

Catalyst CHICAGO

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APRIL 2004 INDEPENDENT REPORTING ON URBAN SCHOOLS

NARROWING THE SCHOOL FUNDING GAP

TRY, TRY AGAIN



EDUCATION ADVOCATES ARE FINDING NEW FRIENDS AND FOES IN THEIR LATEST CAMPAIGN FOR SCHOOL FINANCE REFORM

THE DEMOCRATIC GOVERNOR IS OPPOSED, THE BUSINESS COMMUNITY IS WARY, BUT MORE SUBURBAN DISTRICTS ARE LENDING SUPPORT

Principal candidates get deadline to submit portfolios

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Bring back the assessment center



Linda Lenz, publisher

The Chicago Board of Education has a spotty history for crafting new programs. In the late 1990s, it rushed into a high school reconstitution program that chased away good faculty members as well as dismissed presumably bad ones. It wrote its own set of end-of-course exams for high schools, winning praise for some and ridicule for others.

It gathered teachers to write daily lesson plans for every core subject at every grade level—a total of 9,360—again getting mixed reviews. By 2003, all three programs had been abandoned.

So, longtime observers are understandably nervous about the board's new policy for screening aspiring principals. The policy calls for what may be the most hurdles set up by any school system in the country for becoming a principal. They include a writing sample, a test of policy knowledge, a portfolio on leadership and management skills, a prescribed course of study and an oral interview. So far, the board isn't saying how it intends to develop these measures so that they fairly gauge the skills needed to be an effective principal. That lack of specificity can only breed distrust and undermine a worthwhile cause: improving the pool of principal candidates.

To make matters worse, the board has decided to start with the screening that local school councils can most readily do themselves, a review of candidates' leadership and managerial experience.

It would have been far better to start with the measures that councils are not in a position to do well and that lend themselves to more objective standards, such as the writing

sample or even the test on board policies and state regulations. While neither gets at the most important leadership skills, both measure necessary knowledge and skills.

The board then could adopt, if only temporarily, an established principal interview process such as the one developed by University of Wisconsin Professor Martin Haberman. Many Chicagoans know Haberman through his teacher interview process, which Teachers for Chicago used to select career-changers for its certification program.

With these measures in place, the board would then have time to revisit one of its more promising initiatives from the late 1990s, the Principal Assessment Center. Developed by the Financial Research and Advisory Committee, a branch of the Civic Committee of the Commercial Club of Chicago, the center ran aspiring principals through a kind of administrative obstacle course that simulated the trials and tribulations of being a principal. Using the board's seven principal evaluation standards as a guide, trained observers recorded what they saw, and then a proctor boiled the observations down to a set of scores. The assessment activities and the scoring each took a day.

When the center's foundation

grants dried up, the board took it over for two years before abandoning it for financial reasons. Educators familiar with the center say it would need upgrades to be used as a filter for the principal pool and not just for the professional development of candidates, as was the case before. The cost per candidate would rise. However, with other screening mechanisms in place, fewer candidates would have to go through the center, possibly balancing out the costs. Regardless, the role of the principal is so challenging and so crucial that it would be a terrible waste for the board not to remount a program that so many Chicagoans had already bought into and that did a good job of keeping personal bias out of the evaluation process.

Even the Chicago Teachers Union might support the increased expenditure. In announcing an upcoming survey of members on the quality of Chicago principals, President Deborah Lynch practically made the case: "As teachers, we know what a difference principals make in their schools. Good principals are leaders who create environments that allow teachers to teach and children to learn. And we also know that bad principals create conditions that lead to teacher attrition, student turnover and, ultimately, low student achievement."

ON THE WEB Got to www.catalyst-chicago.org for links to Chicago's principal-evaluation standards and previous Catalyst articles about principal leadership and the principal assessment center.

A handwritten signature in cursive script that reads "Linda Lenz".

FINANCE REFORM

Campaign eyes the grassroots

Unlike previous efforts, the latest campaign to increase school funding and make it more equitable includes a broad spectrum of advocates, not just those from the education community. All make the same argument: the state's tax structure is not geared to meet the needs of children. To help politicians over the hump of higher taxes, the campaign is going to the grassroots to explain that need—and the numbers. **COVER STORY: PAGE 6**

RESOLVED: STATE TAXES SHOULD BE RAISED TO IMPROVE SCHOOL FUNDING

The pros and cons of the debate, and how the state's education dollar is spent **PAGE 9**

WHAT REFORM MIGHT LOOK LIKE

Outlines of proposals from the Center for Tax and Budget Accountability and Cook County Assessor James Houlihan **PAGE 12**

GLENCOE, MIDLOTHIAN ILLUSTRATE FUNDING GAP

A richer property tax base means Glencoe pays higher salaries, has smaller classes **PAGE 13**

STANDARDS PUSH HELPS LAWSUITS

Political organizing can make lawsuits pay off, even if they fail in court **PAGE 14**



JOHN BOOZ

Former State Sen. Arthur Berman (right) at the A+ Illinois kick-off press conference.

“We’re saying, ‘Let’s set the table first.’ Our expectation is that this is more than a one-year effort to create momentum for change.”

MarySue Barrett of the Metropolitan Planning Council, on building grassroots support for school finance reform.

ON THE COVER: Gov. Rod Blagojevich addresses legislators about his education plan during a Committee of the Whole meeting on March 3. Behind him is Sen. Miguel del Valle, D-Chicago, chair of the Senate Education Committee. PHOTO BY RANDY J. SQUIRES

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ON THE WEB

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- PDFs of current and past issues
- Spanish translations
- Directories, like Yellow Pages

Notebook

Q&A with ...

Leticia Alvarez, former dropout

TIMELINE

March 1: Deseg decree

U.S. District Court Judge Charles Kocoras says he may end federal oversight of Chicago's desegregation consent decree by 2006. The School Board and the U.S. Department of Justice agree to an interim plan until then, under which the board must meet a number of conditions, including considering new standards for admission to magnet schools and issuing public reports on school-by-school spending.

March 17: LSC update

Thanks to last-minute recruiting, nearly 6,900 parents and community members signed up to run for 5,698 seats in April's local school council elections. It's the lowest number of candidates ever. Three-fourths of schools will have contested elections, and two schools did not have enough candidates for a quorum. Meanwhile, community groups call for legislative hearings on the status of LSCs.

March 18: Hiring policy

To boost teacher recruitment, especially in shortage areas such as math and science, CPS announces new hiring policies. Principals can now make guaranteed job offers to teachers as early as March, and new hires will no longer lose their jobs after the 20th day of school if enrollment does not meet projections. The board also expects to hire more teachers from alternative-certification programs.

When severe health problems forced sophomore Leticia Alvarez to miss too many days at her former school, she dropped out and enrolled in Pedro Albizu Campos, an alternative high school designed to help Puerto Rican youth. Alvarez told Associate Editor Maureen Kelleher that her former school did not seem sympathetic to the health issues that led to her attendance problems. She says schools need to do a better job of connecting with students, to keep them from dropping out.

What happened when you dropped out?

They just gave my step-dad the transcripts and we left the school. That was it, no questions asked. ... They figured, you know, I was 16 years old, I could drop out

Some people think that there are neighborhoods where no one thinks it's a big deal to drop out. How accurate is that perception?

Yeah, it's extremely accurate, because some people [think] 'Oh you dropped out, OK.' You know, they don't even talk about it, they don't even ask why did you drop out? They just figure, it's OK, my cousin dropped out yesterday or last week. ... They see it every day.

What could high schools do to help students stay in school?

Well, I think that a lot of the teachers who teach in Chicago Public Schools have given up on teaching. Like it's not their passion any more, so they've given up on it and they've given up on all the students they teach. And I think they could change that by holding conferences or something with the teachers to get together during the summers. ... To have new ways of teaching, to encourage them more [so they] encourage the students more.

The district has just announced that students and parents will now have to sign a consent form that explains the consequences of dropping out. Would that have made a difference in your case?

No, I would have left that school anyway.

Will it make a difference to other students?

I think it would. ... But sometimes it won't make a difference because they figure, OK, [teachers] have given up on me, I can give up on myself and my parents could give up on me

ELSEWHERE

New York: Promotion policy

Mayor Michael Bloomberg won approval from the Panel for Educational Policy of his strict new promotion policy for 3rd-graders. Just before the vote, Bloomberg fired and replaced three panel members who were against the plan, according to the March 16 *New York Times*. Students who score in the lowest quartile on city-wide English and math tests will be retained unless they raise their scores after attending summer school.

Philadelphia: Teaching disparity

A federal complaint filed by an advocacy group for parents and students charges that the district violates the civil rights of minority students by allowing a disproportionate number of inexperienced and uncertified teachers to teach in low-income, minority schools. The Education Law Center wants the district to overhaul the assignment process, according to the

March 9 *Philadelphia Inquirer*. The teachers' union contract allows teachers to choose where they work based on seniority. Schools CEO Paul Vallas says the district is working to bring additional highly experienced teachers to poor schools.

North Carolina: Certification

Teachers with National Board certification are more effective in raising students' test scores, a new study reports. Researchers found that students taught by certified teachers scored significantly higher on end-of-year reading and math tests, compared to students whose teachers started but did not finish the certification process, according to the March 10 *Raleigh News & Observer*. Poor students showed the greatest gains. The study analyzed three years' worth of scores for 3rd- through 5th-graders. North Carolina has more certified teachers than any other state and pays those who earn the credential a 12 percent salary supplement.

IN SHORT

"We'd like to believe that [the board] is good at hiring principals, but we haven't seen a record that indicates that. Until then we'll go with democracy."

Madeline Talbott of Illinois ACORN on the new policy that could put half of schools on probation, giving the board, not LSCs, authority to select those schools' principals.



JOHN BOOZ

too. I think the change doesn't only start with the student. It should start with the school, and the teachers in the school.

How is your school experience now different from what it was before?

At this school, I know they push you. They want to see you do good. They'll sit and talk with you. They have no problem encouraging you and trying to help you.

So you feel that here people have been much more supportive?

It's a small school and the teachers ... are familiar with your background. And they'll compromise with you if you can't do a lot of work. They'll sit and explain it to you. I'm a senior, and this year we have to do a senior project and my senior counselor actually took me out to lunch. ... If you need some kind of special attention, they'll give it to you without questions asked, as long as they see that you're trying too.

If you had advice for students who are struggling in their high school right now, what would you tell them?

I would tell them to try to stick it out. ... If you're going to drop out, don't drop out and not do anything with your life and never go back to high school and never get that diploma. ... Look for another school, an alternative school, another public high school if you have to. ... Push yourself to get that diploma.

Is there anything that the school system can do to reach out to students who have already left school but want to return?

There's a lot of things that they could do [but] they don't necessarily have to be once you've dropped out. ... They could talk to you and ask you, you know, what's your reason for dropping out? Get to know you better, because in public schools, they don't know you—you're just another name, another number. ■

ASK CATALYST

Our council [is] having a tough time recruiting parents. Several said that they would be interested, as long as they didn't have to worry about missing time from work. Does the law mandate that employers grant time to employees to serve on LSCs?

David Piel, community representative, Gladstone Elementary School

Some employers do grant leave time for school-related matters, but state law does not require them to do so, says Sarah Vanderwicken of the Chicago Lawyers Committee for Civil Rights Under Law. To accommodate more parents' schedules, alternate between different meeting times or switch off days of the week, suggests William Rice of CPS' LSC relations office.

