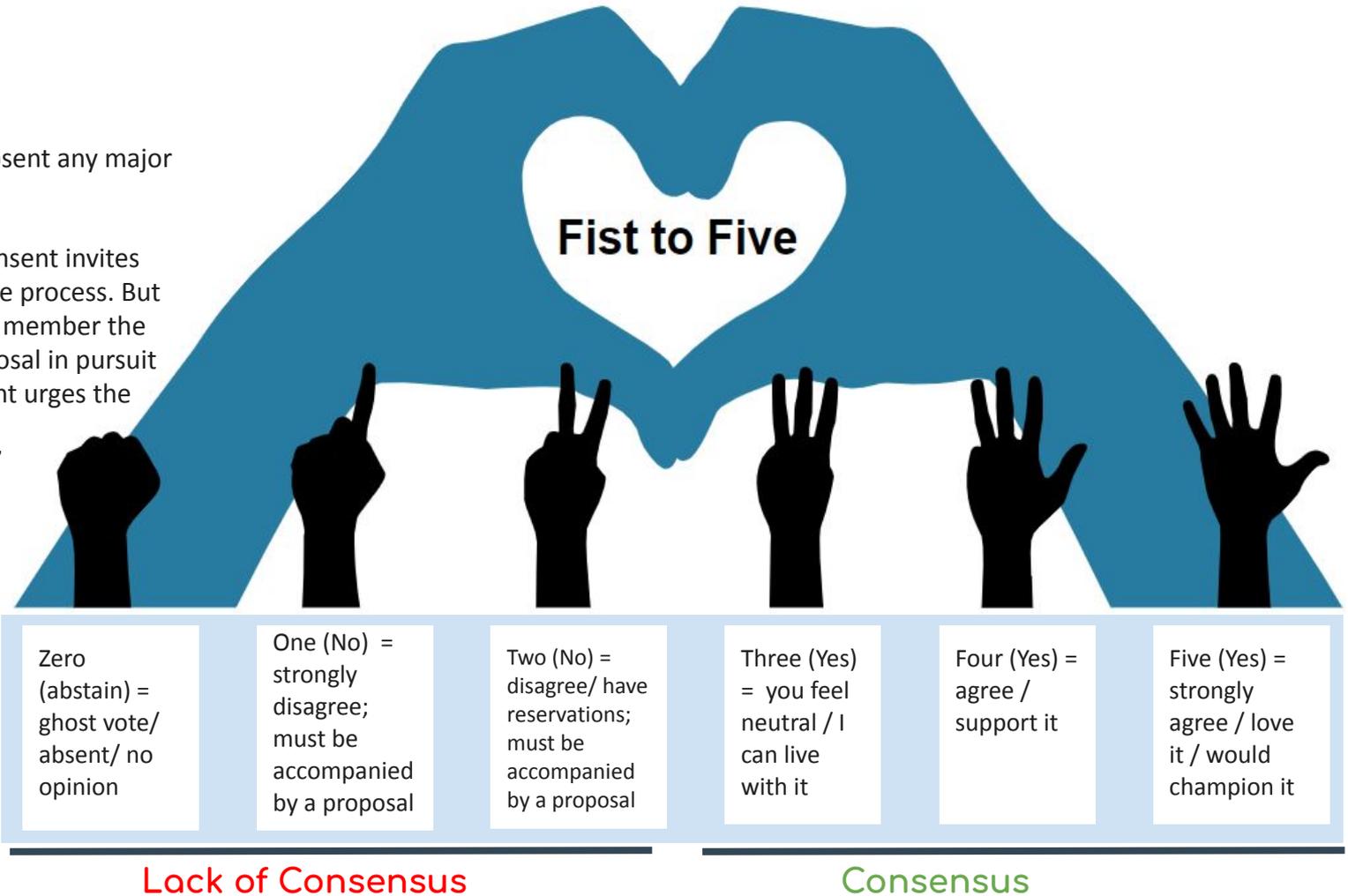


Consent Input

Consent = agreement absent any major objections.

Similar to consensus, consent invites group participation in the process. But instead of granting each member the power to mold the proposal in pursuit of a compromise, consent urges the group to approve an “acceptable” solution. Those recommendations will then go to ODE leadership to ratify the charter.

Consensus =
All 3s and above



- **Clarification of Charge:** Is this work focused on spending or allocation? How do we define “impacts” and “spending pattern” as described in the budget note?
- **School-Level Spending:** How do we determine how dollars are being spent and whether that spending is effective? Do locally-adopted equity lenses impact spending patterns?
- **State School Fund Formula:** How does the formula impact different variables, and vice versa? E.g. BIPOC and Tribal students; teacher experience factor; teacher diversity; rural schools; SPED population; etc. How and why was the funding formula created? Does the Constitution allow weights/funding based on race?

