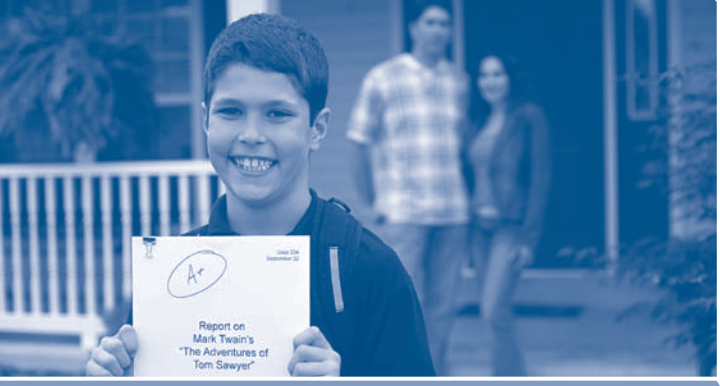

Quality Education Commission

Quality Education Model

Final Report
December 2008

Quality Education Commission

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Quality Education Model
Final Report

December 2008

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Preface

The Quality Education Commission has focused its work this past year on the implications of the new graduation standards adopted by the State Board of Education in January 2007 to better prepare students for postsecondary education, work, and citizenship. This focus is consistent with the Commission's statutory requirement to refine and update the Quality Education Model, which identifies the components of a quality education and then estimates their costs. The model is based on three prototype schools (elementary, middle, and high) and a set of 12 "Quality Indicators" characteristic of high-performing schools. The prototypes provide examples of how schools of certain sizes and characteristics could be organized to implement the instructional best practices that research and experience have shown are correlated with high student achievement.

The new Oregon Diploma raises the bar for all students and schools across the state. Changes in the graduation standards and expectations are driven by a vision of increased academic rigor, relevance, and personalization. Beginning with the class of 2010, students must successfully complete a minimum of 24 credits to graduate. In addition, all students must demonstrate proficiency in essential skills (initially reading, writing, math, and speaking) and meet personalized learning requirements designed to prepare them for post-high school education and careers. The timeline for implementing these changes raises urgent questions about systems improvement and alignment, resources, and accountability.

This report summarizes the findings and recommendations of panels established by the Commission to examine best practices for improving schools and raising achievement, the new Oregon Diploma, and the costs of operating a system of highly-effective schools that can meet Oregon's ambitious educational goals. The Commission thanks all of the educators, school board members, parents, and other community leaders across the state who contributed their time, expertise, and insights as panel members. We also wish to acknowledge Governor Kulongski's support for the Quality Education Model and the work of the Commission and its panels.

Moving forward to keep our promise of a quality education for every student is a steep challenge given the economic downturn and resulting decline in state resources. However, it is a challenge Oregonians must meet to secure our long-term economic viability and quality of life.

Additional information on the Commission, the Quality Education Model, best practices, and the new diploma is available on the Oregon Department of Education website at *www.ode.state.or.us*. The Quality Education Model is also available from the Commission on an interactive disk that allows users to explore various policy assumptions, resource scenarios, and cost implications.

Executive Summary

The Quality Education Model (QEM) was initially developed in 1999 to establish an objective and research-based link between student achievement and the resources devoted to Oregon schools, to use as a guide in efforts to fund Oregon schools adequately. In 2001 the Legislative Assembly created the Quality Education Commission (QEC) to serve as a permanent body to update and improve the QEM. The Commission's work in 2007-08 was driven by the sweeping changes in Oregon's high school graduation requirements. The Commission established broad-based panels to examine the best practices in Oregon's most successful schools, the resources needed to implement the new Oregon Diploma successfully, and the cost implications associated with recommended changes to Oregon's model system of highly effective schools.

Panel Recommendations for Improving the Quality Education Model

The Best Practices and the Diploma Panels recommend revising the Quality Education Model to include adequate time for collaborative planning, teamwork, research, and review of student achievement data among teachers and other school staff.

Best Practices: Consistent with their analysis of best practices at successful schools, panel members also recommend providing resources to improve communication and build effective partnership relationships with parents and community members. Strategies include family math/science/literacy nights, parent education classes, websites, newsletters, and "tool kits" of activities parents can use at home to support their children's academic progress.

Schools require formative assessment tools to inform classroom instruction and better meet individual student needs. Schools also need professional development resources focused on building local leadership capacity. Successful schools arrange for teachers who are specialists in subject areas such as mathematics and reading to provide "double-dose" classes and other targeted interventions for students who are not meeting state standards. Successful schools also target their resources to provide additional support for students through before/after-school tutoring and enrichment programs, Saturday and summer schools, and other activities that extend the school day, week, or year.

Oregon Diploma: Education is the foundation of Oregon's quality of life and economic aspirations. To meet the global challenges of the 21st century, all Oregonians must be educated at higher levels than ever before. The new Oregon Diploma requirements adopted by the State Board of Education in 2007-08 are designed to ensure that every student acquires the knowledge and skills necessary for a successful transition to advanced learning, work, and citizenship. These demanding new graduation standards pose important questions about education policy, systems alignment, best instructional practices, communication, and resources.

Providing additional staff development and training, particularly in the areas of reading and mathematics, and additional time for teachers to work together, are among the major recommendations of the Quality Education Commission's Diploma Panel. Other needs addressed by the panel's recommendations include developing local assessments of essential skills and other new graduation requirements, updating the technology infrastructure, and reducing the student/computer ratio in order to improve teaching and learning opportunities. Several recommendations address staffing allocations, such as providing adequate clerical support at the high school level to manage record keeping associated with students' required Education Plan and Profile; math and science teachers in middle and high schools; and staff time for extra academic assistance and coaching in targeted subjects. Because of the added math and science requirements, it will be important to provide incentives to encourage middle and high school teachers to attend professional development on effective instructional strategies for all students.

Costs: The Commission's Cost Panel updated the QEM by adding current data (on school finances, enrollment and other student information, and economic and price information) and incorporating the recommendations of the Best Practices and Diploma Panels. The panel estimates the added cost of implementing the new Oregon Diploma is $266 million in 2009-11 and $438 million in 2011-13. These estimates are included in the costs of fully implementing the Quality Education Model.

Based on the recommendations of the Best Practices and Diploma Panels for phasing in several changes to the QEM, the Cost Panel examined the costs of baseline and full implementation of the model over the 2009-11 and 2011-13 biennia, with a comparison to the two prior biennia (2005-07 and 2007-09). The comparisons are shown in the following table.

QEM Funding Requirements

Millions of Dollars	2005-07	2007-09	2009-11	2011-13
State Funding Requirement for Baseline*	$5,305.2	$6,244.7	$6,598.9	$7,178.2
Percent Change from Prior Biennium		17.71%	5.67%	8.78%
Total State Funding Requirement for Fully Implemented Model	$7,096.7	$7,766.2	$8,347.9	$9,057.3
Percent Change from Prior Biennium		9.43%	7.49%	8.50%
Funding Gap: Fully Implemented Model minus Baseline	$1,791.5	$1,521.5	$1,749.0	$1,879.1
Percent Change from Prior Biennium		-15.07%	14.95%	7.44%

* 2007-09 Baseline reflects actual legislative appropriation to the State School Fund and the School Improvement Fund

As the above table shows, the school funding gap – which had previously been predicted to grow to $1,960.1 million in the 2007-09 biennium – was reduced substantially, to $1,521.5 million, through legislative appropriations that were above the levels needed to keep up with inflation and enrollment growth. The table also shows, however, that the funding gap will grow again if the legislature chooses to fund Oregon's schools just at the baseline level. Reducing the funding gap requires a continued commitment to fund schools above the level needed to simply keep up with inflation and enrollment growth.

Alternatives to Full Implementation of the Quality Education Model

As part of its legislative charge (ORS 327.506), the Quality Education Commission is required to present two alternatives to full implementation of the Quality Education Model. The following proposals reflect the realities of the state's current economic turmoil and the importance of phasing in changes at a rate that allows schools adequate time to adjust to new demands and provides teachers at every level – elementary, middle, and high school – with the support and resources they need to help students meet higher standards. While adequate funding is essential to achieve Oregon's quality education goals, we cannot let funding limitations prevent us from moving forward. The following proposed two alternatives are intended to provide a pathway forward.

Alternative 1: Based on the 2008 recommendations of the Best Practices and Diploma Panels, determine the strategic priority goals likely to prepare the largest proportion of students to meet Oregon's high academic achievement and new diploma standards.

Oregon must invest in research-based and high-leverage strategies along the entire education continuum. Students will not succeed in meeting new high school graduation requirements unless changes are made at each level: grades K-8 as well as grades 9-12. Key examples of promising and high-leverage approaches to an improved PK-12 system include:

- Developing early literacy and reading proficiencies that are sustained into the middle grades. Every Commission report since 2000 has included a focus on reading in the early grades and sustaining those skills into the middle grades.
- Increasing time for study, collaboration, review of student achievement data, and team planning among teachers and other staff.
- Providing professional development focused on building local school leadership capacity.
- Providing additional resources that allow schools to extend the time available for learning and extra assistance (such as before- and after-school and summer school programs); implement targeted interventions (such as double doses of reading and math instruction and hiring specialists); and communicate with parents and community members.

Alternative 2: Determine a timeline for phasing in full implementation and funding of the Quality Education Model. The 2006 Commission Report recommended a ten-year phase-in period (five biennial budget cycles). Oregon legislative actions funded K-12 education at roughly the level recommended by the Commission for 2007-09. The Commission's Diploma Panel developed recommendations designed to be phased in over the next two biennia (2009-11 and 2011-13). With methodical and strategic planning, Oregon can continue to move forward in aligning policies, best practices, and funding with higher standards and clear goals for a quality education system.

Introduction

Mission and Purpose of the Oregon Quality Education Commission

The Oregon Legislative Assembly established the Quality Education Commission in statute in 2001. The Commission's charge under Oregon law (ORS 327.500 and ORS 327.506) is to:

1. Determine the amount of monies sufficient to ensure that the state system of kindergarten through grade 12 public education meets the quality goals established in statute.
2. Identify best practices based on education research, data, professional judgment, and public values, and the cost of implementing those best practices in K-12 schools.
3. Issue a report to the Governor and Legislative Assembly in even-numbered years that identifies:
   - Current practices in the state's system of K-12 public education
   - Costs of continuing those practices
   - Expected student performance under those practices
   - Best practices for meeting the quality goals
   - Costs of implementing the best practices
   - Expected student performance under the best practices
   - Two alternatives for meeting the quality goals

Oregon's History of High Education Goals

The Oregon Legislature has set high goals for our K-12 schools which are embodied in the Oregon Education Act for the 21st Century, originally enacted in 1991. These goals call for a world-class education system with rigorous academic standards for all students and expectations that all children are challenged to meet their potential. The State Board of Education is responsible for developing standards to implement the legislative goals. The target adopted in 1999 as part of the Quality Education Model is that not fewer than 90 percent of Oregon's students should meet all the state's academic performance goals. The Quality Education Commission meets throughout the year to refine the QEM and changes are reflected in its biennial report. Oregon is also responsible for meeting the federal mandates of the No Child Left Behind Act of 2001, which requires that all students meet state-defined academic benchmarks by 2014.

"Oregon students receive a solid education but the world continues to change rapidly and the educational system must respond to ensure that each and every student is prepared for the demands of the 21st century. Too many Oregon high school students are not adequately prepared to enter the workforce or postsecondary education. Many students lack the skills needed for today's high-skills jobs, while others require remediation in basic academic skills at the postsecondary level."

Oregon's New Diploma, State Board of Education, 2007

The Oregon Diploma: A New Era for Public Education

In January 2007 the State Board of Education voted unanimously to strengthen Oregon's long-standing high school graduation requirements toward the goal that "each student demonstrates the knowledge and skills necessary to transition successfully to his or her next steps: advanced learning, work, and citizenship." Several task forces were convened in 2007-08 to study the potential issues involved in implementing the new diploma requirements. In May and June 2008 the State Board gave final approval to three Oregon Administrative Rules establishing the new Oregon Diploma. Implementation of the new diploma will be phased in over the next seven years.

Among the changes are elimination of the Certificate of Initial Mastery (CIM) and Certificate of Advanced Mastery (CAM), making the new Oregon Diploma the single credential of achievement. Although the CIM and CAM were key provisions of Oregon's 1991 school reform legislation, they were never fully funded or implemented, and they were not widely embraced by schools, students, employers, or college admissions offices. The new diploma is designed to provide greater clarity about what Oregon expects students in its public schools to have learned and to be able to do by the time they leave high school. Beginning in 2010, students will need to complete increased credit requirements successfully, demonstrate proficiency in essential skills, and meet personalized learning requirements in order to earn an Oregon Diploma.

Exhibit 1: Timeline and Phase-In for Oregon Diploma Credit Requirements

(Grey shading indicates when changes in the credit requirements come into effect.)

Credits by Subject	Graduating Classes of 2007, 2008, & 2009	Graduating Classes of 2010 & 2011 (11th and 10th Graders in 2008-09	Graduating Classes of 2012 & 2013 (9th and 8th Graders in 2008-09	Graduating Class of 2014 (7th Graders in 2008-09
English/Language Arts	3.0	4.0	4.0	4.0
Mathematics	2.0	3.0	3.0	3.0 – all at Algebra I level and above
Science	2.0	2.0	3.0 – scientific inquiry (2 with lab experiences)	3.0
Social Sciences	3.0	3.0	3.0	3.0
Physical Education	1.0	1.0	1.0	1.0
Health	1.0	1.0	1.0	1.0
Second Language The Arts Career & Technical Education (CTE)	1.0	1.0	3.0	3.0
Electives	9.0	9.0	6.0	6.0
Total Credits	**22.0**	**24.0**	**24.0**	**24.0**

New Credit Requirements. As indicated in the above chart, the new Oregon Diploma increases the minimum number of credits required to graduate from 22 to 24. It phases in requirements for more and higher levels of mathematics (three credits), English/language arts (four credits), and science (three credits). Math credits must be at the level of Algebra I or higher, all science credits must be inquiry-based, and two science credits must be laboratory-based. Individual districts may have additional requirements.

As part of the new diploma the State Board has asked the Oregon Department of Education to identify core standards for grades K-8 and grades 9-12 in all academic subjects. The goal is to create fewer standards that are more focused and coherent. The core standards will help align instruction within and across grade levels and provide a consistent foundation for credits, courses, and career-related learning experiences across the state. Students seeking credit by proficiency rather than through coursework will be required to base their learning experiences and performance outcomes on these same core standards.

> *"It is the State Board of Education's intent to increase the rigor, relevance, and personalization of the high school diploma, while allowing school districts the flexibility and autonomy to enact policies that are innovative or that better meet the unique needs of their district's students."*
>
> Oregon's New Diploma, 2007

Proficiency in Essential Skills. In addition to increasing credit requirements, the State Board is working with the Oregon Department of Education to identify key outcomes for high school graduates that include demonstrated mastery of the following essential skills:

1. Read and comprehend a variety of texts.
2. Write clearly and accurately.
3. Listen actively and speak clearly and coherently.
4. Apply mathematics in a variety of settings.
5. Think critically and analytically.
6. Use technologies to live, learn, and work.
7. Demonstrate civic and community engagement.
8. Demonstrate global literacy.
9. Demonstrate personal management and teamwork skills.

These skills are necessary for success in college, the workplace, and civic life. They cross all academic disciplines and are embedded in rigorous content standards. This means that mastery of these skills can be demonstrated in a variety of courses, subjects, and settings, through applied, integrated, and field-based learning experiences. The Oregon Department of Education and the State Board have focused initially on the first four essential skills, which will be required for the 2012 graduating class. The remaining essential skills (numbers 5-9) will be phased in, following a timeline to be determined.

Personalized Learning Requirements. The new Oregon Diploma is designed to prepare each student for successful transitions to his or her next steps after high school. Personalized learning, learning beyond the classroom, and meaningful, real-world connections are critical for preparing all students, whatever path they take after graduation, for the vast challenges and opportunities of the 21st century. The following requirements personalize the diploma for each student and help students plan for their post-high school education and career goals:

Education Plan and Profile – Students develop a plan and profile to guide their learning and document progress toward their personal, career, and post-high school goals.

Career-Related Learning Standards – Students demonstrate knowledge and skills in personal management, problem solving, communication, teamwork, employment foundations, and career development.

Career-Related Learning Experiences – Students participate in experiences that connect classroom learning with real-life experiences in the workplace, community, and/or school relevant to their education plan.

Extended Application – Students apply and extend their knowledge in new and complex situations related to the student's personal career interests and post-high school goals through critical thinking, problem solving, or inquiry in real-world contexts.

Oregon Diploma Guiding Principles

- Be flexible and student-centered; the student Education Plan and Profile should guide student choices where developmentally appropriate at each level of schooling.
- Encourage students to meet academic standards as well as diploma requirements at their own pace, whether that is faster or slower than a nine-month school year or the traditional course length.
- Promote the viability of proficiency-based credit and alternative means of assessment to encourage multiple pathways to graduation that are equally rigorous and challenging.
- Ensure that students will get the resources needed to meet the new higher standards, whether that takes the form of after-school opportunities, tutoring, summer classes, online courses, or additional time to meet standards, and ensure that additional funding is available to support these services.
- Encourage and support students to excel beyond minimum standards.

Source: State Board of Education

Higher academic standards, and these new diploma requirements, necessitate significant changes at all levels of education. By incorporating each of these three components – credit requirements, essential skills, and a personalized learning plan – the Oregon Diploma is intended to serve as a capstone to a rigorous K-12 education. Some students will need more support and more time to complete the requirements while others will meet them more quickly. To ensure the success of all students, all schools – not just high schools – will need to follow the key principles that have guided development of the diploma.

The State Board identified two other important principles to guide Oregon's educators and policymakers in implementing the diploma. The first is to phase in changes at a rate that allows schools enough time to help teachers gain any needed additional skills. The second is continued work on aligning standards PK-20, from grade to grade, and from high school to post-secondary options.

Exhibit 2: Student Growth Trends in Oregon School Districts

YEAR	Special Education Students	English as a Second Language Students	Students in Poverty*	All Students (ADM)
2000-01	67,768	42,104	78,452	522,753
2001-02	69,201	47,912	78,964	528,346
2002-03	70,519	49,940	79,012	530,653
2003-04	69,720	53,272	81,833	528,180
2004-05	70,230	54,478	82,213	528,191
2005-06	71,238	54,713	82,438	530,888
2006-07	72,353	53,464	82,523	532,992
2007-08**	73,076	53,552	82,972	533,612
FORECAST				
2008-09	73,807	54,623	83,221	534,946
2009-10	74,545	55,989	83,471	536,283
2010-11	75,290	57,388	83,721	537,624
Avg Annual % Change	**1.1%**	**3.1%**	**0.7%**	**0.3%**

Source: Oregon Department of Education

* Large increase in 2003-04 is due to revisions based on 2000 Census data.

** Preliminary

Oregon's schools continue to become more diverse, with students from minority ethnic/cultural backgrounds comprising 28.9 percent of the statewide enrollment in 2007-08. The numbers of special education students, English language learners, and students living in poverty are increasing at a faster rate than the general student population. As shown in the above table, these growth trends are expected to continue in the future. All of these student population groups will require targeted school support and additional resources if they are to meet higher academic and graduation standards.

