



Catalyst CHICAGO

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INDEPENDENT REPORTING ON URBAN SCHOOLS

HOW MUCH IS THIS CHILD WORTH?

ACCORDING TO A *CATALYST* ANALYSIS OF SCHOOL-LEVEL BUDGETS, IT DEPENDS ON WHICH CHICAGO PUBLIC SCHOOL SHE ATTENDS. OVERCROWDED, PREDOMINANTLY LATINO SCHOOLS SUCH AS HERS ARE MORE LIKELY TO GET LESS MONEY PER-PUPIL THAN OTHERS.

Also: Top-notch school libraries rare in CPS **PAGE 22**

Equity push worth the struggle



Veronica Anderson

When it comes to financial equity among the city's public schools, the numbers speak for themselves. A *Catalyst Chicago* investigation into how the district distributed its funds to schools in the fiscal 2005 budget found 27 percent getting more than a fair share, and 19 percent getting less.

Disparities between individual schools were stark—at the bottom of the list, an elementary school where displaced students were a late addition to its rolls, was allocated just over \$2,000 for each of its student; at the top, a high school in transition, was slated to get in excess of \$16,000 per pupil. The differences are in part due to unique circumstances at these schools, but more telling, and disturbing, are patterns of funding disparities among schools with similar student bodies.

Most significant among our findings: Schools with fewer poor children are budgeted relatively more money. Likewise for schools with selective enrollment. Schools that are large and overcrowded—many of them predominantly Latino—are likely to be underfunded.

Presented with these figures, Chicago Public Schools budget officials concede that they knew such funding discrepancies exist, and explain they're working on a new budgeting system that will correct many of them. Beginning next fall, all new schools opened under the Renaissance 2010 initiative will be funded on a per-pupil basis, receiving a base-level amount for each student, plus supplemental funds to offset expenses

incurred by accommodating students with special needs, enrolling fewer students or leasing space.

Budget Director Pedro Martinez says he's looking to expand the new system to all schools in a few years. "The simple reason is equity," he says. He also envisions incentives that would motivate schools to improve their performance—a three-tiered system, where the best schools would get full authority over budgets and spending, and the worst would be heavily managed by central administrators. Schools in the middle would get limited control over their budgets and some central oversight, with a few incentives thrown in to nudge them to do better.

"We need different degrees of freedoms based on school performance and other criteria," explains Martinez, who belongs to a team of CPS leaders participating in the Public Education Leadership Project, a three-year joint research effort with The Harvard Graduate School of Education, Harvard Business School and eight other urban districts.

Working with these experts and colleagues who are further along than Chicago is bound to help, the transition to a new funding system no doubt will be difficult. As Martinez notes,

per-pupil funding has never been implemented in a district as large as CPS. Districts a fraction of Chicago's size have struggled to overcome resistance from schools that stand to lose money, and to equitably carve an ever-shrinking pie of resources.

Still, the new system will be worth it in the long run. It will rid the district of shrouded budget practices and replace them with a system that spreads district dollars more fairly. Cautious supporters, rightly, are concerned about how CPS will foot the bill for the healthy new schools base funding—\$5,000 for elementary schools; \$6,000 for high schools—and whether it can afford to expand. ("We will take a small hit," says Martinez.)

But the effort is a huge step toward giving schools the flexibility and freedom they need to better serve the educational needs of their students.

GRANT PICK 1947-2005 As many of you know, Grant Pick, a longtime *Catalyst* contributor and friend, died suddenly of a heart attack on Feb. 1. He was 57. Among the many stories he penned for this magazine were captivating profiles of the last two schools CEOs, Paul Vallas and Arne Duncan, and a prescient piece on an award-winning principal, Barbara Eason Watkins, who later ascended to the district's No. 2 spot. Grant was a masterful journalist who treated all whom he interviewed with respect. We will miss him.

Veronica Anderson

CPS BUDGET ANALYSIS

CPS eyes budget equity

Chicago Public Schools has only begun to push for per-pupil budgeting, a system that could more equitably distribute funds to schools and give principals more control over how those funds are spent, and some already are pushing back. Concerns center on whether schools would get more or less money under the new system. “We’ve looked at this from every angle, and no one wants it,” says one principal. **COVER STORY: PAGE 6**

SOME MORE EQUAL THAN OTHERS

Catalyst analyzes CPS school-level budgets and finds patterns of inequity. **PAGE 11**

TRACKING ELUSIVE SCHOOL-LEVEL SPENDING

More than \$200 million spent at the school level is difficult to pinpoint. **PAGE 13**

SPECIAL EDUCATION TOUGH TO DISSECT

A wide range of disabilities poses a challenge for setting per-pupil rates. **PAGE 14**

SEATTLE, OAKLAND ENSURE FUNDING FOLLOWS STUDENTS

One district is a pioneer; the other a newcomer using a radical approach. **PAGE 15**

