

Topic Description	Discussion Notes
<b>1. Welcome</b>  <i>(Carmen Urbina)</i> <b>5 to 10 min.</b>	<p>Livestreamed to: <a href="#">Oregon ODE - YouTube</a></p> <p>Cindy called to order handed to Andrew Overview of agenda OEA - Teacher Margaret Peoples <b>ABSENT</b>  <b>COSA - Policy Morgan Allen</b>  <b>COSA - Equity Board Paul Coakley ABSENT</b>  <b>COSA Equity Board - George Mendoza ABSENT</b>  <b>OSBA - Policy Lori S. ABSENT</b>  <b>OSBA - Caucus of Color member Neelam Gupta ABSENT</b>  <b>OASBO- Jackie Olsen</b>  <b>Stand for Children - Sarah Pope ABSENT</b>  <b>Oregon PTA - Scott Overton ABSENT</b>  <b>Oregon Coalition of Charter Schools - Iris Chavez ABSENT</b>  <b>Charter School Leader with Finance Background - Jon Bullock ABSENT</b>  <b>Foundations for a Better Oregon - Amanda Manjarrez</b>  <b>Children's Institute/AABS advisory/ charter school leader - Dana Hepper</b>  <b>RJC - SKSD Administrator - Cynthia Richardson ABSENT</b>  <b>RJC - Teacher - Jennifer Scurlock</b>  <b>RJC and Siletz, AI/AN advisory group - Sonya Moody-Juardo - ABSENT</b>  <b>FACT Oregon - Heather Olivier -ABSENT</b>  <b>QEC - Carlos Sequeira - ABSENT</b>  <b>OSBA - Jim Green</b>  <b>OEA - Laurie Wimmer</b>  <b>Julie Neburka - LFO</b>  Link to the interim report for your review:  <a href="https://drive.google.com/file/d/1-suF1FnZEa1xvcDMX6c9BbZDrDPlt2eA/view?usp=share_link">https://drive.google.com/file/d/1-suF1FnZEa1xvcDMX6c9BbZDrDPlt2eA/view?usp=share_link</a>  slides:  <a href="https://drive.google.com/file/d/16PUFikrzFGYDJZ0xTQhgsfJmJCYY--kx/view?usp=share_link">https://drive.google.com/file/d/16PUFikrzFGYDJZ0xTQhgsfJmJCYY--kx/view?usp=share_link</a> </p>
<b>2. Updates on State School Fund Research and the drafting of the preliminary legislative report.</b> <i>(Contractors)</i>  <b>45 min for presentation and have a document for people to write their questions and</b>	<p>Identified 25 focus districts data received first week in November completed focus group and interviews interim report submitted today plan a survey of selected staff at 25 districts with admin, budget, student data adm greater than 500 5 districts with largest BIPOC enrollment resource differences: expenditures at school level, ex: average per student experiences by BIPOC v white students. Then calculate weighted average at district and state level allocations and calculate gap.</p>

wonderings for 5  
min

Gap greater than 0 BIPOC experienced schools spending more than white, less than zero is opposite.

resource difference calculation example

- Laurie Wimmer questions validity, does it include student

- We know how much a school is spending but don't know what they are spending on
- District level engagement will help with this issue
- Looking at student outcomes, higher spending per student and good vs opposite (graduation) iterative process

1<sup>st</sup> step is identifying districts to talk to

Morgan Allen flagged issue with data validity as well, mentioned budget note interpretation, must look beyond state school fund dollars

Jackie Olsen – what years of data?

- 2019-2020
- 2020-2021

Data list

Map view

District poverty rate v percent of BIPOC enrollment graph to show we have high poverty with high BIPOC enrollment chart (pre pandemic)

ELL enrollment story follows same alignment shows low ELL, low poverty (pre pandemic)

Dropout rate (pre pandemic) chart

4 yr cohort graduation rate (pre pandemic) chart

ELA Median Growth percentile (pre pandemic)

Math Median growth percentile (pre pandemic)

Summary of interim report

Showed HB 5006 budget note

4 research questions

Amanda Manjarrez – review budget note, want to make it specific to SSF, need to frame to legislature

John Tapogna – summary of literature review

Findings

1. Does money matter – yes, and how it is spent.
2. What formulas and other allocation rules determine how money flows to schools? Oregon's equalization formula and its associated rules, resources outside the formula

Dana Hepper – Is the school data calculated at avg FTE cost to assume budget or real salary and budget packages at each school?

Andy gave answer for data, John gave answer for literary review.

