

OASE Regional Off-the-Record Meeting

October 30, 2014 – 9:00 a.m.-3:00 p.m. – Beaverton School District, 16550 SW Merlo Road

AGENDA

9:00 **Welcome and Introductions**

- *Jeff Rose, OASE President-Elect*

9:15 **Effective Advocacy**

- *Chuck Bennett, COSA*

- Importance of “One Voice”
 - Role Play: “What do you need?”
- How to advocate with your legislators
- Advocacy Development Process

9:45 **OASE Funding Coalition Report and Discussion**

- *Jeff Rose, OASE President-Elect*

- *Craig Hawkins, COSA*

- Expected Governor’s Recommended Budget for K-12
- Base Funding + Roll-Up
 - Funding Coalition Summary
 - Survey
- Full-day Kindergarten
- Table Discussion and Report Out:
 - Despite promises made following the 2013 special session, there is some debate among policymakers about whether the K-12 SSF “base” for 2013-15 is \$6.55 billion or \$6.65 billion. How did your district use the \$100 million that was added to the SSF this year?
 - What SSF level will it take for 2015-17 to roll up exactly the same program as the one your district is offering this year?
 - What “basics” are not included in “Base + Roll-up + Full-day K,” but ought to be?

11:15 Potential Funding and Policy Considerations

- OASE Past-President Bob Stewart and OASE Zone Directors Candy Armstrong, Darin Drill, Jim Golden and Jim Schlachter

- Instant Poll and Discussion:
 - Other than “base + roll-up + full-day K,” what are your top funding-related issues for COSA/OASE advocacy (state support for K-12 capital construction, fifth-year programs, etc.)?

11:45 LUNCH

12:15 Potential Policy Considerations (continued)

- OASE Past-President Bob Stewart and OASE Zone Directors Candy Armstrong, Darin Drill, Jim Golden and Jim Schlachter

- Table Discussion and Report Out:
 - Targeted investment may be one way to improve outcomes for Oregon students, and there are currently a number of potential proposals under consideration. Which of the following goals do you think most deserves our serious consideration, and potentially support, and why?
 - Improving outcomes for ELL students
 - Making sure that ninth graders are “on track” for graduation
 - Making sure that all students are reading at or above grade level by the end of grade 3
 - Improving programs that serve the “middle 40,” such as CTE
 - Improving student attendance and reducing chronic absenteeism
 - Making sure that high school students are “fully scheduled” – includes college courses, work experience, etc. – to improve college and career readiness and reduce the need for college remediation
 - “Other” – another proposal that would improve outcomes for Oregon students
- Next steps at state level for potential proposals on ELL, K-3 literacy, etc.
- Instant Poll and Discussion:
 - What are your top priorities for policy/advocacy development that we haven’t yet discussed?

1:00 OASE Vision & Policy Report and Discussion

- *Jeff Rose, OASE President-Elect*

- *Craig Hawkins, COSA*

- Three “Main Things”
- Instructional Time in Oregon presentation
- Table Discussion and Report Out:
 - What do you think about using the issue of instructional time to drive K-12 funding? How about the marriage of the fundamentals of time and class size?
 - What makes the topic of “time” work for us, and what challenges to this approach should we be ready to address?
 - If your district had the equivalent of another 100 hours of instructional time in grades 1-12, what do you think would be the most effective use of that time?
 - If the additional time were implemented over a period of three biennia, how would you recommend it be staged?

2:30 Summing Up

- *OASE President-Elect Jeff Rose, OASE Past-President Bob Stewart, COSA*

President Colt Gill, Craig Hawkins, Chuck Bennett

- What have we heard today?
- What’s our “number,” and why?
- On what issues do we appear to have reached consensus, or at least a “lean”?
- Next steps

3:00 Adjourn

Anatomy of a Typical Legislative Meeting

1. Personal meeting is your single most powerful grassroots action.
 2. Your life, professional expertise and local experiences give you everything you need to know to fight for issues you care about.
 3. Real life stories illuminate statistics.
 4. Stay on message. Don't get sidetracked.
 5. Don't participate if you don't agree with the message.
 6. Don't address unrelated issues.
 7. Be sure to follow up with requested information and a thank you note.
 8. **Remember:**
 1. **Hook – Who you are.**
 2. **Line – A strong argument or personal story.**
 3. **Sinker – Your request for action.**
- **Before the meeting – 10 min.**
 - Meet 10 minutes early as a group to review talking points, message and what each person will contribute to the meeting.
 - **Introductions – 5 min.**
 - Introduce yourselves and remind legislator that you are constituents with unique information.
 - **Local stories and statistics – 5 min.**
 - Real life examples to illustrate statistics and how state money is spent in the district.
 - **The request – 5 min.**
 - Make a clear request and listen for insights into needed additional information for a delayed decision.
 - **After the meeting**
 - Meet after the meeting to compare notes and id follow up work such as requested information. Get business cards from staff and send a thank you letter asap.