The Work of the 2007-08 Quality Education Commission Panels

Oregon's Quality Education Model incorporates assumptions about school size, demographics, staffing, professional development, technology, supplies, and other factors in order to evaluate the effects of various resource levels and to estimate specific costs, including a per-student figure. The Quality Education Model is a powerful and straightforward tool that allows legislators, educators, and the public to examine a variety of "what-if" policy questions and scenarios. For example, what are the cost impacts associated with reducing or raising class sizes, providing reading and math specialists to work with struggling students, hiring additional high school counselors, extending the school day/year, or addressing challenges specific to rural or urban districts? The QEM Working Model, stored as interactive Excel spreadsheets, allows a user to examine various policy scenarios in terms of their potential financial implications and then compare them with the costs of funding the current level of services in Oregon schools.

The Commission uses an extensive, broad-based review process to examine the Quality Education Model. Prior reports examined the K-12 education system toward the goal of at least 90 percent of Oregon students meeting the state's academic performance benchmarks. The 2006 QEM report looked closely at the relationship between school funding and student achievement.

The new Oregon Diploma creates a broader set of expectations and a higher measure of success for students. To address the new challenges and opportunities resulting from these changes, in 2007-08 the Commission asked panels of educators and policymakers to conduct additional research and make recommendations focused on three key and interrelated areas: Best Practices, the Oregon Diploma, and Cost. Panel members included teachers, principals, superintendents, parents, school board members, and other experts and stakeholders representing higher education, business/industry, government, and professional associations.

As part of their work, the panels surveyed educators across the state and interviewed staff members at 42 elementary, middle, and high schools identified as successful in educating students to the Oregon standards. The range included a high school in the northeast corner of the state enrolling fewer than 100 students and a high school in the Portland area enrolling more than 2,200 students. This report summarizes their findings and recommendations for improving the Quality Education Model.

The "40-40-20" Goal for Oregon Education

Realizing Oregon's vision of a quality education for every student requires a more coherent and seamless system. As an independent and non-partisan group, the Quality Education Commission is ideally positioned to provide policymakers, school districts, and the public with the information needed to make important decisions about school improvement, funding, and accountability for expected performance results. The changes in the Quality Education Model recommended by the Commission's 2007-08 panels are congruent with, and designed to inform, statewide efforts to accelerate the arc of education transformation toward the goal of "*Every student, every day, a success*."

> ***"For Oregon to succeed in the 21st century, all Oregonians in all their diversity must be educated at higher levels than ever before. Oregon should embrace the ambitious education benchmarks proposed by the Governor and adopted by the Legislature: 40 percent of Oregon adults should have a bachelor's degree or higher (compared with 28 percent now), another 40 percent should have at least an associate's degree or other technical credential, and the remaining 20 percent should have a high school diploma that represents a high level of academic and work readiness skills."***
>
> Moving Forward: 2008 Oregon Business Plan Policy Playbook and Initiative Guide

The Joint Boards of Education are working to establish and align curriculum standards, proficiencies, and assessments across the education continuum, from prekindergarten through high school graduation and post-secondary studies. The Oregon Department of Education has been working for several years to create an integrated data system to track student progress. The Governor's office and Legislature are committed to the creation of a unified, transparent, and student-centered PK-20 budget. In August 2007 the Governor charged a newly established Post-Secondary Quality Education Commission with developing a model to guide policymakers in funding Oregon's colleges/universities and community colleges, pursuant to quality goals. Organizations such as the Chalkboard Project, Oregon Business Council, E3: Employers for Education Excellence, Stand for Children, and the Engineering and Technology Industry Council (ETIC) are prominent examples of partners working at the grassroots and statewide level to support education transformation and improve school quality, accountability, and funding, through public communication initiatives, research, advocacy, and other activities. Many of these leaders and organizations have incorporated the QEM into their deliberations and goals. The Commission trusts that the 2008 Quality Education Model Report will continue to support coordinated and congruent efforts on behalf of Oregon's schools and students.

Previous Commission Recommendations

Since 2000, the Quality Education Commission's biennial reports have provided an objective analysis of instructional best practices, school funding, and Oregon's quality education goals. Recommendations reflect findings about student performance, per-student spending, demographic trends and resulting resource needs, class size, curriculum, and PK-20 alignment. The 2006 report made the following six recommendations:

- Provide adequate and stable funding for Oregon's schools.
- Continue achievement gains by targeting additional resources to the areas where added resources have the greatest impact. Areas such as early childhood development policies, early reading initiatives, and high school restructuring appear to show the most promise.
- Conduct more research into best practices and effective resource use.
- Continue efforts to improve the governance and accountability structures that promote more effective use of resources across all three sectors of Oregon's educational system: Pre-kindergarten, K-12, and post-secondary.
- Continue efforts to build integrated data systems to foster alignment and coordination among all three education sectors as well as with social service agencies, business, and the public.
- Develop capacity to evaluate education's role in improving Oregon's economy and lowering social services costs.

"The ultimate goal is to have students leaving the system with strong literacy skills, meaningful evidence of academic proficiency, and a positive attitude about readiness for their next steps in schooling and career development."

The 2006 QEM Report also identified the following priority areas for allocating any additional funding resources:

- **Make literacy the standard for all students.** Reading and writing are the gateway skills to all learning. The PK-12 system must maintain a consistent focus on these skills at every grade level and guarantee that any student has access to extra assistance if needed.
- **Have all students demonstrate mastery of academic content.** All students must show mastery over core academic content in order to graduate. To assure this, students must receive an instructional program that contains all of the elements of state standards and receive them in a timely way.
- **Assure that schools provide assistance to all students who are not making appropriate progress in the curriculum and are in need of additional supports.** Tutoring, remediation, an extended day and year, credit retrieval, and other appropriate steps to assist struggling students to achieve the state's expectations should be available to all students.
- **Continue systems improvements.** The model provides for system support across the whole enterprise, including both data systems and accountability systems. This is necessary for instructional decisions to be based on good data and good research.

Progress has been made over the past two years on most of the Commission's 2006 recommendations. Securing adequate and stable school funding is a notable exception and continues to be a daunting challenge.

As described below, however, the actions of the Governor and 2007 Legislative Assembly represent an important renewed focus on education and a significant financial investment. Accomplishments include:

- **2007 Funding Restoration:** Following years of cuts and languishing spending, the 2007 Legislature made across-the-board increases in the education budget, including targeted investments such as full funding for the Head Start early childhood education program. The legislature also authorized an Education System Design Team in the Governor's office to overhaul the state's fragmented budgeting process.
- **Targeted Resources:** 2007-08 School Improvement Funds provided districts and schools with additional resources to use for literacy programs, class size reductions, quality prekindergarten and full-day kindergarten programs, increases in instructional time during the summer and before/after school, remediation, professional development, and other approved research-based strategies. Legislation established the Special Education High-Cost Disability Fund as a permanent source of additional resources for school districts.
- **New Oregon Diploma:** The new graduation standards adopted as law in 2008 require students to demonstrate their understanding of and ability to use essential skills needed in post-secondary education, careers, and civic life.
- **Integrated Data System:** The Oregon Department of Education KIDS Project is creating a uniform, integrated, and automated system to track student progress PK-20. The system is being piloted in several school districts and is scheduled for full implementation by fall 2009.
- **PK-20 Systems Improvement and Alignment:** The Unified Education Enterprise overseen by Oregon's Joint Boards of Education is designed to align curriculum standards and assessments, support an integrated data system, and facilitate successful student transitions across the education continuum.

Best Practices Panel Report

Everybody, it seems, has an idea about what makes for a quality education. Foundations, business leaders, representatives of education organizations, higher education scholars, teachers, parents, students, journalists, and other citizens; they all have opinions or theories about "what works" and why. Oregon's Quality Education Commission has paid attention to all these varied and often conflicting voices in developing a Quality Education Model that will "hold water" in both theory and practice.

The Quality Education Model is more than a tool for determining the funds required to provide a quality education for all students. It is a model for high-performance instructional improvement. The model stimulates focused discussion on exactly what a quality education is, what it would cost on a statewide basis, and what we can expect from students if the QEM is implemented. We know what we need to do to prepare more of our students to reach high standards. We also know that resources make a difference. No matter what angle we take in examining the issues involved in providing a quality education for all students, two key factors emerge as essential: leadership and time.

"I know what makes a successful school. Really, really, really good teachers, who teach what you are supposed to know, and students who want to learn."

10-year-old Portland student

"The society that scorns excellence in plumbing because plumbing is a humble activity and tolerates shoddiness in philosophy because it is an exalted activity will have neither good plumbing nor good philosophy. Neither its pipes nor its theories will hold water."

John W. Gardiner in Excellence: Can We Be Equal and Excellent Too? - 1984

Best Practices Panel Charge and Methods

The QEC is charged with identifying best practices to incorporate in the prototype schools that are at the heart of the Quality Education Model. In previous QEM reports, best practices were determined by reviewing the current research literature, conducting focus groups with Oregon educators, consulting national experts, and assessing approaches in other states. This year the Best Practices Panel was composed of five regional panels representing Oregon's various geographic areas. The regional panels comprised superintendents, principals, teachers, and school board members nominated by the Confederation of Oregon School Administrators (COSA), the Oregon Education Association (OEA), or the Oregon School Boards Association (OSBA). Each regional panel selected successful schools to interview, based on the following criteria and data provided by the Oregon Department of Education:

1. Schools that had high "status" (RIT) scores for math and reading in benchmark assessment years.
2. Schools that had been rated "Exceptional" on the Oregon Report Card.
3. Schools that had improved the percentage of students meeting or exceeding benchmark in one or more of the federally defined assessment cohorts (American Indian/Alaskan Native, Black, Hispanic, Special Education, Economically Disadvantaged, Limited English Proficient). These schools "earned" their way out of the federally defined "School Improvement status" by instituting effective instructional practices.
4. Schools that were finalists or winners in the Oregon State Superintendent of Public Instruction Closing the Achievement Gap Celebrating Student Success Award program.

Together the five regional panels interviewed staff at 42 schools: 16 elementary schools, 12 middle schools, and 14 high schools. A schedule and common interview protocol were developed to help the panels (1) explore what factors were present in schools that matched best practices already identified in the QEM; (2) determine what factors were not in the QEM but were considered important in the success of a school and should therefore be added to the model; and (3) look for factors that were in the QEM that schools thought did not make a significant difference for students. (Appendix A includes a list of the Best Practices regional panel members, schools interviewed, and the interview questions.)

Findings on Best Practices

All five of the regional panels agreed that two factors – *time and leadership* – are essential components of the QEM. The following additional broad areas emerged from the interviews at successful schools as necessary to a quality education: communication, relationships, and unity of focus; student connections to school; instructional adaptability; and data and formative assessment.

"So Much Depends on Time." Every successful school emphasized time as the most important factor in raising academic achievement for all students and closing the gap for under-performing students. Extra time on task is important for all students, but especially for those struggling to succeed in school.

Teachers need time for the collaboration and team planning activities that build school leadership capacity. They need time for discussion and student review and for data analysis and interpretation. They need time during the school day for professional development, time for teacher-to-teacher exchange, and time to work with other staff within and across disciplines and grade levels. Individual teachers need time to communicate with parents, colleagues, and others as appropriate to support their classroom instruction.

Time for staff collaboration is a key to creating leadership capacity in local schools. In 2008 Prineville seventh-grade science teacher Mike Geisen became the first Oregonian in 35 years to be selected as National Teacher of the Year through the prestigious program sponsored by the Council of Chief State School Officers (CCSSO). In its announcement of the award, CCSSO described Mr. Geisen as "exactly the type of educator we want to acknowledge. He believes in and encourages collaboration between and among teachers and school leaders as he knows this brings the right focus on the student." Regional panel members also noted that his district is committed to teacher collaboration and leadership as an important strategy for addressing its Continuous Improvement status under No Child Left Behind (NCLB) requirements.

- Talent Elementary School in Ashland provides "double-dose" classes in specific subjects for students who need extra help; for example, students performing below standard in reading spend an extra 45 minutes with a reading specialist after their regular 90-minute class. Some students also get additional after-school instruction.
- For the past three years the Bend-La Pine School District has made collaboration a high priority for teachers through either late-start or early release School Improvement Wednesdays. This strategy allocates time for collaboration between grade levels and within departments. It has also supported teacher collaboration between buildings and ongoing training on new curriculum adoptions.
- Hoover Elementary School in Medford schedules an early dismissal day once a week for teachers to plan and collaborate in grade-level and core subject teams. The school also schedules time for a weekly "rule review" focused on school climate and student behavior.
- Talmadge Middle School in Independence has eliminated most electives in order to provide all students with a daily reading class. They have provided training on professional learning communities and sent teacher teams to a conference on differentiated instruction. Participating teachers conduct research, complete lesson plans, share them on a website, and then lead differentiated instruction teams.
- Linus Pauling Middle School in Corvallis provides a reading class for all seventh and eighth graders who are not meeting benchmark. Sixth-grade electives have been eliminated to provide an additional reading class. All staff are trained in Sheltered Instruction Observation Protocol (SIOP) which is an approach for teaching content to English language learners in strategic ways that make the subject matter concepts comprehensible while promoting the students' English language development. Mentors from Oregon State University assist struggling students.
- Clackamas High School has a staff induction and support program led by a master teacher and two half-time professional development specialists. They serve as mentors and coaches, facilitate conversations about best practices, build collegial connections, and support professional growth for all probationary first-, second- and third-year teachers.

How do successful schools capture more time for teachers and students? A typical school day has just 6.5 hours of classroom time; lunch and the minutes students spend passing between classes can reduce actual classroom time to just over five hours. Some schools have gained as much as an extra instructional hour a week by reducing this classroom "passing time."

Schools have extended the instructional day by starting earlier and ending later. Before- and after-school programs, Saturday schools, and summer school programs provide extra time for tutoring, other targeted support, enrichment in various academic subjects, and extra-curricular activities. Teachers in successful schools across the state have exchanged their classroom "prep" time for additional professional development time. Some teachers arrange to take on larger classes so that other teachers have smaller classes where they can work more closely with students needing help to meet academic benchmarks. Many schools provide a "double-dose" (or even "triple-dose") of instructional time for under-performing students in core subjects such as reading and math.

- "Failure is not an option." Hoover Elementary School (Medford) staff members on leadership.
- A Willagillespie Elementary School teacher on the role of principal leadership: "She does the research, develops the data, helps analyze the data, leads in professional development, models collaborative behavior, and is just there for us when we need her."
- Crooked River Elementary School credits much of its success to the fact that the principal has had seven years at the school. This stability has led to development of common understanding among staff and the ability to put systems in place.
- The principal at Armand Larive Middle School in Hermiston cites the value of "teacher attitude and commitment," while teachers recognize the principal for providing for "a strong leadership team." Every teacher meets with the principal to talk about how each of his or her students is doing.

Leadership Matters. Schools organized to develop leadership capacity are more focused, cohesive, and collaborative. The leadership of the principal and the affiliated leadership of key teaching staff are an important – and often primary – factor at successful schools. The schools interviewed described effective leadership as coming from *both* the principal and skilled teachers.

According to the staff members at successful schools, leadership that supports improved student learning occurs when:

- The school community is focused on goals and a well-articulated vision or common purpose.
- School goals address state standards, and there is a clear, realistic plan to enable an increasing number of students to meet standards over time.
- The school routinely uses data to monitor progress.
- Decision making is broad-based and clearly focused on student learning.
- Leadership roles are shared in the school community and result in all staff being committed to enhanced student learning.
- The school community has a healthy organizational climate and a minimum of political "in-fighting".
- All staff hold themselves accountable to high performance standards.
- Resources and time are devoted to ongoing professional growth.

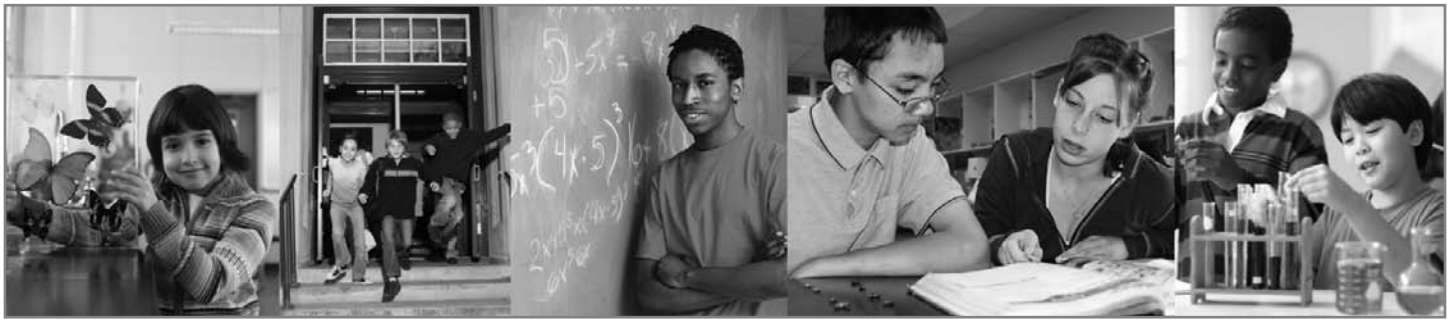
Effective Communication, Relationships, and Unity of Focus Foster Success. Respect, trust, and unity characterize the work environment at successful schools. There is regular contact with parents – and not just when a student is in trouble. Multiple parent communication and involvement strategies are used: newsletters, special family nights, e-mail, phone calls, web postings, one-to-one meetings, mentor programs, English language classes, home study kits, after-school activities that support the school's student learning goals.

Maintaining a safe and orderly learning climate is a priority: school policies, practices, and norms ensure that all students are on task in their classrooms, hallways and public spaces are in order, violent incidents are rare and dealt with immediately and effectively, the school is perceived as safe and welcoming, and community agencies are partners in programs to assist disruptive students. Relationships of trust, cooperation, and respect are evident between the principal and teachers, among school staff, between the staff and students, and between the staff and parents.

- Several successful schools cite staff "book study" groups focused on effective teaching and learning as valuable in building shared knowledge and unity of focus.
- McKay High School in the Salem-Keizer School District holds a family college night once a month.
- Eagle Point High School has a "Parent Connect" web-based grade reporting system.
- Talent Elementary School provides classes and a "learning toolbox" that help low-income and LEP parents assist their children at home with schoolwork.
- Student progress reports for every class are sent to parents every two to three weeks at McLoughlin High School in Milton-Freewater.
- At Gervais High School, where approximately 63 percent of parents do not speak English as their first language, one successful communication strategy involves students as parent conference leaders and translators. An adult school translator also is involved.

Students Feel Connected to their School. Relationships, along with academic rigor and relevance, are widely cited in the research literature as key to improving student achievement. All of the successful schools that were interviewed work to ensure that student interactions occur on a human and manageable scale and that all students are well-known and valued by school adults. Numerous and varied opportunities allow all students to pursue their academic and extracurricular interests, demonstrate their knowledge/skills, and become involved in school decision making and in meaningful, community-based learning. Award and recognition programs include a wide range of students, not just the same few. These schools work on ways to identify and engage students who might otherwise fall through the cracks, drift through school anonymously, or drop out. Many have alternative education programs and pathways that help students connect to broader school programs and their community.