COVER PHOTO BY JOE GALLO



JOHN BOOZ

DEPARTMENTS

UP CLOSE Page 20

- Earning a diploma a nearly impossible dream

UPDATES Page 22

- Too few top-notch libraries
- Faculty integration an elusive goal
- First Renaissance schools chosen as charter leaders depart

Norwood Park 1st-grader

Stephanie Olsen picks out a book from the library's huge collection. **See story, page 22.**

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ON THE WEB

Go to the *Catalyst* web site, www.catalyst-chicago.org, for news and resources on Chicago school reform, including:

- Spanish translations
- Citywide data from the 1980s
- Calendar of events

Catalyst turns 15

Fifteen years ago, Catalyst published its first issue. Then, we were a black-and-white newsletter. Today, we are a news service, with a four-color magazine, a well-stocked web site, a biweekly calendar of events and resources (delivered by fax and email), Spanish translations that are posted on the web, a monthly radio program and a sister publication in Cleveland, which turned 5 this year.



More new services are on the way, including community forums and an overhauled web site that will provide more information and make it easier to find the treasures already there. All in all, Catalyst is poised for a big growth spurt in this 15th anniversary year!

But our purpose—and promise—remains the same: to bolster and prod the city's broad-based school reform community with news and analysis that promotes positive school change.

In recognition of what this sometimes fractious community has gone through, we will dip into our archives each month with news snippets from the past. As you can see from this groundbreaking issue on school funding, you will continue to get cutting-edge journalism as well.

Linda Lenz
Publisher

CORRECTION

A photo caption in the December issue incorrectly identified Luis Garcia-Juarez as a teacher. He is a paraprofessional technology assistant, not a certified teacher.

Notebook

Q&A with...

*Shari Demitrowicz, principal,
Lawrence Hall Youth Services
Therapeutic Day School*

TIMELINE

Jan. 30: Tutoring

CPS and the state will chip in \$5 million to keep the district's No Child Left Behind tutoring program up and running till the end of the school year. The U.S. Department of Education told CPS in December to stop using federal money for the program, which provides tutoring at schools, by teachers, to about 42,000 students. Another 41,000 students are tutored by private providers. CPS will pay \$4 million, using funds typically spent on summer school programs. The state will pay the other \$1 million.

Feb. 1: Deseg transfers

Following a federal judge's order that CPS offer more seats to minority students at mostly white schools, 190 students were expected to begin classes in their new schools. CPS found 288 seats in 33 schools, mostly on the Northwest Side. CPS said in the spring that mostly white schools had no open slots. But the U.S. Justice Department said in November that hundreds of white students were allowed to transfer into white schools, taking seats that should have gone to black and Latino children to improve integration.

Feb. 2: Graduation

The CPS high school graduation rate is improving, but it's still worse than state data show, according to a report by the Consortium on Chicago School Research. Only 54 percent of freshmen graduate, the report states, while the latest state report card puts the rate at 70.7 percent. African American boys fared worst; only 39 percent graduate by age 19, compared to half or more of Latino, white or Asian boys. The Consortium report includes data by race, gender, community and school. For a link, go to www.catalyst-chicago.org.

Children with behavioral and emotional disorders can pose significant discipline problems for schools. But these students can become self-disciplined if they are taught the right decision-making and problem-solving skills, says Shari Demitrowicz, principal of Lawrence Hall Youth Services Therapeutic Day School. The school serves some of the most troubled special education students who have been referred from Chicago Public Schools. Demitrowicz talked with writer Alejandra Cerna Rios.

How do you teach troubled young people to manage their behavior?

Let's say there are two students in a fight. In a traditional school, they would probably be suspended. We use what we call life-space interviewing, or LSI. Our students know that skill by that name. They would say, "Ms. D., I need to LSI with so-and-so because we're having a conflict." They sit down and work through a mediation process. The goal is not to point fingers, but to talk about the events, find out the root of the problem and come to a win-win resolution. If they come back later and there's still conflict, I've got to help them take responsibility for the part of their agreement that they didn't hold to. Every time special ed kids, who we know have limited social skills, have a fight, we can't just discipline them and say "You're out" [on suspension]. I'm going to be dealing with that same behavior when that student comes back. It's better to teach skills so that when they're in that situation again, they can find resolution.

What needs to happen when students transition back to regular school?

It's not easy, when kids become very comfortable in a therapeutic setting, to move to a traditional setting, because the schools are bigger and there's a lot more peer pressure involved. We're getting away from what we call the drop-in method: "Here's your school, here's your counselor, and guess what, you have all these classes, go for it." We talk with the counselor and administrators prior to the student making the transition. We hook up peer mentors for that student, and let them know what their avenues are if they get in trouble. We want to be proactive.

ELSEWHERE

Florida: Middle schools

Gov. Jeb Bush wants to require middle school students to earn credits in core subjects before moving on to high school, according to the Jan. 11 *Palm Beach Post*. Bush's proposal was sparked by middle-schoolers' poor performance on state achievement tests last year, when only half of 6th- through 8th-graders scored at grade level. Students would need three credits each in math, science, social studies and language arts to graduate to 9th grade. Middle schools would have to use the same standardized grading system as high schools.