'Base + Roll-up' Discussion

SSF Level needed to "Roll Up" 2014-15 K-12 programs in the 2015-17 biennium:

Base = 51% of \$6.55 billion plus \$100 million (SSF Level in 2014-15)

Roll-Up (CSL) Consensus = \$7.3 billion

Roll-Up (CSL) Range: \$7.1 - \$7.45 billion

"Roll-Up" number (above) includes:

- Existing (2014-15) levels of staff, programs, supplies, capital expenditures
- Expected (in many cases, contracted) personnel cost increases – COLAs, steps, health insurance, employee benefits, PERS, etc.
- Expected fixed cost increases – utilities, fuel, etc.
- Existing (2014-15) levels of purchases of new instructional materials and technology

"Roll-Up" number (above) does not include:

- Full-day Kindergarten
- Abandoned maintenance
- Technology deficit
- Instructional materials deficit
- Restoration of eliminated/reduced programs (art, music, career-technical education, elective courses, etc.)
- Restoration of eliminated/reduced staffing (librarians, counselors, P.E. teachers, school nurses, art and music teachers, career-technical instructors, etc.)
- Restoration of a full school year in all districts
- Reduced class sizes

K-12 Roll-Up/CSL for 2015-17

***1. Your Name**

***2. Name of Your School District or ESD**

3. In order to offer exactly the same educational program as this year in 2015-16 and 2016-17, what level of funding does your district need? This question assumes that our current biennial funding level is \$6.65 billion. It also assumes that you will make this estimate based on:

- . Existing levels of staff, programs, supplies, capital expenditures, etc.**
- . Expected/contracted personnel cost increases (COLAs, steps, health insurance and PERS rate changes, etc.)**
- . Expected fixed cost inflationary increases (utilities, fuel, property/liability insurance, etc.)**
- . Normal technology replacement**
- . Scheduled instructional materials adoption(s)**

This estimate should NOT include funding for implementation of FULL-DAY KINDERGARTEN.

Please see the included spreadsheet for use in calculating your answer.

Please describe your answer in billions, e.g. \$6.95 billion or \$7.33 billion.

4. What COLA percentage increase(s) did you use in making your estimate?

5. What percentage for PERS rate changes did you use in creating this estimate?

6. What percentage of health care cost increase did you use in this estimate?

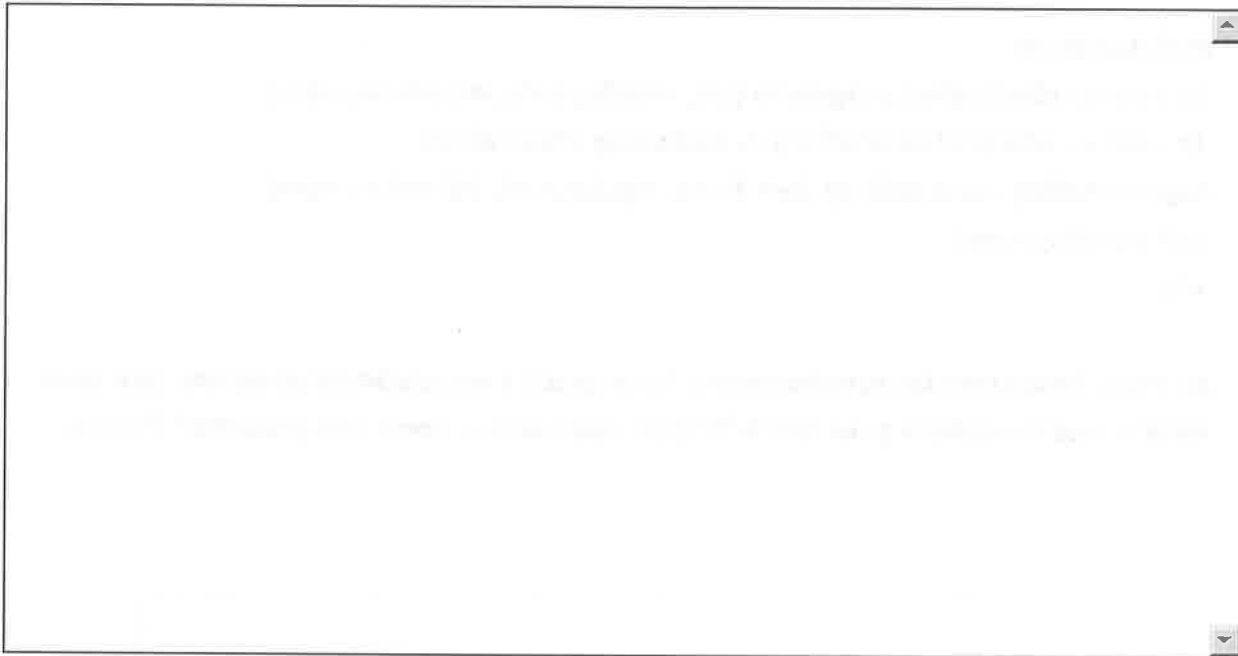
7. Depending on the district, the estimated 2015-17 "Roll-Up" number you provided in the first question may not have included costs for:

- . Full-day Kindergarten**
- . Deferred instructional materials purchases**
- . Deferred maintenance**
- . Investing in new or eliminated programs (art, music, CTE, electives, etc.)**
- . Investing in new or eliminated staffing or reducing class sizes**
- . Deferred capital outlay (technology, bus fleet, equipment, infrastructure)**
- . Needed staff development**
- . Other basics**

What are the most fundamental requirements for a quality educational program that your current budget -- and therefore your 2015-17 CSL estimate -- does not provide? Please describe.

