



MEMORANDUM

To: Beaverton School District

From: Larry Picus and Allan Odden

RE: Continuing the Process of Mapping Beaverton's Strategic Plan into Program Resources and a District Budget

Date: March 10, 2010

In previous memoranda written for the January and February meetings, Lawrence O. Picus and Associates identified how the goals, objectives and key strategies in Beaverton's Strategic Plan can be mapped into school-based resources using the Evidence-Based Model. We have had three meetings with various groups in the district, including the Budget Committee, the elementary and secondary principals, and Superintendent's Cabinet to review, discuss and modify our mapping suggestions.¹ This memo does not review the ideas elaborated in those memoranda but instead uses them as a basis for moving the strategic budgeting process forward.²

At the February 2010 meeting, we began to link discussions of resource needs to our simulation model so we could develop an understanding of the impact of staffing resource decisions on all district schools. The goal of this exercise is to compare the results of proposed staffing alternatives to current staffing in schools and describe the impact on total district staffing patterns. We have stated many times that Beaverton will not be able to afford all the staff and other resources recommended by the Evidence-Based model, so the challenge for the district is to make strategic decisions about all resources so that schools have sufficient staff and funds to implement the Strategic Plan within the district's budget constraints.

One of the major points made in our previous memos and on which there seems to be agreement among leaders in Beaverton, is that the best way to organize teaching work is in collaborative

¹ We will be meeting with a focus group of teacher leaders in March and hope to meet with BEA leaders in the future if they so desire.

² Please see Chapter 4 of Odden and Picus (2008), *School Finance: A Policy Perspective*, for a review of the research and best practices literature behind all of the core formulas for the Evidence-Based funding model.

teacher teams, which use student data to design/hone/modify curriculum units and lesson plans, and collectively engage in the cycle of continuous instructional improvement. Thus, the prime task that was addressed in the February meetings was determining core class sizes and the provision of additional, elective/specialist teachers so that every school could organize its schedule in a way that provides all teachers with at least three 45-55 minute periods during the week to work collaboratively on curriculum and instructional issues, and maintain other time that might be used for individual planning or work on other issues. We asked elementary principals, middle school principals and high school principals how the teacher work day could be organized so that this goal for collaborative time could be attained.

The most specific recommendations emerged from the middle school principals who suggested that a workable way to provide this time was to organize the day into four 90 minute blocks of time, with teachers providing instruction for three of those 90 minute periods. This would then provide 90 minutes of non-pupil contact time each day for each teacher, 45 minutes of which could be used for individual planning and 45 minutes of which could be used for collaborative planning. These blocks of time could be organized differently throughout the day, sometimes even providing a full 90 minutes for collaborative work on some days. Given the district's current staffing ratios for middle schools of 1 FTE position for every 24.35 pupils, the above time periods could be provided with a core³ class size of 32.4 students, with elective/specialist teachers provided at the rate of 33% over core class teachers.

We did not receive similarly detailed suggestions from high school principals, although we hope to have further input from them during our March meetings. However, using the middle school model and the current high school staffing ratio of 26.40 would result in core class teacher allocations for high schools for class sizes of 35.1 students, with elective/specialist teachers provided at an additional 33% of core teachers.

We are also waiting to review some specific elementary school schedules, something we could do collectively with the elementary principals during our March meetings. At the February meeting, the group of elementary principals that addressed the issue of collaborative time suggested that allocating elective/specialist teachers at the rate of about 20% over core teachers could provide sufficient staffing for organizing the school schedule to provide the desired time for collaboration. This would allow elementary school schedules to be divided into about 6 instructional time periods, each about 60 minutes long. Individual teachers would provide instruction for five of those periods which would provide for a nearly 60 minute block of time every day for planning and collaborative work. Because the district provides 2.0 FTE non-

³ Core classes generally are English/Reading/Language Arts/Writing, math, science, social studies and world language.

convertible specialists at each elementary school, the equivalent core class size in the model is approximately the same (25.15 as the district's staffing ratio).

We view these decisions as the critical first decisions for engaging in the strategic budgeting process, as core and elective/specialist teachers consume the vast bulk of all teaching positions. Though subject to change, we will begin the “zero-based” budgeting exercise with the above parameters, which generally will provide to each school a similar number of core teachers and elective/specialist teachers as the budget does today. Of course, these parameters could be changed to be more or less restrictive in future simulations.