- Positive Behavioral Support (PBS) is a set of strategies adopted by many of the schools to help students develop social and communication skills and create a positive learning environment. It includes school-wide, group, and individual support strategies. It requires training and staff time, as well as resources for student incentives and rewards.
- Every student at Eagle Point High School has a six-year plan, starting in seventh grade. Every eighth grader has an upper-grade-level high school mentor who assists the student throughout his or her freshman year.
- Clackamas High School has expanded its arts program in response to student requests. Over half of the student body participates in music, drama, and arts survey classes which build strong connections among participants.



- Stoller Middle School in Beaverton is organized into "neighborhoods" led by teams that include a math, science, and humanities teacher. Each team is assigned 90 students. The teachers do not loop (stay with the students across grades) but the students stay together as a group from grades 6-8.
- McKay High School in Salem has redistributed FTE to provide additional mathematics classes and more instructional aides for after-school tutoring. They have decreased electives for students who are below benchmark in reading/math and have increased resources for freshmen writing labs.

Instructional Adaptability is a Key Characteristic of Successful Schools. The schools examined by the regional panels are flexible and regularly review their goals and methods. They use task forces, study groups, and ad hoc committees to evaluate student success. Most have a formal planning process to examine internal and external data on student progress and goals achievement. These schools appear to focus on identifying new challenges, rather than recounting old accomplishments. Smaller schools may have an important advantage: "they know every student, know all the parents, and nothing goes unnoticed." This advantage can, in some degree, be replicated at larger schools by implementing a small learning community concept, looping the students through the grade levels and looping the instructional staff with a student group.

Data and Formative Assessments are Necessary Tools for Raising Student Achievement. Successful schools cited the importance of frequent and regular classroom-based assessments of student progress, usually referred to as "formative" assessments.

To accelerate student achievement, schools need access to good formative assessment data, the ability to manage the collected data, and training in how to "mine" the data sources for information to guide decisions about curriculum and instruction. While data-driven decision making is called for in numerous school improvement initiatives, the buildings interviewed often lacked resources to support it.

The QEM should consider the benefits and costs of access to data systems for all school districts. At present, data are stored in a variety of systems and are being collected in "data warehouses." These warehouses provide ready access to numerous data that can be scaled down to the classroom level to inform teaching and learning or up for district analysis. However, the costs of accessing these data warehouses are now borne by local districts. The successful schools interviewed reported their need for formative assessment tools that allow them to monitor and evaluate individual student performance and growth against an unchanging standard. These tools provide valuable information on current students that teachers can use to modify and tailor their instruction to address identified needs.

Technology plays a central role in effective data collection and analysis, and the panels recommended adding it to the QEM in terms of definitions, tools, use of databases, and support for assessments. The Teaching Learning Connection (TLC) being developed by the Oregon Department of Education is a promising statewide framework of tools, processes, and support to help districts and schools implement effective practices. Training in data-driven decision making is included in the framework but may need to go deeper to the classroom level. Local districts will need to build up the talent or resources to develop a system that links to the data. The Education Service Districts (ESDs) could play a major role in this area. (Additional background on the need for an integrated data system is provided in Appendix D.)

- Learning how to use data to drive instruction made the biggest impact on McNary Heights Elementary School's improvement efforts. They implemented an assessment system to provide teachers with multiple data sources and then trained them in interpreting the assessments to make instructional changes in a timely manner.
- A data team at Stoller Middle School in Beaverton analyzes and interprets student data and then helps teachers look at various instructional strategies in light of the data.
- A team of 10 staff at La Pine Middle School were sent to the IPSE technology conference, and then conducted an all-staff presentation and a series of workshops for small groups of teachers scheduled on early-release days.
- Waldo Middle School in the Salem-Keizer School District has one person who organizes student data and meets regularly with teachers to look at disaggregated information for each student. They plan two days a year off-campus to go deep into the data.
- When asked to identify what they need next to build on their success, Pacific High School in the Port Orford-Langlois School District said it was better access to data in a useful form. What they have now takes too long to distill and does not provide enough information on students.

Best Practices Recommendations

Based on the findings described above, the Best Practices Panel recommends the following changes to the Quality Education Model:

1. Include adequate time for staff study, collaboration, team meetings, and data review. This would be in addition to the teacher preparation time and the professional development days already in the model.
2. Provide a licensed full-time position (1 FTE) to support additional instruction time (such as "double-dose" reading and math classes) and other interventions for students who are not meeting state standards.
3. Provide resources to compensate teachers for working with students beyond the regular school day, week, and year. Successful schools find effective ways to extend the time available for quality teaching and learning and for targeted assistance (e.g., before- and after-school tutoring and enrichment programs, Saturday school, summer school).
4. Include school leadership development. Additional professional development time should be dedicated to this focus.
5. Include communication and relationship building with parents and community members. Before- and after-school activities and communication strategies (e.g., parent classes, family nights, newsletters, websites, take-home study kits for parents) should not come at the expense of regular school programs for students.
6. Provide resources for formative assessments so that teachers have the data they need to address individual students' academic needs.

Based on the analysis conducted by the Cost Panel and the review of the entire Commission, funding resources required to implement these recommendations have been incorporated into the 2008 Quality Education Model, as described in Exhibits 13-15.

Diploma Panel Report

The Quality Education Model, like all models, is a representation of reality intended to provide insights to guide decision making. The purpose of the QEM is to depict Oregon's school system with sufficient detail and accuracy that policymakers can better understand how schools allocate their resources, how various policy proposals affect funding needs, and how the level of resources provided to schools is expected to affect student achievement. It was anticipated that the new graduation requirements adopted in 2007-08 would have a significant impact on both the Quality Education Model and the level of state funding required for K-12 schools.

Diploma Panel Charge and Methods

The Quality Education Commission established a panel of practitioners to answer the following questions about the new graduation requirements:

- What adjustments to the Quality Education Model are necessary if the student performance objective is earning the Oregon Diploma?
- Are there K-12 systemic factors that predict success in achieving the diploma?
- Are there K-12 practices that need to change in order for all students to achieve the Oregon Diploma?
- Should additional components be used in the QEM analysis of high school funding adequacy?
- What is the appropriate response to changing demographics in the student population?
- What are the best measures of student performance at the secondary level?
- What level of investment is needed for students to successfully achieve the Oregon Diploma?
- How should schools/teachers be held accountable for the new diploma standards?

Panel members were selected to combine varied backgrounds, perspectives, and specific areas of expertise: (1) recent experience as administrators at each level of schooling; (2) district office perspective in terms of curriculum and policy initiatives; (3) a geographical balance across the state; (4) a mixture of large, medium, and small school districts; and (5) Oregon Department of Education and State Board points of view. Many members have worked as teachers and administrators in several districts, thus expanding the panel's statewide representation. The panel met monthly from January to May 2008. (A list of panel members is included in Appendix A.)

Needs Analysis. Oregon's school districts vary widely in terms of size, demographic characteristics, rural versus urban geographic locations, and access to resources. Effective statewide implementation of the rigorous new diploma requirements will necessitate additional resources for all schools as well as sufficient flexibility to allow districts to meet their specific needs.

The Diploma Panel reviewed current research on the systemic factors proven to be critical in raising academic achievement and evidence from local studies, including *Connected by 25*, a 2007 report by Portland Public Schools on the factors influencing school dropout rates. These factors include:

- Students are more likely to drop out at certain times, with the risk peaking during the summer and in their last years of high school.
- Eighth-grade students who fail to meet academic standards in two or more subjects (e.g., reading, math, science) are four times more likely to drop out of school.
- Ninth grade is pivotal. Students who perform poorly in ninth-grade classes and fail to earn sufficient credits are five times less likely to graduate.
- Students who are over age, repeat grades, enter high school after grade 10, or transfer between high schools are six times less likely to graduate.
- Students who withdraw and then re-enter school are nine times less likely to graduate.

Early Intervention as a Guiding Principle of Diploma Implementation. The new Oregon Diploma affects the entire K-12 continuum, not just high schools. Changes will be necessary at every level to support the new graduation requirements, and early intervention is essential to help struggling students. The Response to Intervention (RTI) Model being implemented to support reading and mathematics achievement in many Oregon elementary schools is a model that has a broader potential application conceptually and systemically. RTI uses a tiered approach to monitor student progress and provide different levels of intervention intensity. The panel suggests that as parents, students, and staff examine district readiness to meet the new diploma requirements they should also consider adding this type of model for identifying students who are failing to meet or exceed state standards and then linking them to an appropriate intervention. This approach would require additional resources and ongoing staff development across the K-12 system. However, it is an important first step for determining where and when interventions and additional funding are most critical.

Goal: Each student demonstrates the knowledge and skills necessary to transition successfully to his or her next steps: advanced learning, work, and citizenship.

State Board of Education

Panel Procedures. The panel developed a 17-question survey that was sent electronically in spring 2008 to all 197 superintendents across the state. Questions were designed to assess current realities regarding student and system readiness to address the new diploma requirements (i.e., how many students currently start Algebra I as a freshman in your high school(s) in your district?) as well as superintendents' assessment of necessary next steps (i.e., what additional training is required for teachers?). Panel members presented at a COSA-sponsored meeting involving approximately 140 school and district leaders and provided draft recommendations to administrators in their home districts/county for additional feedback on the impact of the new diploma requirements.

Panel members emphasized the importance of keeping in mind Oregon's demographic diversity and the varied challenges the new graduation requirements will pose for school districts. Small and rural districts, for example, already have difficulties attracting and retaining staff with multiple endorsements to meet NCLB requirements. Math/science credit requirements for the new diploma will have staffing implications at the middle and high school levels. Schools will need professional development resources focused on achievement of essential skills and other requirements. Some districts will have facility needs given the increased requirements for laboratory science; some will need to enhance their technology infrastructure; and some will need additional clerical support for record keeping.

Findings on the New Oregon Diploma

The Diploma Panel's findings and recommendations for successful diploma implementation focus on three areas:

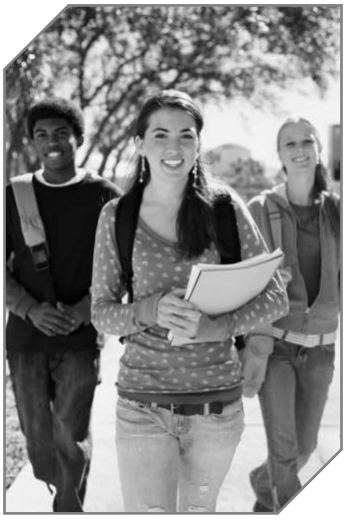
- Alignment of current policy/practice,
- Communication, and
- Additional resources.

Alignment of Current Policy/Practice. Implementation of the new Oregon Diploma will require effective coordination among all of the stakeholders and careful alignment of policies and practices. The State Board recognized the need for a system of clear and rigorous standards regarding accountability combined with the flexibility and resources districts need to support innovation and specific student needs.

"In order to accomplish the goals established by the State Board of Education to ensure higher standards for high school graduates in Oregon, the current K-12 system must be one characterized by increased flexibility, accountability, and rigor. Given both the research and the feedback collected, meeting those requirements will require changes in the current K-12 system as well as additional funding."

2008 Diploma Panel Report

- Some students will need less time to complete the graduation requirements and some more.
- Coordinating or streamlining current state and federal reporting requirements would help schools focus more tightly on accountability in terms of student outcomes.
- Legislative requirements regarding the modified diploma, the PSAT in grade 10, and counseling ratios all have important implications.
- Assessment tools and practices need to be examined carefully, including a reliance on multiple-choice tests, the use of work samples and other research-based student performance assessments, the use of alternative assessments (Advanced Placement, SAT, ACT), at what grades in high school the statewide tests should be administered.



Communication. A common set or "tool kit" of communication materials is needed at every stage of the implementation process to send a clear and coordinated message about the new graduation standards, expectations, and timeline, as outlined in Exhibit 3. This year's entering freshmen (the class of 2012), their parents, school administrators, teachers, and community partners especially need to understand the new requirements. The panel also recommends that the State Board work with other organizations to develop a K-12 funding package tied to the requirements. Higher education and the Teacher Standards and Practices Commission have important communication roles related to teacher recruitment, incentives, and NCLB requirements.

Additional Resources. The majority of superintendents responding to the Diploma Panel's e-survey felt that most students could meet Oregon's higher graduation standards if the requirements are phased in and if a corresponding increase in targeted funding for implementation is provided by the legislature in 2009 and 2011. Funds may need to be "front-loaded" for the first phase of diploma implementation. Tying additional funding for the new diploma with School Improvement Fund allocations beginning in 2009-2011 is a potential strategy. Again, flexibility is an important guiding principle in order to accommodate the varied conditions in which Oregon schools operate in terms of size, geography, student demographics, enrollment trends, and other factors.

The panel discussed the importance of a statewide data system to support schools in examining student achievement. The KIDS Project (K-12 Integrated Data System) already underway at the Oregon Department of Education is constructing a statewide technology infrastructure. This data warehouse system was initially funded by the 2005 legislature and is scheduled for full implementation by fall 2009. The panel noted that effective transferability of data across organizations and state agencies would enhance K-14 and K-20 alignment, help address student mobility issues, and streamline reporting requirements. (See Appendix D for more information on the statewide data system.)

The majority of superintendents responding to the Diploma Panel's e-survey felt that most students could meet Oregon's higher graduation standards if the requirements are phased in and if a corresponding increase in targeted funding for implementation is provided by the legislature in 2009 and 2011.

Exhibit 3: Implementation of the New Oregon Diploma: Key Elements and Phases

	Current Diploma Requirements	**Current Requirements:** • Career Related Learning Experiences (CRLES) • Personal Plan & Profile • Credit for Proficiency (optional) • Extended Application • 22 Credits
	2008-2009 Planning	**Focus: Clarifying Requirements & Communication** Key Activities: 1. ODE/State Board: • Assessment decisions re: essential skills, 10th or 11/12th grade testing, graduation alternatives (e.g., OSA, SAT, ACT, work samples, AP, PSAT scores) • Communication plan • Tool kit (key documents for parents, students, staff) • Exemplars (e.g., credit for proficiency rubric, portfolios) • Best Practices/Research (math, science) 2. Districts: • Internal communication plan (parents, students, staff) • Readiness assessment (e.g., number of students entering meeting/exceeding 8th grade benchmark) • Policy development (e.g., credit by proficiency) • Clear expectations for incoming freshmen
	2009-2011 Budget	**To Implement Phase I Diploma Requirements, additional dollars are required from the legislature for:** Key Activities: 1. Continued statewide development of technology infrastructure to promote a) access to student data including work samples; and b) efficient transfer of data across districts. 2. Districts: • Additional FTE in grades 6-12 for math/reading/science to avoid loss of electives • Additional time for staff training in math/reading/science strategies K-12 • Additional time to develop K-16 options and proficiency-based credit opportunities • Additional time for teacher data teams to analyze student achievement data, develop formative assessments, and identify interventions • FTE/transportation to extend learning time for students through targeted interventions (i.e., summer school, after-school/online options, additional year of HS, double-dose of math/language arts) • Incentive dollars to encourage teachers to get additional math training 3. Other: Higher education recruitment of math/science teachers from other professions
PHASE I	2012 Diploma Requirements	**Additional Requirements:** • 24 credits (+1 math & +1 science) • 4 essential skills (reading, writing, math, speaking) • Continued focus on Extended Application • Continued focus on CRLES • Credit for proficiency in place
	2011-2013 Budget	**To Implement Phase II Diploma Requirements, additional dollars are required from the legislature for:** Key Activities: 1. ODE: • Rubrics for assessing remaining essential skills 2. Districts: • Expand technology infrastructure • Increase number of computers for student use to lower student/computer ratio • FTE for math/science/reading instructional coaches/site-based support at middle/high school • Additional time for K-12 math/science training via ESD/district consortia • Clerical FTE for documentation/record keeping • Additional time to develop local assessments for final group of essential skills
PHASE II	2014 Diploma Requirements	**Additional Requirements:** • Remaining essential skills (technology literacy, global awareness, critical thinking, civic engagement) • Continued focus on Extended Application • Continued focus on CRLES • Math credits = Algebra I or higher • Science credits 2 of 3 credits = lab

Diploma Panel Recommendations

The Diploma Panel recommends phasing in the following changes and resources to support the new Oregon Diploma requirements over the next two biennia, 2009-11 and 2011-13.

2009-11 Biennium Diploma Implementation Recommendations:

1. Provide staff development in math/reading/science strategies for K-12.
2. Allocate sufficient teacher FTE in grades 6-12 for math/reading/science to avoid the loss of elective courses.
3. Provide time to develop K-16 options and proficiency-based credit opportunities.
4. Provide time to develop local assessments of the essential skills requirements.
5. Provide time for teacher data teams to analyze student achievement data and identify interventions.
6. Develop a statewide technology infrastructure to promote access to student data and efficient transfer of data across districts. (The Oregon Department of Education KIDS project supports this recommendation.)
7. Provide adequate staff at the middle and high school levels to assist students in developing and managing their Education Plan and Profiles.
8. Provide clerical staff to support documentation/record keeping.
9. Provide staff FTE and transportation services to support targeted interventions for students, such as summer school, after-school/online study options, an additional year of high school, double-dose classes in mathematics and/or language arts.
10. Provide incentive dollars to encourage teachers to get additional training in mathematics.

2011-13 Biennium Diploma Implementation Recommendations:

1. Continue the activities implemented in 2009-11.
2. Develop Oregon Department of Education rubrics for assessing the remaining essential skills.
3. Continue to expand the technology infrastructure and add resources to lower the student/computer ratio.
4. Provide staff FTE for math/science/reading instructional coaches and site-based supports at the middle and high school levels. Provide math/science training via ESD/district consortia.

The funding implications associated with these recommendations were analyzed by the Cost Panel and the full Commission and have been incorporated into the revised 2008 QEM, as outlined in Exhibits 13-15.

The State Of School Funding In Oregon

The Quality Education Commission is assigned the task of determining the amount of funding to ensure that Oregon's K-12 education system meets the quality goals and works to link spending with student performance, using a "professional judgment" approach. Oregon has labored for more than 15 years to reconcile its ambitious goals for education with budgetary limitations.

Ballot Measure 1 was passed by Oregon voters in November 2000 as an effort to increase education funding levels. In all three of its constitutionally mandated reports since the measure was passed (the latest was completed in March 2006), the Oregon Legislature has acknowledged that the level of state resources devoted to K-12 education funding has been insufficient to meet the quality education goals established in Oregon law. The reports attribute the funding shortfall to insufficient revenue growth and rapid rises in the costs of delivering educational services.

The legislative reports cite the following specific factors:

- Declines in local resources available for schools due to cuts in property taxes required by Ballot Measure 5 (1990) and Ballot Measure 50 (1997).
- State revenue declines resulting from the economic recession starting in the 2001-03 biennium.
- New federal mandates not accompanied by sufficient federal funding.
- Large increases in required contribution rates to the Public Employees Retirement System (PERS).
- Rapid growth in health insurance premiums paid by school districts.
- Higher transportation costs faced by school districts due to increases in fuel prices.