E-mail your question to askcat@catalyst-chicago.org or send it to Ask Catalyst, 332 S. Michigan Ave., Suite 500, Chicago, IL 60604.

CAPITAL DISPATCH

SPRINGFIELD—More than 3,100 people have signed an online petition urging legislators to restore \$3.8 million in funding for the Golden Apple Scholars, a scholarship and mentoring program for aspiring teachers that Gov. Rod Blagojevich has proposed cutting from the state's budget.

If funding is cut, 380 students stand to lose \$5,000 scholarships next fall. Another 300 new teachers will lose mentors arranged through Golden Apple.

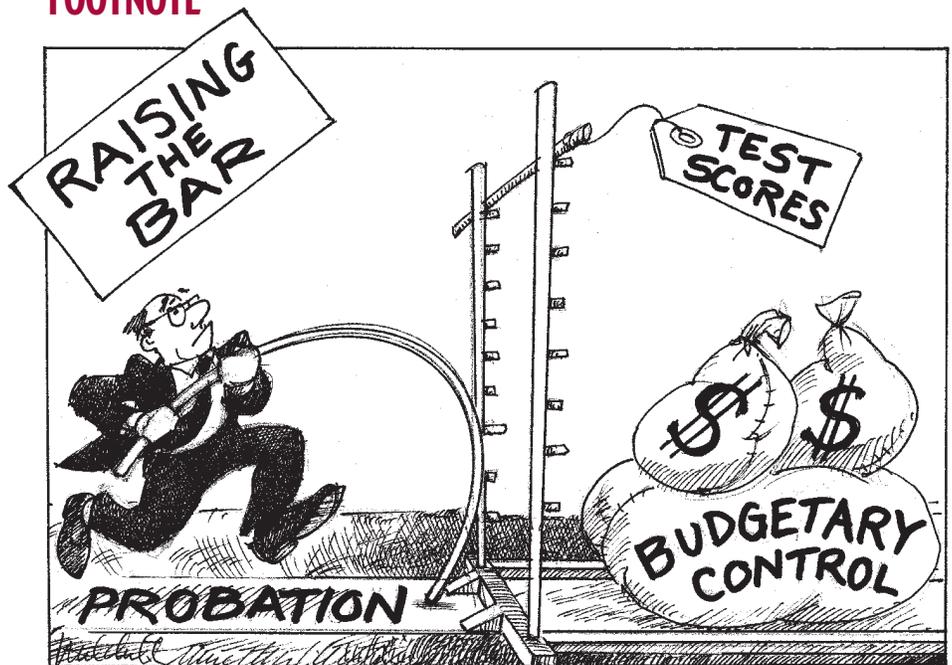
Dominic Belmonte, Golden Apple's director for teacher preparation, calls the

program "the Holy Grail of teacher retention and teacher quality." Belmonte says only two out of every 10 graduates from Illinois colleges of education typically teach in Illinois for five years or more, while almost nine out of 10 Golden Apple Scholars complete their five-year commitment to urban schools. Currently, 325 of 420 Golden Apple graduates are teaching in CPS.

Blagojevich spokeswoman Rebecca Rausch says, "We had to make some tough calls, and this was one of them."

Daniel C. Vock

FOOTNOTE



KURT MITCHELL

Campaign eyes the grassroots

By Ed Finkel and Daniel C. Vock

Ralph Martire, an enthusiastic numbers cruncher, had just finished explaining the details of his school finance reform plan at a town meeting in Grayslake when state Sen. Wendell Jones weighed in.

Martire's plan, which would lower property taxes and raise the state sales and income taxes, may make economic sense, said Jones, a Republican from northwest suburban Palatine. But it would fail politically, he continued. "Here's why," Jones explained, turning to the audience of 75 to 100 people. "Who's willing to pay higher sales and income taxes?"

Virtually everyone raised a hand, Martire recalls. "And [Jones] thought no hands would go up. Voters are more sophisticated than we give them credit for."

Through gatherings like these, Martire's organization, the Chicago-based Center for Tax and Budget Accountabili-

ty, and dozens more hope to succeed where like-minded advocates repeatedly have failed in the past. They want the state to raise income and sales taxes both to provide property tax relief and to raise the level of school funding for hundreds of poor districts without siphoning money from rich districts.

"The state has needed [this] for the past 30 years but has been unable to generate the political willpower," says Martire.

Organizers of the new campaign, called A+ Illinois, plan to barnstorm the state, build a broad coalition of support and raise public awareness before approaching the Legislature.

A+ LEARNS FROM PAST MISTAKES

MarySue Barrett, president of the Metropolitan Planning Council, another coalition

But politicians say the fate of proposals to provide property tax relief and more money for schools rests with Gov. Blagojevich, who has pledged not to raise the income and sales taxes.

leader, says A+ learned a few lessons from "past efforts that have not gotten to the finish line."

For one, A+ broadened its base beyond "education-connected leaders" to include advocates for such issues as housing, health care and social services.

These related services suffer from the same tax structure that afflicts education, Martire notes, and their advocates have come to recognize the interdependence of all their work. "That is new, and that's very powerful," he says.

A+ also is trying to build support for the concept of finance reform before getting too specific. "If you get into those details too soon, before the public is really with you on understanding the nature of the problem, then it can be labeled and tagged as unworkable before the debate

has begun," Barrett says. "We're saying, 'Let's set the table first.' Our expectation is that this is more than a one-year effort to create momentum for change."

The coalition is targeting the Legislature rather than the state constitution or the courts because all routes lead there eventually.

Besides, any effort to get Illinois courts to boost money for schools "is not likely to succeed," says Dawn Clark Netsch, a former Illinois comptroller who made overhauling the education funding system a central part of her unsuccessful 1994 bid to unseat Jim Edgar as governor.

Netsch, now a Northwestern University law professor, notes that the Illinois Supreme Court repeatedly has refused to enter the education-funding debate, leaving the matter to the Legislature.

BLAGOJEVICH THE BIG OBSTACLE

One large—and perhaps insurmountable—obstacle stands in the way of the A+ efforts: Gov. Rod Blagojevich's opposition to raising the sales or income taxes.

"The reality is that the legislative process in a lot of ways begins and ends with the governor," explains Steve Brown, spokesman for House Speaker Michael J. Madigan, D-Chicago, who shepherded a measure to swap higher state income taxes for lower property taxes through the House in 1997.

Lawmakers usually don't pass highly controversial proposals if they know the governor is opposed to them, because they likely would have a hard time gathering enough votes to override a gubernatorial veto, Brown notes.

The governor repeatedly has called for an overhaul of the state's education bureaucracy, so it would report directly to him. In March, he told the Senate that his proposed reforms, slated to take effect in 2006, must be instituted before school finance reform could ensue.

"Unless we change the system, unless we instill a culture of accountability, until we create a culture of innovation, the ongoing discussion on how we fund schools will continue to ring hollow to the taxpayers," he said.

However, as longtime Springfield watcher Charles N. Wheeler III reads the situation, Blagojevich's political advisors think it is more important for him to keep his campaign pledge not to raise the income or sales taxes than to please allies in the finance reform movement.

The governor's proposals are a way "to blunt whatever criticism he might come under for not addressing the underlying problem of school



JOHN BOOZ

Finance reform advocates launch the A+ Illinois campaign at a Feb. 10 press conference in the James R. Thompson Center. From left are Ralph Martire of the Center for Tax and Budget Accountability, Cook County Assessor James Houlihan and James Compton, president of the Chicago Urban League.

finance," says Wheeler, director of the Public Affairs Reporting program at the University of Illinois at Springfield.

Regardless, the governor has made no guarantees that he would take on the finance issue even if he gets his reforms.

Advocates for the tax swap acknowledge the difficulty that Blagojevich's position presents. They hope to generate excitement at the grassroots level and then show the governor that the idea has broad support. One measure of public opinion is a February *Chicago Tribune* poll that found that more than half of Illinois voters support trading higher state income taxes for lower property taxes and adding money for schools.

And history shows that raising the income tax is not the "third rail" of Illinois politics that many suppose it is, suggests Wheeler. Gov. Jim Thompson won election after hiking payroll taxes, and Edgar successfully campaigned on making a temporary tax "surcharge" permanent, Wheeler notes.

How previous reform attempts fared

1970—Illinois voters approve the current state constitution, which provides that "the state has the primary responsibility for financing the system of public education."

1973—The Illinois Supreme Court determines that the state's "primary responsibility" for school funding doesn't require it to pay for at least half of education expenses. The U.S. Supreme Court also blocks federal suits claiming that disparities among schools violate the equal protection clause of the U.S. Constitution.

1989—Legislature passes temporary income tax "surcharge," raising the rate to 3 percent. The money goes mainly to schools and municipalities.

1992—A proposed constitutional amendment that would require the state to fund 51 percent of education costs fails. While 57 percent of voters supported it, the measure needed 60 percent to pass.

1993—The income tax surcharge is made permanent.

1994—Gubernatorial candidate Dawn Clark Netsch proposes raising the income tax in order to lower property taxes and better fund public schools. Her opponent, Gov. Jim Edgar, attacks the idea. Edgar wins.

1996—The Illinois Supreme Court rejects a suit claiming that the statewide disparities in school funding were unconstitutional.

1997—Edgar proposes a tax swap similar to Netsch's. The measure passes the House but stalls in the Senate. Later, Edgar and the Legislature establish minimum levels of per-pupil funding. The required money comes from higher taxes on cigarettes, riverboats and phone services.

1999—The Illinois Supreme Court rules on a class-action suit brought by East St. Louis students who say their education was so poor that it amounted to a deprivation of their right to a free education under the Illinois Constitution. In a 5-2 decision, the court again leaves the matter to the Legislature.

EDGAR SAYS LEGISLATORS HARD TO CONVINCE

But poll numbers and history might not be enough to convince Blagojevich and other politicians. Edgar said his staff showed legislators the results of polls conducted in their districts that showed support for his 1997 finance reform proposal, which added accountability measures to Netsch's finance scheme. "They'd say, 'Yeah, that's now, but once the tax passes they're going to be mad,'" Edgar recalls.

Even so, Edgar insists that his plan would have become law if Senate President James "Pate" Philip, R-Wood Dale, had let it come up for a vote on the Senate floor. But Philip decided the plan would be bad for suburban schools, so he blocked it.

After leaving Springfield for the summer, Senate Republicans came under fire for not acting on the measure, so later that year they agreed to a proposal that set a minimum amount of money, called the "foundation level," that school districts should spend on each student. If local taxes didn't provide that much, the state would kick in the rest. Edgar signed the measure.

Since then, Philip has retired, and Democrats now control both the House and Senate. "There's no doubt that if I had the [current] legislative make-up, I would've passed the [tax swap] bill," Edgar says.

The fault lines in the school finance debate often fall along geographic, rather than partisan, lines. Edgar maintains that 10 Republicans in the 59-member Senate were ready to vote in favor of his 1997 proposal. On the other hand, Democrats who represent affluent suburbs—some of the most politically vulnerable members of the Legislature—probably wouldn't support a higher income tax.

Moderate gain seen for CPS

From the standpoint of its property tax base, Chicago is not a poor district. Thus, even though its student body is overwhelmingly poor, school finance reform likely would bring it only moderate financial gain.

