“Whiteboard Project” Response to the Chalkboard Project Survey
(Oregon Education Association, Confederation of Oregon School Administrators, Oregon School Boards Association and Oregon PTA)

CHALKBOARD PROPOSAL #1

Provide a mentor for every beginning teacher and every beginning administrator for their first 3 years in the classroom, school or district.

- Reinstitute, expand, and fund the Oregon Mentor Program, providing state funding for mentors and master teachers to help new teachers strengthen classroom management skills and to help new administrators build practical educational and leadership skills.

WHITEBOARD RESPONSE:

We agree. We were involved in ensuring that the 2001 legislation allowing mentorship programs was signed into law. Many school districts do a remarkable job of maintaining informal mentoring programs that help new teachers. We are not aware of programs supporting administrators, though we believe mentorship to be equally important for them.

For mentoring to provide real support and an opportunity for professional learning, it does require Oregon to invest in the program by providing experienced teachers and administrators with the time necessary to be actively involved in a young educator’s career. As noted by the Chalkboard project, assuming annually 1,550 beginning teachers at $3,000 per mentor --- the cost of a quality mentoring program in Oregon could be $4.6 million annually or $9.3 million per biennium for mentoring for one year. We note that this would require an investment of $13.9 million annually once the program was fully functional and providing three years of mentoring support.

CHALKBOARD PROPOSAL #2

Enhance professional development for every teacher and administrator in Oregon.

- Ensure that all professional development activity ties directly to student achievement and school performance goals.
- Provide new methods of professional development, including learning networks developed across the state, supported by state funding.
- Require leadership development for administrators to lead school reform efforts.
- Assign the Teachers Standards and Practices Commission to accredit professional development programs to ensure statewide consistency and quality.
**WHITEBOARD RESPONSE:**

We agree that professional development for teachers, principals and superintendents is vital to the ongoing success of our students and our schools. We believe that all education employees should have the opportunity to improve their skills and grow professionally. We believe, however, that policies and practices for professional development must apply to an educator’s entire career — recognizing that although the needs of novice teachers and those with experience differ dramatically, professional development should be anchored to the learning progress of students. Research shows that the most effective type of professional development offers support within the context of an educator’s school, involves sustained interactions over time, and focuses on the unique needs of educators in relation to those they serve, and their learning. Mentorship and professional development should work hand in hand.

Oregon’s current professional development system allows educators with the input of their administrator to identify their unique needs as it pertains to the students they serve and their goals in the learning environment within which they serve. Keeping new teachers teaching and experienced teachers from suffering burnout are critical goals for Oregon to resolve. This can only occur through sustained funding and support for mentorship and professional development.

**CHALKBOARD PROPOSAL #3**

Launch voluntary pilot projects in selected Oregon schools that will evaluate and pay educators based on their skills and ability to increase student achievement. Change evaluation and compensation to allow administrators to reward teachers who perform very well and elevate them to master and mentor teachers. Entire school staff can be rewarded for reaching school goals, such as increased attendance and higher graduation rates.

- Test the concept of locally developed teacher alternative compensation and evaluation plans that are based on moving away from the existing salary structure that sets pay based on seniority and experience. Pilots will be based on new, rigorous evaluation concepts (using several forms of measurement) that identify strong performers and deal with poor performers. Incentives to participate would include additional per student funding. Local schools would establish multiple career paths, objective assessment systems and professional development that align with performance pay.

**WHITEBOARD RESPONSE**

Rewarding schools for working together as a team to reach school goals that support student achievement is a wonderful idea. We are less enthusiastic about rewards based on the performance of individual educators and are not clear how this will work for administrators. We are not opposed to an alternative compensation pilot project that is bargained at the local level to ensure that the local school district and education association are in agreement.
LOWER CLASS SIZES FROM 25 TO 15 IN GRADES K-1.