California: School funding

Gov. Arnold Schwarzenegger's proposal to cut \$2.2 billion from education spending next year has angered education groups, according to the Jan. 6 *Los Angeles Times*. The governor wants to suspend Proposal 98,

which exempts education from across-the-board budget cuts and sets aside a specific portion of state revenue for education. Educators say the governor is renegeing on a deal not to cut K-12 spending.

Arizona: Scrap tests?

A coalition of conservative legislators, the state's largest teachers union and the statewide association of school boards has joined forces to scrap AIMS, the high school exit exam, according to the Jan. 3 *Arizona Republic*. Students get four chances to pass all three sections of the AIMS test (reading, writing and math) to graduate. About 57 percent of current high school juniors failed AIMS the first time and need to pass it to get their diploma in 2006. A leading GOP lawmaker plans to introduce a bill that would keep AIMS as a diagnostic tool but allow students to receive their diploma even if they do not pass it.

IN SHORT

"You want a good school? We're giving you what you want. Don't change what's working."

Jose Barrera, principal, Columbia Explorers, at a Jan. 12 hearing where parents and students protested a CPS plan to put the high-achieving school on a year-round schedule.



ASK CATALYST

If you're a local school council member, what information about your school is considered confidential?

Cynthia Smith, Parent Representative, Murray Language Academy

LSCs oversee budgets, school improvement plans, and principal selection. Most of this information can be shared with the public. Documents pertaining to school policy and compliance are also generally considered public information. However, CPS policy says that LSC members cannot reveal information regarding personnel, especially details such as personal opinions about a particular teacher or principal, according to James Deanes, CPS officer for local school council relations. Principal evaluations are strictly confidential for this reason. Information about a particular student or family, and phone numbers and addresses for local school council members, are also considered confidential.

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

A recent study by the University of Chicago showed that foster children in CPS perform worse than their peers. How do you balance addressing social and emotional problems with raising academic achievement?

They go hand-in-hand. Severe behavioral problems mask [a student's] real potential. So we assess students' academic and intellectual levels right away. We measure their progress frequently during the year, because for our types of students, we've got to celebrate success in small steps. The best behavioral tool for any teacher is sound instruction, so we spend a lot of time in our staff development on quality teaching, looking at strategies for the at-risk learner, ways to measure a student's true potential, as opposed to just standardized tests.

Give an example in which your staff addressed a social or behavioral or emotional problem, and raised achievement.

I have a young lady who lived with foster parents for six or seven years, and was placed back with her father. She is very, very bright. But she did not want to follow rules, wanted that freedom of the streets. We started seeing her grades fall, and there were other indicators—the way she was coming in with her hygiene, coming late, carrying a backpack with other clothes in it—that something was going on. We were able to get her and her father into counseling. She was able to make the transition successfully and will now be finishing up her next two years of high school at Farragut.

What advice would you give to CPS teachers when they deal with troubled children?

Every student has something to offer. Every student may need something different, but that doesn't mean that they're not going to be successful and a productive member of society. If that student could build a relationship with just one person, that could make a difference. Every success story that I hear, it's because one person came along in the life of that kid, and that kid ended up believing that they could do it. ■

MATH CLASS

The U.S. is near the top of the list of major industrialized nations in its reliance on local tax revenue to fund **K-12** education. According to **2001** data from **18** nations compiled by the Organization for Economic Cooperation and Development and the United Nations, **50%** of education funding in the U.S. comes from local sources. Only **3** countries rely more heavily on local revenue—the United Kingdom at **72%**, Denmark at **62%** and Finland at **57%**. Local taxes pay approximately **25%** or less of education costs in **14** other countries where regional and national government pick up most of the tab. In **5** countries—Australia, Greece, Ireland, New Zealand, and Portugal—regional and national government pay all **K-12** costs.

FOOTNOTE



KURT MITCHELL

CPS eyes budget equity

By John Myers

This September, Little Village will open the doors to four new high schools that the community, for the first time, can call its own. A grandmothers' hunger strike in 2001 forced Chicago Public Schools (CPS) to reconsider the educational needs of this largely Mexican community on the city's West Side. Since then, a \$63 million facility is being built to suit, and educators and organizers from the community have had their say over every detail related to the school, from curriculum to interior design (they call it earth, wind, water, fire) to a handpicked staff.

However, a citywide new-schools initiative backed by City Hall has thrown a last-minute wrench into their plans. Schools slated to open under the initiative—dubbed Renaissance 2010—will use a new funding formula that also gives them more control over their money, setting the stage for more transparency and equity in how funds are allocated to schools throughout the district.

CPS is joining a budding national trend with its move toward a more transparent and equitable way of distributing money to schools. But early reaction indicates the transition will be tough, as some schools lose ground while others gain.