In the last 15 years, "we've built a lot of new buildings in the city, and the value of homes has increased significantly. Now it's about mid-range in terms of property wealth per pupil," observes G. Alfred Hess Jr., a research professor at Northwestern University.

He also notes that the outcome for Chicago—indeed, for all districts in the state—would depend not only on the amount of new money for schools but also on how the money gets distributed. For example, Chicago would benefit from increased funding of the so-called poverty grant.

Any revenue gains realized by Chicago likely would reflect the state average, Hess says.

Chicago school officials support a shift from the property taxes to state taxes. "We're definitely advocating for some property tax relief for our residents here in Chicago," says Pedro Martinez, CPS budget director.

Ed Finkel

Many suburbanites moved to their communities in order to give their children a quality education, and the high value of real estate in those areas provides an ample tax base to pay for good schools. Relying more heavily on statewide taxes would almost certainly decrease the money available for affluent suburban districts.

"Heck, there's no way the state could have the money to bring everybody up to New Trier [standards]. And if you take New Trier down to the average, there's a lot of other suburbs that are going to come down, and that sends people off" in the Legislature, Edgar says.

NEW SUPPORT IN THE SUBURBS

However, the A+ coalition believes the issue is ripe politically because the Democrats control Springfield and because a broader swath of school districts would benefit. With three out of four districts in the state in the red, even north and northwest suburban districts might be supportive.

Neil Codell, superintendent of Niles Township High School District 219, says he supports a tax swap "in theory" but adds: "We want to know what we're going to get back."

As a March 16 tax referendum approached, Codell's

district, which has a median home price of \$224,000, was contemplating such measures as limiting students to five courses plus physical education, combining sports teams at Niles North and Niles West high schools, and eliminating extracurricular arts. (The referendum passed.)

The North Cook Superintendents Association agrees with the governor that some kind of administrative reform is needed first, says Max McGee, Wilmette School District superintendent, former state schools superintendent and president of the North Cook group. "This group is very skeptical of an income tax increase in return for a property tax rebate," he says. "They're thinking, as I am, that you need to have some other things in place first."

A more broadly based suburban group echoes that sentiment, supporting a tax swap only if it includes a guarantee that suburban schools would not lose money. "Our school districts recognize the need for equity statewide. But it has to be a bringing up of the bottom and not a leveling down," says Donna Baiocchi, executive director of a consortium of 114 suburban districts, mainly in Cook, Lake and DuPage coun-

ties, that is known as Ed-Red, for Education Research and Development.

BUSINESS COMMUNITY HANGING BACK

Often, downstate Republicans support higher dependence on the income tax. But in 1997, many were hesitant to sign on because the top GOP leaders in both chambers, who exert a lot of power, hailed from Chicago suburbs. Now those leaders have changed, weakening the suburbs' control of the GOP agenda.

The business community, traditionally supportive of Republicans, played a key role in promoting Edgar's plan, the former governor says. It signed on after Edgar pledged support for other reforms they supported, including higher standards for teacher recertification.

Today, different sectors of the business community have slightly different takes on a tax swap, but all are concerned that property tax relief might save them less than an income tax hike would cost. With dozens of business-related fees hiked last year and a potential increase in the corporate income tax this year, businesses are wary of any plan to make them pay more.

"We believe in local control and local taxation, and we don't trust the state," says Douglas Whitley, president and CEO of the Illinois State Chamber of Commerce.

Even with broad support, many observers insist, the fate of any funding reform rests with Blagojevich. "I've got to say, all of this is kind of minor, or just kind of insignificant, as long as the governor's sitting out there saying he's against it," says Edgar.

Ed Finkel is a Chicago-based writer. Daniel C. Vock is the Statehouse bureau chief for the Chicago Daily Law Bulletin. To contact them, send an e-mail to editor@catalyst-chicago.org.

RESOLVED:

State taxes should be raised to improve school funding

As yet another campaign to overhaul school funding gets underway in Illinois, *Catalyst* contributor Ed Finkel interviewed individuals on all sides of the question to clarify the issues. **We present their arguments here in debate format** and invite readers to provide additional arguments or evidence, which we will post on the *Catalyst* web site, www.catalyst-chicago.org.

PRO: UNDER THE CURRENT SYSTEM, SCHOOL FUNDING IS EXTREMELY INEQUITABLE

Accounting for such factors as the cost of living, *Education Week*, a highly regarded national newspaper, recently gave Illinois a C+ for the overall level of school funding. However, it gave it the only F in the country on school funding equity.

With heavy reliance on property taxes, the average spending per pupil ranges from \$6,341 in bottom-quartile schools to \$12,177 in top quartile schools, according to figures provided by the non-profit Metropolitan Planning Council, a leader in the A+ campaign to reform school finance.

Besides generating uneven

amounts of money from one school district to the next, Illinois' reliance on the property tax puts a greater burden on poor and largely minority districts. "All of the top property tax effort communities are in poor or rural areas," says Ralph Martire, executive director of the Center for Tax and Budget Accountability, a non-profit, bipartisan research and advocacy organization that is a member of A+ Illinois, the coalition promoting school finance reform.

PRO: MOST SCHOOLS DO NOT HAVE ENOUGH MONEY TO PROVIDE AN ADEQUATE EDUCATION

School advocates believe that the "foundation," or floor, for school funding should be raised about \$1,000 per student—from the current \$4,800 to \$5,835. The foundation level is a baseline amount that includes teacher salaries, classroom materials and physical plant but does not factor in additional costs associated with low-income, special education, gifted or bilingual students. The Legislature provides additional "categorical" grants to help cover those costs.

The \$5,835 figure stems from studies conducted in 2001 by the Denver-based school funding research firm of Augenblick & Myers. The firm arrived at that number by identifying and examining districts that were operating in the black and had at least two-

WHERE ILLINOIS RANKS

TAXES OVERALL

- 43rd in state taxes as a percent of personal income
- 34th in state and local tax burden as a percent of personal income
- 41st in state income tax rates (among 41 states with income taxes)

TAXES FOR SCHOOLS

- 47th in state share of tax revenue for schools per \$1,000 in personal income
- 10th in local share of tax revenue for schools per \$1,000 in personal income

SCHOOL SPENDING

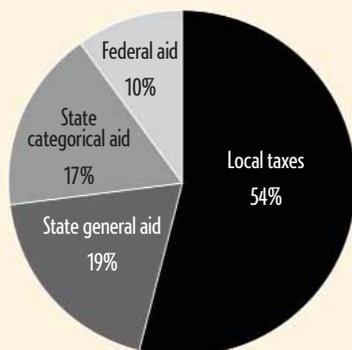
- 10th in school spending per enrolled student
- 50th in funding difference per student between state's highest and lowest poverty districts
- 40th in funding to the states' highest poverty districts
- 41st in state and local spending for education per \$1,000 personal income

STATE SPENDING

- 41st in overall state spending per \$1,000 in personal income

Sources: "The Condition of Education 2003," Illinois State Board of Education; Center for Budget and Tax Accountability, Tax Policy Center

A: SCHOOLS RELY ON PROPERTY TAX



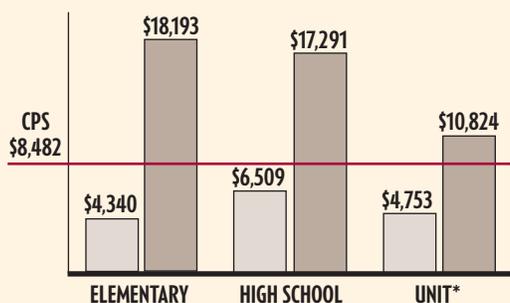
Source: 2000-01, Illinois State Board of Education

thirds of their students performing at grade level or better.

The Metropolitan Planning Council, a nonprofit, nonpartisan group of business and civic leaders, says that 845 of the state's 888 districts, including Chicago, currently fall short of the \$5,835 goal. In addition, three out of four districts are operating in deficit. One reason is the state-imposed property tax cap, which limits increases in school property taxes in 37 counties to the rate of inflation or 5 percent,

B: HUGE DIFFERENCES IN PER-PUPIL RESOURCES

The bars represent the highest-spending and lowest-spending school districts in the state. All the highest-spending districts are in Chicago suburbs; the lowest-spending districts are outside the Chicago metropolitan area. School district names can be found on the Catalyst web site.



* Includes kindergarten through 12th grade.
Source: 2000-01, Illinois State Board of Education

C: POOR, MINORITY DISTRICTS HAVE HIGHER TAX RATES

COOK COUNTY ELEMENTARY DISTRICTS

	Bottom 20	Top 20
Average property wealth per student	\$60,464	\$444,528
Average tax rate	\$4.53	\$2.41
Average % low-income students	53	7
Average % white students	8	74
Average per pupil spending	\$7,300	\$10,900
% students meeting state learning standards	41	82

Note: Numbers are averages of district averages. Additional notes are on the Catalyst web site.
Source: Catalyst analysis of data from 2003 school report cards.

whichever is less. In recent years, inflation has run around 2 percent.

"We've set expectations appropriately high for what we want our students to achieve," says MarySue Barrett, president of the Metropolitan Planning Council. "We know what it takes to meet those expectations on a fiscally efficient basis, and yet we don't guarantee that schools have that. We're really out of whack between the results we say we want" and the funding level provided.

CON: CHOICE, ACCOUNTABILITY AND WISER SPENDING—NOT MORE MONEY—ARE THE KEYS

Students will be able to meet expectations without major funding

increases if schools are held accountable and parents are given choices, counters Herbert J. Walberg, a visiting fellow at the Hoover Institution, a public policy research center, and university scholar at University of Illinois-Chicago. "Accountability and choice have much better prospects of improving achievement than tinkering with the funding system because they put the focus on achievement rather than spending," Walberg says. "Spending more money is not the answer."

PRO: DISTRICTS HAVE LITTLE CONTROL OVER MAJOR COST INCREASES

But proponents of finance reform say that schools are being squeezed by costs they cannot control. Health insurance costs have risen 125 percent since 1991, says Martire of the Center for Tax and Budget Accountability, and schools must carry out a bevy of under-funded state and federal mandates, topped by special education (costing districts a total of \$1 billion) and the federal No Child Left Behind Act (\$1.4 billion to \$1.5 billion).

"Gasoline just went up 20 cents a gallon in the past couple of months," says Walt Warfield, executive director of the Illinois Association of School Administrators. "That doesn't mean we can drive our buses fewer miles. Health insurance costs are going up. Liability insurance costs are going up."

CON: DISTRICTS SHOULD LOBBY TO REPEAL UNFUNDED MANDATES

If such fixed costs are really that burdensome, George Clowes, senior fellow at the libertarian Heartland Institute, would like to know which ones school boards would like to jettison. "I'd like to hear which mandates they've gone to the state and said, 'We don't want this. We want you to repeal it,'" he says. "Part of their responsibility is to say, 'This is enough.'"

CON: STATE GOVERNMENT CAN SAVE EDUCATION DOLLARS

Gov. Rod Blagojevich says there is waste in the system. In his State of the State address, he complained that only 46 cents of every dollar goes into instruction. He says he can

save more than \$1 billion in four years by establishing a new Department of Education under which many functions of local school districts would be consolidated. (See charts D and E.)