- The Oregon Department of Education should develop a transition plan to help districts reduce class sizes in K-1 to 15 students per class, while also tailoring professional development to help teachers take full advantage of the lower class sizes to improve instruction. Within those grades, students from low-income families appear to benefit more than students from middle-and upper income families so a phased-in approach could start with schools receiving federal Title I funding (provided to help low-income children) and progress gradually to higher income areas as financial resources, the supply of qualified teachers, and facilities allow.

WHITEBOARD RESPONSE:
In theory, we support reduction in class size throughout elementary schools as being best practice to encourage reading and other appropriate developmental skills in elementary students, particularly in K-3. With additional revenue to pay for personnel, classrooms and other necessary educational infrastructure such a focus makes sense. Without additional revenue to support current service levels and additional classrooms, we have a major concern about shifting resources from other classroom services to fund this proposal and the resultant ill effects on those students. Further concerns center on capital costs in high-growth districts.

California provides a good example of the stresses and inequities that can occur with a blanket policy: teacher shortages in areas most in need and classroom shortages in high-growth areas.

Instead of across-the-board class size reductions, consider alternatives. The following ideas are from the Oregon Legislative Policy and Research Office. Researcher Jan Norland reviewed local and national resources for an interim legislative committee in January 1998.

1. One-on-one and small group tutoring for students who are falling behind.
2. Split scheduling (also referred to as “early-late” or parallel block scheduling) allows students to be taught core courses in small classes for a portion of the day.
3. Use appropriate student grouping strategies to achieve classrooms within classrooms.
4. Incorporate small class instructional methods into larger classes.
5. Limit high school teachers to 80 students per day in the core subjects, allowing more time for correction of writing assignments.
6. Require all teachers and specialists to teach 15 students in core academic areas for three hours a day (Oak Park Plan).
CHALKBOARD PROPOSAL #5

Provide early tutoring programs in reading for every child not reading at grade level for K-3.

- Every Oregon school district should have a plan for each elementary school to provide tutors (paid or volunteer) and one-to-one support for all students reading below grade level in grades K-3. This concept includes half of Oregon’s districts partnering with SMART (Start Marking A Reader Today) and using volunteers, which would require funding for additional classified staff for coordination; and the other half of Oregon’s schools hiring paid reading specialists to assist students.

WHITEBOARD RESPONSE:

We agree that early tutoring programs for every child not reading at grade level is a good idea. We support additional opportunities for developing readers; programs such as SMART that have a record of meeting stated goals should be encouraged.

We are concerned, however, that these reading programs take students away from regular classroom instruction. Also the programs have very strict criteria that would not allow many interested school districts to participate.

We also believe that without a serious infusion of revenue to ensure that tutors are properly trained and to support the efforts in the classroom that this goal has little hope of correcting the underlying issue that not every child is able to read at grade level.

ACCOUNTABILITY IMPROVEMENTS

CHALKBOARD PROPOSAL #6

Launch Statewide Program to Identify and Implement Organizational Efficiencies in Schools

- Require the State Board of Education, with assistance from the Oregon Association of School Business Officials, to implement a statewide program to help school districts find ways to save money. Chalkboard believes savings of approximately $205 per child per year, or $118 million total, should be achieved by 2014-15 based on better business practices (such as "pooling" purchases with other districts and creating uniform data systems), changing how we pay for student transportation and eliminating early retirement contracts. Statewide targets should be set around reducing health care benefit costs to the national average (Oregon is significantly higher), and incentives created to help districts manage those costs (new purchasing options, districts’ participation in existing school employee insurance pools). Savings from lower health spending should be reinvested in the K-12 system.
WHITEBOARD RESPONSE:
The premise of this proposal suggests that there is waste in Oregon’s public school system. We do not agree. Local school districts have made choices that each feels is within the best interest of its students and local community. While we support efficiencies that will save money for other important educational services, we don’t believe that there is any evidence that statewide control of the issues noted above will lead to savings and continue to meet the needs of local school districts.