"Determining the cost for implementing the standards will require a detailed analysis of the proposed requirements, and the systems currently in place by the schools, districts, and state, and measuring the gap. In any case, new revenue is essential to the success of the new diploma requirements."

Oregon's New Diploma
State Board of Education, March 2007

The Legislative Assembly shall appropriate in each biennium a sum of money sufficient to ensure that the state's system of public education meets quality goals established by law, and publish a report that either demonstrates the appropriation is sufficient, or identifies the reasons for the insufficiency, its extent, and its impact on the ability of the state's system of public education to meet those goals.

Section 8(1), Article VIII
Oregon Constitution

Trends in School Funding

It is impossible to understand the state of school funding in Oregon today without going back to the property tax limitation measures passed in the 1990s. Ballot Measure 5, passed in 1990, cut school property taxes dramatically by capping the school property tax rate at $5 per $1,000 of market value. Rapidly growing real estate market values in the early and mid-1990s caused property tax bills to continue to grow, and in response Oregon voters passed Measure 50 in 1997, further cutting property taxes and limiting their growth. As a result, the amount of funding for schools has been decreasing in inflation-adjusted dollars. Prior to the passage of Measures 5 and 50, school property tax rates in Oregon averaged $16.53 per $1,000 of market value. For the 2005-06 tax year, they averaged $4.33 per $1,000 of market value, a tax rate cut of 74 percent since 1990-91. As a result of the dramatic decline in local property tax funding available for schools, the responsibility shifted to the state, with general fund dollars, primarily from the state income tax, becoming the primary source of funding for Oregon schools.

Exhibit 4: Total Operating Revenue

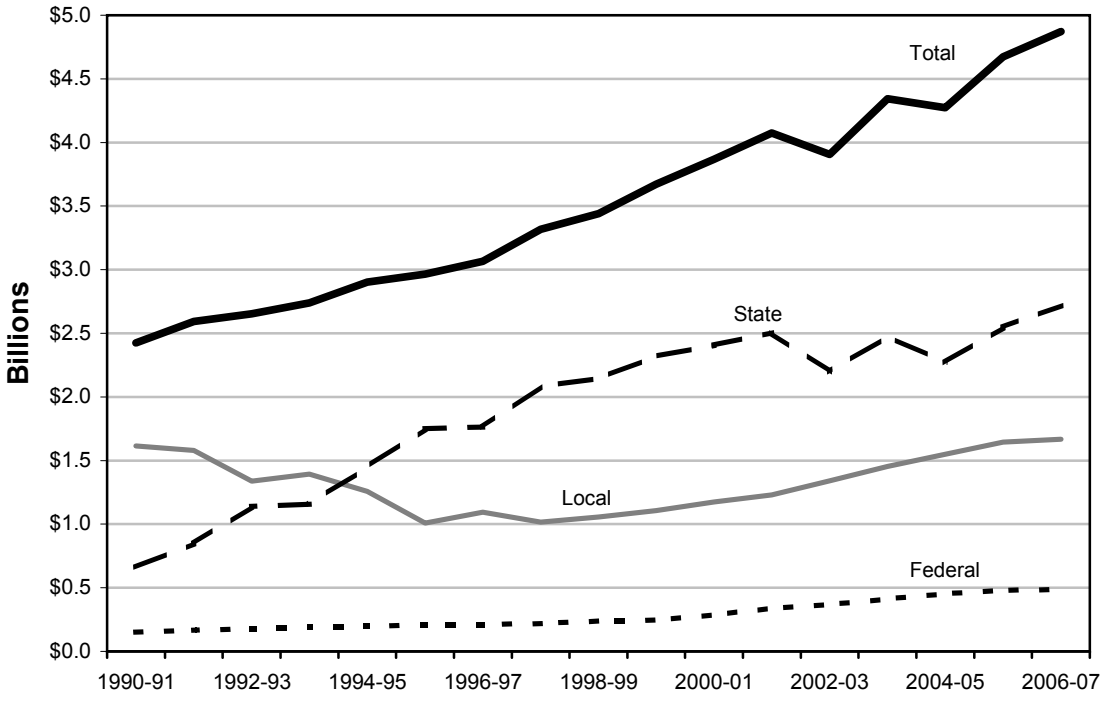


Exhibit 4 shows the trend in funding by source. The shift in school funding from local property taxes to the state general fund caused by Measures 5 and 50 occurred relatively smoothly because robust growth in the economy during the 1990s meant that income tax revenues in Oregon grew rapidly, providing the funds needed to replace the lost property taxes to schools. However, state income tax revenue – the source of over 60 percent of school funding – declined abruptly in 2001 with economic downturns. With little or no ability to raise more local property tax revenues because of constitutional limitations, school districts were forced to cut staffing levels and even shorten the school year in order to balance their budgets. These cuts in funding, along with steep increases in fixed costs whose increases cannot be controlled by school districts, led to diminished real resources reaching the classroom. Furthermore, although K-12 operating revenue has risen over the past several years, this growth has not kept pace with inflation and rising costs associated with student enrollment growth. In other words, inflation-adjusted revenue per student has declined.

Exhibit 5: Inflation-Adjusted Revenue per Student

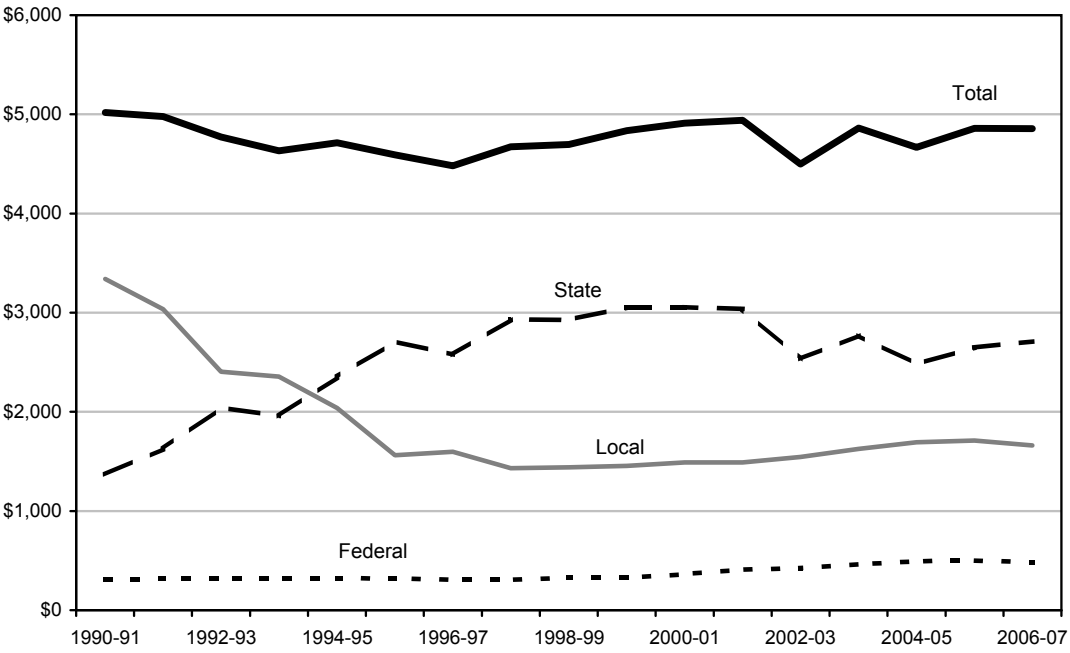


Exhibit 5 shows how per-student funding, adjusted for inflation, has declined over time. The measure of inflation used in this exhibit, labeled the Education Price Index, is a weighted average of teacher salary increases and health insurance premiums increases. This index better reflects actual price increases in the education sector than does the Consumer Price Index (CPI). As the graph shows, real resources per student available to Oregon school districts have fallen over time, from $5,019 per student in 1990-91 to $4,856 in 2006-07.

The Funding Gap

For the 2009-11 biennium, the Quality Education Model estimates that state funding of $8.35 billion for K-12 education is necessary to meet the goal of at least 90 percent of students meeting established academic standards and graduation requirements. With an Essential Budget Level estimate of $6.60 billion (the amount required to fund the same level of services provided in the prior biennium), a funding gap of $1.75 billion will remain if the legislature adopts the Essential Budget Level for the 2009-11 biennium, as shown in Exhibit 6. Reducing the education funding gap will require, in other words, an increased level of investment by Oregon's legislative leaders.

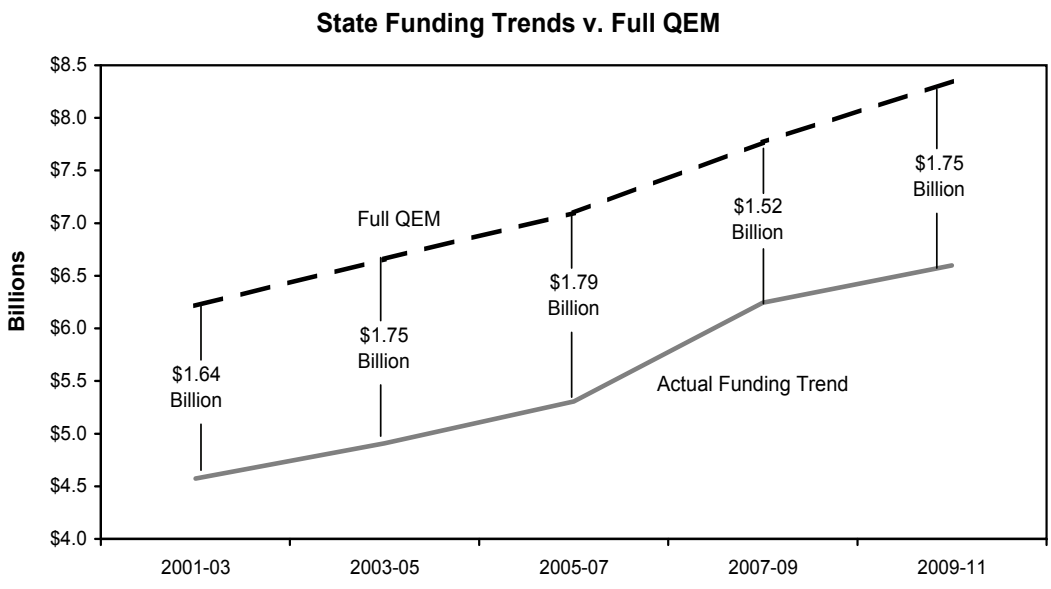
Exhibit 6: State Portion of K-12 Education Funding

State Portion of K-12 Education Funding - Billions of Dollars	
	2009-11 Biennium
Essential Budget Level*	$6.60
Fully-Funded Quality Education Model	$8.35
Funding Gap Relative to Essential Budget Level	$1.75

* Funding level required to maintain current service levels

The result of the Oregon Legislature's inability to appropriate sufficient resources for the public education system has been a continuing gap between the resources available and the level needed to fulfill the educational goals established in law. In the 2001-03 biennium, the funding gap was $1.64 billion, growing from $602 million in the first year of the biennium to over $1.0 billion in the second year as Oregon's economy fell into recession and the K-12 legislative appropriation was reduced. As Exhibit 7 shows, the funding gap narrowed in 2007-09, to $1.52 billion. That is considerably less than the anticipated gap of $1.96 billion estimated in the 2006 QEM report. This significant reduction in the funding gap was the result of the K-12 education funding restored by the 2007 Oregon Legislature, an appropriation above the levels needed to keep up with inflation and enrollment growth. Exhibit 7 also shows, however, that the gap will widen once again if the legislature chooses to fund education at just the level needed to keep up with inflation and enrollment growth.

Exhibit 7: Projected Oregon School Funding Gap



The strategy to eliminate the funding gap must include two components: increasing the level of funding available to schools; and increasing the efficiency in the delivery of education. For more than a decade, education funding per student has not kept pace with educational cost increases, which have consistently risen faster than commonly used measures of inflation such as the Consumer Price Index (CPI). At the same time, Oregon has experienced substantial increases in the number of students with special needs. While the number of students meeting state academic standards increased over this period, that achievement growth is slowing. Unless the state and districts can increase funding and efficiencies, the progress Oregon's schools have made over the past decade is unlikely to continue. The diploma standards adopted as Oregon law in 2008 underscore the importance of the work ahead in the face of steep challenges resulting from the current severe economic downturn.

The State Of Student Performance In Oregon

Oregon's Quality Education Goals and new high school diploma standards set high expectations for students to demonstrate the knowledge and essential skills needed for advanced learning, careers, and citizenship in the 21st century. Although results on annual statewide standardized assessment tests are the most commonly used measure of student performance and trends over time, the Commission recognizes that they are just that: one measure, and too narrow to reflect the many dimensions of learning necessary for students to meet their full potential. Past Commission reports have recommended the development of broader assessments, including school-based and community measures that are consistent with the Quality Indicators included in the Quality Education Model.

> *"Oregon's standards-based system puts the focus squarely on students."*
>
> State Superintendent of Public Instruction
> Susan Castillo

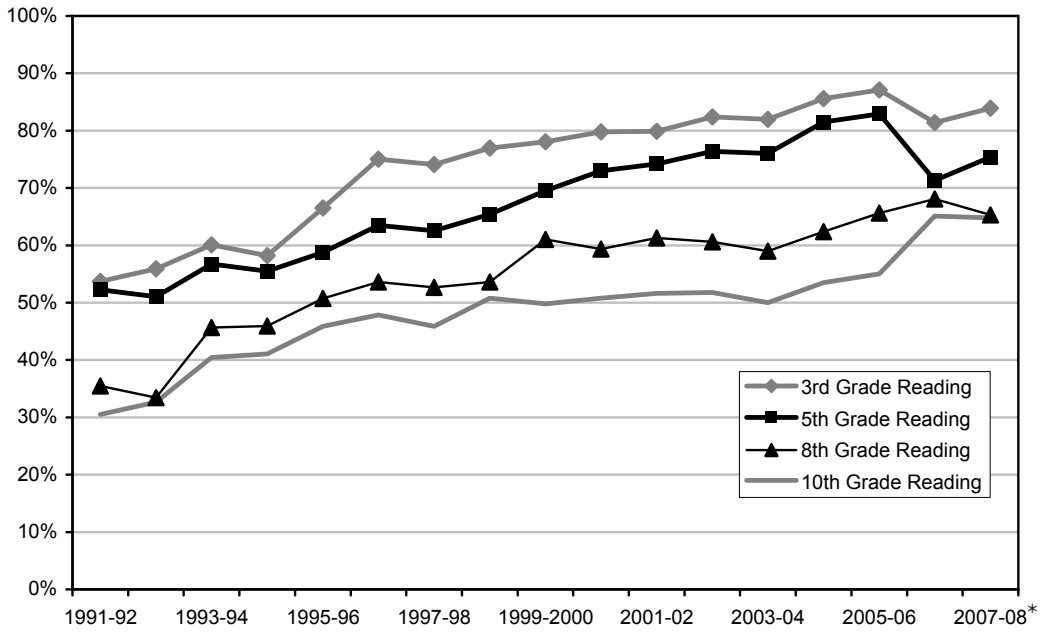
Oregon's new diploma requirements will change curriculum, instruction, and assessment practices. Efforts are underway to develop a set of K-8 and high school core standards in all academic subjects. A structure of core standards emphasizes major disciplinary concepts and coherent learning progressions within and across grade levels. Core standards help teachers design more focused lessons and use classroom assessments of student learning to guide their instructional decisions.

Unlike other states around the country that have adopted new high school diploma standards, Oregon will not require students to pass a single "exit exam" in order to graduate. The Oregon Diploma will provide students with opportunities to demonstrate academic proficiency through multiple pathways and assessments. The State Board of Education approved three options for students to demonstrate their mastery of essential skills such as reading, writing, mathematics, and speaking: (1) state assessment tests, or (2) locally scored assessments (such as student work samples or projects) that meet state criteria, or (3) an approved national standardized test.

Past Commission reports have examined academic performance as measured by state assessments in reading and mathematics; analyzed performance over time on these assessments at all benchmark grade levels; and looked closely at the score distributions over time and at each benchmark level. This year's report also includes statewide data on science, writing, and the graduation rate. The Oregon Assessment of Knowledge and Skills (OAKS) tests are administered at grades 3-8 and 10 in reading and math. Scientific inquiry is assessed using a statewide multiple-choice test administered in grades 5, 8, and 10; the writing tests are given at grades 4, 7, and 10.

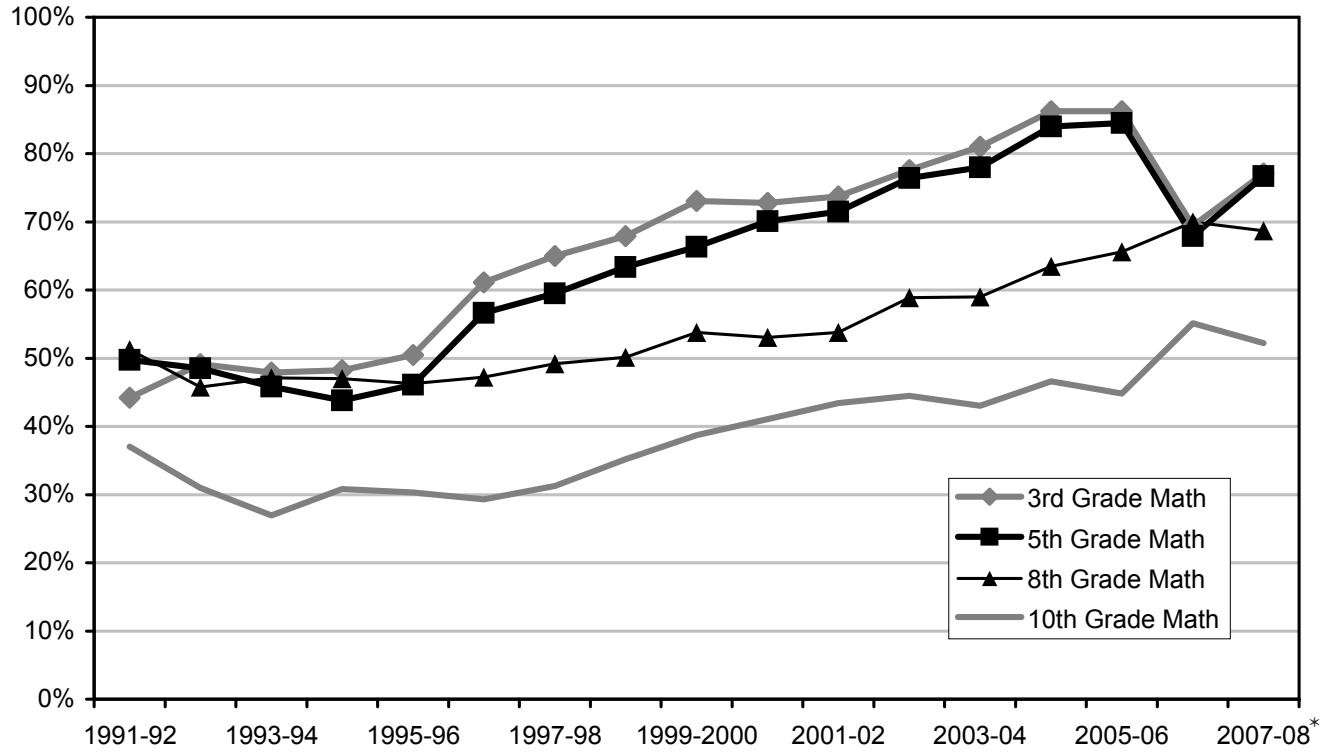
In reviewing the following graphs, it should be noted that data for 2006-07 and 2007-08 are not comparable to prior years due to changes in the scores required to meet state benchmarks. The science test was suspended in 2006-07, and 2007-08 was the first year science was included as part of federal NCLB reporting requirements.