K-12 Roll-Up/CSL for 2015-17

8. As policymakers look for ways to deal with various 2015-17 budget demands, there is some discussion about whether the \$100 million added to the SSF in the second year of the current biennium should be considered part of the "base" going forward, or whether it was a "one time" investment. COSA and OASBO strongly believe the \$100 million should be (and is) part of K-12's base funding. Will you please briefly describe how your district utilized the your portion of the \$100 million this year? (For example, "We added back three days and hired five elementary teachers to reduce class size.")



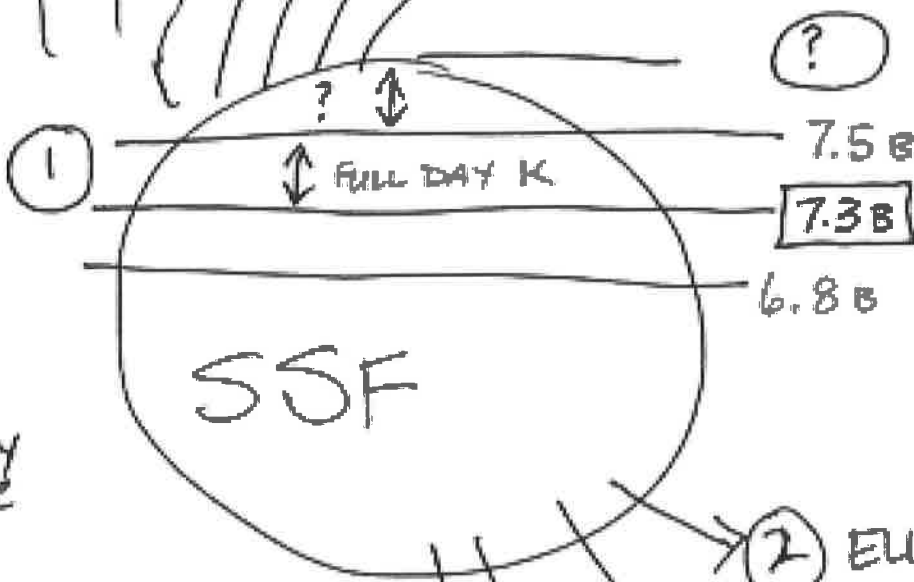
proposed strategies to meet outcomes we are looking for -

How much for each one?
 Prioritize adding changes over time as we have resource to add.

↑
 MORE MAXIMIZES PRODUCTIVE POTENTIAL

↓
 POTENTIALLY DESTRUCTIVE

- (8) add 3 more weeks to school year for students not meeting benchmark
- (7) CTE formula shift
- (6) 5th yr college
- (5) HS - calculate numr needed for all students to have full day
- (4) 3rd grade / CBO
- (3) 9th
- (2) ELL / weighting



Proposed FORMULA SHIFTS
 within existing or less resource

- (2) ELL $\left\{ \begin{array}{l} .6 \\ 7 \text{ yr} \\ 4 \text{ yr} \\ +250 \end{array} \right.$
- (3) 9th \leftarrow not underserved
- (4) 3rd grade read $\left\{ \begin{array}{l} fund \\ CBO \\ partners \end{array} \right.$
- (5) HS ADMW adjustments
- (6) 5th yr college included in SSF
- (7) CTE formula shift

Impact of ~~the~~ formula adjustments across + ~~the~~ within districts:

UNKNOWN / No stabilizing

potentially decreasing / nonproductive investment

Anticipated Policy Proposals and Initiatives – ODE, OEIB

K-3 Literacy Initiative

- Full-day Kindergarten
 - Implementation of high-quality all-day kindergarten programs throughout Oregon
- Literacy Initiative
 - District- and school-level instructional coaches
 - After-school and summer programs for targeted students, in partnership with nonprofit community-based organizations, with funds potentially going directly to nonprofit partners
 - Certain requirements for districts (approved research-based program, partnerships, etc.); districts must meet all requirements to receive funding.