PRO: THE STATE HAS A "STRUCTURAL" DEFICIT THAT CUTS IN EDUCATION SPENDING CANNOT RESOLVE

Martire says that in 10 years, the cost of current state programs alone would outpace revenues by \$3.5 billion. This budgetary quicksand is driven by factors like more than \$35 billion in under-funded pension liability, healthcare costs that have doubled every six years since 1980 and under-funded state and federal mandates in a number of areas, led by special education, he says.

Even if the state saves the \$1 billion the governor proposes, this structural deficit will quickly eat it up, he says.

CON: TO INCREASE SCHOOL FUNDING, THE STATE CAN CUT SPENDING IN OTHER AREAS

Paula Wolff, co-chair of the governor's Council of Economic Advisors and former president of Governors State University, dismisses the structural deficit argument. If the state were to examine its spending practices, particularly with regard to the Department of Corrections, significant savings could be found, she believes. Among other things, the state needs to think seriously about the wisdom of continuing to reincarcerate nonviolent offenders picked up on technical violations of parole, Wolff says.

"We're just loading up more people in prison at \$30,000 or more per year," she says. "That can buy a lot of education. A structural deficit assumes that all of the services that are now being provided are essential. And I think that's the wrong assumption."

PRO: WITHOUT AN OVERHAUL OF THE TAX SYSTEM, AN INCREASE IN STATE SCHOOL FUNDING WOULD BE A BAND-AID

"If the only thing we do is raise the foundation level without chang-

ing the underlying system, we'll be back here every year," Barrett says. "Communities will have the same problem: They have no tax base, they can't support schools, they can't attract economic development."

QUALIFIED PRO: LEGISLATORS CANNOT NECESSARILY BE TRUSTED TO REPLACE PROPERTY TAX CUTS WITH HIGHER STATE TAXES

Walt Warfield, executive director of the Illinois Association of School Administrators, says his group is "nervous" about a tax swap because it fears that replacement revenue would not materialize or would be diminished over time by future legislators with less buy-in. Protections would need to be written into any legislation to make tax reforms "tight, controlled and predictable," he says.

Such concerns are valid but could be addressed easily, says Tim Bramlet, president of the Taxpayers Federation of Illinois. "That's pretty curable by writing into the statute the guarantee that the state will get those dollars one way or another," he says. On the flip side, Bramlet adds, "How does the state guarantee that [property taxes] stay down and not creep back up?"

CON: THE PROPERTY TAX PROVIDES STABILITY IN TURBULENT ECONOMIC TIMES

Clowes, of the Heartland Institute, notes that property taxes bring stability you don't get from the sales and income taxes. "If you shift the funding to the state level, you've got to be prepared that when there is a downturn, you're going to have to make some cuts," he says. "The idea of property taxes is that you know what's coming next year. It might not be as much as you wanted, but it's certainly predictable."

CON: THE PROPERTY TAX PROVIDES LOCAL ACCOUNTABILITY

Such fiscal prudence would be more likely to happen with the property tax, says Walberg of UIC, because local communities can keep better tabs on school boards than the state can. "I don't think the state spending more money is key

D: SAVING A BILLION DOLLARS

Gov. Rod Blagojevich claims that creating a new Department of Education would save Illinois more than \$1 billion the first four years. Many of the savings would come from consolidating under that agency various functions of local school districts.

The estimates assume the Chicago Public Schools would not be included in the consolidation. The governor also contends he can reduce expenses by eliminating upper-level positions in the state education bureaucracy, but, at press time, his administration had not released estimates of how much that would save. Here's how the governor's office expects to realize the \$1 billion in savings:

- \$12 - \$20 MILLION A YEAR** **Create "Regional Administrative Service Centers"**
Operated through the Regional Offices of Education, the centers would pool administrative tasks of districts, such as accounting, auditing and accounts payable.
- \$80 - \$180 MILLION A YEAR** **Create a statewide benefits purchasing center**
The administration predicts it can save \$80 million in administrative costs and an additional \$100 million by obtaining lower prices through bulk purchasing of benefits such as health insurance. The department would also attempt to rein in costs of the retired teachers' health insurance program through consolidation with other state-run health insurance programs.
- \$184 - \$552 MILLION OVER FOUR YEARS** **Create a statewide purchasing center**
The center would negotiate better prices for school equipment from suppliers, using the leverage of bulk purchasing. Districts would still buy directly from suppliers, but at state-negotiated prices. Meanwhile, the state would also subsidize procurement tools, such as Web sites allowing districts to order reduced-rate equipment online or buy supplies from other districts. The governor's office cites a study by the consulting firm McKinsey & Co. that pegged potential savings at \$184 million over four years, if bulk purchasing could achieve 5 percent savings, and at \$552 million if it can save 15 percent. The administration sticks by the higher number.
- \$160 MILLION OVER FOUR YEARS** **Reduce school construction overhead**
Blagojevich proposed doling out \$500 million in school construction grants plus another \$50 million in grants for maintenance of schools and related facilities. The Capital Development Board would pay project management fees, now paid by districts. Blagojevich claims the state can reduce those fees from 6 percent to 1 percent. This initiative, unlike the others, doesn't depend on establishing the new agency.

TOTAL SAVINGS: \$712 MILLION - \$1.512 BILLION

E: WHERE THE EDUCATION DOLLAR GOES

During his State of the State address, Gov. Rod Blagojevich lamented the fact that only 46 cents of every dollar spent on education in Illinois went toward "instruction."

Education advocates maintained that that figure was misleading because it didn't include other necessary costs, such as heating, construction, food service and guidance counselors.

The Illinois State Board of Education has since released an updated analysis for the 2002 school year showing how education dollars are spent. The following breakdown is from that analysis.

BREAKING DOWN THE DOLLAR

- 49 CENTS Instruction**
That includes 32 cents for regular instruction and 8 cents for special education. The vast majority of that goes toward salaries. The remaining 8 cents funds ancillary programs such as bilingual instruction, summer school, job training and interscholastic activities.
- 21 CENTS Facilities**
About 12 cents pays for construction of new facilities; 9 cents pays for building maintenance.
- 10 CENTS Instructional support**
This category covers funding for speech therapists, guidance counselors, social workers, assistant principals and others who help with school supervision. It also includes assessment and testing, library services and instructional media (such as audio-visual and computer-assisted instruction).
- 7 CENTS Administration**
Slightly more than one cent goes toward the Illinois State Board of Education, 2 cents pays principal salaries, and one cent pays local superintendent salaries. Between two and three cents pays other administrative costs such as bookkeeping and support for staff.
- 6 CENTS Debt service**
Mostly on bonds issued to build new schools
- 4 CENTS School transportation**
- 3 CENTS Food preparation**

DISCLOSURE: The Community Renewal Society, which publishes Catalyst, is a signatory of the A+ Illinois campaign for finance reform.

because you lose that local accountability," he says. "People who live in a local community can make sure that the system is not only effective but efficient—in other words, that tax monies are being used wisely."

QUALIFIED PRO: INCOME TAXES SHOULD BE RAISED BUT MAINLY TO OFFSET PROPERTY TAX REDUCTIONS

With a flat rate of 3 percent on individuals and 4.8 percent on corporations, Illinois has the lowest income tax rates of all 41 states that have income taxes—it is one of only six that do not have graduated rates for individuals. Illinois could handle an increase of about 1 percentage point, coupled with a decrease in property taxes, says Bramlet of the taxpayers federation. "We've got the capacity," he says of such a swap. "On balance, it would be a good step forward."

He acknowledges that revenue from the income tax might fluctuate more but notes that the tax structure "would better reflect citizens' ability to pay."

PRO: ILLINOIS CAN AFFORD TO RAISE STATE TAXES NOT ONLY FOR PROPERTY TAX RELIEF BUT ALSO TO GIVE MORE MONEY TO POORER DISTRICTS

School advocates variously are eyeing an increase in the income tax of 1.5 to 2 percentage points so that school funding equity is achieved by raising the bottom up. Martire says Illinois can afford such an increase because it is a low-tax, low-spend state.

According to the Washington, D.C.-based Institute on Tax and Economic Policy, Illinois ranks 47th out of the 50 states in total tax dollars per \$1,000 in personal income, a calculation that includes all taxes, fees or other levies (no matter what they are called) that state and local governments charge citizens.

Counting only taxes, Illinois ranks 37th—below the neighboring states of Iowa (33rd), Indiana (18th) and Wisconsin (6th).

Looking at state spending per \$1,000 in personal income, Martire's group found that Illinois again ranks below its neighbors: 41st, compared with 26th for Iowa, 25th for Indiana and 9th for Wisconsin. ■

What reform might look like

A + Illinois, the umbrella group for advocates of school finance reform, has not committed to a specific plan, figuring it would be better to line up support for the concept first. However, two group members have sketched possible tax reconfigurations. Here they are in nutshell.

ASSIGNMENT

Revise the state's tax structure to:

- Reduce the schools' reliance on property taxes.
- Boost minimum baseline spending by \$1,000 per child.
- Increase overall revenue to arrest what some see as a growing structural deficit.

SOLUTION

From the Chicago-based Center for Tax and Budget Accountability: Change the tax structure to generate an additional \$6.7 billion in revenue:

- Hike the state's personal income tax from 3 percent to either 4.5 percent or 5 percent, generating \$3.7 billion or \$5 billion;
- Include retirement income as personal income for seniors with adjusted gross incomes above either \$75,000 or \$100,000, raising \$207 million to \$359 million depending also on the new income tax rate;
- Hike the state's corporate income tax to either 7.2 percent or 8 percent (from the current 4.8 percent), generating either \$442 million or \$491 million;
- Expand the sales tax to include all personal services, entertainment and possibly other consumer services, raising \$580 million to \$900 million;
- Expand the sales tax to include food, generating \$1 billion;
- Eliminate tax expenditures, raising \$500 million.

HOW THE \$6.7 BILLION WOULD BE USED:

- \$2.4 billion to replace property tax savings, roughly 25 percent of property taxes currently going to education.
- \$1.8 billion to increase the minimum per-student spending level from \$4,800 to \$5,835.
- \$2.5 billion to eliminate a structural deficit in state education spending that the center says will deepen over time.

TAX RELIEF

- Property tax reductions of at least 20 percent. "The amount of property tax relief would show up on every homeowner's bill," says center Executive Director Ralph Martire. "It's completely transparent. Folks need to know this stuff."
- To counteract the regressive effect of a hike in the sales tax on low- to moderate-income people, the plan advocates refundable tax credits.

PROTECTIONS FOR SCHOOLS

- To provide greater truth in budgeting, use the prior fiscal year's spending as the base for the current year. "No more lottery shell games," says Martire. "Whatever [amount] it was that went to schools in the prior year, you've got to start with that."
- That amount would then be adjusted by the employment cost index (ECI), not the consumer price index (CPI), because "it's much more reflective of the labor and energy and healthcare costs, etc., that school districts have to pay," he says.

ALTERNATIVE PLAN

Proposed by Cook County Assessor James Houlihan, this plan would raise \$6 billion to provide tax relief and an extra \$1.5 billion for education.

- Raise state taxes by \$4.5 billion to provide more property tax relief—25 percent of the total, not just 25 percent of the amount going to schools.
- Hike the personal income tax rate to 4 percent from 3 percent and the corporate income tax rate to 6.4 percent from 4.8 percent.
- Increase the personal income tax exemption to \$6,000 from \$2,000. Expand tax credits to the lowest earners.
- Lower the sales tax to 4 percent from 5 percent while broadening it to include some services and eliminating a number of exemptions.