In our opinion the issue is Oregon’s broken tax system. Revenue simply has not kept pace with Oregon’s ambitions for its students. Ballot Measures 5 (in 1990) and 50 (in 1997) have caused major reductions in property tax revenues for public schools, causing a shift to reliance on state revenues to fund schools. Now, approximately 70 percent of total K-12 education dollars come directly from the state (up from as low as 25 percent prior to the enactment of property tax limitations). With this new balance, resources from other important state services compete with the need to fund schools adequately and stably.

CHALKBOARD PROPOSAL #7
Implement Performance Audits of Schools.
- Require State Board of Education to conduct performance audits of schools and create incentives for schools to meet the savings targets outlined in the previous question. This would require a new in-house audit function similar to the model used by the Oregon University System.

WHITEBOARD RESPONSE:
Current state law already requires an external audit of district financial data; these reports already include a review of overall best business practice and admonishment where such practices are not being met. To illuminate a district’s budget process within the community, all or a portion of the cover letter from the external letter could be included in the annual school report. Districts are also required to have budget committees comprised of community members.

We encourage and support adoption of local Business Advisory Task forces that routinely combine performance and financial audits to encourage adoption and implementation of sound business practice.

CHALKBOARD PROPOSAL #8
Change the way we pay for student transportation. As a short-term fix, provide districts with a set amount of money for student transportation, and allow them to return any savings they generate to the classroom. (The current system reimburses districts for actual busing costs.) As a long-term solution, develop an alternative formula for 2009 legislative approval that uses cost per mile, population density and/or student location to determine district transportation funding.
WHITEBOARD RESPONSE:

Chalkboard provides no evidence that there are savings to be found through block-grant funding of transportation costs. Further, we refute the notion that districts do not already employ accountability and efficiency measures with regards to transportation. Rather school schedules and the very precious cargo being transported would indicate the reverse to be true. We support a review of current transportation funding, but do not support the implementation of block-grants until a comprehensive study proves that they are the best solution.

CHALKBOARD PROPOSAL #9

Implement the OpenBook$ Project in every school district. The OpenBook$ Web site, created by the Chalkboard Project in partnership with Oregon education leaders, allows Oregonians to see how districts spend dollars and to compare and contrast their local district spending with other Oregon school districts and the national average.

WHITEBOARD RESPONSE:

We support Chalkboard’s work with the Department of Education to develop a budget template for use by all districts that will simplify the public’s understanding of revenue and expenditures for individual districts and schools. We believe this is a good tool to assist districts to communicate with community members about how their tax dollars are spent. Chalkboard’s assistance in educating the public that “more dollars to the classroom” actually translates to appropriate salary to recruit and retain high quality administrators and teachers would be beneficial.

An additional feature that would help clarify school funding and make local spending choices more clear to both the general public and the legislature, would be the inclusion of information regarding revenue sources and amounts for each school district.

FUNDING IMPROVEMENTS

CHALKBOARD PROPOSAL #10

Convert the statewide Education Stability Fund to a general rainy day fund and increase the cap from 5 to 10% of General Fund.

- The current stability fund is dedicated to education. But the reality is it’s easy to provide money to education from this stability fund, while taking money away from education elsewhere to fund other state services. What we need is a rainy day fund that will protect all state services, including education, from dramatic budget cuts during an economic downturn. The existing 5% cap is on this rainy day fund is inadequate to cover a major recession and should be raised to 10% of the general fund. There are many ways we can fill this fund, but the
recommendation is to redirect the current surplus income tax “kicker” (both personal and corporate) until the emergency fund is full, and then return the kicker to taxpayers. Redirecting the kicker to a state “rainy day” fund would require a Constitutional amendment.