It sounds like a community's dream, but Little Village principals are balking. "We've looked at this from every angle and no one wants it," says Jose Rico, whose Multicultural Arts High School is one of the small schools scheduled to open there this fall. "It's more money the other way."

Their response suggests difficult times ahead for a funding approach that CPS is looking to take districtwide by 2007. Renaissance schools will pilot the approach, which allots a basic amount of money per child and then supplements those funds with additional money for each child with special circumstances, such as coming from a low-income family or needing special education or bilingual services.

Called weighted per-pupil funding or student-based

budgeting, the approach is getting increased attention nationally now that schools are being held accountable for student performance under the federal No Child Left Behind law. If schools are expected to teach all children, the reasoning goes, then they need resources to match their students' needs.

That is not what happens under the budgeting system now in place in Chicago and the vast majority of school districts across the country. "I've looked at the data, and if someone asked me today how much it costs to educate a child, I have no clue," admits CPS Budget Director Pedro Martinez, who's leading the push for greater equity within the district.

Indeed, a *Catalyst Chicago* analysis of \$1.7 billion in

This report is the first of three that will analyze Chicago Public Schools' budget policies and practices. In this issue, Catalyst Chicago examines school-level funding equity within the district. The budget analysis project, to be spread over the next 18 months, was made possible by a grant from The Woods Fund of Chicago.

school-level funding in CPS found per-pupil spending ranges widely from school to school, from a low in elementary schools of \$2,150 at Doolittle East to a high of \$8,582 at Farren. Among high schools, it ranges from \$5,404 at Westinghouse Career Academy to \$16,757 at Lindblom College Prep.

The extreme differences



JOHN BOOZ

Little Village principals Jose Rico (Multicultural Arts), Martha Irizarry (Infinity High) and Rito Martinez (School for Social Justice) do not want to use the per-pupil funding formula for Renaissance schools. They expect to get more money using the district's traditional budgeting system, which is mostly based on staffing.

between these schools, to be sure, reflect unusual situations. For instance, nearby school closings swelled enrollment at Doolittle East beyond expectations. Lindblom was relocated temporarily while its building was repaired and, for now, is not accepting new students. And Farren, located at 50th and State streets, has seen the number of students in its attendance area shrink as public housing is demolished.

But between these individual school extremes, patterns of inequity exist.

The *Catalyst* analysis also shows that small high schools, like those slated to open in Little Village, receive more funding from the district, on a per-pupil basis, than large schools. Magnets and selective enrollment schools are also funded at higher-than-average rates. (See story on page 11.)

COMMON PRACTICES IMPACT BOTTOM LINES

Dozens of factors can impact the per-pupil funding in an individual school's budget, from enrollment size

to the types of classes offered. But a few common budgeting practices—used here and elsewhere—can also dramatically impact a school's bottom line.

First, schools get teaching positions based on the number of students enrolled, and the district picks up the tab for hiring those teachers no matter where they fall on the pay scale. The reality, however, is that similar schools may spend vastly different amounts of money on teacher salaries, producing unequal budgets.

For example, the average teacher salary at Paderewski Learning Academy is \$44,000 compared with \$58,000 at Kershaw. Both are regular elementary schools, but Kershaw is getting about 33 percent more in per-pupil funding this year than Paderewski.

Rigid staffing formulas play a role, too. Consider the art and music programs at Joplin and Haley elementaries. The district pays half the salary for Joplin's art teacher, but it picks up the full tab for Haley's music teacher because its total student enrollment squeaked

by the minimum requirement of 750. Joplin fell short by 3 students.

In a strictly student-based system, the budgeting process would start with each school getting a certain amount of money based on the number and characteristics of the students it served. It would then have to live within those means, hiring teachers from varying levels of experiences as it can afford.

Another cause of inequity in school-level budgets is central office control over large sums of money that eventually get spent at schools. In Chicago, for example, CEO Arne Duncan and Chief Education Officer Barbara Eason-Watkins control the dispersal of some \$200 million earmarked for district educational priorities.

About \$50 million of that money pays for 600 literacy coaches who work in about half of the district's schools under the Chicago Reading Initiative. Schools that are on academic probation get additional supports, but there are no clear rules to guide spending.

Chicago is not alone.

"That's the non-transparent part of many district's budgets," says school finance researcher Marguerite Roza of the Center on Reinventing Public Education at the University of Washington.

Roza has identified large-scale inequities within dozens of urban districts, including Houston, Cincinnati and Denver. Most of the districts she studied have adopted a semblance of per-pupil budgeting, and all those experienced political backlash similar to that now brewing in Little Village.

"In many districts, a few schools clearly receive more than their share of the district pie," says Roza. "In order for district leaders to be strategic in allocating their dollars across schools and types of students, they need a clear picture of where their dollars are going."