- **Other models:** What can be learned from or incorporated from other policies/initiatives, including the Student Success Act/Student Investment Account, House Bill 3499 (English Learner School & District Improvement Program), and the Educator Advancement Council (EAC).
- **Process:** How will the researcher be selected? How will the researcher's scope be determined? What role will committee members have in that process?
- **Small Groups:** The breakout rooms provide a sense of comfort and safety for more free expression.

- *A one-time \$500,000 General Fund appropriation was approved for a study of the impacts of State School Fund spending and to determine if this spending pattern results in disparities between students who are black, indigenous or people of color (BIPOC) and those who are not BIPOC students.*
- *The Oregon Department of Education will award a contract to an experienced researcher who has done research on exploring and modeling education finance policy and practice including research on the effects of fiscal policies and implications on resources at the school and classroom levels. The researcher awarded the contract should have completed at least one multi-year study of weighted student funding. The Department is to provide support and data for the researcher(s).*
- *The Department should also appoint an advisory committee with representatives from various educational advocacy and community groups with experience working with historically underserved students. This committee is to review variations in school level spending across multiple types of expenditures across 25 school districts, and to review the proportion of diverse teachers and students.*
- *The Department is to submit a report with the results and findings of the study and advisory committee by December 15, 2022.*

Clarification of Charge

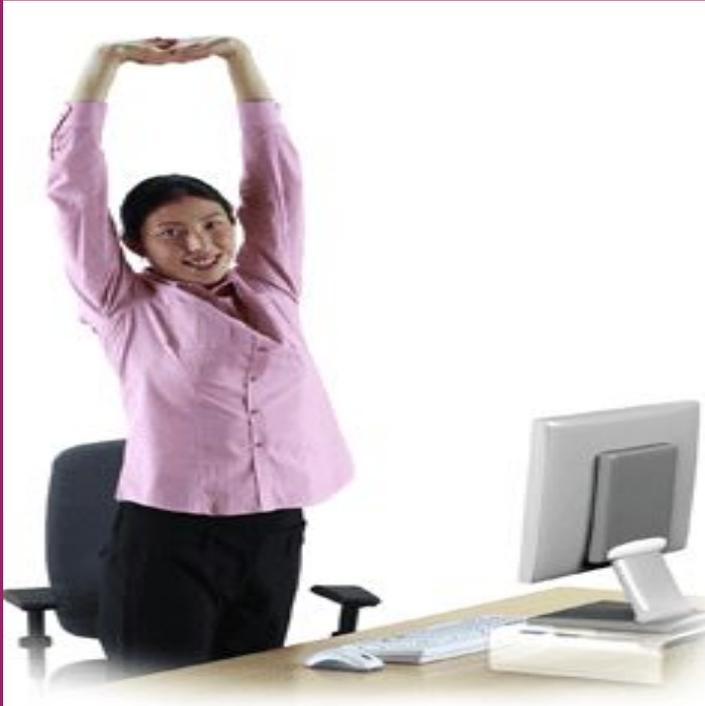
What is the problem the budget note is trying to address:

Moneys distributed by the State School Fund are not being consistently expended equitably on BIPOC and Tribal students at the state and local level. This spending pattern has contributed to both achievement and opportunity gaps between BIPOC and Tribal students and their white peers. State level laws and local policies are creating or influencing this result.

Clarification of Charge

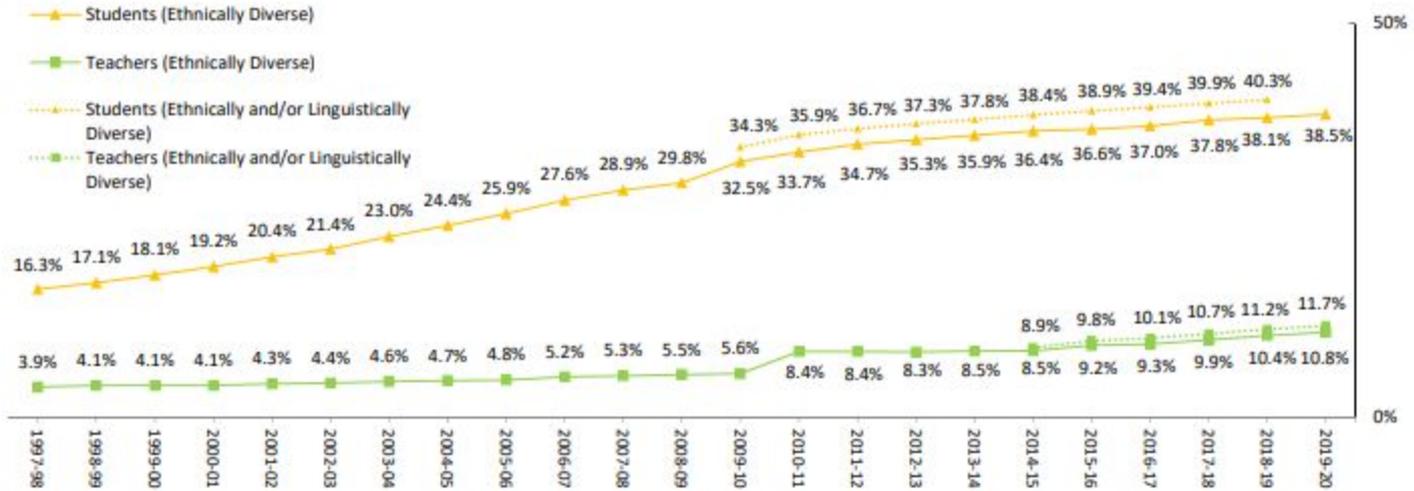
Why was the budget note and advisory group created?
Are there underlying assumptions within the budget note?
What is the problem the budget note is trying to address?