Exhibit 8: Percent Meeting Reading Standards



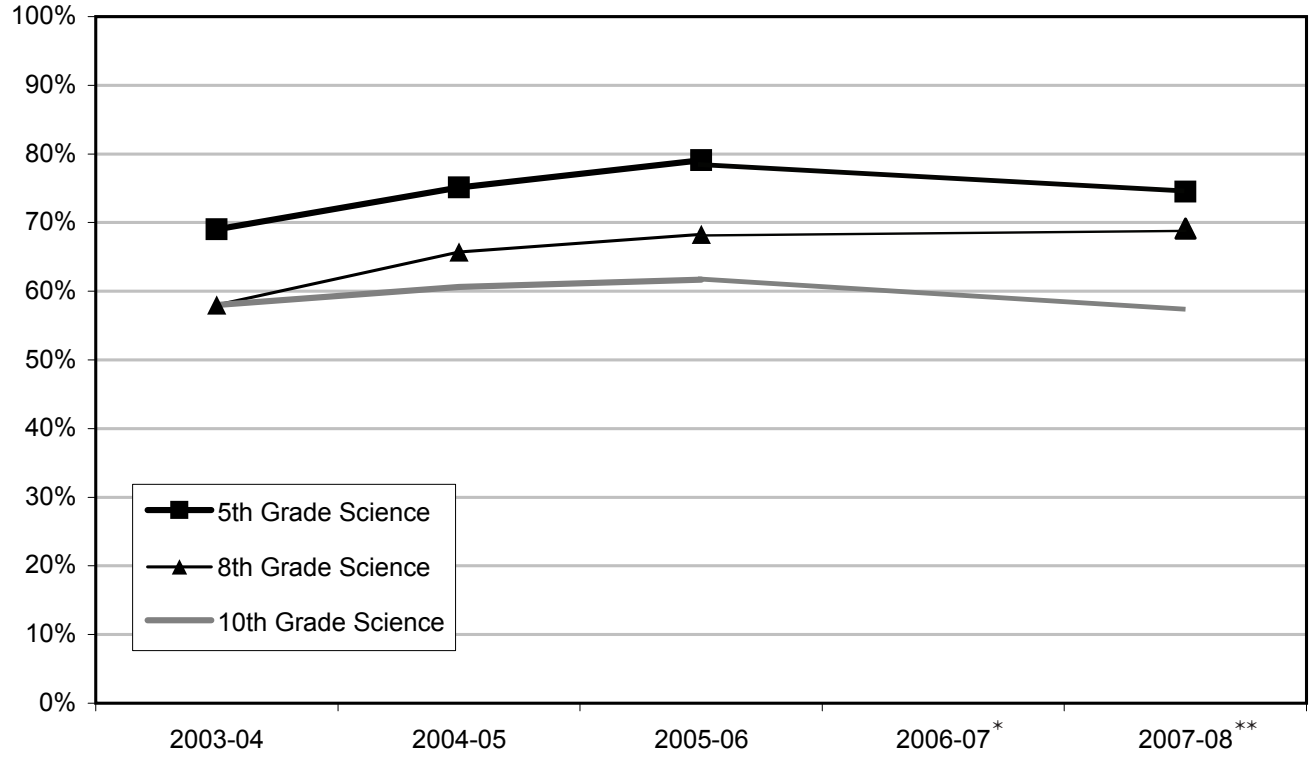
*Data for 2006-07 and 2007-08 are not comparable to prior years due to changes in the scores required to meet state benchmarks.

Exhibit 9: Percent Meeting Math Standards



*Data for 2006-07 and 2007-08 are not comparable to prior years due to changes in the scores required to meet state benchmarks.

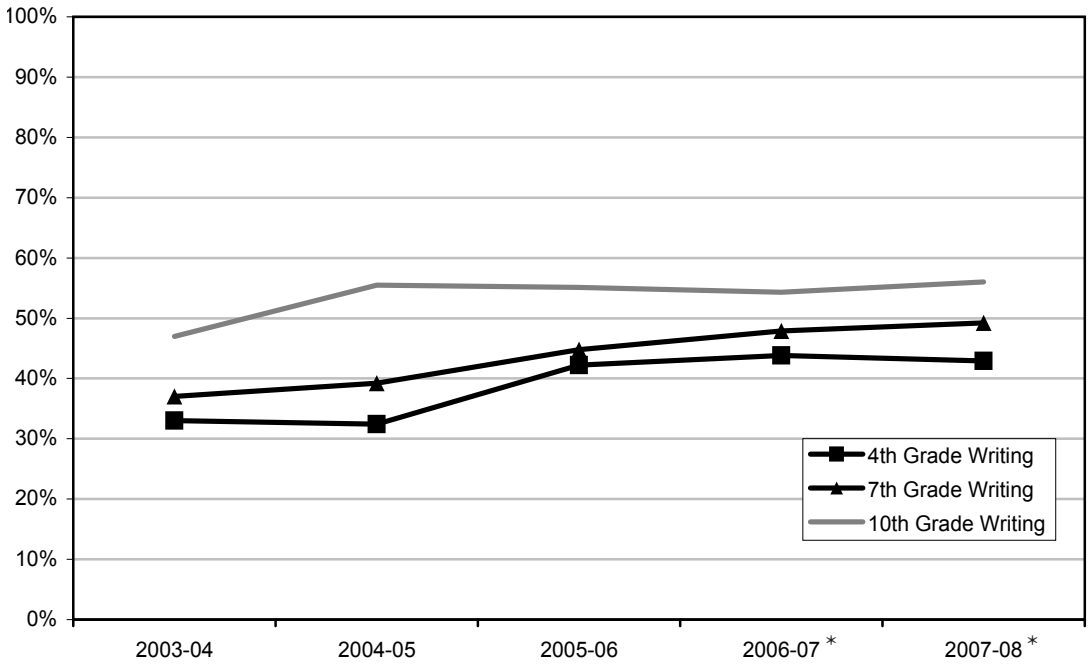
Exhibit 10: Percent Meeting Science Standards



* Science test was not given in 2006-07.

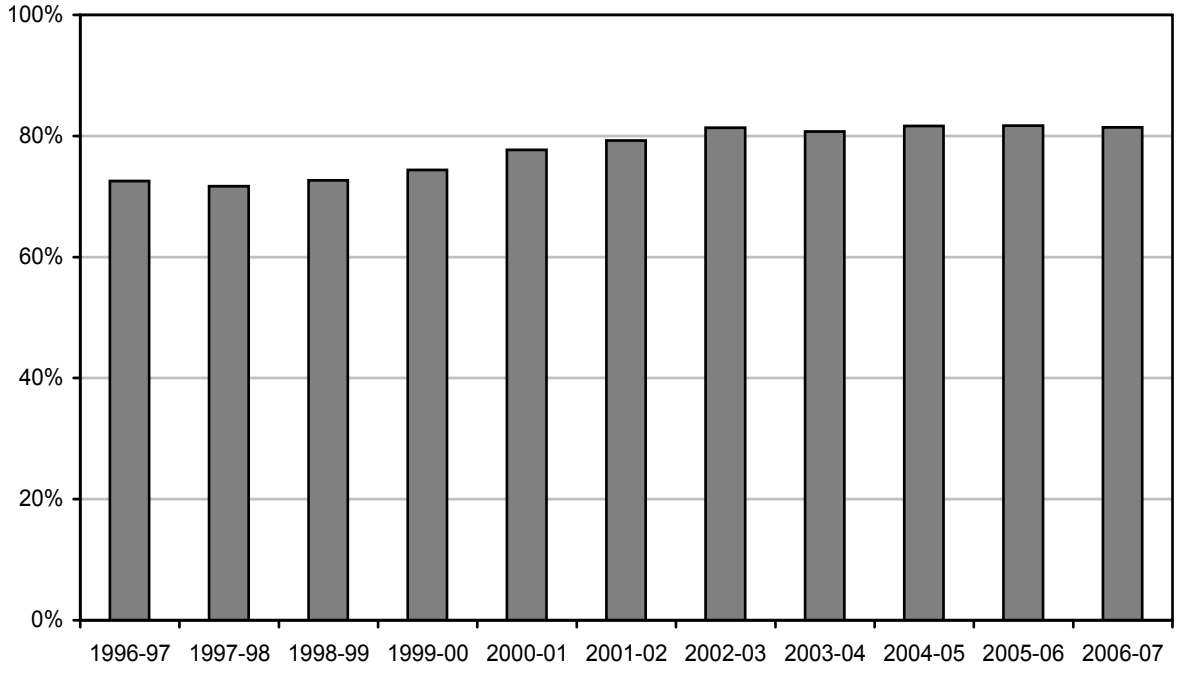
**Data for 2006-07 and 2007-08 are not comparable to prior years due to changes in the scores required to meet state benchmarks.

Exhibit 11: Percent Meeting Writing Standards



*Data for 2006-07 and 2007-08 are not comparable to prior years due to changes in the scores required to meet state benchmarks.

Exhibit 12: Oregon Graduation Rates



The graduation rates shown in Exhibit 12 were calculated using the formula developed by the National Center for Education Statistics (NCES). Oregon's adopted formula was approved by the U.S. Department of Education for determining Adequate Yearly Progress (AYP) under NCLB regulations. As the graph shows, Oregon's graduation rate showed steady improvement between 1997-98 and 2002-03, but has leveled off in recent years. In addition to the traditional rate, in spring 2009 the Oregon Department of Education plans to calculate graduation rates for a cohort class of entering ninth graders.

General Conclusions:

- The Quality Education Commission has supported, in principle, the goals of the federal NCLB legislation in promoting high academic achievement and closing the achievement gap. It is clear, however, that those goals cannot be met in Oregon without improved education practices based on sound research; adequate and stable funding at the local, state, and federal levels; and accountability structures that promote efficient use of resources.
- For more than 15 years, the proportion of Oregon students reaching benchmark standards in reading and math showed general overall progress, with the greatest and most consistent gains occurring at the elementary level. Gains became considerably smaller as students moved through the middle and high school levels. Last year also saw significant declines in performance in reading and math at the middle school and high school levels. (Again, the 2006-07 and 2007-08 data in Exhibits 8-11 are not comparable with prior years' results due to changes in the scores required to meet state benchmarks.)
- Differences in achievement based on ethnic/cultural background, limited English proficiency, low-income status, and disability are a persistent issue. Changing student demographics may also result in slower growth at the elementary level without additional targeted resources and practices as described in the Quality Education Model. A continued focus on early literacy and reading in grades K-3 is needed as a foundation for all learning.
- Student achievement trends underscore the importance of investing in K-8 as well as grades 9-12 improvements in order to realize Oregon's high standards and successful implementation of the new diploma. Middle schools may see some sustained improvement as student cohorts arrive with a stronger foundation of knowledge and skills. In other words, investments in best practices leading to improved academic performance at the elementary grades should result in better-prepared students at the higher grade levels. For example, a continued focus on literacy is essential to help students transition successfully from elementary to middle school. The data suggest that a significant proportion of students at the middle and high school levels will need more instructional time or other support, such as tutoring or after-school programs, to meet academic performance targets and increase the graduation rate.

> *"To increase the achievement levels of minority and low-income students, we need to focus on what really matters: high standards, a challenging curriculum, and good teachers."*
>
> Kati Haycock,
> Educational Leadership, 2001

- Estimates that assume full implementation of the QEM Prototype Schools suggest that sustained improvement can occur at the third- and fifth-grade levels until 90 percent or more students meet academic benchmarks by 2014. Reaching that performance level for eighth and tenth graders is expected to take longer.
- Assumptions are based on both dimensions of the QEM Prototype Schools being implemented: Increased resources targeted to student learning, combined with consistent improvements in the Quality Indicators that identify effective educational practices and policies. Implementing Oregon's high standards and new diploma in a period of deep economic uncertainty and changing student demographics is a daunting task. Student improvement rates are likely to slow or stall in future years unless Oregon continues to move its reform agenda forward.

Oregon in a National Context

"We can, whenever and wherever we choose, successfully teach all children whose schooling is of interest to us. We already know more than we need in order to do this. Whatever we do, it must finally depend on how we feel about the fact that we haven't so far."

Dr. Ron Edmunds
Educator and Effective Schools Researcher

- Average reading and math scores on the National Assessment of Educational Progress (NAEP), also known as "the Nation's Report Card," have generally increased in Oregon and are slightly above the national average in many categories, although the differences have tended to narrow over time. The 2007 NAEP results showed Oregon's fourth graders falling below the national average in both reading and math. Several sub-group populations fell behind the national average in 2007, including European American students, African American students, and students eligible for the free and reduced-price lunch program. Oregon's eighth graders scored above the national average in reading and math between 1998 and 2007, although scores did not increase significantly either in total or when broken out by race and ethnicity.
- Oregon students have historically out-scored U.S. students on the SAT college admissions test. In 2007 Oregon students scored second in the nation on the verbal (critical reading) and math sections of the SAT among states that tested at least 50 percent of graduates. About 54 percent of Oregon's graduating seniors took the test in 2007. A relatively small proportion of Oregon's high school students take the other widely established college admission tests administered by the American College Testing (ACT) program. Only 18 percent of Oregon's graduating seniors in 2007 took the ACT, compared to 42 percent nationally.
- The number of students taking the Advanced Placement exams increased 36.5 percent between 2006 and 2007, and the number of students passing the exam was the highest reported in six years among European American, Asian American, American Indian, and African American students.
- After significant progress in reducing the high school dropout rate from 1997-98 to 2005-06, Oregon's rate moved up slightly – from 4.1 percent to 4.2 percent – in 2006-2007. Furthermore, minority students continue to be disproportionately represented among the dropout population. Oregon has also seen little progress in raising the graduation rate in recent years. The National Center for Education Statistics (NCES) publishes data on the average freshman graduation rate across the nation; Oregon's rate in 2006-07 was 74.2 percent, just under the national average of 75 percent.

The Quality Education Model And The Prototype Schools

What is a quality education and how much does it cost? The Quality Education Model is the innovative tool Oregon has developed to answer that question. Its purpose is to depict Oregon's K-12 education system with sufficient detail and accuracy to help policymakers better understand how schools allocate their resources, how various policy proposals affect funding needs, and how the level of resources provided to schools is expected to affect student achievement.

> *"A model of this nature solves two problems at once: It reduces the ambiguity in the local-state relationship as well as clarifying the state's responsibilities relative to funding school reform and improvement."*
>
> Dr. David Conley
> University of Oregon, 2003

While the Quality Education Model does not perfectly capture every aspect of Oregon's K-12 education system – no model can do that – it does describe the system in sufficient detail to be a powerful tool to guide decisions at the school, district, and state levels.

Oregon was one of the first states in the nation to seek to craft a reliable school finance model using a "professional judgment" approach combining research, practical experience, and a set of assumptions about what comprises a quality education at the elementary, middle, and high school levels. The Quality Education Model is both a framework and an interactive tool for analyzing the dynamic interplay between education policies intended to raise academic standards and achievement, instructional best practices carried out in local schools, funding resources, and student performance. One of the strengths of the model is that it is relatively easy to understand and can clearly demonstrate the impact that changes in state funding levels have on school programs as well as estimate the funding requirements of proposed new programs.

This section of the report provides a brief description of the prototype schools approach used by the Quality Education Model. It provides a comparison between current education practices and funding levels in Oregon schools with those needed to achieve the state's education goals, as well as the performance expectations associated with each situation. The Commission recognizes that the level of resources outlined in the fully-funded Quality Education Model will need to be phased in over time, based on identified priorities.

The Prototype Schools Approach

The Quality Education Model is structured around three prototype schools – elementary, middle, and high – designed to prepare students to meet Oregon's high standards and performance goals. Each prototype reflects best practices research on effective and high-performing schools. The school prototypes provide a mechanism for evaluating the resource and costs implications of various education policies, programs, and strategies.

The prototype schools are not intended to be prescriptive. Their purpose is to assist educators, policymakers, and citizens at the local and state levels in making informed and data-based decisions.

The Quality Education Model assumes that the prototype schools have certain non-fiscal characteristics or traits that are important measures of organizational functioning and efficiency.

These Quality Indicators derive from research on effective schools and are grouped into twelve school-level, teacher-related, classroom-focused, and student-centered factors.

The Quality Indicators help illuminate the degree to which the educational system is employing effective practices and utilizing available resources efficiently.

Quality Indicators

Schools

- Leadership that facilitates student learning
- Parental/community involvement
- Organizational adaptability
- Safe and orderly learning environment
- District policies to support learning

Teachers

- Teacher and teaching quality
- Professional development program
- Teacher efficacy

Classrooms

- Effective instructional programs and methods
- School database collection and analysis to improve instructional programs

Students

- Readiness to learn
- Connectedness to school and engagement in academics and extra-curricular programs

Best Practices are those strategies and programs that research and experience have demonstrated to be successful in effecting high student achievement. The prototype schools are examples of how schools could be organized to implement best practices. The 2002 Best Practices Panel identified the following essential characteristics that support best practices:

- Each student has a personalized education program.
- Instructional programs and opportunities are focused on individual student achievement of high-quality standards.
- Curriculum and instructional activities are relevant to students' lives.
- Each student has access to a rich and varied elective co-curricular and extra-curricular program.
- The school creates small learning environments that foster student connection.
- The school provides and encourages connections with significant adults, including parents, mentors, and other advisors to ensure that each student develops a connection to the greater community, along with a strong sense of self.
- The school makes data-informed decisions about the capability of programs to foster individual student achievement.
- The school at upper grade levels uses community-based and worksite learning as integral components of its instructional program.
- The school has a comprehensive staff induction program that guides recruitment and employment and provides ongoing professional development programs.
- Cost-effective management of resources allows school districts to better meet the needs of the greatest number of students.

In 2008 the Best Practices Panels created by the Commission used the above list as part of their interviews at 42 schools selected across the state for their success in improving performance consistent with established standards. The panels' recommendations – based on findings at rural, urban, and suburban schools ranging in enrollment from fewer than 70 students to more than 2,000 – are congruent with the national research literature on standards-based reform, effective schools, and the correlates of high student achievement.[1] The Commission's Diploma Panel also used statewide survey results and current research to identify the resources needed for effective implementation of Oregon's new graduation requirements.

Added time for teacher collaboration and extra instructional support, targeted interventions for struggling students, focused professional development and the creation of school leadership capacity, use of high-quality student data to modify instruction, effective parent/community communication and relationships: All of the panels' recommendations have a solid grounding in research and the practical experience of Oregon's principals, teachers, other staff, and school board members.