ACHIEVING EQUITY IS PAINFUL

Leveling the playing field can be painful for schools that get more money under traditional budgeting schemes, especially in cash-strapped

One school, 2 budgets

Sawyer Elementary in Gage Park would receive more money if it were allocated under the per-pupil budgeting system now planned for Renaissance schools. The school is an example of an overcrowded, predominantly Latino school that currently is likely to be underfunded.

SAWYER ELEMENTARY

5248 South Sawyer Ave.

GRADES: K-8

PRINCIPAL: Gerard Gliege

ENROLLMENT: 1,758 (controlled)

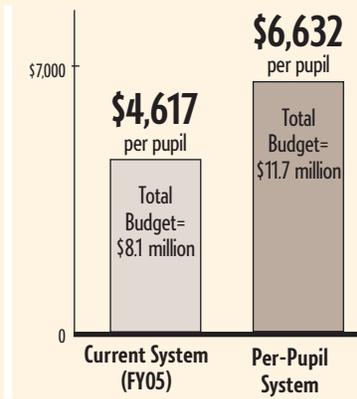
SPECIAL ED: 134

RACE/ETHNICITY: 97% Latino

LOW INCOME: 96%

ITBS READING: 52% meets

ITBS MATH: 58% meets



UNDER THE CURRENT BUDGET SYSTEM

CALCULATION/FUNDING CATEGORY	AMOUNT
One per school	
■ Principal, assistant principal	\$206,000
■ Building engineer	\$69,000
Formula based on total enrollment	
■ Regular classroom teachers	\$3,084,000
■ Art, gym, counselors, other "specials"	\$451,000
■ Clerical, custodial staff	\$427,000
■ Equipment, supplies	\$283,000
Formula based on students served	
■ Special ed teachers, support staff	\$534,000
■ Bilingual teachers	\$144,000
Per pupil with free or reduced-price lunch	
■ Poverty supplement	\$1,837,000
Union contracts	
■ Staff benefits	\$1,082,000
TOTAL: \$8,117,000	

USING PER-PUPIL FUNDING

Basic per pupil	+	Bilingual per pupil	+	Special ed per pupil	+	Poverty per pupil
\$5,000*		\$520*		\$4,000*		Same
x 1,758		x 884		x 143		formula
\$8,790,000		\$460,000		\$572,000		\$1,837,000
TOTAL: \$11,659,000						

*Note: Figures proposed by CPS budget office. CPS estimates that special education costs range from \$3,000 to \$5,000 per pupil. The midpoint was used for this example.

Source: Catalyst calculations based on data from CPS Office of Management and Budget; Annenberg Institute for School Reform

districts like Chicago and Cincinnati, which has been slowly implementing per-pupil funding under tough conditions for six years.

"It's a mixed bag. The reality is we're just spreading crumbs," says Sue Taylor, president of the Cincinnati Federation of Teachers.

Cincinnati desperately needed to equalize its funding, she notes, but the district did not foresee a myriad of problems that accompany student-based budgeting. Some schools overstated their enrollment to get more money, Taylor says. Principals and parents at some schools tried to scrap caps on class size—a major issue for the union—so they could cut staff and shift money to after-school programs, she adds. Arts programs got the ax as well.

Chicago Teachers Union officials, who were not aware that the district was considering the new budgeting approach, questioned the district's motives. "Is the total amount of funding that's going into the schools going to be enough to meet those schools' needs?" asks Vice President Ted Dallas. "Are we trying to improve education or are we just trying to save money?"

It's a lot easier for districts to convert to weighted per-pupil funding if the move is accompanied by an infusion of extra cash, Roza says. That way, the district can minimize losses at higher-funded schools as it balances the scales.

CHARTERS PUSH MORE PER-PUPIL FUNDING

Chicago's move toward weighted funding owes much to charter schools rallying for increased funding.

Illinois law requires districts to fund charter schools at a minimum of 75 percent of the district's average base educational costs. Existing charter

school leaders complained that they were being short-changed because they didn't have access to millions of dollars in federal and state funds that are earmarked for special programs, such as special education and summer school.

In November, the district raised the basic per-pupil allocation for charters and other schools slated to open under Renaissance 2010. Elementary schools will get roughly \$5,000 per student; high schools will get \$6,000. On top of those funds, schools will get additional per-pupil funding to compensate them for small enrollment (\$200 per pupil), extended-day programs (\$260) and bilingual education (\$520).

Still being worked out are per-pupil figures for special education services, where expenses can vary widely depending on the severity of a student's disability.

CPS based the figures on rough estimates of the amount of money it spends out of central budgets and school-level budgets in regular schools, figures obscured by the district's antiquated budgeting practices.

One result may be that Renaissance schools will have at their disposal more money per pupil than most regular schools. Diana Nelson, executive director for the Cross City Campaign for Urban School Reform, favors the move to per-pupil funding but wonders whether inequities will be exacerbated during the pilot.