Take a Stretch Break



Student and Educator Demographics

Figure 2. Longitudinal Data Report on Oregon Student and Teacher Demographics



Source. Data provided by the Oregon Department of Education.

Note. Data reflect Fall Membership and Staff Position Collections. In 2009-10 for students, and 2014-15 for teachers, the guidelines for reporting race and/or ethnicity changed – see the Federal Race and Ethnicity Reporting Assistance Manual for details. These data may not be comparable to prior years.

Federal regulations on race and ethnicity reporting require districts to ask a two-part question:

1. Are you Hispanic/Latino (Y/N)?
2. Select one or more races among the following:
American Indian/Alaska Native; Asian; Black/African American; Native Hawaiian/Pacific Islander; White

Federal Reporting Rules:

- Students who are hispanic are reported as hispanic, regardless of race.
- Non-hispanic students who identify with more than one race are reported as multi-racial.
- Additional racial categories can be used, but they must be sub-categories of the five above.

School Year	Total Students	Native Hawaiian/ Pacific Islander		Black/ African American		American Indian/ Alaska Native		Asian		White		Hispanic
		Federal	Flags	Federal	Flags	Federal	Flags	Federal	Flags	Federal	Flags	
2011-12	560,946	3,657	9,062	14,182	25,148	10,131	67,172	22,048	32,831	366,470	470,619	118,017
2012-13	563,714	3,741	9,513	13,969	25,913	9,577	66,519	22,215	33,809	364,792	474,076	121,372
2013-14	567,098	3,907	9,252	13,699	26,311	9,161	64,629	22,344	34,459	363,770	478,888	124,701
2014-15	570,857	3,983	9,575	13,673	26,968	8,650	62,985	22,440	35,221	363,155	483,747	127,845
2015-16	576,407	4,032	10,222	13,744	27,544	8,305	61,545	22,726	36,404	365,593	489,909	129,410
2016-17	578,947	4,172	10,392	13,654	28,285	8,184	58,617	23,067	37,604	364,581	494,321	131,089
2017-18	580,684	4,232	10,813	13,509	29,023	7,724	56,275	23,324	38,764	362,396	497,991	133,822
2018-19	581,730	4,363	11,477	13,301	29,573	7,280	54,272	23,267	39,505	360,197	501,331	136,186
2019-20	582,661	4,431	11,743	13,176	30,176	7,010	51,548	23,208	40,280	358,257	504,468	138,273
2020-21	560,917	4,335	11,776	13,021	30,374	6,570	47,927	22,733	40,423	338,528	486,105	137,101

Federal = count of students using the federal racial and ethnic reporting rules

Flag = number of students having that race flag set to 'Y'

