Equity and Excellence in Finance and Accountability Courses: Significant State, National Reports, Policy Strategies & Legislation

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Did You Know that In Illinois.. Funding Levels for Students are not the Same?....

For Example:

• **Iroquois West CUSD 10 per capita Expenditure is $11,744.41**

• **St. Anne 302 – $16,083.96**

• **Momence – $7,883.053**

• **Paris-Union SD 95 - $6,016.04**
  – $103 LESS then the Foundation Level

• **Seneca Twp HSD 160 - $25,289.26**
  – WOW

• **If you are in Illinois, Check this site to find Yours**

  • [OEPP-PCTC 2012](#)

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Group Presentation EDL 6860, Falk, Dukes, Kolitwenzew and Walker, 2013
Years of Funding Reform Efforts in Illinois

Educational Funding Advisory Board (EFAB)  
Foundation Level Recommendation 2013  
$8672 Poverty  
$490-4129  
Begin with Public ACT 90-548 1997  
• First Report 2002  
• Foundation Level Recommendation $5662  
• Poverty $355-$2994  
• Report Released 2002

Educational Funding Advisory Committee (EFAC)  
Simplified Level of Funding  
Streamlined System Of Funding  
Begin with SR 431 July, 2013  
• Hearings Across the State  
• Designed to ensure a system that is Adequate, Equitable, provides for Student Success and Teacher and Administrator Support  
• Report Released 1/31/14
EDUCATION ADVISORY FUNDING BOARD (EFAB)

MISSION

• “MAKE RECOMMENDATIONS ... TO THE GENERAL ASSEMBLY FOR THE FOUNDATION LEVEL ... AND FOR THE SUPPLEMENTAL GENERAL STATE AID GRANT LEVEL ... FOR DISTRICTS WITH HIGH CONCENTRATIONS OF CHILDREN FROM POVERTY. THE RECOMMENDED FOUNDATION LEVEL SHALL BE DETERMINED BASED ON A METHODOLOGY WHICH INCORPORATES THE BASIC EDUCATION EXPENDITURES OF LOW-SPENDING SCHOOLS EXHIBITING HIGH ACADEMIC PERFORMANCE.”
EFAB Recommendations
FY 2014

- Increase the Foundation Level to $8,672
- Increase the Poverty Grant Payment Range from $355 - $2,994 to $490 - $4,129
- Continue Study of the GSA Formulas and Consider Other Models for Determining Adequate Education Funding Levels
On July 9, 2013, the Illinois Senate adopted Senate Resolution 431 (SR 431), which created the Education Funding Advisory Committee (Committee).

The Committee Charge was charged with conducting a thorough review of the state’s existing pre-kindergarten to 12th grade education funding system—with a specific focus on state aid.

The Committee also was charged with recommending changes to the state’s education funding system. SR 431 stated that recommendations from the Committee should ensure that any new Illinois school funding system would be adequate, equitable, prepare students for success after high school, and support teachers and school leaders.
In addition to the four above criteria for a school funding system, SR 431 required the Committee to consider the following when making any school funding recommendations:

• **Student Populations**, at both the school and district level
• **Student Needs**, including special needs populations
• **Each District’s Ability to Pay**
• **Transparency and Accountability**
• **Predictable Results**
A streamlined single funding formula would allow the state to achieve the following goals:

**Simplicity and Clarity:** Districts would no longer be required to track a variety of funding programs to determine how much they would receive from the state.

**Predictability:** By including almost all state operational funding in a single formula it will help to insulate funding for programs and services from annual budget decisions.

**Equality:** Under the current funding system only 45% of state dollars are equalized based on a districts relative wealth. Under this proposed formula 96% of operational funding will be equalized based on a districts wealth. This will create greater equity between high and low property wealth districts.
“For Each and Every Child” — And Why Funding Reform is Crucial to Enhancing Student Achievement”

a Strategy for Education Equity and Excellence

Equity and Excellence Materials Provided by Ralph Martiere, Center for Tax and Budget Accountability, Chicago, IL
Originally Presented for the National Conference of State Legislators
Georgia World Congress Center
285 Andrew Young International Blvd., NW Atlanta, Georgia
And to the Illinois Principal’s Association Springfield, Illinois

Materials from the Equity and Excellence Commission are from a Report to the US Secretary of Education, 2013
The Equity & Excellence Commission’s charge was to advise the Department of Education concerning:

“THE DISPARITIES IN MEANINGFUL EDUCATIONAL OPPORTUNITIES THAT GIVE RISE TO THE ACHIEVEMENT GAP, WITH A FOCUS ON SYSTEMS OF FINANCE, AND TO RECOMMEND WAYS TO WHICH FEDERAL POLICIES COULD ADDRESS SUCH DISPARITIES.”