'ALL WE WANT IS PARITY'

Charter schools are clear winners in the district's transition to student-based funding. Most significant will be the additional funds those schools will receive to pay for special education services, where charters are most pinched financially, says Chris Kelly, dean of operations for

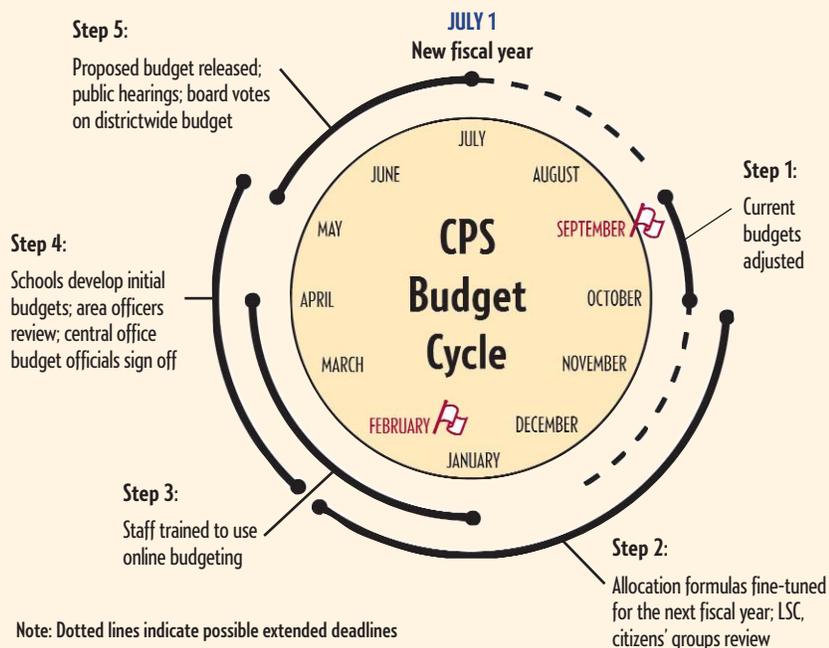
Savvy planning required

School districts that use per-pupil budgeting rely on forecasts of student enrollment. Erroneous predictions force schools that have control over their spending to make tough choices. Barak Ben-Gal, who monitors student-based budgeting in Oakland, says a school that enrolls 20 fewer students than it anticipated "could easily face an \$80,000 deficit." School leaders are responsible for

balancing the budget. "Do they cut a teacher? Cut an aide?" Ben-Gal asks. For the last two years, CPS has used professional demographers, such as those in Oakland, to project in the spring what school-by-school student enrollment will be the following fall. District officials say last spring's estimates matched September enrollments within 1 percent.

SHIFTING GEARS

CPS is past the midpoint of its budget planning cycle for the 2006 fiscal year. Dozens of principals are testing a new system that streamlines the process. Red flags note when per-pupil schools must address enrollment issues.



RED FLAG: SEPTEMBER

When classes begin, per-pupil schools will find out whether their enrollment projections hit the mark; those that underestimate must address funding shortfalls.

RED FLAG: FEBRUARY

This year, CPS announced its school closings early, giving displaced students more time to find new schools. It also allows schools to adjust enrollment projections.

CRITICAL TIMES FOR DISTRICT DEMOGRAPHERS

SEPTEMBER-OCTOBER

CPS surveys student enrollment by grade, race/ethnicity and disability. Those figures are then reported to the state board of education and become the basis for projecting the following year's enrollment.

NOVEMBER-DECEMBER

CPS demographers review school-by-school enrollment trends, graduating class sizes and so-called volatility variables, such as public housing demolitions. Projections are due to the budget office by year-end; schools have one month to refute them.

North Lawndale College Prep.

"All we want is parity in funding," says Ron Manderschied, board president of Noble Street Charter School. "We get no funding for night school, after-school programs, summer school or sports. You start to add all that up and you're starting to talk about some real, serious money."

Parity is an easy sell to schools that stand to get more money, but not for those facing the prospect of losing it.

The Little Village high school principals compared the per-pupil rates the district was offering to Renaissance schools to the amount it spent at existing small high schools, and say they found the small

schools were better off. The principals also wanted to avoid responsibility for paying teacher salaries, as charter schools do; regular public schools use staffing formulas that shift the financial burden for teacher salaries to the district. Finally, they noted that sheer numbers would initially work against them—as startups, each Little Village school would enroll only 100 or so freshmen this fall.

Martinez explains that new schools with artificially small enrollments could get additional funds to supplement their per-pupil allotment as they grow to full enrollment.

South Shore's School of Entrepreneurship, a small high

school that is one class shy of full enrollment, for instance, is getting a basic allotment of \$5,858 per pupil. If it were a Renaissance school, it would get \$150 per pupil more.

To further make the district case for per-pupil funding, Martinez notes that principals using the new system would have increased purchasing power, much like charter schools have now. And he is eyeing a strategy that would mitigate the financial impact of more expensive, experienced teachers.