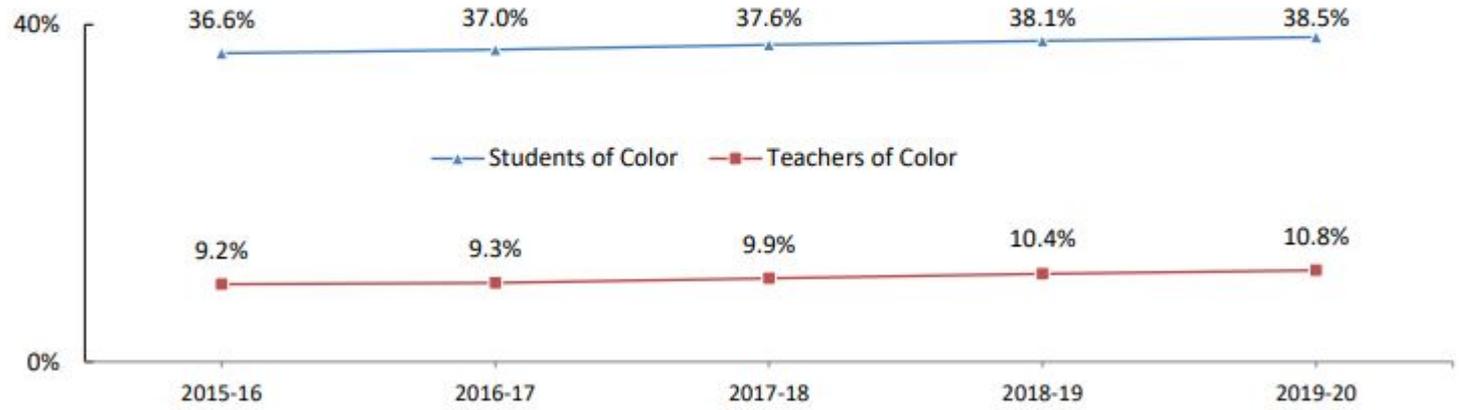
School Year	Total Students	Native Hawaiian/ Pacific Islander		Black/ African American		American Indian/ Alaska Native		Asian		White		Hispanic
		Federal	Flags	Federal	Flags	Federal	Flags	Federal	Flags	Federal	Flags	
2011-12	560,946	0.7%	1.6%	2.5%	4.5%	1.8%	12.0%	3.9%	5.9%	65.3%	83.9%	21.0%
2012-13	563,714	0.7%	1.7%	2.5%	4.6%	1.7%	11.8%	3.9%	6.0%	64.7%	84.1%	21.5%
2013-14	567,098	0.7%	1.6%	2.4%	4.6%	1.6%	11.4%	3.9%	6.1%	64.1%	84.4%	22.0%
2014-15	570,857	0.7%	1.7%	2.4%	4.7%	1.5%	11.0%	3.9%	6.2%	63.6%	84.7%	22.4%
2015-16	576,407	0.7%	1.8%	2.4%	4.8%	1.4%	10.7%	3.9%	6.3%	63.4%	85.0%	22.5%
2016-17	578,947	0.7%	1.8%	2.4%	4.9%	1.4%	10.1%	4.0%	6.5%	63.0%	85.4%	22.6%
2017-18	580,684	0.7%	1.9%	2.3%	5.0%	1.3%	9.7%	4.0%	6.7%	62.4%	85.8%	23.0%
2018-19	581,730	0.8%	2.0%	2.3%	5.1%	1.3%	9.3%	4.0%	6.8%	61.9%	86.2%	23.4%
2019-20	582,661	0.8%	2.0%	2.3%	5.2%	1.2%	8.8%	4.0%	6.9%	61.5%	86.6%	23.7%
2020-21	560,917	0.8%	2.1%	2.3%	5.4%	1.2%	8.5%	4.1%	7.2%	60.4%	86.7%	24.4%

Federal = count of students using the federal racial and ethnic reporting rules

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Students and Teachers of Color

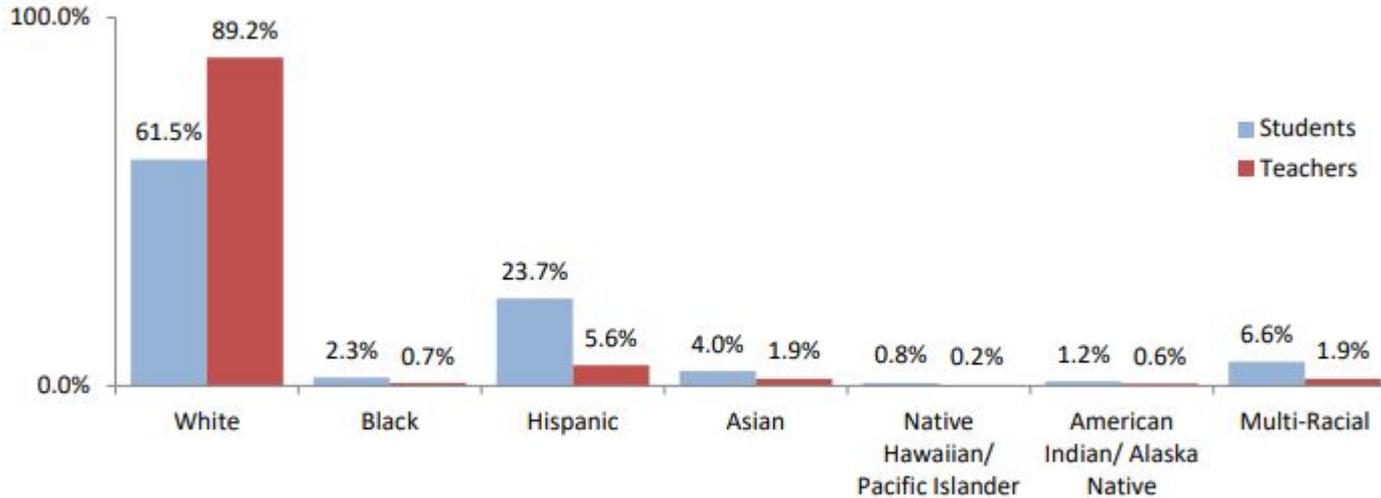
In the 2019-20 school year, the proportion of both teachers and students of color continued to increase at a steady rate. Because the growth rates are the same, however, the discrepancy between the number of students of color and teachers of color remains unchanged.