Individual Prototype Schools

The model assumes the three prototype schools incorporate what research and best practices have shown to be most important in improving student achievement and providing a level of resources that sustains that goal. The prototypes are not richly staffed but they do provide staffing levels associated with improved student learning and a comprehensive, balanced general education. Each prototype school includes:

- Adequate staffing
- Added instructional time and activities for students having trouble meeting standards
- Curriculum development and technology support
- On-site instructional improvement
- Professional development for teachers and administrators
- Adequate classroom supplies
- Adequate funds for building maintenance

[1] Examples include *How People Learn: Brain, Mind, Experience, and School*, John D. Bransford et al., editors, National Research Council, Arlington, VA: 2000; *The Kids Left Behind: Catching Up the Underachieving Children of Poverty*, Robert D. Barr and William HI Parrett, Solution Tree, Bloomington, IN: 2007.

Prototype Resource Assumptions

The three prototype schools used in the Quality Education Model incorporate approximately 80 assumptions or parameters.

The basic prototype assumptions include:

- The size of each school is within a range the research literature recognizes is efficient.
- The assumed level of teacher experience is about average for schools in Oregon.
- Each school has Internet access.
- Teachers are using technology in the design and delivery of instruction.
- The schools are located in close proximity to an urbanized area.
- The schools are slightly below the state median in socioeconomic status (40th percentile).
- The schools have approximately 13 percent of their students identified for special education.
- 11 percent of the students are identified as speaking English as a second language.
- The principal is knowledgeable about reform requirements and is supportive of the reform goals.
- The principal is supportive of reform implementation and the training necessary for school staff.
- The principal is somewhat skilled as a leader and skilled as a manager.
- Teachers are open to reform goals and the training necessary to support the reform requirements.
- Teachers possess content knowledge necessary to teach to applicable state standards.

Elementary School – 340 Students

- All-day kindergarten
- Class size average of 20 in primary grades
- Class size of 24 in grades 4-5
- 4.5 FTE for specialists in areas such as art, music, PE, reading, math, TAG, library, ESL, child development/ counselor

Middle School – 500 Students

- Class size average of 22
- 1.5 additional teachers for math, English, science
- Alternative programs for special needs and at-risk students
- Volunteer coordinator and community outreach worker
- One counselor for every 250 students
- Adequate campus security

High School – 1,000 Students

- Class size average of 21
- 3.0 additional teachers for math, English, science
- Alternative programs for special needs and at-risk students
- Volunteer coordinator & community outreach worker
- One counselor for every 250 students
- Adequate campus security
- School-to-work coordinator

Changes in the Quality Education Model 2008

The following exhibits describe the Commission's 2008 prototype elementary, middle, and high schools. These charts incorporate changes recommended by the Commission's Best Practices, Diploma, and Cost Panels.

The model has been reorganized so that it focuses on the following key policy variables: (a) evidence-based practices proven through rigorous research to be effective in strengthening academic achievement or meeting other identified K-12 goals; (b) components designed to improve teacher and administrator effectiveness; and (c) components needed to implement the provisions of the new Oregon Diploma adopted by the State Board of Education.

In prior versions of the model, input values (such as the number of teachers in the prototype high school) could be changed, but the value remained the same for all years. Allowing the input for policy scenarios to vary from year to year provides greater flexibility; for example, by allowing proposed programs to be phased in.

The Baseline Prototypes in Exhibits 13-15 show the characteristics of schools under current funding levels, based on actual spending patterns in Oregon schools. The Fully-Funded Prototypes show the Commission's recommended levels of funding for a comprehensive model that includes all of the relevant resources and education programs. Some of the recommendations of the Best Practices and Diploma Panels were already addressed as resources in the fully implemented version of the QEM (one example is additional instructional time for students who are struggling to meet standards), while other recommendations represent new resource needs above this level (such as dedicating two hours per week for teacher collaboration in all three prototype schools). Several of the panels' recommendations also overlap: allocating additional time for teachers to collaborate in reviewing student achievement data, for example.

QEM Changes Supporting Best Practices

- Dedicated time for teacher collaboration (two hours per week)
- Resources for communication and relationship-building with parents/community
- Resources for formative assessments to better determine individual student needs
- Added staff for "double-dosing" of instruction and targeted student interventions
- Resources for targeted programs to give students more time on task
- Professional development time to promote building-level leadership

QEM Changes Supporting Diploma Implementation

- Added time to develop K-16 options and proficiency-based credit opportunities
- Resources to develop local assessments for essential skills
- Time for teacher data teams to analyze student achievement
- Added clerical staff for record keeping for the Personal Plan and Profiles
- Incentive dollars to encourage teachers to get additional math training
- Academic counselors to assist students with their Personal Plan and Profiles
- Additional teachers in math/science/reading
- Staff training in math/science/reading strategies
- Resources to support targeted interventions for students
- Math/science/reading instructional coaches beginning in 2011-12
- Added training for middle and high school math and science teachers beginning in 2011-12
- Resources for added technology infrastructure beginning in 2011-12
- Reduced student/computer ratio beginning in 2011-12

Exhibit 13: Prototype Elementary School – 340 Students

	Baseline Prototype*	Fully-Funded QEM	Difference
Kindergarten	Half-day	Full-day	Doubles learning time
Average class size	22 for grades K-3 24 for grades 4-5	20 for grades K-3 24 for grades 4-5	Cuts class size by 2 for grades K-3
K-5 classroom teachers	14.0 FTE	16.0 FTE	Adds 2.0 FTE
Specialists for areas such as art, music, PE, reading, math, TAG, library/media, second language, or child development	2.5 FTE	4.5 FTE	Adds 2.0 FTE
Special education licensed staff	2.5 FTE	3.0 FTE	Adds 0.5 FTE
English as a second language licensed staff	0.5 FTE	1.0 FTE	Adds 0.5 FTE
Licensed substitute teachers	$89 per student	$89 per student	
On-site instructional improvement staff	None	0.5 FTE	Adds 0.5 FTE
Instructional support staff	5.0 FTE	6.0 FTE	Adds 1.0 FTE
Additional instruction time for students not meeting standards: 20% of students	Limited	Summer school, after-school programs, Saturday school, tutoring, etc.	Additional programs for 20% of students
Professional development time for teachers	3 days	Equivalent of 7 days	Equivalent of 4 additional days
Dedicated Teacher Collaboration Time	Limited	2 hours per week	Additional 2 hours per week
Leadership development training for administrators	Limited	Based on 4 days of training	4 additional days
Students per computer	6	6	
Textbooks	$64 per student	$85 per student	$21 per student
Classroom materials & equipment	$82 per student	$82 per student	
Other supplies	$101 per student	$105 per student	$4 per student
Operations and maintenance	$700 per student	$700 per student	
Student transportation	$382 per student	$382 per student	
State-level special education fund	$33 per student	$82 per student	$49 per student
Centralized special education services	$97 per student	$97 per student	
Technology services	$161 per student	$186 per student	$25 per student
Other centralized support	$320 per student	$335 per student	$15 per student
District administrative support	$282 per student	$282 per student	
Education Service District Services	$641 per student	$641 per student	
Total Cost per student in 2006-07	**$9,167 per student**	**$10,892 per student**	**$1,725 per student**
Percent of students meeting standards in 2007-08**			
Reading	3rd grade=84% 5th grade = 75%	n/a	
Math	3rd grade=77% 5th grade = 77%	n/a	
Percent of students expected to meet standards by year 2013-2014			
Reading	3rd grade=91% 5th grade = 85%	3rd grade=95% 5th grade = 90%	
Math	3rd grade=89% 5th grade = 88%	3rd grade=93% 5th grade = 93%	

* The Baseline Prototype shows the Quality Education Model's prototype school costs estimated using the level of inputs that currently exist in Oregon schools.
** Due to revisions in the state standards, the percent of students meeting standards is not comparable to prior reports.

Exhibit 14: Prototype Middle School – 500 Students

	Baseline Prototype*	Fully-Funded QEM	Difference
Class size in core subjects of math, English, science, social studies, second language	23	22, with maximum class size of 29 in core academic subjects	Cuts average class size by 1 in core subjects
Staffing in core subjects	21.5 FTE	22.5 FTE	Adds 1.0 FTE
Extra teachers in math, English, and science	0.5 FTE	1.5 FTE	Adds 1.0 FTE
English as a second language licensed staff	0.5 FTE	0.75 FTE	Adds 0.25 FTE
Special education and alternative education licensed staff	4.0 FTE	4.5 FTE	Adds 0.5 FTE
Media/Librarian	1.0 FTE	1.0 FTE	
Counselors	One for every 333 students	One for every 250 students	Adds 0.5 FTE
Licensed substitute teachers	$92 per student	$92 per student	
On-site instructional improvement staff	None	1.0 FTE	Adds 1.0 FTE
Instructional support staff	11.0 FTE	10.0 FTE	Eliminates 1.0 FTE
Additional instruction time for students not meeting standards: 20% of students	Limited	Summer school, after-school programs, Saturday school, tutoring, etc.	Additional programs for 20% of students
Professional development time for teachers	3 days	Equivalent of 7days	Equivalent of 4 additional days
Dedicated Teacher Collaboration Time	Limited	2 hours per week	Additional 2 hours per week
Leadership training for administrators	Limited	Based on 4 days of training	4 additional days
Students per computer	6	6	
Textbooks	$51 per student	$85 per student	$34 per student
Classroom materials & equipment	$87 per student	$87 per student	
Other supplies	$94 per student	$104 per student	$10 per student
Operations and maintenance	$737 per student	$737 per student	
Student transportation	$384 per student	$384 per student	
Centralized special education services	$97 per student	$97 per student	
State-level special education fund	$33 per student	$82 per student	$49 per student
Technology Services	$161 per student	$186 per student	$25 per student
Other centralized support	$310 per student	$325 per student	$15 per student
District administrative support	$282 per student	$282 per student	
Education Service District services	$641 per student	$641 per student	
Total Cost per student in 2006-07	**$9,440 per student**	**$10,407 per student**	**$967 per student**
Percent of students meeting standards in 2007-08**			
Reading	65%	n/a	
Math	69%	n/a	
Percent of students expected to meet standards by year 2014			
Reading	73%	82%	
Math	75%	83%	

* The Baseline Prototype shows the Quality Education Model's prototype school costs estimated using the level of inputs that currently exist in Oregon schools.
** Due to revisions in the state standards, the percent of students meeting standards is not comparable to prior reports.

EXHIBIT 15: PROTOTYPE HIGH SCHOOL – 1,000 STUDENTS

	Baseline Prototype*	Fully-Funded QEM	Difference
Class size in core subjects of math, English, science, social studies, second language	22	21, with maximum class size of 29 in core academic subjects	Cuts average class size by 1 in core subjects
Staffing in core subjects	43.0 FTE	44.0 FTE	Adds 1.0 FTE
Extra teachers in math, English, and science	1.0 FTE	3.0 FTE	Adds 2.0 FTE
English as a second language licensed staff	0.5 FTE	0.5 FTE	
Special Education and alternative education licensed staff	5.0 FTE	5.25 FTE	Adds 0.25 FTE
Alternative education and special programs	2.5 FTE	2.5 FTE	
Media/Librarian	1.0 FTE	1.0 FTE	
Counselors	One for every 333 students	One for every 250 students	Adds 1.0 FTE
Licensed substitute teachers	$91 per student	$91 per student	
On-site instructional improvement staff	None	1.0 FTE	Adds 1.0 FTE
Instructional support staff	20.0 FTE	20.5 FTE	Adds 0.5 FTE
Additional instruction time for students not meeting standards: 20% of students	Limited	Summer school, after-school programs, Saturday school, tutoring, etc.	Additional programs for 20% of students
Professional development time for teachers	3 days	Equivalent of 7days	Equivalent of 4 additional days
Dedicated Teacher Collaboration Time	Limited	2 hours per week	Additional 2 hours per week
Leadership training for administrators	Limited	Based on 4 days of training	4 additional days
Students per computer	6	6	
Textbooks	$56 per student	$110 per student	$54 per student
Classroom supplies and materials	$120 per student	$120 per student	
Other supplies	$116 per student	$131 per student	$15 per student
Operations and maintenance	$785 per student	$785 per student	
Student transportation	$382 per student	$382 per student	
Centralized special education services	$97 per student	$97 per student	
State-level special education fund	$33 per student	$82 per student	$49 per student
Technology Services	$161 per student	$186 per student	$25 per student
Other centralized support	$304 per student	$344 per student	$40 per student
District administrative overhead	$282 per student	$282 per student	
Education Service District services	$641 per student	$641 per student	
Total Cost per student in 2006-07	**$9,479 per student**	**$10,588 per student**	**$1,109 per student**
Percent of students meeting standards in 2007-08**			
Reading	65%	n/a	
Math	52%	n/a	
Percent of students expected to meet standards by year 2013-2014			
Reading	73%	82%	
Math	62%	75%	

* The Baseline Prototype shows the Quality Education Model's prototype school costs estimated using the level of inputs that currently exist in Oregon schools.
** Due to revisions in the state standards, the percent of students meeting standards is not comparable to prior reports.

Quality Education Model Estimates for the 2009-11 Biennium

Prior to the start of each legislative session, the Commission updates the Quality Education Model to include the most recent data available. The Commission also reviews the assumptions in the model to be sure they are consistent with current research. Once the updates are complete, the Commission uses the model to estimate the level of funding required to meet Oregon's educational goals as established in law.

As with past rounds, the Commission's Cost Panel tackled these more technical aspects of the Quality Education Model. In general, the panel's charge is to make recommendations for improving the QEM as a tool to support policy decisions regarding school funding in Oregon. (A list of Cost Panel members is included in Appendix A.) The panel supported the Commission's work by focusing on the following tasks:

- Updating the Quality Education Model to reflect the most recent data available and to refine the cost estimates so they are as accurate as possible. Most of the data used are from the 2006-07 school year, including expenditures by category, wages and salaries of school personnel, retirement system and health care costs, and class size.
- Making the model as comprehensive as possible by including all relevant resources and education programs.
- Making the model more flexible and easier to use.
- Calibrating the model so that the baseline cost estimates are consistent with current spending in Oregon schools and with the Essential Budget Level amount estimated by the School Revenue Forecast Committee for the 2009-11 biennium.

Based on the findings and recommendations of the Best Practices Panel, the Cost Panel took into account the educational practices found in some of Oregon's most successful schools and incorporated the added costs to the extent they were not already included in the model. Based on the work of the Diploma Panel, the Cost Panel incorporated the added costs of Oregon's new high school graduation requirements to the extent that the resources needed to implement the new Oregon Diploma were not already included in the model. The model was updated using the most current available data, including the school district audited financial information available through the Database Initiative project (DBI), enrollment and other student data from the Oregon Department of Education, and economic and price data from the Office of Economic Analysis (Oregon Department of Administrative Services).

Exhibit 16: Quality Education Model Impact Analysis for the 2009-11 Biennium

Baseline (Essential Budget Level) Funding Compared to Full Funding of the QEM	Baseline Funding	Full Funding of the QEM	Difference	Percent Difference
Estimated District Operating Exp. for 2009-10*	$5,347,423,305	$6,178,772,251	$831,348,947	15.5%
Estimated District Operating Exp. for 2010-11*	$5,564,324,177	$6,427,939,188	$863,615,011	15.5%
2009-11 Biennium Total	**$10,911,747,482**	**$12,606,711,440**	**$1,694,963,958**	**15.5%**
Plus: 2009-11 ESD Expenditures	$839,903,271	$839,903,271	$0	0.0%
Plus: High-Cost Disabilities Fund	$36,000,000	$90,000,000	$54,000,000	150.0%
Equals: Total 2009-11 Funding Requirement	**$11,787,650,753**	**$13,536,614,710**	**$1,748,963,958**	**14.8%**
Less: Local Revenue not in Formula**	$1,004,542,607	$1,004,542,607	$0	0.0%
Less: Federal Revenue To School Districts and ESDs	$1,056,423,876	$1,056,423,876	$0	0.0%
Less: Food Service Enterprise Revenue	$127,111,629	$127,111,629	$0	0.0%
Equals: Total Formula Funding Requirement	**$8,603,395,283**	**$10,563,493,338**	**$1,960,098,055**	**22.8%**
Less: Property Taxes and other Local Resources	$3,000,656,000	$3,000,656,000	$0	0.0%
Equals: 2009-11 State School Fund Requirement	**$6,598,916,641**	**$8,347,880,599**	**$1,748,963,958**	**26.5%**

* Includes food service and other expenditures not included in prior versions of the model, so not comparable to prior reports.
** Local option taxes, fees, and donations.

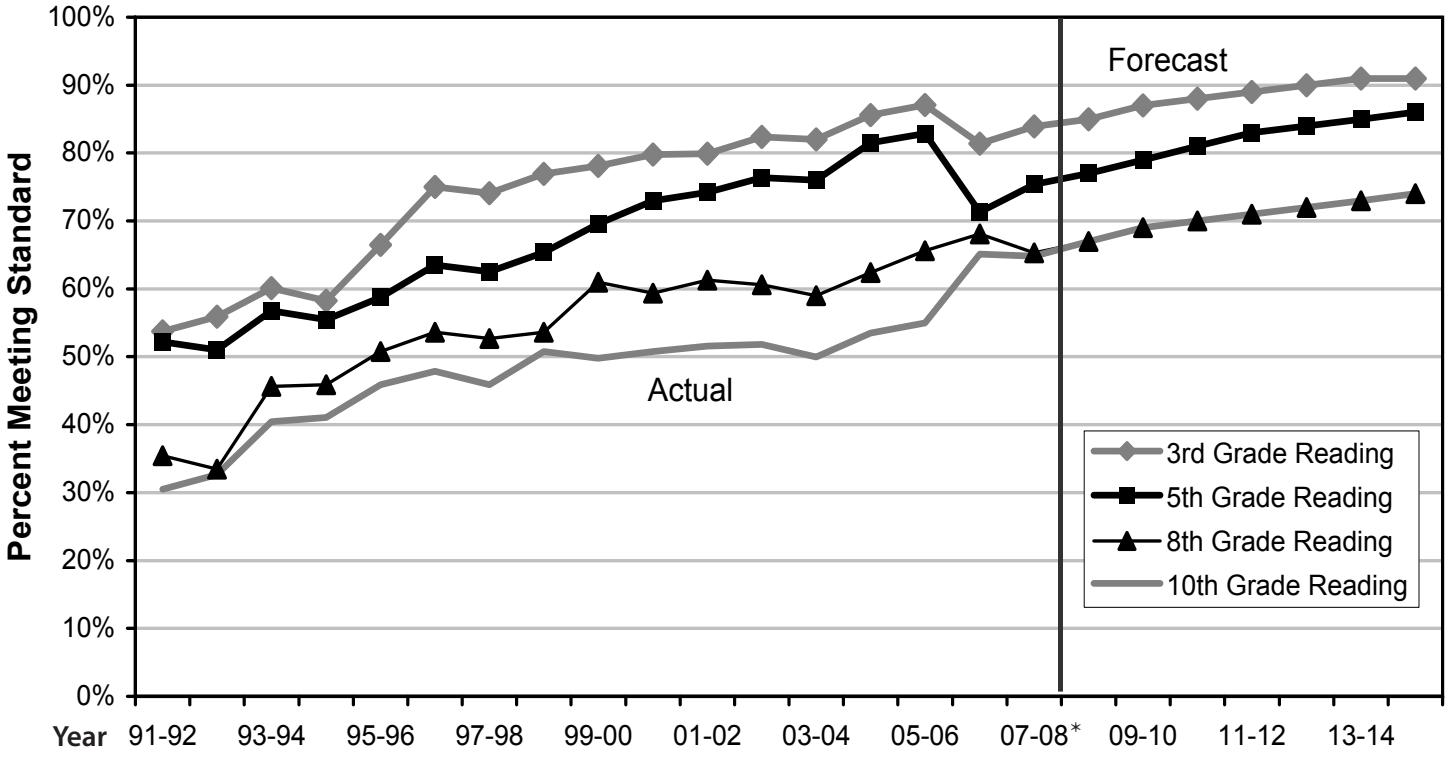
Exhibit 16 provides preliminary estimates of the resources needed to fully fund the Quality Education Model in the 2009-11 biennium. For comparison purposes, it also shows the estimated level of funding required in 2009-11 to allow school districts to provide the same level of education services they provided in 2007-09: the Baseline (Essential Budget Level) scenario.