WHITEBOARD RESPONSE:
The Education Stability Fund has already endured one “conversion”, and it cost some college-bound students Opportunity Grant dollars that would have otherwise been available. If the state needs a general-purpose stability fund – and we’d agree that this would be wise – then one should be created alongside the ESF, not instead of the ESF, and its revenue source ought to be kicker monies, not lottery dollars. OEA asked the Legislative Revenue Office how long it would take to capitalize the ESF sufficiently to hold education programs (pre-K through higher education) harmless in the next predicted economic cycle. The answer was that lottery resources would be inadequate to fully address a presumed shortfall. By contrast, converting at least a part of the kicker to a rainy-day fund would have perfect synchrony (fill the piggy bank in good times; crack it open in bad) and would also yield a healthier flow of revenues. Both proposals would require constitutional changes, and therefore a vote of the people.

As for increasing the cap from 5 to 10 percent, we’d agree that the state as a whole ought to have reserves of at least 10, and preferably 15 percent. If a second general-purpose fund were created, the cap issue presumably would be moot.

CHALKBOARD PROPOSAL #11

Establish a new guaranteed funding level for every student in Oregon based on the savings and costs of implementing Chalkboard’s identified efficiencies and new targeted investments. This level would be increased each year by inflation and other cost factors, plus any new programs approved by the Legislature. If revenues are not sufficient to fund K-12 at this level, the Legislature should allow automatic withdrawals from the stability fund to maintain the guaranteed funding level.

- Funding guarantees enhance stability by giving school districts a figure they can use for budgeting purposes while the Legislature is making decisions. The amount of funding per student should be based on the actual costs of educating each Oregon student given the outcomes (high achievement) we expect. Currently, there is no connection between the amount of state money provided to K-12 schools and the cost of educating each of the students in the system.

WHITEBOARD RESPONSE:
Our greatest point of agreement is the statement that current funding is disconnected from the true cost of educating Oregon’s 550,000+ public school students. Many education advocates have argued that Oregon should accept the Quality Education Model’s assessment of the investment level needed to help Oregon’s students maximize their educational experience – as measured not only in
test performance, but also, in other valid measures of program richness, opportunity, and student success. That would establish the missing link between level of needed investment and educational outcomes. If fully funded, Oregon schools would need time to “ramp up” the staffing, capital, and professional development required to achieve state education goals.

Increments of growth from biennium to biennium, however, should never be based on an arbitrary number because that would only destroy the link that we seek to establish between student needs and the funding required to meet those needs. Predictability can be protected, however, by establishing an adequate floor below which we will never fall and a ceiling with a constitutional guarantee that the reserve fund will serve as an insurance policy in times of revenue shortfalls.

### CHALKBOARD PROPOSAL #12

Repeal the state “local option” laws that allow some communities, but not others, to raise varying amounts of money through local school levies. Replace them with a new law that allows every school district to ask for extra local money equal to 15 percent of what it receives from the state school fund. (Local levy taxes would be based on assessed values set by Measure 50, a 1997 voter-passed property tax initiative.)

- Current state law requires the state to fund schools, and limits the funds local communities can raise. Oregonians have passed two initiatives in the past 16 years (Measure 5 and Measure 50) that impact how much local levy money each school district can request from voters. The result is a complicated and highly unequal system. Some districts can request nothing above what they receive from the state. Some can request up to $100 per student. Some can request more than $700 per student. Changes to local option laws would require a constitutional amendment.

### WHITEBOARD RESPONSE:

When the original local options law was passed, we would have agreed with the statement that the law benefited only a handful of wealthy districts. That’s why education advocates fought for and passed – with voter approval, in the Constitution – Ballot Measure 1 (now Article VIII, Section 8). Part of that initiative “power equalized” the local option device to enable more communities to have a chance to pass local levies by offering a state match.