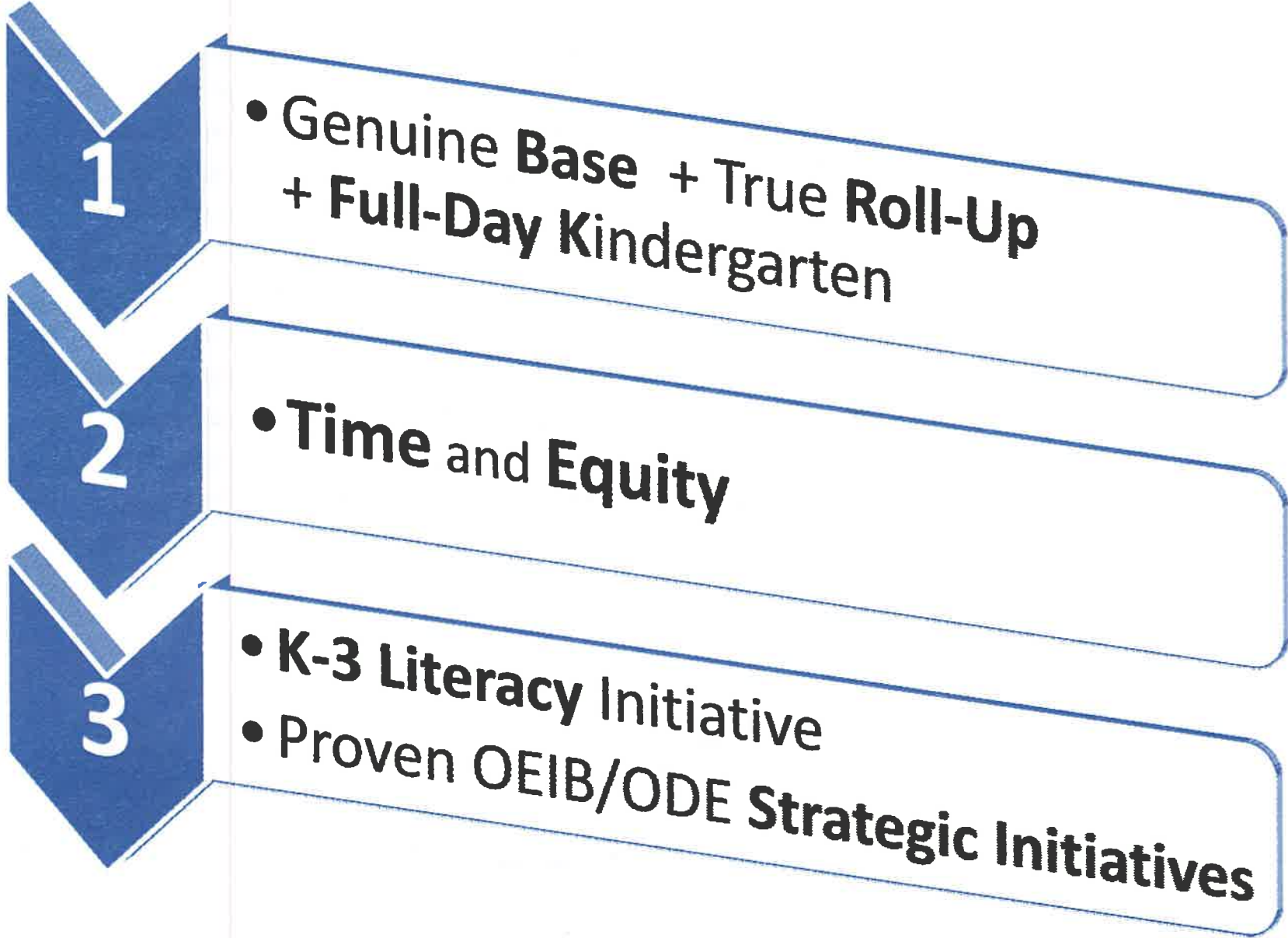
ELL Proposal

- Equity for English Language Learners
 - SSF weighting for ELL students increased from .5 to .6
 - Weight is provided to districts for 7 years for students initially identified at Level 1 or 2 by ELPA, for 4 years for students initially identified at Level 3 or 4
 - Weight is provided even if student becomes proficient in English and exits the program in fewer than 7 (or 4) years
 - Districts required to spend a minimum of 90% of the extra weight on ELL students
 - Districts receive an additional \$250 incentive when an “ever ELL” student graduates with a diploma
 - Requires State School Fund formula change; does not include additional funding

9th Grade on Track Proposal

- Outcome-based funding for districts based on having historically underserved students “on track” before beginning of sophomore year
 - School delivers programs to underserved students
 - If historically underserved students earn 6 credits prior to the start of 10th grade, district receives .045 ADMw (about \$290/student)
 - If historically underserved students attends more than 90% of days, district receives additional .05 ADMw (about \$50/student)
 - Requires State School Fund formula change; does not include additional funding

OASE Vision & Policy 'Main Things' – August 2014 Retreat





1

• **Genuine Base + True Roll-Up + Full-Day Kindergarten**

- Our top priority. Every other education investment is contingent upon the allocation of sufficient base K-12 funding + funding to cover inflationary costs + funding for full-day kindergarten.
- Recommended funding and rationale should be developed by the OASE Funding Coalition.
- Base should include not only the staffing and programs districts will have this year, but the staffing and programs our students should be reasonably able to expect: an appropriate classical education – the basics, plus arts, P.E., extra-curricular activities, technology, ELL, TAG and enrichment programs, special education, second language, STEM and CTE options, media/library – acceptable class sizes, satisfactory health (including mental health) services, etc. Not the ideal level of each of these programs, but a reasonable level.
- Roll-up should include true school/district cost increases, and should also recognize the deep recession-related hole out of which districts must climb (including restoration of days, delayed compensation, class sizes, etc.).
- Current estimates of biennial full-day kindergarten funding range from \$210 million to \$275 million.