Sources: Fall Membership and Staff Position Collections

04 Educator Demographics

Race/Ethnicity of Students and Teachers, 2019-20



Source: Fall Membership and Staff Position Collections

Note: Multi-Racial does not include students or staff who reported Hispanic Ethnicity – they are all reported under Hispanic. See the [Federal Race and Ethnicity Reporting Assistance Manual](#) for more information.

Table 3. 2011 – 2020 Statewide Counts of Teachers by Race and/ or Ethnicity

	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19
American Indian or Alaska Native	174	171	164	168	164	168	172	184
Asian	442	435	441	477	507	528	551	571
Black or African American	177	174	167	184	180	193	197	204
Hispanic/Latinx (any race)	1,005	1,016	1,067	1,154	1,277	1,392	1,529	1,690
Multi-racial	531	483	503	471	530	564	578	570
Pacific Islander or Native Hawaiian	39	39	44	53	69	64	69	68
White	25,699	25,328	25,696	26,939	27,799	28,242	28,233	28,227

Source: 2011-2012 through 2019-20 ODE Staff Position Collection

Over time there have been only slight increases in educator diversity, but this does mask some added diversity in teachers with fewer than 5 years of experience. Data below are for the 2020-21 school year.

Race/Ethnicity	All Teachers	Fewer than five years of experience	More than fifteen years of experience
American Indian/Alaska Native	0.6%	0.8%	0.6%
Asian	2.0%	2.6%	1.5%
Black/African American	0.7%	1.2%	0.6%
Hispanic/Latino	5.9%	9.6%	3.8%
Native Hawaiian/Pacific Islander	0.2%	0.3%	0.2%
Multi-racial	1.9%	2.3%	1.6%
White	88.7%	83.2%	91.8%

School-Level Expenditure Report

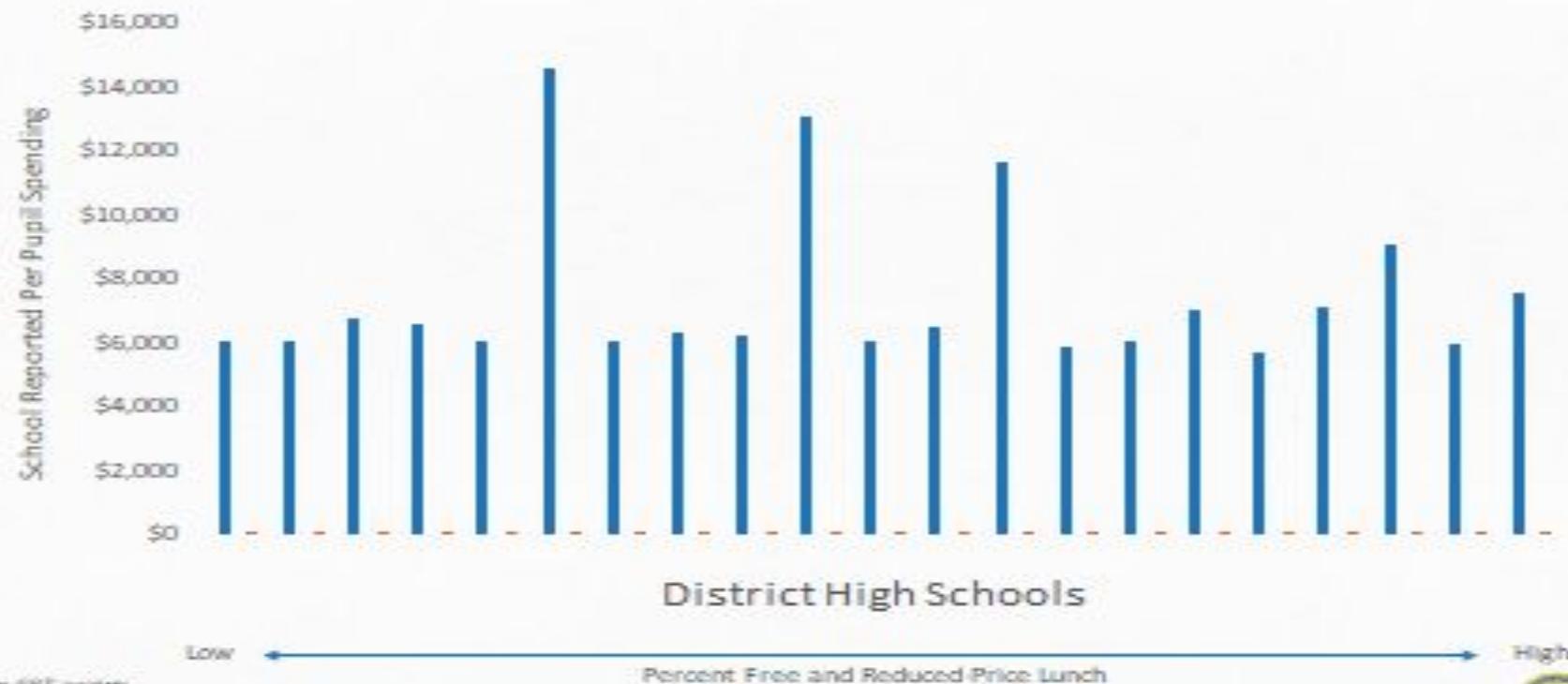
2017 Federal Mandate

Section 1111(h)(1)(C)(x) of the Elementary and Secondary Education Act (ESSA) requires the reporting of:

“The per-pupil expenditures of Federal, State, and local funds, including actual personnel expenditures and actual non-personnel expenditures of Federal, State, and local funds, disaggregated by source of funds, for each local educational agency and each school in the State for the preceding fiscal year.”

PER-PUPIL SPENDING WITHIN A DISTRICT

THIS SPENDING CAN VARY WIDELY WITHIN A DISTRICT, WHICH MAKES IT HARD FOR STAKEHOLDERS TO KNOW IF INDIVIDUAL SCHOOLS ARE OVER- OR UNDER-FUNDED



School-Level Expenditure Report

There are a variety of reasons schools will vary in funding:

- 1. Size of school*
- 2. Needs of school*
- 3. School district strategies for allocating resources*
- 4. Specialized programs housed at certain schools*
- 5. How the school district reports its data*
- 6. Additional resources – e.g., Local Option, private donations*

School-Level Expenditure Report

Inst_Id	County	District	ADMr	Local Option	Local Opt/ADMr
2180	Multnomah	Portland	48,439.10	\$122,633,054	\$2,532
2243	Washington	Beaverton	40,609.30	\$33,330,338	\$821
2082	Lane	Eugene	16,907.70	\$17,169,025	\$1,015
1923	Clackamas	Lake Oswego	7,013.20	\$10,969,489	\$1,564
2242	Washington	Tigard-Tualatin	12,539.50	\$9,463,320	\$755
1922	Clackamas	West Linn-Wilsonville	9,875.70	\$8,853,425	\$896
1901	Benton	Corvallis	6,734.70	\$7,233,192	\$1,074
2041	Jackson	Ashland	2,851.50	\$3,721,350	\$1,305

Examples of per-pupil spending:

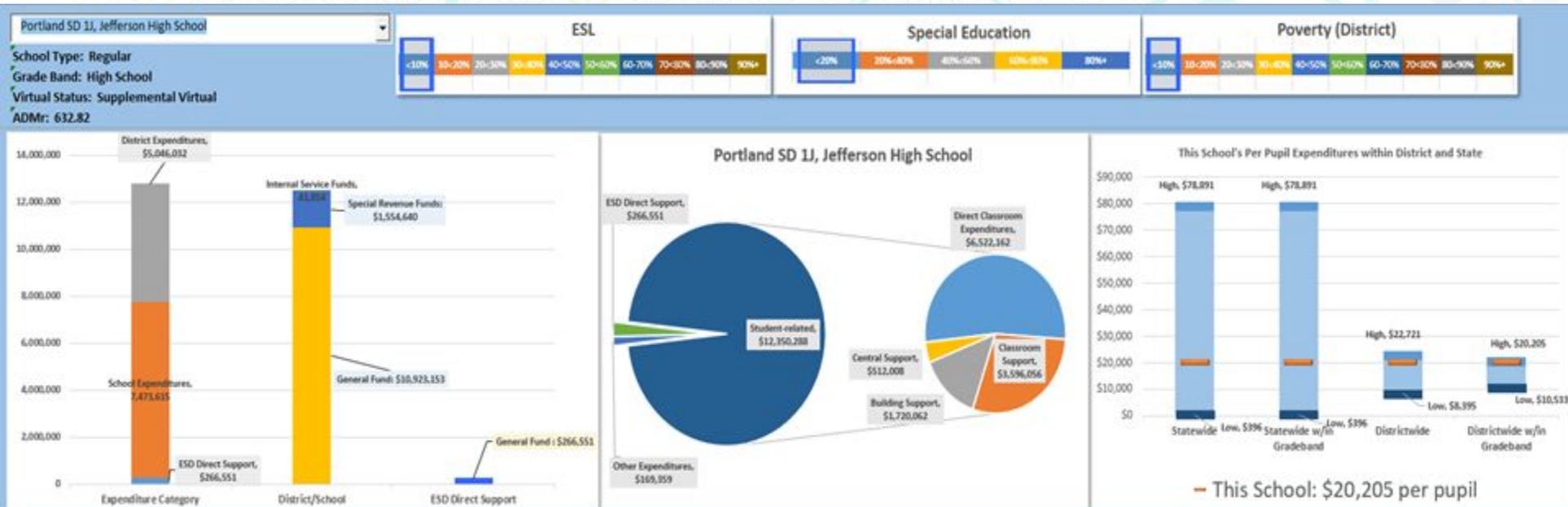
- 1. Lake Oswego Sr HS: \$15,992*
- 2. Salem – Keizer McNary HS: \$13,063*
- 3. Salem – Keizer Sprague HS: \$13,402*
- 4. Troy: Troy Elementary School: \$93,036*
- 5. School district per pupil is typically <\$10,000*