That's an attractive proposition to Principal Bill Gerstein of the School of Entrepreneurship. "I'd love more control over the budget, but

you'd have to be careful which schools you roll it out in," he says. Experienced principals who work well with their local school councils and who know their students' needs are the ones who will make effective hiring and purchasing decisions, he notes.

Gerstein warns the district to slow down the rollout of its budget reforms. School leaders need enough time to adjust to the district's new computerized financial system, which is slated to come online this fall, let alone any newfound spending authority.

Already, 10 principals are test driving the new computer program which streamlines finances and budget planning.

Laying the groundwork

CPS is retooling its budgeting practices and seeking to determine exactly how much is spent per pupil at each school. Budget officials say their goal is to identify inequities and set the stage for per-pupil funding.

STEP 1: TRACK AND BUDGET FOR DOLLARS SPENT IN SCHOOLS

Currently, the district allocates some school-level expenses centrally in citywide services, making it impossible to determine how much money is spent school by school. Some operating expenses, such as transportation costs and salaries for substitute building maintenance and lunchroom personnel, will remain in the district's central budget.

EXPENSES TO BE REALLOCATED TO SCHOOL BUDGETS:

By fiscal 2006:

■ General administrative services	\$229 million
■ Pensions	\$110 million
■ Workmen's compensation	\$13.5 million
■ Unemployment insurance	\$2.5 million

By fiscal 2007:

■ Privatized building maintenance services	\$75 million
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STEP 2: REFINE PER-PUPIL RATES FOR RENAISSANCE SCHOOLS

Next fall, funding for Renaissance schools will be based on the system the district uses for existing charter schools—essentially a per-pupil block grant based on enrollment and school characteristics. Per-pupil figures are based on rough estimates of spending in regular schools. Once CPS reallocates districtwide dollars to schools where money is spent, it will refine the per-pupil estimates listed below.

PER-PUPIL FIGURES FOR RENAISSANCE SCHOOLS:

Elementary base	\$5,000
High school base	\$6,000
Bilingual education	\$520
Special education	\$3,000 to \$5,000
Extended school day	\$260
Small schools (*500 students or less)	\$200
Facilities subsidy (schools housed in non-CPS space)	\$425

STEP 3: SWITCH ALL SCHOOLS TO PER-PUPIL FUNDING

Pedro Martinez, the district budget chief, is looking to perfect per-pupil funding with Renaissance schools, and then convert all schools to the model by 2007. Before then, CPS will have to decide whether it will allow schools to hire teachers without regard to their salary levels, or force them to hire a mix that meets their per-pupil budget.

Seattle, Houston and San Francisco—school districts using per-pupil budgeting—all opted for the former choice. Oakland, which converted in the fall, decided to use the latter.

Source: CPS Office of Management and Budget

CPS will train 60 more this spring and move every school online over the summer.

Since November, Martinez has also convened focus groups of principals to find out how much control and flexibility local leaders would like over their schools' finances.

Finkl Elementary Principal Susan Jensen, who is participating in the pilot, says the new system organizes the school's spending history and saves her a lot of time. A recent computer purchase, for instance, would have taken weeks to process under the old system, but the new system allowed her to shift \$5,000 in the budget to make way for the acquisition.

Timothy Knowles, director of the University of Chicago's Center for Urban School Improvement, suggests CPS go all the way with its budget decentralizing effort, citing a successful pilot schools program in Boston. There, he says, the district converted central office services offered to schools, such as art programs, into a per-pupil rate. Participating schools could then choose whether they wanted to buy those services from central office or elsewhere. "Not surprisingly, they didn't buy much back," says Knowles, formerly a Boston deputy superintendent.

Knowles offers that the district's reading, math and science initiatives are good candidates for buy-back.

CPS is unlikely to take its project that far, says Martinez. Funds for the reading and math initiatives are controlled by Eason-Watkins, he says. "It's not like we can say, 'Here's \$250 a student, now go run your own reading program.'"

Nonetheless, Martinez says he's ready for the challenge. "We feel confident that going forward with a per-pupil funding system is right

for us. We're going to do the whole thing and figure it out as we go."

CAN CPS STAY THE COURSE?

Some longtime reformers, noting an erosion of local school councils' authority, doubt that all of the district's leaders fully embrace the idea of shifting most or all control over budgets to school leaders.

John Ayers of Leadership for Quality Education cites two recent examples. A small schools initiative in recent years created several autonomous small high schools to replace larger schools, but the district did not turn over the reins to the budget to the new schools' leaders, he says.

Also, he says, the district recently reasserted its control over budgets in schools on probation. These schools must spend "discretionary" funds—state and federal supplemental poverty funds that go directly to schools—on a mandated reading program.

"We can't afford to waste a single penny in our schools," responds schools chief Arne Duncan. He envisions a system where area instructional officers make decisions about spending and instruction for schools that have poor academic and fiscal track records. However, district bureaucrats would step aside and allow better performing schools to make their own decisions. "It's really about trusting your stars," he says.