2

• Time and Equity

- **Time.** By the time they have completed high school, students in the state of Washington (and 29 other states) have attended school for a full year more than students in Oregon. Why would we want to put our students (and our state) at that kind of competitive disadvantage? Our students deserve the right to compete and achieve at a national – even international – level.
 - We need to “seize the year” – invest in the “missing” year of schooling for our students and really make it count.
 - It needs to be quality time – student centered, STEAM, two languages, technology, etc. – that engages students, is rigorous, and leads to the achievement and growth we seek (third grade literacy, ninth-grade “on track,” high school completion and post-secondary attainment, etc.).
 - Should we add traditional school days or add extended-day and extended-year programs and opportunities based on needs and interests of students, or some combination?
 - Time is also needed for professional development and staff training.
 - Put parameters around the funding for time so that it can only be used to add time.



2

• Time and Equity

- **Equity.** Opportunity. Access. Visibility. Voice. Every – All. No gaps. Health – physical, emotional, mental.
 - Make a meaningful plan and investment for improving outcomes for ELL students. Two languages for all students? Expansion of bilingual programs (Utah plan)?
 - Extended day and summer programs for students who need them.
 - Early literacy programs.
 - Partner with parents and community.
 - Special education supports and services.

3

- **K-3 Literacy Initiative**
- **Proven OEIB/ODE Strategic Initiatives**

- We support the OEIB/ODE literacy initiative, assuming we are able to reach reasonable accommodations related to plans for partnerships with community based organizations, and certain other initiative requirements.
- We support continuation of the OEIB/ODE strategic initiatives that we believe are most successful and beneficial. These initiatives should be available to every district (not via competitive grants).

OREGON'S 'EDUCATION FUNDAMENTALS' GAP

What is the **cumulative effect** of one of the **shortest school years** in the nation?

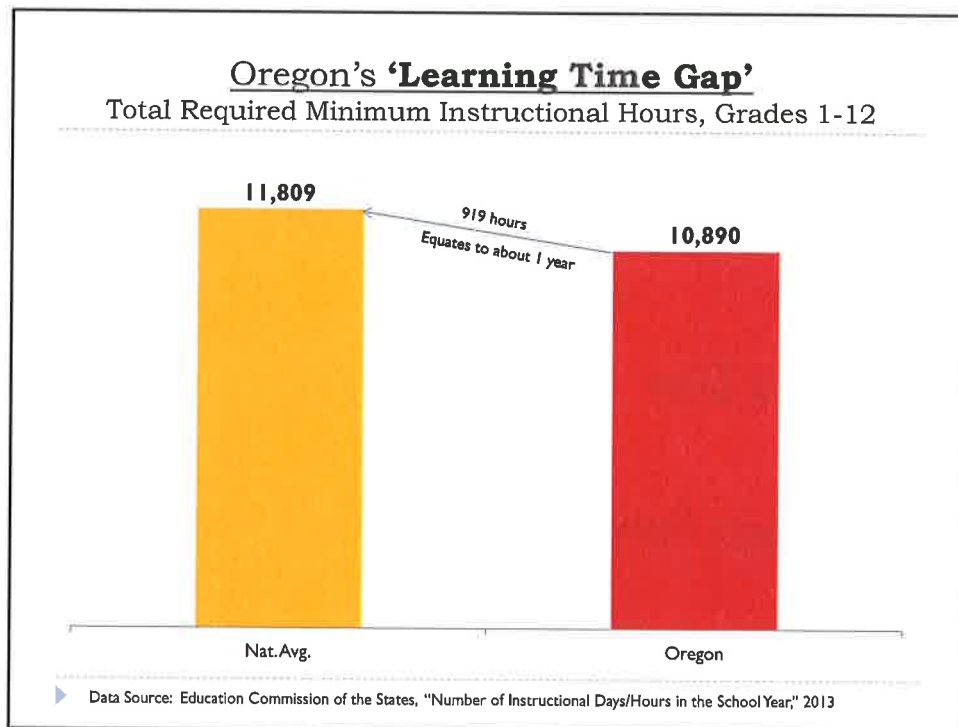
...not to mention the **added impact** of some of the **nation's highest class sizes**?

Oregon's Education Fundamentals Gap

- ▶ Instructional Time
- ▶ Class Size
- ▶ School Funding

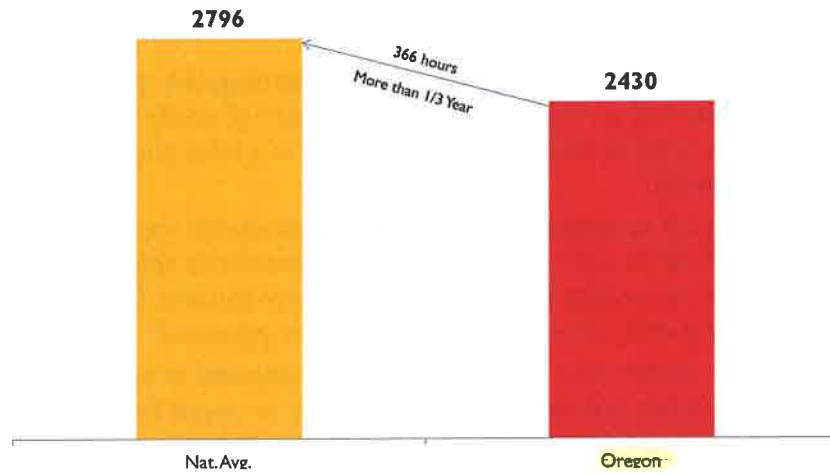
Comparing instructional time

- ▶ Information comes from Education Commission of the States and compares minimum required instructional hours. 33 states, including Oregon, use the “hours” standard.
- ▶ Rules about instructional time differ from state to state.
- ▶ Many schools and districts across the country choose to exceed the minimum, including many in Oregon.
- ▶ The information on the following pages does not include “cut days” or kindergarten.