To organize teachers into collaborative work teams that work effectively, our previous memos have suggested schools also need instructional coaches. Though the EB formula for instructional coaches is too robust for Beaverton, we stated in our February memo that there should be a minimum of one instructional coach, whose job it is to work with collaborative teacher work teams as well as with individual teachers, in every prototypical school – about 432 elementary students, 450 middle school students and 600 high school students (so, for example, a minimum of two coaches in a middle school with 900 students). Our initial zero-based budget provides for this level of instructional coaches.

We have stated that all schools will have children who struggle to learn to high performance standards – “exceeds” on the Oregon OAKS tests – and need some extra help to succeed. The EB approach for such initial intervention is first some accommodations within the regular classroom, which requires no additional resources, and then 1-1 or very small group tutoring. The EB formula for such tutors is 1 FTE teacher position for every 100 at-risk students, with a minimum of one tutor position for each prototypical-sized school.

In addition, schools need **administrative and support staff** such as:

- Principals
- Assistant principals
- Secretaries
- Supervisory aides, excluding food service staff which is budgeted separately.

For beginning purposes of discussion and analyses, our “zero-based” budget begins with the above core and elective staffing formulas, augmented by a minimum number of instructional coaches and tutors for struggling students, as well as principals, assistant principals and secretaries.

Simulation M-1 represents these parameters, and includes no other school-based staff. The overall results show that this bare minimum staffing requires 1,825.6 FTE teaching positions

(cores, specialist, tutor, and coach) across all the district's schools, compared to the current district total of 2,258.3 FTE certificated positions, leaving a total of 432.7 additional but as yet unallocated certificated staff positions currently funded through school and district budgets.

To engage in this zero-based budgeting exercise, Beaverton needs to decide if it agrees with this starting point for teacher staff, or some different starting point that can be easily simulated at any of the March meetings. The remainder of this memo uses this as a starting point and will add teaching staff in our suggested priority order. Beaverton also will need to identify how it would prioritize the additional staffing positions.

The **additional teacher staffing positions** include, in a general order of suggested priority:

1. More tutor positions for struggling students
2. ESL staff for teaching English Language Development to ELL students
3. Staff for students with disabilities (excluding students with severe and profound disabilities staffing for which we assume the district will maintain current practice)
4. Extended day staff for struggling students
5. Summer school academic programming for struggling students
6. Pupil support staff – guidance counselors, social workers, nurses, family outreach and liaison, service learning, etc.
7. Librarians

In addition, the EB model includes **dollar per pupil amounts** for:

- a. Instructional materials (\$145 for each elementary and middle school pupil and \$180 for each high school pupil)
- b. Formative assessments (\$25 per pupil at all levels)
- c. Computer technologies (\$250 per pupil at all levels)
- d. Student activities (\$200 per elementary and middle pupil and \$250 per high school pupil)
- e. Gifted and Talented (\$25 per pupil at all levels)
- f. Professional development trainers (~\$100 per pupil including central office professional development staff).

This totals \$745 per pupil for elementary and middle school students and \$830 for high school students. This compares to about \$535 for elementary schools, and \$560 to 570 per pupil for middle and high schools allocated for these items in the current budget. It should be noted that some of the figured included as district allocations are actually managed centrally and have been allocated to schools on a per pupil basis to facilitate comparisons.

In March, we propose to focus on completing the zero-based budgeting for the **additional teaching staff** and propose an additional simulation with these parameters:

1. Tutors – if desired, Beaverton could enhance the minimum tutoring staffing for struggling students in Simulation M-1, but we have not done so for the following budget exercise.

2. ELL staff – the EB model in other states and districts has assumed that ESL instruction is provided to ELL students in place of an elective (i.e., ELL students are not pulled from regular instruction in reading/writing, math, science or social science, but other elective areas). Further, the EB model has provided for elective class sizes of 18 in elementary schools and 25 in middle and high schools and uses that staffing allocation for ESL classes. But the EB model provides *additional* ELL staff so these class sizes can be reduced for instruction in 2-3 different levels of English language proficiency, with students grouped across grade levels for such ESL classes. To provide these small ESL class sizes generally required an additional ELL allocation of 1 FTE position for every 100 ELL students, in addition to the reallocation of the teacher spots for electives to ESL instruction. This equates to about 2.0 FTE positions for every 100 elementary ELL students, or 1 per 50 elementary ELLs, and 1.8 FTE positions for every 100 secondary ELL students, or 1/55.55 secondary ELL students (again counting the initial allocation for electives but reallocating that first to ELL instruction). But again, this requires just an additional allocation of 1 FTE position for every 100 ELL students.