As the table shows, to fully fund the Quality Education Model in 2009-11 would require $1.75 billion more than it would cost to continue the level of funding from the prior biennium (adjusted for inflation and enrollment growth).

Student Performance Expectations: Baseline and Fully Funded Model

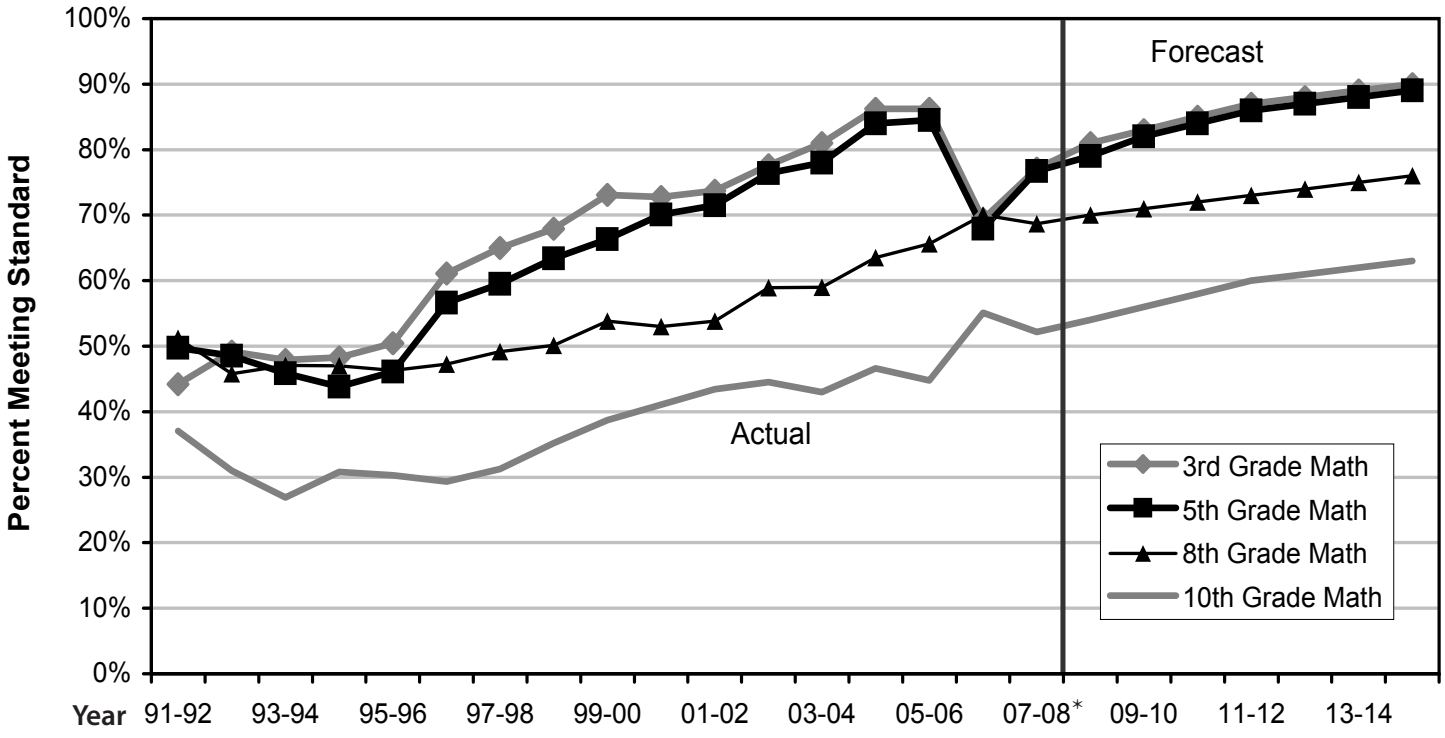
The Quality Education Model is a powerful tool for examining the links between education policy, finances, and expected student performance. The following graphs show estimates of achievement outcomes, measured as the percentage of students meeting the state's benchmark standards in reading and mathematics, for both the baseline level of funding and the fully funded QEM. (Because of changes in the scores required to meet the benchmark reading and math standards on the statewide assessment tests, the data starting in 2006-07 are not comparable to prior years.) As the graphs show, student achievement is expected to continue to improve, but at a diminishing rate. These increases are due primarily to better alignment of curriculum and instruction to the new standards. Full funding of the model would result in an accelerated rate of growth in the percentage of students meeting the reading and math standards and thus on track toward meeting rigorous new graduation standards.

Exhibit 17: Percent Meeting Reading Standard if Baseline Funding Level Continues



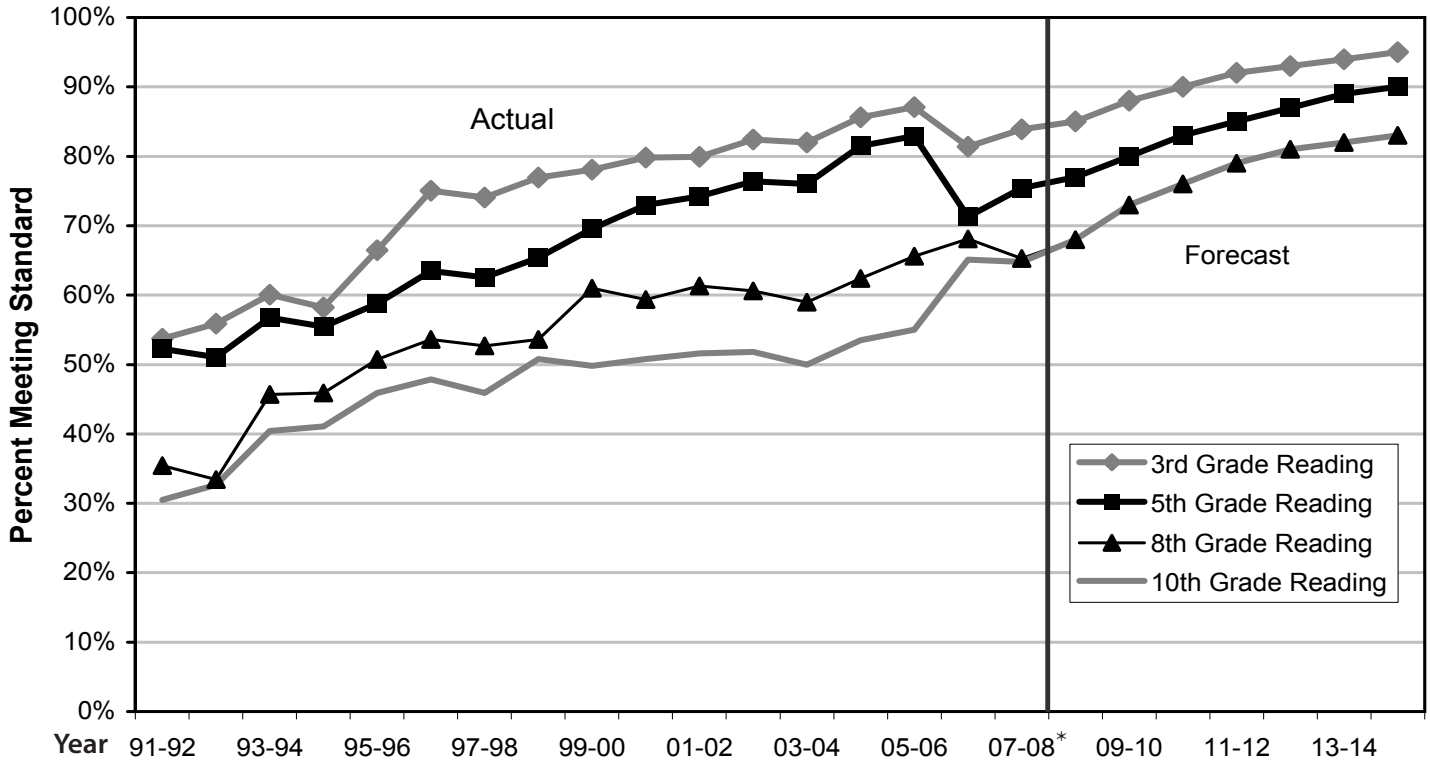
*Data for 2006-07 and 2007-08 are not comparable to prior years due to changes in the scores required to meet state benchmarks.

Exhibit 18: Percent Meeting Math Standard if Baseline Funding Level Continues



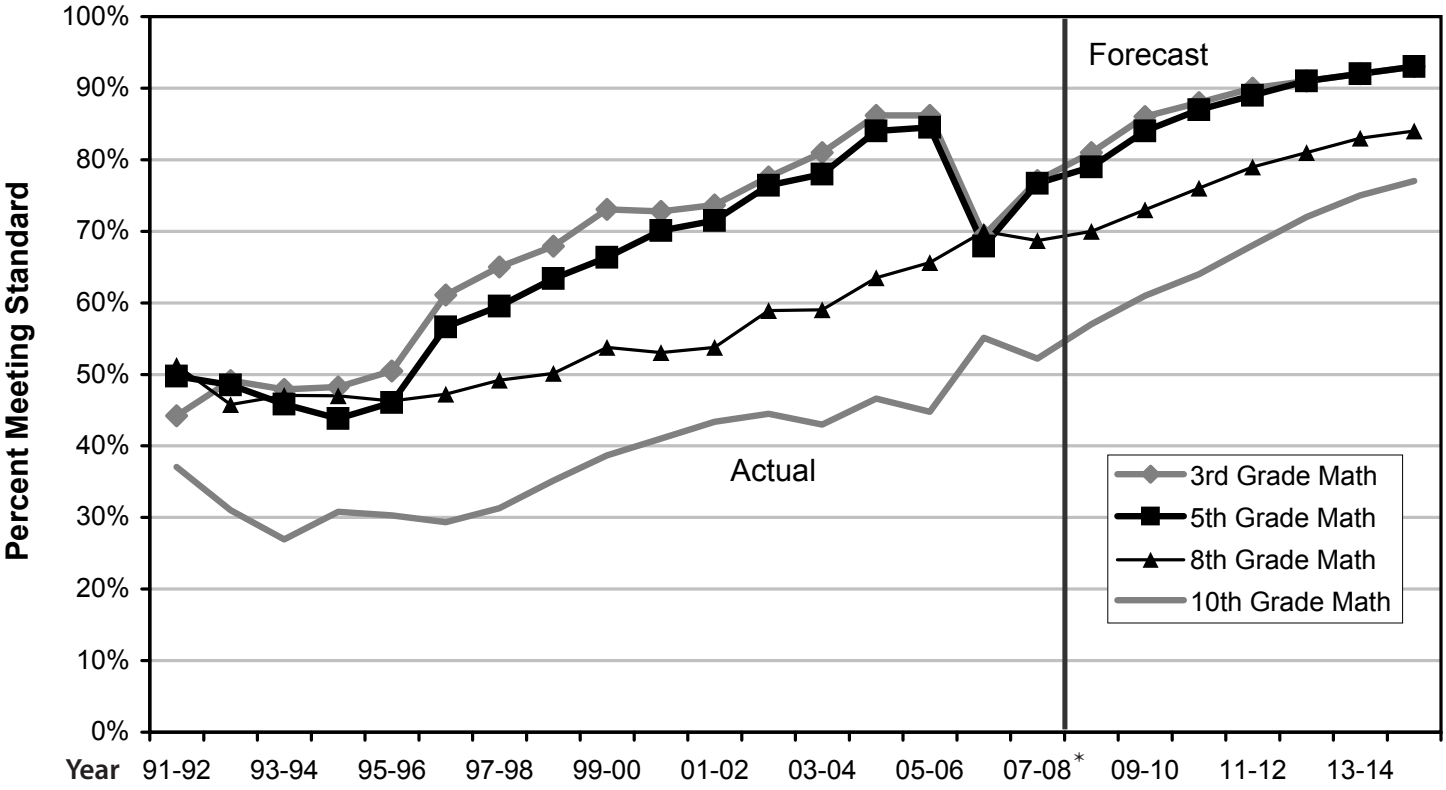
*Data for 2006-07 and 2007-08 are not comparable to prior years due to changes in the scores required to meet state benchmarks.

Exhibit 19: Percent Meeting Reading Standard With Full QEM Funding



*Data for 2006-07 and 2007-08 are not comparable to prior years due to changes in the scores required to meet state benchmarks.

Exhibit 20: Percent Meeting Math Standard With Full QEM Funding



*Data for 2006-07 and 2007-08 are not comparable to prior years due to changes in the scores required to meet state benchmarks.

Alternative Strategies For Implementing The Quality Education Model

The Quality Education Model is Oregon's tool for analyzing the resources and costs needed to implement major policy initiatives such as the new diploma. The 2008 Quality Education Model estimates the level of resources needed to prepare Oregon's students to meet the state's academic performance benchmarks and new graduation standards. In implementing the provisions of the QEM, it is important for policymakers to recognize that the changes in educational practice and resource requirements incorporated into the 2008 QEM cannot be realized overnight.

The Oregon Diploma is moving public education into a new era: students are accountable for meeting more rigorous standards; schools are accountable for providing the quality education that will prepare students to meet those standards at each step of the education pathway, from prekindergarten through high school. The Commission supports one of the important principles guiding implementation of the diploma: Changes should be phased in at a rate that allows schools adequate time to make needed curricular adjustments and prepare teachers to support the changes. The Commission's Diploma Panel identified recommended phase-in targets for the next two biennia: 2009-11 and 2011-13.

The two alternative strategies described below acknowledge the reality of the current economic downturn, Oregon's revenue structure, and the capacity constraints of school districts. However, the Commission also shares the sense of urgency and supports the principle of reciprocal accountability that has driven Oregon's education transformation goals. Investing in a quality education system is investing in Oregon's future. High-leverage strategies and shorter-term goals provide a roadmap for moving forward despite limited resources.

Alternative 1: Short-Term Strategic Goals and High-Leverage Targets

An alternative to full implementation of the Quality Education Model is to invest in identified high-leverage strategies that advance Oregon's adopted standards for student achievement and high school graduation. This alternative focuses on shorter-term strategies of devoting limited resources to those areas that are likely to allow the largest proportion of students to reach the state's achievement and new diploma standards. Since its first full official report in 2000, the Commission has identified three strategic investments as showing the most promise in supporting student success: (1) reading in the early grades and sustaining those skills in the middle grades; (2) providing the training and skill development that teachers and principals need to deliver on all of Oregon's academic goals; and (3) providing the resources needed to implement high school reform and restructuring that is consistent with graduation requirements and the need for more personalized, contextual learning.

"A good idea poorly implemented is a bad idea."

2007 Oregon Diploma Report

Consistent with Oregon's high academic and new diploma standards, the 2008 Commission recommends that strategic goals for partial implementation of the Quality Education Model should focus on the entire education continuum: grades K-8 as well as high school. As an alternative to full funding of the QEM, the most promising, research-based, and high-leverage implementation strategies should include the following:

- Increase time for collaboration among teachers and other staff to analyze student achievement data and plan instructional improvements.
- Increase school leadership capacity through focused professional development.
- Provide resources that allow schools to increase instructional time, implement targeted interventions to improve student achievement and support successful PK-16 transitions.
- Improve communication and partnerships with parents and community members.

Alternative 2: Ten-Year Phase-In of the Quality Education Model

Phasing in the provisions and funding of the Quality Education Model over a ten-year period (five biennial budget cycles) is an example of an implementation approach that would give school districts time to build capacity and the Oregon Legislature time to develop funding strategies capable of delivering the needed level of resources. The 2006 Commission report recommended this alternative.

The Oregon Legislature funded K-12 education for the 2007-09 biennium at roughly the level recommended by the Commission for the first phase of a ten-year implementation plan. Exhibit 21 shows an example of how state funding for full implementation of the Quality Education Model could be phased in over the remaining four biennia of a ten-year approach (2009–2017). The estimates shown in the table assume that the total costs of fully implementing the QEM will grow 7 percent per biennium, from $13.5 billion in 2009-11 to $16.9 billion in 2015-17. Based on expected growth in local and federal revenues of 9 percent per biennium, that would require a State School Fund (SSF) appropriation in the 2015-17 biennium of $10.4 billion.

Achieving a State School Fund level of $10.4 billion for 2015-17 requires $3.8 billion in expenditures above the 2009-11 Essential Budget Level of $6.6 billion. Exhibit 21 illustrates one possible way to phase in funding to that level by filling 10 percent of the "funding gap" in 2009-11, an additional 20 percent in 2011-13, and so on.

Exhibit 21: State School Funding Required to Fully Phase-in QEM by 2015-17

Billions of Dollars

Biennium	Essential Budget Level (EBL)	Percent of Gap Closed	Required Funding Above EBL	Total State School Fund Required
2009-11	$6.599	10%	$0.380	$6.979
2011-13		20%	$0.761	$7.740
2013-15		30%	$1.141	$8.880
2015-17		40%	$1.521	$10.401

This type of phase-in approach – where a smaller share of the funding gap is filled in the earlier years and a larger share in later years – recognizes that state revenue and spending patterns are often difficult to change and require action by the legislature. This approach also recognizes, as previously discussed, that school districts need time to build capacity both to implement new requirements and practices and to use higher levels of resources effectively and efficiently. In addition to providing districts with time to adjust to Oregon's rigorous new graduation standards and associated best practices, a phase-in approach also has the advantage of allowing districts to learn from their successes and failures during the process and to make needed improvements.

Next Steps

The Commission has looked objectively at best practices in successful schools across the state, the implications of the new high school diploma, and the funding requirements associated with Oregon's quality education goals for accelerating student achievement.

Given the recent steep economic downturn, providing an adequate, stable, and predictable level of funding for Oregon's schools continues to represent a fundamental challenge. While funding alone will not allow Oregon to realize its quality education goals and new graduation standards, additional financial resources – coupled with best instructional practices – are essential components of a standards-based system.