Oregon's 'Early Literacy Time Gap'

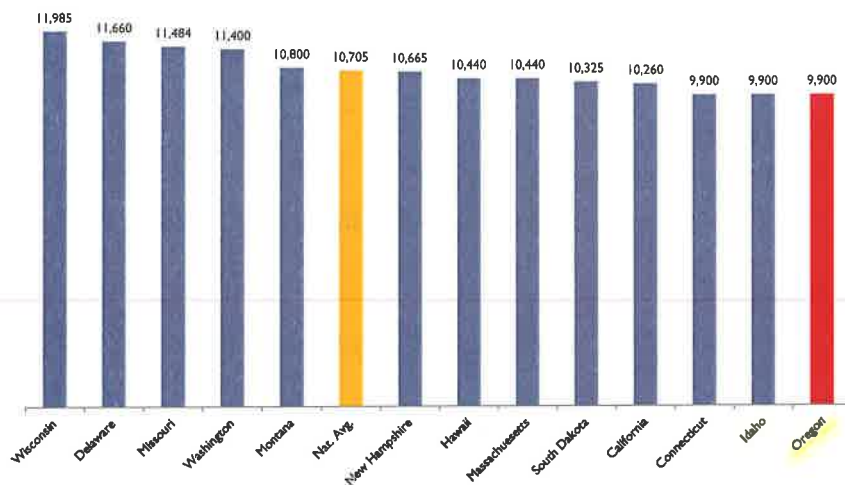
Total Required Minimum Instructional Hours, Grades 1-3



Data Source: Education Commission of the States, "Number of Instructional Days/Hours in the School Year," 2013

Oregon's 'Smarter Balanced Time Gap'

Total Required Minimum Instructional Hours by 'Smarter Balanced' State, Grades 1-11



Data Source: Education Commission of the States, "Number of Instructional Days/Hours in the School Year," 2013

Instructional Time

It's about **achievement** and **equity**

- ▶ “Decades of research have found that there is a meaningful relationship between time and learning, especially for at-risk students.”
- ▶ “What is more important for student learning, the quality of time in school or the quantity? What years of study have demonstrated is that this question itself is a false choice. Both are essential.”
- ▶ “Holding all students to the same high standards means that some students will need more time.... Standards are then not a barrier to success but a mark of accomplishment. Used wisely and well, time can be the academic equalizer.”
- ▶ Hawaii – driven by a commitment to equity and excellence, legislature has put school on a trajectory to move from the shortest to the longest school year in the nation.

▶ Data Sources: National Council on Time and Learning; Hawaii Department of Education

Instructional time is one part of Oregon's **'Education Fundamentals' Gap**

- ▶ **Instructional Time Gap**
 - ▶ One year less than the national average, grades 1-12
- ▶ **Class Size**
 - ▶ 49th in student-teacher ratio
 - ▶ (Nearly 6 more students per teacher than the U.S. average)
- ▶ **Funding**
 - ▶ Oregon spends about 88% of the national average per pupil on K-12
 - ▶ Oregon is 46th in state expenditures on K-12 as a percent of state taxable resources

▶ Data Sources: Education Commission of the States, 2013; National Education Association, 2013; National Center on Education Statistics, 2012; Quality Counts, 2014

Oregon's 'Education Fundamentals' compared to the Top 5 education states

State	Student Ach. Rank	Min. Instr. Hrs., Gr. 1-12	Class Size Rank	Students Per Teacher
Massachusetts	1	11,430	19	13.9
Maryland	2	12,960	25	14.7
New Jersey	3	N/A (days)	4	12.0
N. Hampshire	4	11,665	5	12.1
Vermont	5	N/A (days)	1	9.2
Oregon	40	10,890	49	21.8

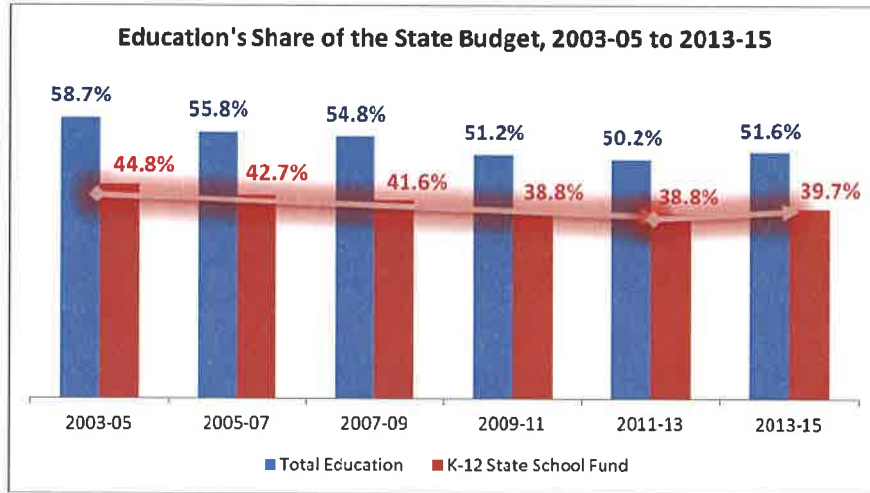
Data Sources: Education Commission of the States, 2013; Quality Counts, 2014; National Education Association, 2013