Because of the way Beaverton organizes ELL instruction and how the district interprets state rules and regulations on ELL programming, the Beaverton model requires about 1 ESL teacher for every 36 ELL students, with the actual staffing allocations depending on whether ELL students are at Levels 1, 2 and 3 English proficiency (triggering a 1-33 staffing ratio) or Level 4, which triggers at 1-50 staffing ratio). But these staffing ratios are over and above all other staffing ratios so actually are higher than the EB model. Because of the desire of nearly everyone to retain this ELL staffing, we include a ratio of 1 ELL teacher for 36 students in Simulation M-2, which consumes 153.6 of the 432.7 remaining teacher staffing positions, leaving 279.0 unallocated staffing positions.⁴

3. Students with disabilities – Services for students with disabilities, like those for ELL students, are required by law so are added next. The EB model, which generally has been used for district allocations, provides a fixed 1 FTE teacher position and ½ FTE instructional aide position for every 150 regular ADM pupil, for the full range of services for all students with disabilities, except those with severe and profound disabilities. We are simulating these positions on an equal basis across all schools, but the district could reallocate such positions to align with the number of students with disabilities at each individual school, though the EB model would keep

⁴ See the appendix for an example of alternative ELL staff allocation strategies

the total positions to those simulated. Entering these formulas into the simulation model M-3 consumes an additional 253.5 teacher staffing positions, leaving a total of just 25.5 positions.

These remaining FTE teaching positions need to be allocated for:

- Extended day staff for struggling students
- Summer school academic programming for struggling students
- Pupil support staff – guidance counselors, social workers, nurses, family outreach and liaison, service learning, etc.
- Librarians

During the March meetings, we hope that the various group discussions, including the Budget Committee, can begin to make preliminary decisions about the staffing levels for these positions.

For **administrative and support staff**, the EB model provides:

- Principals – 1 for every elementary school of 432, middle school of 450 and high school of 600 students.
- Assistant principals – 1 for every high school of 600 and then prorates AP positions for larger schools by student size over 432 elementary students, 450 middle school students and 600 high school students.
- Secretaries – 1 for every 216 elementary pupils, for every 225 middle school pupils and for every 200 high school pupils.
- Supervisory aides for bus and lunch time supervision.

We can compare this allocation with current staffing if we get this far in the March budget deliberations. For simulation M-1 the EB model parameters are displayed to reflect the reality that these positions are necessary to operate schools.

In March, we also can review the per pupil dollar amounts with current practice if we get to this point in the zero based budgeting exercise.

Appendix

ELL Staffing Example

The basis for the EB staffing allocation: Assume a school has two classes of students, each 50% ELL. They get taught in core class sizes of 20. Then at some point they get an elective, and the two classes go to the elective, and each elective, say music, has a class size of 20 initially. But assume that the ELL students are pulled out for ESL instruction, and assume each class is at a different English language level. With ten students pulled out, each elective class will have only 10 students, so schools combine those two small elective classes into a full class of 20 students (if this isn't done, then the elective classes are smaller and more expensive than core classes). This would leave one teacher period free, which could be reallocated for an ESL class of 10 students. But the additional 10 ESL students would also need a teacher for a period, so a total of two teacher periods are needed for ESL classes. BUT one of elective class period allocations that are already provided can first be converted to one ESL period (by reassigning students to just one elective class), so the additional resources needed is just one more ESL teacher period, even though in total the school provides 2 teacher ESL class periods. The point: by pulling the ELL students out of the elective class, the positions allocated for some elective class periods can be converted to ESL class periods requiring only a marginal amount of additional resources to have all the ESL classes smaller than normal classes.

Combining students across grades into both elective and ESL classes also is much easier to do in a larger school, like those in Beaverton.

In Beaverton, however when students are pulled out of a class, that period with the non-ELL students simply has a lower class size, and all teachers for ELL need to be separately allocated. What that means, however, is the non-ELL students also have smaller classes during that time when the ELL students are pulled out for ESL instruction.