The issue Chalkboard raises about the variation in capacity to ask voters for local options has to do with property wealth and whether or not that district is in “compression”. We acknowledge that this is an imperfect way to raise additional revenues, and so a revision, rather than repeal of it might improve the situation to some degree. What we doubt, however, is that local communities would be able to pass a new levy to raise as much as 15 percent of their State School Fund, except in the wealthiest of communities. By both increasing the amount permitted and abolishing the power-equalized current law, Chalkboard would dramatically increase
Quality education costs money, but before there is talk about adding new money, variations in income tax revenue are the primary cause of our current education instability. Instead, new revenues should come from a mixture of different sources.

- Quality education costs money, but before there is talk about adding new money to K-12 education, the system needs to be spending the money it already has efficiently in order to have credibility with its investors. If Oregon’s economy continues to grow and K-12 gets a constant share of the state’s general fund, the quality and accountability ideas presented above could be funded without raising taxes. If K-12 gets a declining share of the general fund due, for example, to rising Medicaid and corrections costs, then new revenue sources may be needed to implement these proposals. And if a goal is greater stability in school funding, more money needs to be set aside now in the rainy day fund. That money needs to come from somewhere – either an existing source or a new source.

WHITEBOARD RESPONSE:

A lot of challengeable statements are made in this position by Chalkboard. Here are the responses, piece by piece:

1. “If new revenues are necessary, they should not come from income tax increases, since such variations in income tax revenue are the primary cause of our current school funding instability.”
   The Oregon Constitution says that it is the obligation of the Legislature to fund schools adequately. It also says that if revenues are insufficient, then the Legislature is obligated to raise enough to satisfy the sufficiency requirement. This is what the plaintiff parents and school districts are asserting in their ongoing school finance adequacy lawsuit.

2. “New revenues should come from a mixture of different sources.”
   We might agree that a more diverse revenue stream would address the pressing issue of adequacy and also remedy the issues of tax fairness (better distribution of tax responsibility) and stability (which is over-promoted as the chief issue – it is not). By “new revenues”, however, the Chalkboard proposal seems to stress overstated “savings” through “efficiencies” as a “revenue source”. The argument that schools waste vast sums of money is a red herring.

3. “Before there is talk about adding new money to K-12 education, the system needs to be spending the money it already has efficiently in order to have credibility with its investors.”
We acknowledge that public perception is that there is waste, regardless of the facts of the matter. We are happy to build back public trust through meaningful accountability measures, such as the “Open Book$” project. As responsible school finance research has shown, and as the Quality Education Commission has repeatedly demonstrated, the degree of funding currently allocated is far short (currently $1.8 billion short) of need, if students are to reach the achievement outcomes set forth in Oregon law.

4. “If Oregon’s economy continues to grow and K-12 gets a constant share of the state’s general fund, the quality and accountability ideas presented above could be funded without raising taxes.”

We cannot “grow our way out” of the problem. Per-student funding is currently at an all-time low, and a 10 percent per biennium projected revenue growth rate will not buy back lost programs, will not add new services, will never invest in the enterprise of public education adequately to underwrite the Education Act for the 21st Century, much less bring 99 percent of students to state standards by 2014, as required by NCLB. While Chalkboard seeks to fund its “quality and accountability ideas”, education stakeholders seek to fund Oregon’s quality education objectives.

The ideas you just reacted to outline a competent investment path, and if adopted, policymakers should stick to it even if, eventually, new resources are necessary. If new revenue to implement longer-term changes is needed, that new revenue should not be overly reliant on any one source, as exists today with the income tax, but come from a mixture of different revenue sources. Only with a revenue mix can stability be maintained during economic downturns.

WHITEBOARD RESPONSE:
Again, we would agree that a mix of revenue sources may yield both greater revenues and a more stable supply, and, if properly designed, could also increase tax fairness by better distributing the tax responsibility. We would add that the healthiest economies around the country can be found in states where a financial commitment has been made to ensure quality education, public services and sound infrastructure. Education is not only the most vital human investment we can make, it is also the best economic investment we can make. Study after study has proven this over the years.