Oregon's 'Education Fundamentals' compared to the Top 5 education states

State	Student Ach. Rank	% State Tax Resources: K-12 Rank	Per Pupil Spending Rank
Massachusetts	1	23	16
Maryland	2	16	17
New Jersey	3	2	7
N. Hampshire	4	7	10
Vermont	5	1	3
Oregon	40	46	34

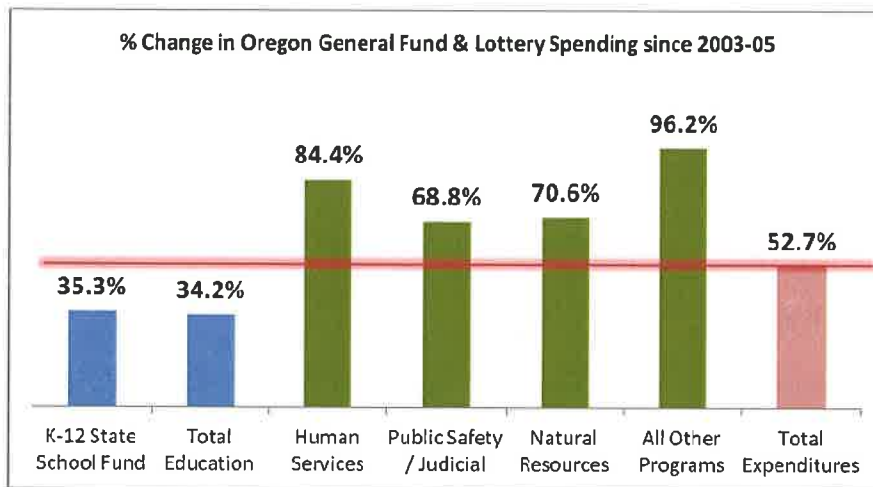
Data Sources: Education Commission of the States, 2013; Quality Counts, 2014; National Education Association, 2013

Education's share of the state budget has declined by about 5 percent since 2003-05



Data Source: Oregon Legislative Revenue Office, 2014

Oregon's state budget has prioritized services other than education since 2003-05



Data Source: Oregon Legislative Revenue Office, 2014

It's about time...

▶ ...to do something about instructional time in Oregon.

- Should we advocate for more instructional time?
 - What challenges to this approach should we be ready to address?
 - What would the best use of 100 hours of additional time look like in your district? Days for all students? Time for students who need it? Both?
 - If the additional time were implemented over a period of three biennia, how should it be staged?
-