Ed Finkel

Glencoe, Midlothian illustrate funding gap

Teacher salaries, class sizes the main difference

By Ed Finkel

The biggest difference between high-spending districts and low-spending districts is teachers, mainly what they're paid but also their relative numbers.

That finding in a December 2002 study by the U.S. General Accounting Office is illustrated by a comparison of two elementary school districts in Cook County: north suburban Glencoe District 35, which spends \$10,935 per pupil, and south suburban Midlothian District 143, which spends \$6,584 per pupil.

The comparison also illustrates one of the consequences of Illinois' high reliance on property taxes to fund schools. Glencoe, an affluent community with few minorities, has a lower tax rate than does Midlothian, a middle-income, mixed-race community.

In property wealth per student, Glencoe ranks 20th among the county's 115 elementary districts while Midlothian ranks 21st from the bottom.

With higher salaries and higher reimbursement for college courses, Glencoe has been able to build a better educated teaching force. It also can provide smaller classes. And it has more specialists in such areas as art, music, technology and foreign language.

Midlothian Superintendent Michael Hollingsworth said that if the district had

more money, he would hire more teachers. "Lowering class sizes would be a must," he says. "But to lower class size, you need building space, and our building space is very limited."

He also would boost teacher salaries to improve hiring and retention and offer more tuition reimbursement for courses that teachers take.

"We're constantly losing good people to other districts, especially to high schools," he says. But he and his administrative staff have worked to appeal to teachers in other ways, for example, by opening a daycare center in a district building that is largely occupied by a nine-district special education cooperative.

In the area of capital spending, he would add cafeterias to the district's schools and increase gym space so the district would not need a state waiver exempting it from the requirement that physical education be offered five days per week.

Glencoe Superintendent Cathlene Crawford also can testify to the difference that money makes in recruitment. "We have lost candidates that we wanted to hire because our salary was not competitive with our neighbors," she says.

However, district Business Manager Ron Chilcote notes that the district generally is in good shape when it comes to hiring. "People gravitate to this area from other parts of the state," he notes. ■



JOE GALLO

With a rich property-tax base, schools in north suburban Glencoe (left) are able to spend \$4,351 more per pupil than schools in south suburban Midlothian, a middle-income community.

NEITHER THE RICHEST NOR POOREST, DISTRICTS STILL FAR APART

The following data are from 2003 school report cards, the U.S. Census and interviews with district officials.

	GLENCOE	MIDLOTHIAN
FINANCES		
Property wealth per pupil	\$325,000	\$88,000
Median household income, 2000	\$164,000	\$50,000
School property tax rate	\$3.38	\$3.68
Revenue from local sources	93%	48%
Spending per pupil	\$10,935	\$6,584
Size of deficit	\$530,000	\$560,000
STUDENT BODY		
Total enrollment	1,325	1,769
Black, Hispanic	2%	39%
Low-income	1%	21%
FACULTY		
Teachers	125	130
Classroom teachers	65	85
Special education teachers	15	25
Other specialists	45	20
Pupil-teacher ratio	14.6	19.5
Salary range	\$30,000-\$83,000	\$28,000-\$60,000
Average salary	\$52,000	\$43,000
Average years experience	12.8	12.6
Teachers with master's degrees	63%	18%
Teacher professional development	\$120,000	\$30,000-\$40,000
Annual tuition reimbursement up to	\$1,000	\$400
OTHER RESOURCES		
School budgets for books, materials, etc.	\$75,000-\$100,000	\$50,000
Textbooks replaced	Every 5 years	Every 5 years
Computers replaced	Every 3 to 5 years	Every 5 years
Physical plant	310,000 square feet	202,000 square feet
MEETING STATE STANDARDS		
3rd-grade reading	86%	51%
3rd-grade math	95%	71%
8th-grade reading	96%	53%
8th-grade math	90%	36%

Standards push helps lawsuits

Simply filing a suit—or threatening to—can spur reform. Then political organizing kicks in.

By Daniel C. Vock

Across the country, 25 states are now facing lawsuits challenging the way they pay for schools, according to the New York-based Campaign for Fiscal Equity, which tracks the progress of such suits.

Indeed, lawsuits are by far the most common tactic activists have used to try and force states to change their education funding systems. In all, 45 states have faced lawsuits filed by reformers looking to the courts for relief. And while every state constitution includes an education clause that can be used as a springboard to a lawsuit, courts in some states have been more willing than others to enter the political thicket to enforce them.

Between 1973 and 1988, funding reform advocates won only seven of 22 lawsuits. But since 1989, activists have prevailed in 19 of 29 suits. (A number of states had lawsuits considered during both periods.)

Plaintiffs are succeeding more often largely because of the standards-based reform movement that's been embraced across the country, says Michael A. Rebell, executive director and top lawyer for CFE, a coalition of parent organizations, community school boards, citizens and advocacy groups. CFE won its own lawsuit last year in New York State.

Rebell explains that these reforms require students to take standardized tests and hold teachers and schools accountable for how well students perform. Through these requirements, states define what the standards are for an adequate education and provide data to show whether or not those standards are being met. If students do not, the data eases the way for plaintiffs to prove to a judge that the state isn't meeting its obligation, Rebell explains.

"It brings the Constitution alive," he says.

A 1989 Kentucky lawsuit was one of the first to link student progress on standardized tests to the adequacy argument, becoming the "blueprint" for subsequent lawsuits, says Steve Smith, an education policy specialist at the National Conference of State Legislatures.

Simply filing a suit—or threatening to—can also spur reform, even if the plaintiffs do not win a favorable verdict, Rebell and Smith both note. That happened in both Maryland and Pennsylvania.

"More and more, these litigation efforts are tied to a basic political organizing campaign," Rebell says. And when plaintiffs have lost, organizations have helped push for the changes anyway, he adds.

Here are some highlights from other states, and their ranking on the annual Education Week survey. "Adequacy" is a measure of how many students received at least the national average (\$6,580) in per-pupil funding for 2000-2001, and how close to the national average funding was for students whose districts did not provide that amount. "Equity" is a measure of the state's contribution to education and the extent to which that money is targeted to low-income students.

NEW YORK STATE

ADEQUACY: A

EQUITY: C-

In a June 2003 ruling, New York State's highest court gave lawmakers until July 2004 to provide students in New York City with access to a "sound basic education." The deadline came as the result of a 1993 lawsuit by the Campaign for Fiscal Equity.

The court also told the state to conduct a "costing-out" study to determine how much money would be needed. One such study, initiated in part by CFE, estimated that it would take \$7 billion to give all students in

the state that level of instruction.

Gov. George E. Pataki has formed a panel to come up with suggestions on how to comply. At Catalyst press time, the panel was scheduled to release its findings in mid-March.

ARKANSAS

ADEQUACY: C-

EQUITY: B

Two 'special masters,' appointed by the Arkansas Supreme Court, will determine by mid-April 2004 if the state has met its obligation under the Arkansas charter to provide an adequate education to each schoolchild.

In November 2002, the state Supreme Court found the school funding system to be inadequate and inequitable. (The special masters it appointed are both former high court members.) The case had been in the courts for at least 20 years.

In response, the legislature passed a series of measures designed to comply with the court's decision. It raised the sales tax to 6 percent from 5.125 percent, bringing in \$364 million in the first year, and added corporate taxes designed to bring in \$8 million. Lawmakers approved mandatory consolidation of districts with fewer than 350 students, beefed up state-funded pre-kindergarten programs and gave teachers in poor areas bonuses for teaching there for their first three years.

OHIO

ADEQUACY: B-

EQUITY: D+

Four times, the Ohio Supreme Court has ruled that the Buckeye State's school funding system violates the state Constitution. The court even used one decision to outline changes to bring the state into compliance, but the legislature came up with other ideas. In 2002, the justices threw up

their hands. They again found the system unconstitutional but decided there was nothing more they could do to force the legislature to comply.

The court has maintained since 1997 that lawmakers should conduct “a complete systematic overhaul” of the funding system, especially its reliance on property taxes. In response, legislators boosted funding and initiated a five-year, \$3.5 billion school construction program. They also added a number of accountability requirements for districts.

But lawmakers have yet to change the “overreliance” on property taxes that the high court found problematic. Writing separately, two judges predicted that more lawsuits would ensue as a result of the 2002 decision. However, a month after the court issued that ruling, two new judges joined the seven-member court, which observers widely believe will now be less sympathetic to funding challenges.

PENNSYLVANIA

ADEQUACY: B
EQUITY: D-

Court challenges have failed three times, most recently in 1998. But several grassroots organizations continue to push for changes, and made education funding a top issue in the 2002 governor’s race.

The Democratic victor, Gov. Ed Rendell, clashed with legislators during his first year on the job as he tried to boost the state’s share of school funding to 50 percent from 35 percent. The result was a six-month stand-off during which schools didn’t receive any money. In this year’s budget, Rendell proposed increasing subsidies to local schools by \$250 million, compared to the \$175 million he agreed to in order to break last year’s stalemate with the Republican-controlled legislature. Republicans have already objected.

MARYLAND

ADEQUACY: B
EQUITY: D

In 2002, Maryland lawmakers agreed to a six-year plan to overhaul school funding and eventually ramp

up the state’s contributions to schools by \$1.3 billion a year. The legislature and governor signed on to the report of the Thornton Commission—a panel of lawmakers, administration officials and private citizens—largely to avoid court intervention.

Back in 1994, the city of Baltimore and the Maryland chapter of the American Civil Liberties Union sued the state, alleging that Baltimore’s children were not receiving an adequate education. The case was settled before trial, but the plaintiffs went back to court in 2000, accusing the state of failing to live up to its end of the bargain. After the judge made a key ruling in favor of the plaintiffs, the two sides settled with the six-year plan.

Under the legislation, new money for schools initially came from higher cigarette taxes. Republican Gov. Robert L. Ehrlich Jr. has proposed allowing slot machines at racetracks and two other locations in order to pay for next year’s share of additional funds. But House Speaker Michael E. Busch, a Democrat, opposes Ehrlich’s plan.

WISCONSIN

ADEQUACY: A
EQUITY: C+

The state is now operating under a “three-legged stool” of finance reforms hashed out under former Gov. Tommy Thompson, now the Secretary of Health and Human Services under President George W. Bush. Two court challenges that attempted to enact reforms failed, the last time in 2000.

Under the three-part plan, Wisconsin pays two-thirds of education costs. Teachers agreed to state-determined raises if collective bargaining negotiations fall through with their local school districts. And districts became subject to revenue caps set by the state, which limit the amount of money schools can raise through property taxes.

Last year, the state fell short of its two-thirds obligation—though not by much—because of budget constraints. The amount of money Wisconsin gives to each district depends

on how much the district raises in property taxes, which creates disparities among districts. Currently, a panel is studying ways to alleviate some of those problems.

MICHIGAN

ADEQUACY: B+
EQUITY: C

In the 25 years before 1994, Michigan voters defeated 11 referendum initiatives to revamp the way the state pays for schools. In 1994, though, they approved “Proposal A,” which raised the state sales tax from 4 percent to 6 percent and increased other taxes as well. The plan reduced property taxes and limited future increases. Most districts now cannot use property taxes to pay for operating costs.