“For Each and Every Child”
Is a Report by the Equity and Excellence Commission, an advisory committee to the Department of Education’s Civil Rights Division, charted by Congress.
According to the Commission, Public Education in America is not so much “broken” as it is under-resourced to educate all children.
• **The International Benchmark:**
  
  — Combined PISA (Reading, Math, Science, Critical Thinking)

• **Overall, U.S. schools scored a middling 500 with the OECD average @ 493**
• But adjusting for poverty

→ U.S. schools w/ 0-10% poverty scored 551, best in the world (Finland was 2\textsuperscript{nd} @ 536)

→ U.S. schools w/ 10-24.9% poverty scored 527, top in the world for similar profiles (Canada was 2\textsuperscript{nd} @ 524 and 4\textsuperscript{th} overall)
• U.S. scores did not start to drop until poverty got over 25%

• In Illinois, roughly 44% of kids live in poverty.

• In CPS (Chicago Public Schools), the number is over 88%.
Which is Nothing New

Who first noted these as core issues in U.S. Education?

“Who”
The Nixon Commission on Education in 1972!
The Nixon Commission found:

1. Educational funding at the state level is too tied to property taxes—and rarely is connected to the educational needs of children.

2. Money can help solve many of the Educational Problems that have surfaced.

3. States have the responsibility to reform school financing to eliminate disparities and ensure adequacy ➔ If they don’t......
So the charge of the Commission was on Point—The Core Issues Remain:

• Poverty
  and
• Insufficient Resources Inequitably Distributed
The EEC Goal

Take what we know and develop a strategic, comprehensive approach for sustainable systemwide improvement.
Disjointed State, Local, Federal Efforts to Define and Meet Needs

Gaps, Overlaps

Counterproductive Competition

Failure to Coalesce Around a national, evidence-based strategy to drive systems reform

Lack of Capacity (Human, Service, Fiscal) to Generate and Sustain Meaningful, Evidence-Based Reform

Inefficient and Underproductive Resource Allocation/Service Delivery
The Context

- **Current Focus of Global Education Reform Movement ("GERM")**
  
  - Set higher standards for student achievement—standardize education generally
  - Enhance accountability metrics and implement punitive consequence matrix
  - Enhance competition between and among schools and educators
# Impact of GERM on Program for International Assessment or “PISA” Math Scores

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Then There’s Finland

• Rejected GERM

• Focused on:
  – Building collaboration/reducing competition;
  – Building teaching profession;
  – Investing adequately in poorest schools on up, focusing on equity as core to excellence;
  – Invest in early childhood, wrap-around services and overall education funding;
  – GOAL → Build capacity so that every school provides high quality education tailored to meet student need
# The Results

## PISA Math Scores

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The Equity and Excellence Commission

• **27 Members**
  – Arne Duncan, Secretary of Education
  – Ralph Matire, Executive Director CTBA
  – Katie Haycock, Educational Trust
  – Jesse Ruiz, VP Chicago Public Schools

• **Meet every 4 years**

• **Develops a strategic plan**
DEPARTMENT OF ED GOALS

- Early Learning
- Elementary & Secondary Ed
- Post Secondary Ed, CTE, Adult Ed
- Equity
- Continuous Improvement of US Ed System
- US Dept of Ed Capacity
Objectives

Support comprehensive early learning assessment systems

Support the successful implementation of college- and career-ready standards and assessments ensuring more students have effective teachers and leaders

Decrease disparities in the national high school graduation rate

Dramatically decrease the number of high schools with low graduation rates

Increase college degree attainment among 25-34 year olds

Increase evidence-based decision making and investment
Action Strategy Report

Improve School Finance and Efficiency
- Restructure of Finance System
- Based upon need, not zip code

Teaching, Leading, Learning Opportunities
- Quality Teachers & School Leaders

High Quality Early Childhood Ed
- Early start, focus on low-income

Meeting needs of High Poverty Students
- Critical Supports – parents, health and social services access, extended instructional time

Governance and Accountability
- Changes to ensure not in the same predicament in 10 years
Most states finance education with no link to cost of delivering rigorous academic standards.