Let's take a look at the reporting tool

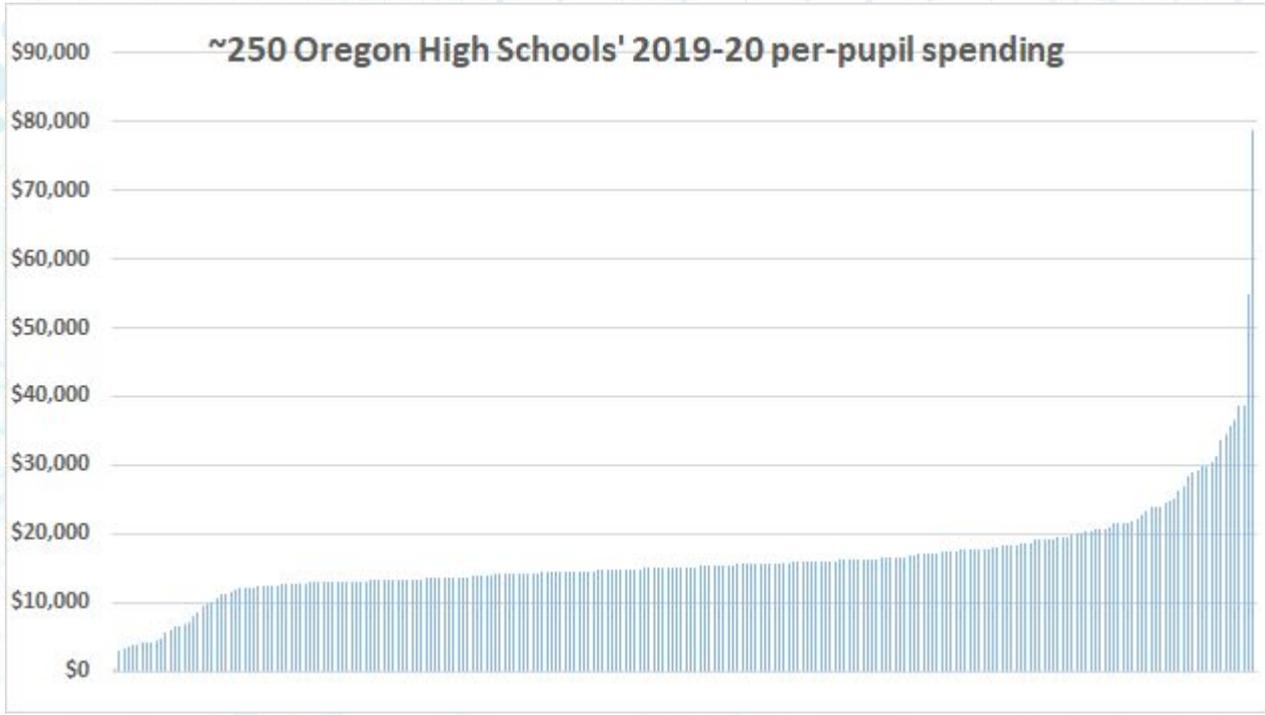
School-Level Expenditure Report

This school-level expenditure report is available at the following link:

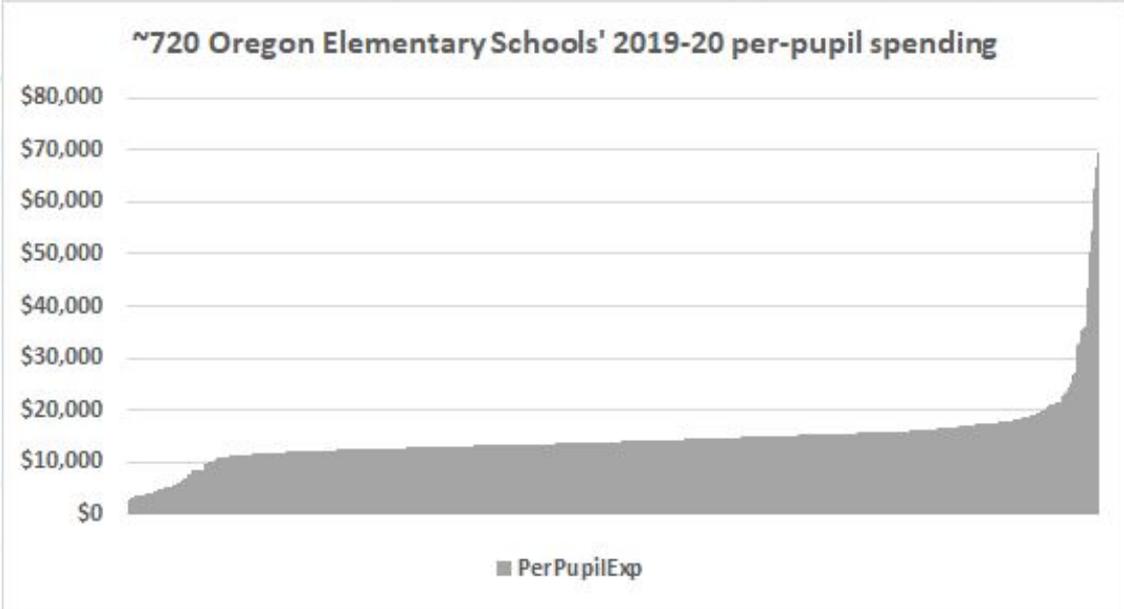
<https://www.oregon.gov/ode/schools-and-districts/grants/Pages/K-12-School-Funding-Information.aspx>