Oregon's Ranking among the US States in Education

Indicator	Oregon	US	Ranking for Oregon	Source
STUDENT ACHIEVEMENT				
Preschool Enrollment - % of 3 and 4-year olds enrolled in preschool in 2012	40.7	47.7	42nd	Quality Counts 2014
Kindergarten Enrollment - % of eligible children enrolled in kindergarten programs in 2012	75.8	77.9	36th	Quality Counts 2014
NAEP 4th Grade Math - % proficient in 2013	40.2	41.3	32nd	Quality Counts 2014
NAEP 8th Grade Math - % proficient in 2013	34.3	34.4	29th	Quality Counts 2014
NAEP 4th Grade Reading - % proficient in 2013	33.4	34	33rd	Quality Counts 2014
NAEP 8th Grade Reading - % proficient in 2013	36.7	34.3	18th	Quality Counts 2014
NAEP Growth in 4th Grade Math - change in average score from 2003 to 2013	3.8	7.2	45th	Quality Counts 2014
NAEP Growth in 8th Grade Math - change in average score from 2003 to 2013	2.6	7.5	45th	Quality Counts 2014
NAEP Growth in 4th Grade Reading - change in average score from 2003 to 2013	1.5	4.2	38th	Quality Counts 2014
NAEP Growth in 8th Grade Reading - change in average score from 2003 to 2013	4.3	4.7	20th	Quality Counts 2014
AP Scores - number of AP scores of 3 or higher per 100 student in 2012	14.9	25.7	35th	Quality Counts 2014
Change in AP Scores - change in number of scores 3 or higher per 100 students from 2000 to 2012	10.2	16.6	30th	Quality Counts 2014
Graduation Rate - 4-year high school graduation rate	68%	80%	46th (out of 47)	ED Data Express
Postsecondary Participation - % of young adults enrolled in postsecondary education or with a degree in 2012	53.7	55.8	30th	Quality Counts 2014
Adult Educational Attainment - % of adults with a three- or four-year postsecondary degree in 2012	40	39.5	23rd	Quality Counts 2014
EDUCATIONAL EQUITY				
SES Gap in NAEP 4th Grade Reading - difference in average scaled score of low-income and non-low-income students	29.3	28.6	38th	Quality Counts 2014
SES Gap in NAEP 8th Grade Math - difference in average scaled score of low-income and non-low-income students	27.2	27.2	36th	Quality Counts 2014
Change in SES Gap for 4th Grade Reading NAEP - change in SES gap from 2003 to 2013	10.9	0.7	50th	Quality Counts 2014
Change in SES Gap for 8th Grade Math NAEP - change in SES gap from 2003 to 2013	7.9	-1.2	50th	Quality Counts 2014
CLASS SIZE				
Teacher to Student Ratio - number of students enrolled per teacher in public K-12 schools in 2012	21.8	15.9	49th	NEA Rankings 2013
STUDENT ATTENDANCE				
Student Absence Rate - % of 4th grade students absent at least 3 days in the prior month in 2013	23%	19%	45th (out of 49)	Absences Add Up
Student Absence Rate - % of 8th grade students absent at least 3 days in the prior month in 2013	25%	20%	45th (out of 49)	Absences Add Up
TEACHER SALARIES				
Teacher Salaries - average salaries of public school teachers in 2011-12	\$56,941	\$55,389	13th	NEA Rankings 2013
Teacher Salaries - average salaries of public school teachers in 2012-13	\$57,612	\$56,103	13th	NEA Rankings 2013
Change in Teacher Salaries - % change in average salaries from 2002-03 to 2012-13	21.4	22.8	35th	NEA Rankings 2013
K-12 EDUCATIONAL EXPENDITURES				
Spending in Education - state expenditures on K-12 schooling as a percent of state taxable resources	2.8	3.6	46th	Quality Counts 2014
Spending in Education - per capita expenditures of state and local governments for public K-12 schools in 2010-11	\$1,555	\$1,813	38th	NEA Rankings 2013
Spending in Education - expenditures of state and local governments for public K-12 schools per student in 2011-12	\$9,811	\$10,838	28th	NEA Rankings 2013
Spending in Education - expenditures of state and local governments for public K-12 schools per student in 2012-13	\$10,251	\$10,938	25th	NEA Rankings 2013
Spending in Education - current expenditures for public K-12 schools per \$1000 of personal income in 2011	\$38	\$40	33rd	NEA Rankings 2013
EXPENDITURES OF STATE AND LOCAL GOVERNMENTS				
Expenditures of State and Local Governments - per capita direct general expenditures of state and local governments in 2010-11	\$8,212	\$8,290	22nd	NEA Rankings 2013
Expenditures of State and Local Governments - direct general expenditures of state and local governments per \$1000 of personal income in 2011	\$218	\$196	13th	NEA Rankings 2013
ECONOMIC CONDITIONS				
Poverty - % of children in poverty in 2011	24%	23%	36th	Kids Count 2013
Poverty - % of children whose parents lack secure employment in 2011	37%	32%	47th	Kids Count 2013

COSA/OASE Advocacy Plan Development Timeline, August 2014-January 2015

August 14
Bend

Vision/Policy Steering Committee retreat. Discussion of policy priorities and direction.

August 22
Salem

Funding Coalition Steering Committee retreat. Discussion of funding priorities and direction (based, at least in part, on Vision/Policy outcomes).

Compile and refine initial priorities and direction based on steering committee discussions.

September 26
Keizer

Off-the-Record meeting. Update on Vision/Policy and Funding Coalition steering committee work, preview O-T-R regionals.

October 3
Eugene

Vision/Policy Steering Committee. Continue development of policy priorities and direction, and prepare for O-T-R regionals.

Prepare for regional Off-the-Record meetings.

October 10-30
Sisters, Coos Bay, Medford,
Baker City, Beaverton

Regional Off-the-Record meetings. Conversations with superintendents and administrators around the state about policy and funding priorities and advocacy plans.

Compile, refine and report results of Regional Off-the-Record meetings.

October-November

State-level Legislative Concept Retreat. Work with Governor's staff, ODE, OEIB and partners to develop proposals we all can support.

Work with Partners. Build consensus among education partners for school funding and other advocacy efforts.

<p>November 13 Portland</p>	<p>Vision/Policy Steering Committee. Continue development of policy priorities and direction, and advocacy strategies.</p> <p>OASE Executive Committee. Discuss OEA/COSA Education Summit outcomes and next steps.</p>
<p>December 3 Eugene</p>	<p>COSA Board of Directors meeting. Update Board and request action or support as needed.</p> <p>Funding Coalition for ALL Superintendents. Discuss Governor's Budget and reach consensus on funding advocacy effort, including any refinements or adjustments due to Governor's Budget.</p>
<p><input checked="" type="checkbox"/> Continue to prepare for 2015 legislative session advocacy.</p>	
<p>December 12 Salem/Online</p>	<p>Vision/Policy Steering Committee. Continue to refine policy and advocacy plans and strategies.</p>
<p>January 16 Salem/Online</p>	<p>Funding Coalition Steering Committee. Finalize funding advocacy plans.</p>
<p>January 29 Salishan</p>	<p>Vision/Policy Steering Committee. Finalize preparations for start of legislative session.</p> <p>OASE Executive Committee.</p> <p>Off-the-Record meeting. Finalize plans for start of legislative session.</p>
<p><input checked="" type="checkbox"/> Implement advocacy plans.</p>	