Few states rationally determined that cost.

Most states do not ensure efficient use of resources.
Solution

DISAGREEMENT!

Agree

• Resources distributed based upon need and efficiently used
State and Local District Roles

- Identify and report teaching staff, programs, and services needed
- Determine actual costs
- Implement financing system that is equitable and sufficient
  - Stable and predictable sources of revenue
- Review, develop performance evidence, update
- Focus on effectively and efficiently using funds
- Develop high quality programs
Federal Government Role

- Focus on finance systems
- Equity and Excellence Legislation
- Incentives
- Reassess
- Amend Title I
- Reevaluate commitment
- Work WITH states
- Provide grants
- Enforce equity mandates intelligently
1. Finance

- A State Should:
  - Identify and publicly report the teaching staff, programs and services needed to provide a “meaningful educational opportunity” to all students of every race and income level (including ELL and special needs) BASED ON EVIDENCE OF EFFECTIVE EDUCATION PRACTICES;
  - Adopt and implement school finance systems that provide equitable/sufficient funding for all students to achieve content and performance standards;
  - “Equitable” in some case means more than equal investment—as in other advanced nations, it includes providing additional resources for at-risk populations.
1. **Finance Continued**

- **The Feds Should:**
  - Direct states, with appropriate incentives, to adopt school finance systems that provide a meaningful educational opportunity for all students;
  - Enact “Equity and Excellence” legislation that:
    1. Targets significant new federal funding to schools with high concentrations of low-income students, particularly where achievement gaps exist;
    2. Provides significant financial incentives to states that in fact enhance investment in “At-Risk” children.
Federal Legislation

Governing for equity and Excellence
Congressman Mike Honda, California
Congressman Chaka Fattah, Pennsylvania

The equity and excellence commission,
For Each and Every Child—A strategy
for Education Equity and Excellence,
Washington DC

Fiscal Smoothing Policy Options for
Federal Government to help States hold
Students harmless—from the effects of
the Recession.

Draft of Legislation to Meet School
Funding disparities and to provide
resources to Bridge the Low-income
Achievement Gap
What Will Be Funded?

(A) BUILDING EDUCATIONAL CAPACITY. —For purposes of this Act, building education capacity of Targeted Schools will mean implementing systems-based reforms, programs and/or initiatives which have been demonstrated, either in the United States or in any other nation, to enhance student achievement, learning and/or critical thinking skills over time. Such reforms, programs and/or initiatives MAY include:
Enhancing Pedagogical Skills of Extant Teaching Staff

(A) induction, mentoring, training and other professional development programs for teachers that are based on best practices, aligned with Common Core Standards, embedded in daily practice, and have evidence-based support, and

(B) collaborative teaching programs across schools and school districts which encourage teachers to work in groups and share effective strategies.
Enhancing Instructional Capacity

(A) implement extended learning time initiatives pursuant to which the school day and/or year is extended in conjunction with a plan that incorporates additional substantive learning, tutoring and/or enrichment programming demonstrated to correlate to enhanced student learning, achievement and/or development of either critical thinking and/or social/emotional learning,

(B) implement high quality afterschool, summer and vacation programs,

(C) implement social/emotional learning curriculum including all teacher training and/or professional development necessary for such implementation to be successful,
ENHANCING INSTRUCTIONAL CAPACITY

(D) introduce, supplement or implement fully rich and rigorous academic programming including but not limited to programming needed for effective implementation of:

- the Common Core, advanced placement, honors and/or gifted programs,
- academic tutoring programs,
- acquisition of all associated textbooks, library materials, computers, smart-boards, electronic tablets or similar devices, lab materials, virtual resources and other technology, pedagogical material or instructional supplies, and
- all professional development necessary for effective implementation,
(E) implement effective “response to intervention” programming with appropriately skilled professional staff,

(F) implement appropriate programs and services for English language learners,

(G) implement meaningful enrichment programming that includes cultural, athletic, academic, civic, community service and other enrichment activities, provided that a Targeted School shall use no more than 5% of its Annual Matching Grant for enrichment programs outlined in this subsection 201(a)(ii)(G), unless such Targeted School receives a waiver of the preceding limit from the DOE,

(H) implement appropriate programs and services for students with disabilities that are not funded under other state or federal programs,
Enhancing Instructional Capacity