Voters were given the choice to either approve Proposal A, or have income taxes increase automatically. Roughly 69 percent of voters opted for Proposal A.

The move was the end result of frustration over high property taxes, which came to a head in 1993. That year, Kalkaska, a small town in northern Michigan, closed its schools rather than raise property taxes. Later that year, the legislature abolished all school property taxes that weren’t used to pay off debts and came up with Proposal A. ■

ON THE WEB

Go to www.catalyst-chicago.org for links to these and other reports and organizations:

REPORTS

- Education Week’s “Quality Counts 2004,” which grades states on finance adequacy and equity.
- Illinois State Board of Education’s “Condition of Public Education 2003.”
- Illinois Education Funding Advisory Board report on reform recommendations.

ORGANIZATIONS

- A+ Illinois
- National Conference of State Legislatures, which provides state-by-state information.
- Campaign for Fiscal Equity, for state-by-state updates on finance litigation.
- Heartland Institute

Research

Student engagement varies by race and type of instruction

Study finds Hispanics typically prefer group work, while Asian students favor working alone

By Jody Temkin

Given a choice between working independently during classes or working in a small group, Von Steuben high school senior Maria Proano would choose the group work.

"If you get something wrong, someone else in the group can help you," Proano says, "and you can get different opinions on a problem."

Given the same choice, Von Steuben sophomore Anna Tran would work alone. In groups, she explains, sometimes one person ends up doing everything while others copy the answers. "I'd just rather do it by myself," Tran says.

Proano is Hispanic. Tran is Asian. And that might be the basis for their preferences. A study of student

engagement in high school math and science classes found significant variations in engagement levels among racial and ethnic groups, depending on whether students were listening to a lecture, working independently at their seats or working collaboratively in groups.

Part of an evaluation of the National Science Foundation's Urban Systemic Initiative, the study defined engaged students as those who "pay close attention to ongoing classroom activities, are interested in the content of classroom lessons, and may feel that time flows quickly."

Hispanic students were found to have the lowest overall level of engagement, while black students had the highest. Whites and Asians were only slightly less engaged than blacks.

But Hispanic students became just as engaged as black and white students when the activity was group work. Listening to a lecture or doing individual work caused Hispanic students' engagement to drop.

In contrast, Asian students were most engaged when working alone and least engaged by group activity. Black students had similar engagement levels across all three types of work.

The study included two high schools in each of four cities: Chicago; El Paso, Tex.; Memphis; and Miami. Researchers observed the classes of one math and one science teacher at each school for one week. Ten students from each class were given vibrating beepers and, when beeped,

were asked to complete brief surveys about what they were doing and how they were feeling about the class.

Students in Chicago had the lowest overall engagement scores of the four cities, while El Paso students had the highest. However, with only two schools included from each city, co-author Kazuaki Uekawa of the University of Chicago says the sample is much too small to draw any city-to-city comparisons.

And since the sample size of students was relatively small (only 21 Asian students were in the study), Uekawa says it's also too early to draw conclusions based on race or ethnicity.

"It's too big of a sweeping statement to say that 'Hispanics like this' or 'Asians like that,' but it's a starting point for looking at this," says Uekawa.

GROUP WORK IS ON THE RISE

In the study, students listened to lectures 41 percent of the time and worked alone 34 percent of the time, compared to working in groups for only 13 percent of class time. Those figures are consistent with previous research that shows lecture and seat-work are the predominant classroom activities, says Uekawa. Group work is on the rise, though, particularly in math, says Johnny Lott, president of the National Council of Teachers of Mathematics.

"There's a growing body of knowledge that says kids do learn some math better in groups. Sometimes we expect kids to learn things totally on

OTHER NOTEWORTHY FINDINGS

- Individual seating resulted in a much higher engagement level than round table seating, and students were much more engaged when the teacher assigned seats. When students got to select their own seats, engagement dropped—perhaps because they sat near friends and socialized, the authors suggest.
- Researchers considered that Hispanics might prefer collaborative work because it allowed them to learn in their native language with other Spanish-speakers. The data did not support that hypothesis.
- The study looked at the relationship of engagement to the students' perception of the relevance of the material to college studies, everyday life, testing and a future job. Engagement was highest when students found the content related to everyday life.

their own, when simply talking to their peers about it helps in the learning process,” Lott says.

Lott adds that studies done in Montana, where he lives, have shown Native American students, like Hispanics, prefer collaborative learning. “They perform better in school when they’re able to talk with each other,” Lott says.

Students interviewed at Von Steuben report working in groups at least once a week, depending on the teacher.

Martin Gartzman, chief officer in the CPS Office of Mathematics and Science, says assigning group work is up to the individual teacher and adds that there is no way to accurately measure whether group work is on the rise in CPS.

Not surprisingly, group work was rated highest by those students who also said they had more fun and felt less sleepy when working with others. More surprising, says Uekawa, is the finding that group work discouraged chatting (talking about non-school matters). Students were found to be more likely to chat with friends during lectures and seatwork.

Kenneth Addison, an associate professor at Northeastern Illinois University who teaches a course in cultural diversity and schools, says it’s not surprising that the study found ethnic and cultural differences in learning preferences.

Addison explains that Hispanic cultures value the common good over individual achievement, which explains why Hispanic students might prefer working together. He also theorizes that the overall lower engagement of Hispanic students in the study might be a result of their more interdependent culture.

“Relationship is paramount [for Hispanics],” says Addison. “They look to the teacher and want to establish a relationship. People count first.” If the teacher doesn’t engage them on a personal level then the student might not become engaged in the class.

In East Asian cultures, Addison adds, the learning process “requires an individual focus on perfection because that’s what is required to

bring honor to your family.”

For teachers who have a diverse student population, Addison recommends using several instructional models, perhaps spending one-third of class time each on teacher-centered instruction, well-structured group activities and individual work.

“If you rotate through the three, you’ll touch every learning style,” he says. “You also can create group activities that have imbedded individual responsibilities, and that’s something I’ve found my East Asian students can enjoy because they can work at home and get their portion done as perfectly as they can, but also contribute to the overall group.”

NOT ENOUGH DIFFICULT MATERIAL

The study also examined students’ perceptions of the curriculum, and found students believed they were exposed to new content only 37 percent of the time. Group work again fared the best, with students believing they were exposed to new content 54 percent of the time while in groups, 10 percent more than when they were listening to a lecture.

Students also reported covering what they deemed to be difficult content only 10 percent of the time, echoing previous research. Students gauged their work to be “very easy” or “easy” 30 percent of the time.

Uekawa says this finding points to a perception gap between students and teachers, and recommends teachers ask students directly if the work is too easy or too hard, “to see what students are thinking.”

Lott says he wouldn’t generalize about math classes being redundant. “It may depend on the sample of students they used or the types of materials being used,” he says.

The study also found engagement did not depend on the teacher. “We tend to think of boring teachers or bad teachers,” Uekawa says, “but based on our sample, the difference between teachers was not that great.” Instead, the bigger gaps were found among individual students in the same class, or when the same student was engaged in different activities.

RESEARCH SUMMARY

WHO CONDUCTED IT: Kazuaki Uekawa, the University of Chicago; Kathryn Borman and Reginald Lee, the University of South Florida

WHAT THEY FOUND: Hispanic students were less engaged in high school math and science classes than white, black or Asian students. Hispanic students found group work to be more engaging than lecture or seatwork, while Asian students showed a preference for working alone. The engagement level of black students remained the same across all methods of instruction. Overall, group work was more engaging than seatwork or lectures.

WHO WAS STUDIED: Students at eight high schools in four cities (including Chicago) were studied for one week during their math and science classes. Students were beeped at random and then asked to answer a brief survey about what they were doing in class and how engaged they felt in the work.

RECOMMENDATIONS: Teachers should use both group work and individual work so that they reach all students.

FOR MORE INFORMATION: The study, “Student Engagement in America’s Urban High School Mathematics and Science Classrooms: Findings on Social Organization, Race and Ethnicity” can be found online at www.estat.us/id12.html.

Time also proved to be a factor. Students reported slightly lower engagement levels on Mondays and Fridays, and during classes that lasted more than 45 minutes. Uekawa says the 90-minute block scheduling of classes in El Paso, “really restricts opportunities to learn because [teachers] seem to do less teaching.” Teachers would teach for about 30 minutes, students would work on seatwork for another 30 minutes and then they’d socialize until the class was over.

In Chicago, students with low math scores are assigned to double periods of algebra this year. Gartzman says in some schools those classes are back-to-back, while other schools separate the periods. “We’re looking carefully at the effectiveness of the various configurations,” he says. Grades on first-semester tests will be the first indication of how the configurations are working. Says Gartzman, “Some people say [double periods are too long] and others say having back-to-back classes allows the kind of problem solving you’re not able to do in 45 minutes.”

Jody Temkin is a Chicago-based writer. To contact her, send an e-mail to editor@catalyst-chicago.org.

Schools skeptical that new policy will curb dropouts

Half of high schools to get **more outside help** to combat truancy

By Maureen Kelleher

The School Board's new dropout policy grabbed headlines because of its requirement that students and their parents sign a consent form that spells out the likely consequences of their decision, such as fewer job opportunities and a greater chance of imprisonment.

However, more important to advocates, the policy takes aim at the chronic "pushout" problem caused by the longstanding practice of dropping students who have too many absences. That practice, common in urban school districts nationwide, is now prohibited. "Schools are moving students out, which we absolutely don't want to happen," says Chicago Public Schools CEO Arne Duncan.

Even so, some school personnel doubt the new policy, or any policy, will have much impact.

Lynne Rone, who oversees attendance at Calumet High School, says, "If a child is not going to come, he is not going to come whether he drops out formally or just doesn't come. The policy doesn't matter."

Wilfredo Ortiz, former director of high school programs and current principal of Gage Park High School, questions how the board will monitor whether schools comply with the new rules. Ortiz says counselors, a social worker and a psychologist at Gage Park all work with students who have attendance problems, and adds that he himself visits a home before dropping a student.

In some cases, calls home about truancy are unproductive, Ortiz says. "The parent has already lost control. If the parent can't get them to go to school, how can we?"

Community groups, however, are cautiously praising the policy. "CPS is admitting they have a push-out problem. That was unprecedented," notes Bill Leavy, executive director of Greater West Town Community Development Project and leader of a coalition that has pressured the district to address the issue.

Here are the specific steps schools must follow:

- Before dropping a student from enrollment, the school must refer

the student and family to social service agencies that can help solve problems that may be contributing to the student's truancy.

- If truancy persists, the parent or guardian can be taken to court, a practice that the system rarely has used in the past.
- If a school can't locate a student, staff must call all emergency numbers, have someone visit the student's last known address and fill out a CPS lost child report.
- Schools cannot send students home for tardiness or dress code violations, and are encouraged to use alternatives to out-of-school suspension, including peer juries, to keep their students in school.

But activists also question how the board will enforce due process provisions that high schools have routinely ignored. State law requires schools to offer due process to dropouts who want to re-enroll, giving them the right to meet with a hearing officer, who will determine whether the student is eligible to re-enroll and can graduate by age 21. If so, the school must re-enroll the student.

The new policy states that parents and students must be informed of their right to return to school and to a due process appeal if that right is challenged. But the consent form makes no mention of either of those rights, raising the question of how the board will monitor whether the school has provided the information.