3. Have state and district level finance policies led to measurable disparities in per student spending? Slightly regressive with low poverty school, more affluent schools receiving 500 to 1000 \$ per student without accounting for federal reserves. Ed Trust characterizes Oregon as moderately progressive vs Alaska, Utah (highly progressive) vs Illinois (highly regressive)

Andrew presents SSF Overview slide

Formula weights suggest a progressive allocation of funds

Amanda Manjarrez raises clarification

District poverty rate v percent ELL – SSF overview formula factors and BIPOC enrollment

Dana Hepper – large cluster of grey dots on 0% ELL have 20% plus BIPOC

Calculated expenditure gaps consistent with national literature,

	<p>relatively modest progressivity.  Formula weights suggest a progressive allocation of funds but districts have other sources of revenue.  Gaps are more progressive when measured at the school level, suggesting the degree to which districts can and do play a role in resource allocation.  Total expenditures are on average distributed slightly less progressively than are general fund expenditures.  K12 resource allocation across districts by student population, at the district level for general purpose grant are distributed relatively progressively  Morgan – do general fund dollars include student investment account dollars?  Andy – yes  From Michael Wiltfong - OR to Everyone 05:03 PM  School-level expenditure data for years after 19-20 will include SSA funding</p>
<p><i>Break 5:08to 5:13</i></p> <p><b>5 min</b></p>	
	<p>Advisory committee focus group summary – Jade Aguilar  Key themes</p> <ol style="list-style-type: none"> <li>1. The methodology for the engagement phase of the study</li> <li>2. The lack of clarity on how state school fund are spent</li> <li>3. How improved coding by school districts could improve fund expenditure transparency and outcomes</li> </ol> <p>Continued</p> <ol style="list-style-type: none"> <li>1. Lack of tracking and knowledge about how revenues are spent. Hb 3499 as ex linking accountability and spending, recommending this type of accountability for other weighted components of the ssf while acknowledging the approach has issues to resolve.</li> <li>2. Lack of state level recommendations on best practices for spending allocated money, school districts don't have time or resources to do their own research.</li> <li>3. Role of data information and communication in supporting school district coding of expenditures in a way that assists with outcome tracking.</li> <li>4. At least two key factors of BIPOC student success: qualified, diverse, and supported teachers, strong curriculum.</li> </ol> <p>Andrew Dyke – quantitative analysis plan  Rely heavily on data provided by ODE  Findings from district level engagement and staff survey will drive specific analyses  Three broad areas of inquiry:  -analysis of the impact of specific formula weights on allocations  - Staffing resource allocation  - Modeling to asses correlates and predictors of educational outcomes and disparities in outcomes  Evaluation of change over time in identified quantitative relationships will provide information about progress made in the past and where the state might be headed under current conditions  From Morgan Allen COSA to Everyone 05:24 PM</p>

	<p>Also should look at adding a BIPOC weight and removing the cap on special education weighting!</p> <p>Assessing impact of specific formula weights on resource allocation possibilities include:</p> <ul style="list-style-type: none"> <li>-testing alternate formula weights</li> </ul> <p>Modeling the effect of allocating non-SSF resources consistent with the formula</p> <p>Staffing resource allocation possibilities</p> <ul style="list-style-type: none"> <li>- The extent of student exposure to novice teachers and to teachers of their own race</li> <li>- Assess correlations between exposure and subsequent outcomes</li> </ul> <p>Total per student expenditures graph</p> <p>From Laurie Wimmer to Everyone 05:26 PM</p> <p>ALL students do better with diverse teachers, so you don't have to match race of student and teacher; you can evaluate the outcomes of all students who have teachers of color</p> <p>Jade Aguilar – engagement plan</p> <ul style="list-style-type: none"> <li>- Survey of staff from 25 selected districts, CFOs and possibly other staff, open ended questions</li> <li>- Potential follow-up requests</li> <li>- Interviews through February</li> </ul> <p>Key survey question –</p> <ol style="list-style-type: none"> <li>1. Do district budgeting processes address inequitable outcomes for BIPOC students, how?</li> <li>2. Do these processes differ for SSF revenue relative to other revenue sources, how?</li> </ol> <p>Interviews breakout, state and region level then district and school level</p> <p>Understanding relationship between business and education side of administrators</p> <p>Interviews will span across geography and other relevant dimensions to get perspectives from diverse sources</p>
<p><b>9. Closing &amp; Next Steps</b></p> <p><i>(Tamara Dykeman)</i></p> <p><b>5 min.</b></p>	<p>Next steps</p> <p>Interim report – Advisory Committee feedback due Thurs, Dec 1</p> <p>ODE submit report to legislature on Dec 15</p> <p>State and district level engagement ongoing through February</p> <p>SSF Advisory Committee meetings scheduled</p> <p>Friday Jan 20 3:30-5p</p> <p>Tentative – Friday March 17, 3:30-5p</p> <p>Tentative – Friday May 12, 3:30-5p</p> <p>Final report delivered to legislature by June 22, 2023</p>