The following recommendations allow Oregon to maintain its strategic focus on creating a quality education system:

- Phase in implementation of the Oregon Diploma over several biennia.
- Continue to review best instructional practices in terms of the national research literature as well as practical lessons drawn from Oregon's schools.
- Invest in high-leverage strategies and allocate additional resources where they will have the greatest impact on student performance. Time and leadership are priority investment targets.
- Strengthen professional development to support teachers and build local school leadership capacity.
- Increase opportunities for teacher collaboration, review of student achievement data, and planning of targeted interventions and additional learning opportunities.
- Extend the time available for quality instruction and extra student assistance through before/after-school and summer programs.
- Build school capacity to use classroom assessment data and adapt instruction to address student needs, especially those struggling to meet Oregon's standards.
- Strengthen communication and relationships with parents and other community partners.

As in past reports, the Commission recognizes that there are local resources issues – such as capital costs – that affect the Quality Education Model and require analysis. Alignment in support of the "40-40-20" goal – as a continuum that includes early childhood education through high school graduation and on to advanced studies – should be part of the Commission's deliberations. Efforts to improve the governance and accountability structures that support effective use of resources across all three sectors of the educational system are still needed: prekindergarten, K-12, and post-secondary.

Oregon has made great strides in building an integrated data system that fosters alignment and coordination among all three education sectors as well as with social service agencies, business, and the public. An integrated data system, combined with the Quality Education Model as an evaluation tool, will greatly enhance the ability of schools, districts, and state policymakers to make sound decisions about policies, resources, and funding.

The Quality Education Commission is uniquely well-positioned to serve as an independent voice for Oregon's K-12 public education system. The Quality Education Model is based on data drawn directly from the Oregon Department of Education, which in turn collects a rich array of data from every school in the state. Information on student achievement, school demographics and resources, best instructional practices, and funding are all considered in updating the model. During the past biennium the Commission made improved communication a priority, to inform more of Oregon's citizens about where we are as a state in terms of our quality education goals, and what it will take to get where we want to go. We plan to continue these communication efforts in the future, as an important and integral part of our work.

Appendices

Appendix A: Panel Members

Regional Best Practices Panels

Co-Chair: Frank McNamara, Retired Director, Oregon School Services Bureau, COSA, and Quality Education Commission
Co-Chair: Yvonne Curtis, Director for Student Achievement, Eugene School District 4J, and Quality Education Commission
Don Bacher, School Board Member, Greater Albany School District (SD)
Mark Burrows, Superintendent, Morrow County SD
Kevin Campbell, High School Principal, Medford SD
Mark Coleman, High School Teacher, Hillsboro SD
Jill Conant, Elementary School Teacher, Nyssa SD
Aaron Cooke, Middle School Principal, Brookings SD
Brian Gander, Superintendent and PK-12 Principal, Long Creek SD
Susie Garrison, Elementary School Teacher, John Day SD
Beth Gerot, School Board, Eugene, and Quality Education Commission
Jim Golden, High School Principal, Crook County SD
Mark Grief, High School Principal, Klamath Falls SD
Rick Hensel, Superintendent, Gervais SD
Jason Hoffert-Hay, Elementary Principal, Greater Albany SD
Kathi Holvey, Elementary Principal, Crow-Applegate-Lorane SD
Teresa Ketelsen, Middle School Principal, Gresham-Barlow SD
Dave Krumbein, School Board Member, Pendleton SD
Tim Labrousse, Superintendent, Malheur Education Service District (ESD)
Tricia Nelson, Middle School Principal, Salem-Keizer SD
John O'Neil, High School Principal, Forest Grove SD
Nancy Olson, Elementary School Teacher, Phoenix-Talent SD
Erin Potampa, Elementary School Teacher, Madras SD
Carol Sanders, Elementary School Principal, Oregon City SD
Don Schrader, Superintendent, Glide SD
Elizabeth Scheeler, School Board Member, Pendleton SD
Kelly Schloer-Beaudry, Middle School Teacher, Bend-LaPine SD
Kathleen Spinks, Middle School Teacher, John Day SD
Cheri Stroud, High School Principal, Corvallis SD
Dawn Tarzian, Superintendent, Corvallis SD
Bryan Trendell, Upper Elementary School Principal, Coos Bay SD
Karen Weiseth, Middle School Teacher, Medford SD
Ron Wilkinson, Superintendent, Bend-LaPine SD
Paul Young, Superintendent and K-12 Principal, Spray SD

Diploma Panel

Chair: Deborah Sommer, Retired Superintendent, Canby School District, and Quality Education Commission
Salam Noor, Oregon Department of Education
Teresa Greene, Oregon Department of Education
Ed Armstrong, Tillamook SD
Doug Potter, La Grande SD
Bob Stewart, Gladstone SD
Paula Radich, Newberg SD
Linda Jessell, Portland State University
Peter Tarzian, Falls City SD
Aelyn Summers. Gresham-Barlow SD
Kelly Carlisle, North Clackamas SD
Kirk Fowler, West Linn-Wilsonville SD
Colin Cameron, Confederation of Oregon School Administrators (COSA)
Lou Bailey, Canby SD
Emilio Hernandez, University of Oregon and Quality Education Commission
Duncan Wyse, State Board of Education and Quality Education Commission

Cost Panel

Chair: Lynn Lundquist, Quality Education Commission
Ann Adams, Amity SD
Nancy Heiligman, Oregon State University
Tami Montague, Dallas SD
Brian Reeder, Oregon Department of Education
Ozzie Rose, Consultant
Mike Scholfield, Gresham-Barlow SD
John Tapogna, ECONorthwest

Panel Resources

Theresa Levy, Oregon Department of Education
Brian Reeder, Oregon Department of Education, Quality Education Commission

Appendix B: Schools Interviewed For Best Practices Report

Armand Larive Middle School, Hermiston SD
Ashland Middle School, Ashland SD
Bear Creek Elementary School, Bend-LaPine SD
Clackamas High School, North Clackamas SD
Crook County Middle School, Crook County SD
Crooked River Elementary School, Crook County SD
Eagle Point High School, Eagle Point SD
Forest Grove High School, Forest Grove SD
Gates Elementary School, Santiam Canyon SD
Gervais High School, Gervais SD
Haines Elementary School, Baker SD
Harold Oliver Primary Center, Centennial SD
Heppner Jr./Sr. High School, Morrow SD
Hoover Elementary School, Medford SD
Hosford Middle School, Portland SD
Jefferson County Middle School, Jefferson County SD
Joseph High School, Joseph SD
LaPine Middle School, Bend-LaPine SD
Lincoln Elementary School, Woodburn SD
Linus Pauling Middle School, Corvallis SD
Madras High School, Jefferson County SD
McKay High School, Salem-Keizer SD
McLaughlin High School, Milton-Freewater SD
McNary High School, Salem-Keizer SD
McNary Heights Elementary School, Umatilla SD
Nyssa Elementary School, Nyssa SD
Nyssa High School, Nyssa SD
Obsidian Middle School, Redmond SD
Pacific High School, Port Orford-Langlois SD
Pine Ridge Elementary School, Bend-LaPine SD
Redmond High School, Redmond SD
Stafford Elementary School, West Linn-Wilsonville SD
Stoller Middle School, Beaverton SD
Taft Elementary School, Lincoln County SD
Taft High School, Lincoln County SD
Talent Elementary School, Phoenix-Talent SD
Talmadge Middle School, Central SD
Vern Patrick Elementary School, Redmond SD
Waldo Middle School, Salem-Keizer SD
Washington Elementary School, Woodburn SD
Willagillespie Elementary School, Eugene SD
Winston Middle School, Winston-Dillard SD

Appendix C: Best Practices Critical Questions

1. Which of the following QEM best practices (page 22 of December 2006 QEM Report) do you use in your school to help make your growth and improvement?
   - Each student has a personalized education program.
   - Instructional programs and opportunities are focused on individual student achievement of high-quality standards.
   - Curriculum and instructional activities are relevant to the lives of students.
   - Each student has access to a rich and varied elective co-curricular and extra-curricular program.
   - The school creates small learning environments that foster student connection.
   - The school provides and encourages connections with significant adults, including parents, mentors, and other advisors to ensure that each student develops a connection to the greater community, along with a strong sense of self.
   - The school makes data-informed decisions about the capability of programs to foster individual student achievement.
   - The school at upper grade levels uses community-based and worksite learning as integral components of its instructional program.
   - The school has a comprehensive staff induction program that guides recruitment and employment and provides ongoing professional development programs.
   - Cost-effective management of resources allows school districts to better meet the needs of the greatest number of students.
2. What trade-offs have you made to make your growth areas? How have you shifted resources in unique ways to address your problems?
3. What added programs or interventions (e.g., instructional time, activities, remediation, support) do you offer for students having trouble meeting standards?
4. Are you using any extended learning time (outside the contact day/school year) for any students who need additional help? How many students are participating in this?
5. What are you doing specifically for ELL students? Special education students? Economically disadvantaged students?
6. What role do art, music, PE, and other non-core subjects contribute to your improvement?
7. Is there something you think might make your school more effective that you are not currently doing?
8. Paraprofessionals: What role do they play? What kind of training do they receive?
9. How are you focusing professional development money and time? What is your rationale for staff development expenditures? Do you use data to drive this decision?
10. What on-site instructional improvement do you offer?
11. What is the availability for instructional purposes of computers in your school?
12. How do you use technology to help your students?
13. How do teachers use technology for instruction?
14. What types of data do you use and how are you using data for school improvement?
15. What do you do to invite and engage family involvement in your schools? What is your outreach model?
16. What role do volunteers play in your school? Do they provide students with additional opportunities to develop skills in areas of difficulty?
17. What role do co-curricular activities play in your success? How do you use them? How are they funded and what percentage of your students is involved in co-curricular activities?
18. If you are a middle or high school, what type of a schedule do you use?
19. If you are a middle or high school, what are your class sizes in core subjects?
20. If you are a high school, what is the number of credits required for graduation? What type?
21. What do you think you are doing differently to improve student learning, behavior, retention, and school completion?

Appendix D: Oregon's Need For An Integrated Educational Data System

Schools can only become high-performance organizations if they are provided sufficient data on a wide range of critical factors related to student learning and organizational functioning. The business of providing data from state benchmark testing, school demographics, and instructional practices, as well as continued development of measurements for the Quality Indicators, is imperative.

Currently, Oregon's school data system is not sufficiently developed to allow conclusions to be drawn about system functioning beyond rudimentary observations, nor does it provide diagnostic data that allow those who seek to improve their performance to do so promptly.

In order for schools to make data-driven decisions that affect practices and performance, they must have the capacity to collect or be provided frequent formative and summative data that they have access to throughout the school year.

The data should be used to prescribe and evaluate the effectiveness of instructional efforts and set priorities for school improvement activities. If no data are collected on a performance area, it is not possible to judge if it is being conducted effectively or whether improvement is occurring.

After high-quality, comprehensive data have been provided, the individuals within the system at all levels can then be motivated to utilize the data to make systematic improvements toward achievement of state goals. Each stakeholder plays a role in creating and maintaining an effective data system.

A data system that allows educators, policymakers, and parents to make informed decisions for improving student performance and school functioning must include the following seven elements:

- **Integrated**: It must include information from multiple K-12 school districts to capture student mobility, and it must bring together all aspects of the student's learning trajectory, from prekindergarten through post-secondary education.
- **Individual**: It must utilize student-level information instead of school averages in order to make accurate determinations about student progress in relation to processes.
- **Informative**: It must include relevant and comprehensive indicators from detailed inputs and processes to a variety of performance measures, and those indicators must be verified to ensure accuracy.
- **Independent**: It must allow for flexibility so schools can customize the system for local needs. For the system to be cost-effective, it must replace current school and district data systems, so it must be able to meet the needs of the current users.
- **Interactive**: It must recognize that different users have different needs and make the data transparent in an easy-to-access format for students, parents, teachers, principals, superintendents, policymakers, and other educational stakeholders.
- **Instant**: It must present data to users in a timely manner so the information can motivate students, engage parents, inform instructional practices, and improve the quality of educational service in real time.
- **Interconnected**: It must promote organizational capacity to analyze the data once they have been collected and presented, not just at the state level, but also within schools and districts so data can become a useful tool for educators.

It is not cost efficient to have multiple school districts and regional Education Service Districts create, maintain, and pay for their own data systems when the state needs district data in one centralized location. Reducing the cost of multiple systems and simplifying the process of connecting those systems will provide an enormous amount of savings in cost and person-hours for all recipients of educational dollars, even though it requires an up-front investment of resources. (From June 2008 Oregon Department of Education "Statewide Data System: FACT SHEET")

Appendix E: Glossary

Academic Content Standards: Statements of what students are expected to know in particular subjects and to be able to do at specified grade levels. Academic content standards are developed through the standards-setting processes established in ORS 329.045.

Applied Academics and Learning: Applied learning can occur in a variety of contexts that incorporate standards from one or more academic disciplines, involving a course, long-term project, or integrated instruction. Some level of collaboration, curriculum planning, and assessment should be part of applied learning strategies, to ensure that the academic content covered is both relevant and rigorous.

Assessment: Systematic gathering of data toward the purpose of appraising and evaluating students' social, emotional, physical, and intellectual development. Activities may include testing to obtain and organize information on student performance in specific subject areas.

Career-Related Learning Standards (CRLS): Fundamental skills essential for success in employment, college, family, and community life. They include personal management, communication, problem solving, teamwork, employment foundations, and career development. As part of the new Oregon Diploma, CRLS will transition to Essential Skills in 2011.

Classroom Assessment: An assessment developed, administered, and scored by a teacher(s) with the purpose of evaluating individual or classroom student performance on a given topic. These are often called local assessments. Classroom assessments may be used as work samples when scored using official state scoring guides (see Performance Assessment).

Core Academic Subjects: English, reading/language arts, mathematics, science, second language, civics and government, economics, arts, history, government.

Core Standards Structure: Small, focused, and coherent set of core standards and supporting content standards at each grade level. Core standards provide the major concepts that will be the primary focus of teaching and learning at each grade. Underneath each of these core standards are content standards, which provide the details necessary for curriculum and assessment. Oregon's new core standards emphasize key ideas that are of value for students over the long term, across the curriculum, and for success in school, work, and life.

Credit for Proficiency: Units or part units of required and elective graduation credit awarded to students who demonstrate proficiency or mastery* of recognized standards (e.g., state content standards and essential skills, industry-based knowledge and skills, other national or international standards). Students may demonstrate proficiency inside the traditional classroom, outside of the traditional classroom where hours of instruction may vary, through documentation of prior learning, by appropriate examination, or any combination thereof. *Defined levels of performance through sufficient evidence reflective of state, local, or national criteria.

Education Plan: A formalized plan and process in which students identify their academic, personal, and career interests and help connect school activities with their post-high school goals.

Education Profile: Documentation of the student's academic achievement and progress toward graduation requirements, post-high school plans, and other personal accomplishments identified in his or her education plan.

Essential Skills: Process skills that are foundational for learning and needed for success in college, the workplace, and community life. The essential skills include reading, writing, listening and speaking, applying mathematics, thinking critically and analytically, using technology, civic and community engagement, global literacy, personal management, and teamwork.

Formative Assessment: A type of classroom assessment used by teachers to help guide instruction by highlighting a student's academic strengths and weaknesses. Formative assessment is often referred to as "assessment for learning," as opposed to summative assessment which is often referred to as "assessment of learning."

KIDS Project: KIDS is a statewide system that is integrating different student information systems from across the state into a common data warehouse. KIDS will serve as a single, accurate, and authoritative PK-12 student data system for the entire state, allowing seamless storage, access, and data transfer between school districts and the Oregon Department of Education.

Oregon Assessment of Knowledge and Skills (OAKS): Official name of Oregon's statewide knowledge and skills tests in reading/literature, mathematics, science, and social sciences. OAKS also includes performance assessment in writing and English language proficiency, and work samples in writing, speaking, math problem solving, scientific inquiry, and social science analyses. OAKS provides comparable testing to students through online, paper and pencil, Braille or large print, and extended options. Operational use of OAKS informs decisions based on student test scores.

Performance Assessment: A measure of a student's ability based on the application of what he or she has learned through standardized tasks such as activities, exercises, or problems. Performance tasks require several steps and often have more than one acceptable solution.

Personalized Learning: Processes schools develop to help each and every student create and pursue an increasingly clear purpose for learning. A personalized learning environment helps students assess their own talents and aspirations, plan a pathway toward their own goals, demonstrate learning against clear standards, and maintain a record of their accomplishments, all with the support of adult mentors and guides.

Proficiency: Demonstrated knowledge and skills which meet or exceed defined levels of performance. Proficiency can be measured through statewide assessments and/or classroom evidence. Districts must have defined proficiency levels for each learning option that is clearly reflective of state, local, or national criteria.

Quality Indicators: Intangible characteristics or traits that play a critical role in student achievement. Examples are instructional leadership, teacher quality, parent/community involvement, and student connectedness to school.

Response to Intervention (RTI): An approach that couples low-performing readers with an intense individualized intervention. Teachers subsequently monitor academic growth and measure the "response to the intervention." Educators are expected to identify and implement an evidence-based reading intervention and measure outcomes using a recognized assessment tool.

Scoring Guide: An evaluation tool designed for scoring student work that includes specific, consistent assessment criteria for student performance and a scale to help rate student work.

Standards-based: Curriculum and instruction that targets required student knowledge and skills as reflected in local, state, national, international, or industry standards.

Summative Assessment: The Oregon Assessment of Knowledge and Skills (OAKS) tests and the National Assessment of Educational Progress (NAEP) are examples of summative assessment tests. Summative assessment generally occurs after a period of instruction as a measure of learning.

Work Sample: Representative samples or artifacts of student work, projects, research papers, statistical experiments, or speaking presentations that are scored using state scoring guides in those subjects for which one has been adopted (that is, writing, speaking, mathematical problem solving, scientific inquiry, social science analysis). Sample scoring guides are available in the arts, physical education, second language, and health.

Appendix F: Additional Resources

Quality Education Commission and Quality Education Model:

Additional information about the Quality Education Commission, including reports and presentations, is available on the Oregon Department of Education website: *www.ode.state.or.us/search/results/?id=166*.

A QEM Working Model is also available from the Commission as an interactive Excel spreadsheet and User's Guide. A model user can explore the cost implications for Oregon's schools of various policy options by adjusting key resource assumptions on a worksheet. (For example, the costs associated with changes such as increasing teacher professional development days, hiring an additional high school counselor, or offering full-day kindergarten.) The model will make the required calculations and display the resulting cost impact on an "Output Table" worksheet. Columns on the "Key Assumptions" worksheet also highlight the difference between the policy scenario assumptions selected and the current situation in Oregon schools. This helps a user identify where an assumption differs from current conditions.

Oregon Diploma information for educators, parents, students, and the community is available at *www.GetReadyOregon.org* and *www.ode.state.or.us/go/diploma*.

The **Oregon Education Data Book** posted at *www.ode.state.or.us/go/DataBook* summarizes multiple years of data for every school district in the state on students, staff, and finances.

Open Book$ posted at *www.openbooksproject.org* is an online tool developed by the Chalkboard Project to provide ready access to information about spending in local school districts, comparisons between districts, and statewide averages.

The **Post-Secondary Quality Education Commission** is available at *www.ous.edu/psqec/* and was established under an executive order signed by Governor Ted Kulongoski in August 2007. Its members are charged with creating a Quality Education Model to guide policymakers in funding post-secondary education in Oregon, including community colleges and universities.

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