School-Level Expenditure Report



School-Level Expenditure Report



School-Level Expenditure Report

What have we learned from this work in the past few years?

- School districts continue to improve reporting expenses at the school level
- This is a substantial change in reporting culture
- It appears school districts are changing strategies for allocating resources
- We still have work to do in creating awareness around resource equity
- We would like to improve upon the current report and model
- It is anticipated there will be a federal mandate called the School Level Financial Survey, or SLFS, which will be part of our annual federal reporting

- *... study of the impacts of State School Fund spending and to determine if this spending pattern results in disparities between students who are black, indigenous or people of color (BIPOC) and those who are not BIPOC students.*
- *The Oregon Department of Education will award a contract to an experienced researcher who has done research on exploring and modeling education finance policy and practice including research on the effects of fiscal policies and implications on resources at the school and classroom levels. The researcher awarded the contract should have completed at least one multi-year study of weighted student funding.*
- *This committee is to review variations in school level spending across multiple types of expenditures across 25 school districts, and to review the proportion of diverse teachers and students.*

What is the problem the budget note is trying to address:

Moneys distributed by the State School Fund are not being consistently expended equitably on BIPOC and Tribal students at the local level. This spending pattern has contributed to both achievement and opportunity gaps between BIPOC and Tribal students and their white peers. State level laws are creating or influencing this result.

Draft Critical questions relating to students:

- What is the impact of state laws and local policies and procedures on state and local resource distribution to schools?
- What data or evidence is available or can be collected to demonstrate the racial inequities, adverse effects, contributing causes, trends and current needs?
- What are the adverse effects that BIPOC and tribal students experience under current conditions, policies, procedures, and expenditures?
- What are the causes or contributing factors (e.g. unfair policies and practices, inequitable funding formulas) that produce or perpetuate the inequities?
- What influences local expenditures? How do districts allocate resources? What patterns exist? For example, does the creation and implementation of an equity lens, racial equity lens or other initiatives at the local level impact expenditures to support students who are BIPOC or Tribal?

Draft Critical questions relating to teachers:

- What is the impact of school level spending on the number of teachers who are BIPOC or tribal members?
- What are the causes or contributing factors (e.g. unfair policies and practices, inequitable) that produce or perpetuate inequities between schools regarding the number of teachers who are BIPOC or tribal members?
- What data or evidence is available or can be collected to demonstrate the racial inequities, adverse effects, contributing causes, trends and current needs?

Minimum qualifications:

- Experience doing research on exploring and modeling education finance policy and practice
- Experience doing research on the effects of state fiscal policies and implications on resources at the school and classroom levels
- Must have completed at least one multi-year study of weighted student funding

Work to be accomplished:

- Complete a study of the impacts of State School Fund spending and to determine if this spending pattern results in disparities between students who are BIPOC or tribal members and those who are not BIPOC students or tribal members.
- The study must include spending at the state and local level.
- The study must include a review of variations in school level spending across multiple types of expenditures across at least 25 school districts, and to review the proportion of diverse teachers and students.
- A review of other research relating to spending patterns and disparities between students who are BIPOC and those who are not BIPOC students

Risks and challenges:

- Procurement timeline and back log
- Data requests may need to be prioritized due to staffing or time to pull data
- Limited data at the school level
- Consistency of data across the state
- Consistency varies depending on the data collected and the purpose
- 2020-21 school year was anomalous and has incomplete data in many areas due to pandemic
- Data suppression rules to protect student privacy

- Phased approach
 - Phase 1: Up to \$150,000
 - What parts of the project would you be able to do in Phase 1?
 - What would be your project plan
- Advantages:
 - Faster process
 - Gets some information to committee faster
- Disadvantages:
 - May not address all research questions

Next steps:

Review Committee Input

Identify Future Meeting Dates (Doodle Poll)

Issue RFP

Select Research Contractor

SSF Advisory Committee Webpage:

<https://www.oregon.gov/ode/schools-and-districts/grants/Pages/SFAC.aspx>