(I) implement compensation programs designed to attract and retain highly skilled teachers, particularly those qualified in the areas of science, technology and math and instruction of English language learners,

(J) hire additional, professional, qualified, teaching staff and classroom assistants needed to reduce class sizes in kindergarten through third grade to no more than 15 students, and class sizes for all grades thereafter to no more than students,

(K) hire additional nurses, counselors, support staff, certified special education teachers and/or assistants as required to service the needs of the children attending such Targeted School,

(L) implement evidence-based, effective strategies for reducing and preventing children from dropping out of school, and

(M) implement enhanced technology and vocational instruction.
Recognizing that what constitutes a “Meaningful Educational Opportunity” will evolve over time: Annual Matching Grant proceeds received may be used for a purpose not enumerated in this Act, provided that each of the following criteria are satisfied:
(A) the state educational agency initially receiving such Annual Matching Grant for redistribution to Targeted Schools makes a written request to the DOE asking for authorization to do so,

(B) such request involves either implementation of an educational practice not enumerated in Sections 201(a)(i) through (v) of this Act for which there is evidence that such practice enhances student achievement, learning and/or critical thinking, or creation/implementation of a pilot program said state educational agency believes will enhance student achievement, learning and/or critical thinking, and

(C) the DOE approves such request in writing.
Eastern Illinois University’s Educational Leadership Department Offers:

- Masters in Leadership
- Specialist in Leadership
- Student Achievement
- Planning & Evaluation
- Resource Management
- Finance
Rethinking and Redesigning Accountability

Accountability and Accountability Systems should:

• **Focus on opportunities and resources, as well as student outcomes**

• **Empower Actors and hold them responsible according to their role—from students to Policy Makers**

• **Use multiple broad measures that fairly reflect the decisions or performance of students, educators, schools and systems**

• **Focus attention on students at all achievement levels—so policies raise the roof not just the floor**

• **Foster collaboration among parties responsible**

• **Include both supports and consequences—mix of incentives and interventions that generate action to improve equity and excellence**
Child poverty has reached record levels.

- One in 5 children (16.1 million) was poor in 2012. More than 7.1 million children were poor. Over 40 percent of poor children lived in extreme poverty.

- Nearly 1.2 million public school students were homeless in 2011-2012, 73 percent more than before the recession.

- The youngest most vulnerable children were the poorest age group. Over 1 in 4 children under age 5 — nearly 5 million — were poor.

- The top 1 percent of earners received 22.5 percent of the nation’s income in 2012, more than double their share in 1964 and equal to levels last seen in the 1920s.
“The Widening Income Achievement Gap” Reardon

“The American Dream Slipping” Neuman

“How Poverty Affects Classroom Engagement” Jensen

(EL Extending our Themeonline)

“Teaching the 22 Percent” Burke

“Closing the Attendance Gap” Lauver

“Helping Poor Kids” Anderson
It’s Time to End Child Poverty in Rich America with Urgency & Persistence

Unfortunately, many Americans live on the outskirts of hope — some because of their poverty, and some because of their color, and all too many because of both. Our task is to help replace their despair with opportunity. This administration today, here and now, declares unconditional war on poverty in America. I urge this Congress and all Americans to join with me in that effort. It will not be a short or easy struggle, no single weapon or strategy will suffice, but we shall not rest until that war is won. The richest Nation on earth can afford to win it. We cannot afford to lose it.

— President Lyndon Johnson,
1964 State of the Union Address
50th Anniversary War on Poverty
A population that does not take care of the elderly and of children and the young has no future, because it abuses both its memory and its promise.

— Pope Francis
Quotes

• "...the moral test of government is how that government treats those who are in the dawn of life, the children; those who are in the twilight of life, the elderly; those who are in the shadows of life; the sick, the needy and the handicapped."

- Hubert H. Humphrey
For More Information

The Equity and Excellence Commission, For Each and Every Child—A strategy for Education Equity and Excellence
For Copies: Educational Publications Center • US Dept. of Education
P.O. Box 22207, Alexandria, VA 22304 • Email edpubs@edpubs.ed.gov
Call 1-877-433-7827 • Fax Orders 1-703-605-6704

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“They have become great and rich... they do not judge with justice the cause of the orphan,... and they do not defend the rights of the needy... shall I not bring retribution on a nation such as this? — Jeremiah 5:27-29

"The test of the morality of a society is what it does for its children". ~ Dietrich Bonhoeffer
References