"I have several cases of students who have been de-enrolled. The parents have tried to get them back in. I've tried to get them back in. Most of the schools aren't aware of the law of

BLACKS LEAST LIKELY TO GRADUATE

Both the Harvard Civil Rights Project and the Consortium on Chicago School Research show significant racial gaps in Chicago's graduation rate. (Data from the Consortium are preliminary findings.)

GRADUATION RATE, CPS CLASS OF 2001

	Overall	Black	Hispanic	White	Asian
Civil Rights Project	48.8	42.1	50.8	65.3	80.6
Consortium	50.5	46.1	50.3	62.7	81.9

Report says flawed data hide real scope of dropout problem

due process itself,” says Terrance Wallace, youth director for Westside Health Authority, an Austin-based nonprofit.

Leavy says he told board officials that they needed to train school staff to implement due process because “they’re gonna resist it.”

The new policy initially sparked loud protest when some activists complained that the first version, approved in January, would allow students who have reached the legal dropout age of 16—but who are not yet 18 and thus still minors—to drop out without their parents’ consent. The rewritten policy, passed at the February board meeting, closes that loophole and adds the consent form.

EXTRA EYES, EARS TO FIND TRUANTS

To augment the policy, CPS is funneling \$1.7 million to nine social service agencies that will work with 36 high schools. The board did not choose schools based solely on poor attendance, however. “We selected some of the lowest attendance schools [but] we wanted to spread it out across the system,” says CPS spokeswoman Joi Mecks.

The social service agencies will counsel struggling students and their families, make sure they are connected to social services and add extra eyes, ears and feet on the ground to find and recover truants.

“When you sit down with the attendance people, they’re very well aware of who’s cutting and who’s not coming to school, but they can’t keep up with it. There’s too many kids,” observes Phil Licata, a program manager at Youth Outreach, which contracted with CPS to work with truants at six far North Side high schools. “When you have 150 kids on your list of chronic truants, and you have to teach class on top of running the attendance office ... it’s physically impossible.”

“The biggest challenge sometimes is just to nail down the parent, especially if you have a child who doesn’t want you to know how to [locate] them,” says Renee Joiner, vice president of human resources and community development for ChildServ, another contractor

Chicago’s dismal dropout rate has garnered plenty of attention in recent months, but a new report contends that other districts across the country also consistently underreport the number of dropouts and overestimate graduation rates.

State graduation rates also mask significant racial gaps in who earns a diploma, warns the report from the Civil Rights Project at Harvard University. Other partners in the project include the Urban Institute, Advocates for Children of New York and the Civil Society Institute.

The report found that Illinois is doing better than other states overall. In 2001, the state posted a graduation rate of 75 percent, compared to 68 percent nationwide. But Illinois ranked ninth in terms of racial disparities in graduation rates.

“Although we may be doing better than national averages on the whole, those gaps are significant,” says State Superintendent of Education Robert Schiller. He says a new state-level tracking system that will be rolled out in 18 months should make data-reporting more accurate. The new system will give each student an individual identifying number that will stay with him or her throughout their school career, even if they transfer between school districts.

The Civil Rights Project report, “Losing Our Future,” warns that dropout and graduation rates reported by states are often misleading because states rely on self-reported data from individual districts, which is often unreliable. That holds true in Chicago for several reasons:

TRANSFERS ARE HARD TO TRACK

Schools often lack sufficient time and staff to determine whether students actually show up at their new school. In Chicago, transfers are considered valid once the old school receives a transcript request from the new school. In practice, however, there is typically little or no follow-up or monitoring of the practice.

DROPOUTS ARE NARROWLY DEFINED

Chicago and other districts count students who leave high school to enroll in a GED program as transfers. However, these students are far more likely to eventually drop out altogether

and never obtain their GED. According to the American Council on Education, only 2 percent of adults who did not have a high school diploma attempted to get their GED in 2001.

In addition, a GED does not offer the same earning power as a diploma. “To be credible, the dropout definition should be simple and clear: Count any student who does not hold a high school diploma,” urges Maria Robledo Montecel, director of the Intercultural Development Research Association, a Texas-based education nonprofit.

Students who are incarcerated are also frequently left out of the equation. CPS has maintained it should not be penalized for having large numbers of incarcerated students and students in alternative programs. Many districts level similar criticisms, notes Jay Greene of the Manhattan Institute, an education think tank, but he says these criticisms don’t wash. “They begin to confuse blame with a description of reality,” Greene says. “We ought to count people who go to jail as dropouts.”

DISTRICTS ARE NOT MONITORED

There is virtually no oversight of the data schools submit on who leaves and why. The Civil Rights Project report cites a 2001 estimate that the federal government spends over \$40 million on the National Assessment of Educational Progress, but less than \$1 million on dropout statistics.

“We are at the mercy of what local districts supply to us in terms of data,” notes Schiller. However, he advocates a carrot rather than a stick to get schools to both improve their data collection and do the difficult work of holding on to potential dropouts. He points to Senate Bill 2918, which would raise the compulsory attendance age to 17 and help fund programs to give students incentives to stay in school, undergo job training and graduate. The report recommends that Illinois provide support and incentives to districts that start with low minority graduation rates but improve substantially over time.

Maureen Kelleher

agency. “Sometimes a school might not even have an accurate address or phone number. Sometimes it takes three to four to five attempts to reach the parent before we even have a phone conversation with them.”

Leavy is hopeful but skeptical about how much the policy will change how schools operate. “I think they intend to [enforce the

new policy], but I think there’s a pretty large disconnect between the intent of the front office, the needs of the public relations department and the life of a local school.”

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Portfolios the first phase of new principal screening

600 eligible candidates must document leadership experience and students' academic gains

By John Myers

CPS is in the midst of launching the first phase of its new principal screening policy, sending out portfolio packages to the 600 candidates currently on the School Board's principal eligibility list.

Those candidates, most of them assistant principals and teachers, will have three months after receiving their package to complete a portfolio demonstrating their leadership experience and the academic progress of the children they have worked with.

If they miss the deadline, they will have to start from scratch, completing all the new eligibility requirements that the School Board adopted in February. If a review committee determines the portfolio falls short, the candidate will lose eligibility and have to undergo additional training that might include a paid internship.

CPS says its new guidelines are intended to "raise the bar" and provide local school councils with an improved pool of principal candi-



E.J. RUBLEV

In early March, Nancy Laho (left), chief officer of principal preparation for CPS, and Clarice Berry, president of the Chicago Principals and Administrators Association, attend a conference where specifics of the principal screening policy were explained.

dates. The requirements come as the system faces a leadership void, with nearly 400 current principals eligible to retire over the next four years.

Nancy Laho, chief officer of principal preparation and development for CPS, says the board needs to take responsibility for having approved some principals in the past who "were not ready yet, but could have been" with additional preparation.

Laho says the portfolios should include testimonials from at least three references, and essays reflecting on a candidate's leadership experiences.

The portfolios will be reviewed by a committee of three representatives from Laho's office and two from the Chicago Principals and Administrators Association, which worked closely with CPS on the portfolio requirements. The two groups also had input from focus groups, assistant principals and other organizations like the Chicago Public Education Fund, an offshoot of the Chicago Annenberg

Challenge, and the Financial Research and Advisory Committee (FRAC) of the Civic Committee of the Commercial Club of Chicago.

The review committee will use a scoring rubric, or guide, that is aligned with the school district's seven leadership standards. Those standards, which were also used in the now-defunct Principal Assessment Center put together by FRAC, range from curricular management to basic leadership and interpersonal skills.

The new policy takes effect July 1st.

NATIONAL TREND, BUT ACTIVISTS FEAR FAVORITISM

School officials say it's critical to find better candidates, given the increasingly complex demands that principals face. And tougher standards are part of a national trend, says Milli Pierce, former director of the Harvard Principal Center.

Savvy superintendents have to choose from a shrinking pool of candidates who can operate effectively in

MORE HOOPS FOR WOULD-BE PRINCIPALS

Current principals, interim and acting principals with more than six months experience, and recent graduates of approved principal-preparation programs automatically meet the new guidelines. Others on the current eligibility list must submit a portfolio within three months of receiving portfolio packages.

Others who have never established eligibility with the board must:

- Pre-register with CPS and pass a background check.
- Possess or obtain a Type 75 certificate and a master's degree.
- Submit a portfolio demonstrating instructional and managerial leadership, including references and essays.
- Successfully complete a writing sample, policy exam and interview.
- Complete an approved program of study in the principalship.

Teachers to 'grade' principals

Chicago principals may soon be getting report cards from their own teachers.

The Chicago Teachers Union has sent each of its 33,000 members a 28-question survey intended to measure principals' effectiveness as instructional and organizational leaders. The results will provide critical information for teachers who are considering a transfer and parents who are choosing a school for their child, the union maintains.

"Bad principals create conditions that lead to teacher attrition, student turnover and ultimately low student achievement," says CTU President Deborah Lynch.

The survey is the third in a series of school reform studies sponsored by the union. Robert Bruno, associate professor of labor and industrial relations at the University of Illinois at Chicago, designed all three. The first two surveys covered teacher attrition and parental involvement in reform. Future studies may address topics like school violence, partnership schools, the No Child Left Behind law and teacher evaluation.

"[Lynch] is giving her members a chance to do something they've never done before," says Bruno.

The survey, based on similar surveys used in Milwaukee and Rochester, N. Y., asks teachers to rate their agreement with statements regarding their principals' leadership qualities, as well as their adherence to union rules.

Respondents are also asked to give their principals letter grades.

Each school that receives a significant number of responses will get a "principal report card" posted on the CTU website. A response rate approaching 50 percent would be required to rule out bias, says Bruno.

A response rate as low as 25 percent might accurately represent a school's teachers, he says, but in such cases, the responses need to be from a demographically representative sample of teachers. Bruno says union leaders cut demographic questions to keep the survey short and quick to take. "In this case, CTU is betting on a really high response rate" to offset any bias, says Bruno.

In subsequent research, the union may correlate survey results with teacher attrition, standardized testing and other school performance indicators.

To be counted, returned surveys need to be post-marked no later than March 29. CTU plans to publish results on their website by mid-April.

John Myers

complicated urban districts that face increasing accountability, Pierce says.

With superintendents facing stiffer consequences for picking ineffective principals, some are even going beyond the standard background checks and visiting schools where applicants once worked, Pierce adds. "They're doing everything they can to make good decisions [because] heads are rolling, starting at the top."

In Chicago, some local school councils also have made school visits.

The new requirements have raised the ire of some activists, who say the standards will encourage favoritism and stifle interest from out-of-town talent.

"I just don't think this is a process that's worth trying to perfect," says Julie Woestehoff of Parents United for Responsible Education. She is especially critical of the personal interview requirement.

Before 1988, CPS used interviews and exams to screen candidates. Woestehoff says the interview process back then was biased in favor of the politically connected. Its "cultural approach" also favored white men, she says.

Clarice Berry, president of the Principals' Association, agrees that interviews could easily be conducted unfairly. To guard against that, she suggests sequestering a group of applicants and asking each one the same questions. Berry says representatives of school reform groups might be included among the interviewers, along with CPS officials and experienced, successful principals. The principals' group expects to work with CPS to develop the interview protocol.

Martin Haberman, a professor at the University of Wisconsin at Milwaukee, says CPS should consider using an interviewing system that compares a candidate's answers to those given by established principals. Haberman has designed such a system, using hundreds of interviews with principals whose effectiveness in highly bureaucratic urban school districts has been confirmed by student achievement and parental support. Fifteen urban districts use Haberman's system.

Haberman says his interview tests an applicant in 11 areas that range from curricular and administrative leadership to community relations skills. Typically, an unsuccessful principal either "schmoozes" well but lacks vision, or sets good goals but cannot get along with people, he says.

Haberman, who has worked with and observed CPS for 45 years, also questions whether the district can keep politics out of the principal selection process. "Chicago wants to go on selecting people with methods that have no predictive validity," he says.

Laho says the design of the interview is on the backburner while the details of the portfolios and exams are hammered out. The writing sample requirement will be outsourced to a company that builds web-based, supervised and timed writing systems. A request for proposals is in development, she says.

'DEVIL IS IN THE DETAILS'

Prospective principals will also have to pass an approved program of study that relates to school leadership. Laho says her office soon will work with the Principals' Association, the Illinois Administrators Academy and university partners to identify classes for this requirement.

The tight implementation schedule concerns some reformers. Don Moore of Designs for Change, which trains local school councils to select principals, says, "There are all kinds of 'under construction' signs. ... The [specifics] should have been spelled out from the beginning."

Others, however, applaud the board.

One of them is Peter Martinez, director of the Center for School Leadership (CSL) at the University of Illinois at Chicago, which prepares aspiring principals for leadership in urban schools.

CSL helped FRAC run the Principal Assessment Center in 2002. From December 2000 to April 2003, CPS required principal candidates to go through the center to get an idea of their strengths and weaknesses, but did not require candidates to share results with LSCs. Candidates were put through scenarios of problems

principals commonly face; trained observers scored them.

Martinez says the School Board cut the program because of its costs, and adds that he's glad to see a new evaluative gateway to the principalship emerge. The real test for CPS will be to implement the selection process fairly.

Says Martinez, "The devil is in the details."

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Probation policy tougher on schools, but gives credit for making progress

Principals, area officers outline spending strategies and other ideas to help schools get off the list

By Alexander Russo

Last month, the School Board approved tougher standards for school probation that left many schools wondering whether they stood much of a chance of ever escaping this sanction.

The new target is 40 percent of students scoring at or above national norms on the Iowa Tests of Basic Skills, or meeting or exceeding state standards on the Illinois Standards Achievement Test. However, little-noticed provisions give schools credit for making progress even if they fall short of the target.

Under the progress standards, Warren, Stowe, and Revere elementary schools all would have avoided probation even though their scores are below 40 percent. At Warren, the percentage of students meeting state standards rose from just under 28 percent to just over 39 percent in the past two years. At Stowe, student proficiency went from 19 percent to almost 30 percent. At Revere, it went

from 20 percent to 32 percent.

About 40 schools made at least 10 percentage points of progress over the past two years and would have escaped probation, according to the School Board.

"I'm telling my schools to concentrate on that 10 percent," says Virginia Vaske, instructional officer for Area 15, who helped three out of the four probation schools in her area get off the list last year.

Under the board's previous standards, almost 150 schools got off probation in the past seven years, during which time the minimum number of students required to score at or above national norms increased from 15 to 25 percent. Some of those schools started in the single digits.

What follows is a sample of strategies and tips from principals and area instructional officers (AIOs) about how to survive the probation process and live to tell the story:

MAINTAIN FOCUS

Trying to do everything at once is an understandable but ineffective reaction, say several principals and AIOs. "The way you survive [probation] is by maintaining your focus on what you're capable of doing," says Noble Pearce, principal of Attucks Elementary School, which got off probation last year with a score of about 35 percent meeting or exceeding ISAT standards. "You have to read the data, see where there are deficiencies and take focused action."

ONE CHILD AT A TIME

Gathering teachers to talk about individual children and develop individualized teaching strategies has usually been reserved for special

education students but is a key part of what teachers are doing at Finkl Elementary, says Principal Susan Jensen, whose school came out of probation in 2000 and now has reading scores in the mid-30 percent range. "We're like a think tank," says Jensen, who arrived at the school recently and credits her teachers for making the most difference. "We look at one child at a time."

SCRUTINIZE YOUR BUDGET

Some schools have been able to make their discretionary dollars go further by looking hard at their budgets and being creative, says Cynthia Barron, instructional officer for Area 24, where six of 15 high schools currently are on probation. For example, they have used volunteers to help with security and have reclassified personnel so that the School Board—not discretionary funds—pays for them.

CHANGE YOUR LINEUP

In education as in sports, sometimes you have to move people around in order to make improvements. In particular, this means putting top teachers in the three ISAT testing grades and subject areas. "Some of my [principals] don't do that," says Vaske. "Their friend wants to teach 5th grade, or they promised someone else they wouldn't have to teach an ISAT grade." But those considerations should come a distant second, she says. "You put your very best teachers at the crucial grades."

OPEN DOORS

Rather than clamp down on teachers, some successful principals worked to create more trust and col-

LOGISTICAL QUESTIONS

- With budgets due before all the test scores come in, how should schools in jeopardy of probation construct their budgets for next school year? The board has sent a letter to schools calling on them to budget as if they were going to be on probation.
- How many more reading specialists and full-day kindergartens will be needed? Estimates vary as to how many of the schools likely to be on probation already have two specialists and/or a full-day kindergarten program, or the space for one.
- Will the board cut back on central office spending at local schools? The board says it will expand its commitment to programs such as the reading specialists but has not released details.

FOUR WAYS TO GET OFF PROBATION

Under the School Board's new probation policy, schools must have a greater percentage of students scoring at or above national norms or state standards. Schools will also have spending guidelines for spending their discretionary money. But for the first time, the policy also lets schools get off the list by making progress toward the tougher standards.

	2003 POLICY	2004 POLICY
■ ITBS reading score	25 percent	40 percent
■ ISAT composite score	25 percent	40 percent
■ PSAE composite score	15 percent	25 percent
■ Making progress*	not applicable	10 percentage points
Schools on probation	82	293 (tentative)
Local school councils	Advisory only	Advisory only
Spending guidelines	Services of external partners	Elementary schools: Second reading specialist, smaller classes, full-day kindergarten High schools: Additional freshman counselors, reading specialists, professional development

* Progress made over two years on the ISAT, ITBS or PSAE, or, for elementary schools, progress in one year through a combination of ITBS and ISAT increases.

Source: Chicago Board of Education

laboration. "The main thing we did was to create a different climate at the school," says Elizabeth Gonzalez, principal at Chase Elementary. "Now we have open doors, grade level meetings and lots of prep time." Chase went on probation six years ago with only 19 percent of students reading at national norms; last year, it had 37 percent.

BAKE A BIGGER PIE

Applying for outside grants has been one of the keys to success at Pickard Elementary School, which was once on probation but now stands a good chance of exceeding the 40 percent. Outside funding helped Pickard support a bevy of experts from outside the school, a second reading specialist, a full-day kindergarten program, 15 aides in the early grades, a dual language program, and—new this year—freeing a teacher to work with students on extended writing for the ISAT.

DON'T IGNORE THE MIDDLE KIDS

"We identified [second quartile] children and targeted them for extra involvement," says Pearce of Attucks.

"We knew that the students had good foundations. They just needed the confidence that they were going to be successful, and help with one or two types of items that they were having difficulty with."

LOOK THE DATA IN THE FACE

Looking at test score results can be as unpleasant as opening your wireless telephone bill, but progress requires it, say some principals and AIOs. "It's common sense, but a lot of people don't do it," says Vaske, saying that many educators are still not comfortable interpreting the data or knowing what to do with the information.

READ THE MENU

Some of the schools that have gotten off of probation report having used one or more of the strategies that the board is now requiring at all probation schools, including hiring a second reading specialist and creating smaller class sizes in the early grades.

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"CITY VOICES" Editor Veronica Anderson hosts this public affairs program at 6:30 a.m. the second Sunday of the month on WNUA-FM, 95.5.

LETTERS TO THE EDITOR

Include the writer's full name, title and contact information for verification. Letters should be limited to 200 words and may be edited for space and clarity. Send them to the attention of the Editor at mail address, e-mail address or fax number listed above.

MOVING IN/ON **NICK CIOTOLA**, formerly a consultant and accountant in the construction and real estate industries, is the new executive director of the Teachers Academy for Mathematics and Sciences, a nonprofit that helps schools improve math and science instruction. He replaced **LOURDES MONTEAGUDO**, who now works as a school reform consultant. ... **ROBERT J. VLADEM**, a private investor, has been elected chairman of the board of Project Exploration, a nonprofit that works to get city schoolchildren, especially young girls, interested in science. Vladem replaces **PAMELA BOZEMAN-EVANS**, who resigned as chair but remains an active member at-large. ... **MARY A. HICKS** has been promoted from program director to chief executive officer of the Rochelle Lee Fund, replacing founder **ROCHELLE LEE**. **TIANA BENWAY** has been promoted from director to chief operating officer. ... **ALLISON JACK**, former director of Leadership for Quality Education's charter school resource center, is now education policy advisor for Gov. Rod Blagojevich's policy team in Chicago. **KATHY LAVIN** replaced her at LQE.

PRINCIPAL CONTRACTS Interim principals who have been awarded contracts: **SHELLY CORDOVA**, Armour; **SHIRLEY DILLARD**, McNair; **RHONDA LARKIN**, Lathrop; **ALLEN M. MOSLEY**, Bontemps;

DARLENE REYNOLDS, West Pullman. Principals whose contracts have been renewed: **HAYDEE ALVAREZ**, Greeley; **JILL BESENJAK**, LeMoyne; **STEPHEN L. JONES SR.**, Yale; **LAWRENCE MCELHERNE**, Las Casas High School.

GOLDEN APPLES Four Chicago Public Schools teachers are winners of this year's Golden Apple teaching award. They are: **JELAINE BINFORD**, Curie High; **TIMOTHY DEVINE**, Northside College Prep; **ELENA DIADENKO-HUNTER**, Clemente High; **DIEGO GIRALDO**, Jones College Prep. Winners get a \$2,500 cash prize, a new computer, free sabbatical training at Northwestern University in the fall and induction into the Golden Apple Academy. Other winners are from the University of Chicago Lab School and four suburban districts.

ACADEMIC DECATHLON **WHITNEY YOUNG MAGNET HIGH SCHOOL** won the Illinois Academic Decathlon this year for the 13th time in 14 years. The contest covers a range of subjects. Whitney Young will now participate in the national competition on April 14-17 in Boise, Idaho.

CTU PRESIDENT HONORED The Chicago Federation of Labor named Chicago Teachers Union President **DEBORAH LYNCH** "Woman Labor Leader of the Year." The federation presented

Lynch with the award during its 23rd annual "Tribute to Women in the Labor Movement" event on March 2. The event coincided with National Women's History Week.

CORRECTIONS In the March issue: An item in Comings & Goings incorrectly reported that interim principal **SHELTON FLOWERS** was awarded a contract at King High. Flowers was awarded a contract at King Elementary. ... In Updates, a story on LSC federations incorrectly reported the founding date and meeting schedule of the North Lawndale LSC Federation. The federation was founded in 2002 and meets quarterly, not monthly. ... In Notebook, the name of **EARNESTINE RICE** was misspelled.

Heather Gillers, John Myers

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