For now, Little Village's new school principals remain opposed to the new funding approach. Full autonomy from the start is overwhelming, says Martha Irizarry, principal of Infinity, one of those schools. "Having CPS hold our hands is not such a bad thing."

New principals don't fully understand what costs go into

Continued on page 17

Some more equal than others

A *Catalyst* analysis of CPS school budgets finds nearly half of all schools get more or less than their fair share of board funds

John Myers

From the perspective of student-based budgeting, schools with the fewest poor students and schools with selective enrollments have padded budgets. At the other end of the funding scale, large and overcrowded schools, many of which are mostly Latino, are likely to be shortchanged.

These are among the findings of a *Catalyst Chicago* analysis of school-level budget and enrollment data. The analysis used a data-based tool developed by researchers to identify inequity among schools in a district.

Using this tool, one in four schools (27 percent) was found to be receiving significantly more than its equitable share of funds from the district. Another 17 percent of schools were identified as getting significantly less than their fair share. More than half of all schools analyzed (55 percent) fell within the range of equitable funding.

"It's understandable, but it's not OK," says Diana Lauber of the Cross City Campaign for Urban School Reform. "There was a real push for equity [in the late 1980s]. It's appropriate that people take a look at it again."

CPS is no different than most urban districts where money is distributed to schools primarily through staffing formulas, which allocate a specific number of positions rather than a specific number of dollars per pupil. Marguerite Roza, who studies school district budgets as a researcher at the University of Washington's Center on Reinventing Public Education, says Chicago's inequities top her findings in many other districts.

Roza and other experts blame a hodgepodge of factors, from teacher salaries to complex accounting prac-

tices to programs that get funded through various sources. All three come into play in Chicago, as well as special circumstances—like converting a large high school into several smaller schools, or displacing families in areas where public housing is being demolished—that affect enrollment.

Fixed costs, like the average high school principal salary, \$111,500, are diluted when schools have more students. For a school like Lindblom, which enrolled only 114 students in September, that average salary becomes \$978 per student, whereas Lane Tech, with more than 4,400 enrolled, pays a mere \$25 per student.

"Small schools get an advantage from that. The small schools are just slightly more inefficient," says John Easton of the Consortium on Chicago School Research. "Should bigger schools be compensated for that?"

DISTRICT AWARE OF INEQUITIES

District officials agree that enrollment is a major factor in schools' bottom line. They also blame discrepancies on the types of classes schools offer, especially in high schools. Some programs, such as Advanced Placement or International Baccalaureate, help a school qualify for more teachers than it would get under regular staffing formulas.

"It's really hard to just grab the budget book and just figure all this out," says Pedro Martinez, CPS budget director. "I will have done my job if when you look at a school and you look at its performance, it's not [doing worse or better] because of the lack or excess resources they get."

Martinez admits there are inequities, but he says the *Catalyst* analysis included only a portion of the district's total budget, and not every CPS school.

Research advisory panel

Catalyst convened a panel of budget and school finance experts to review the methodology and preliminary findings of our equity analysis. We also invited them to help interpret the results.

RESEARCH ADVISER:

Marguerite Roza

*Center on Reinventing Public Education
University of Washington*

OTHER PANELISTS:

John Easton

*Consortium on Chicago School Research
University of Chicago*

Ellen Foley

*Annenberg Institute for School Reform
Brown University*

G. Alfred Hess Jr.

*School of Education and Social Policy
Northwestern University*

Diana Lauber

Cross City Campaign for Urban School Reform

William Testa

Federal Reserve Bank of Chicago

Marla Ucelli

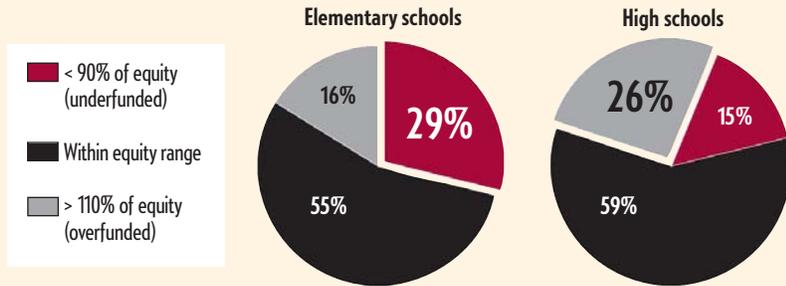
*Annenberg Institute for School Reform
Brown University*

Catalyst analyzed the distribution of \$1.7 billion, which is about 43 percent of the district's \$4 billion fiscal 2005 operating budget, and about 63 percent of the \$2.8 billion that CPS allocates directly to schools. Lack of transparency in the district budget made it necessary to exclude funds budgeted for student transportation, building operations, food services, special education and early childhood. The analysis included some 88 percent of the district's 613 schools. (See story on page 14.)

In all, Chicago allocates some 54 percent of its budget directly to schools, fairly typical for urban districts that use a similar budgeting approach, says Roza. Another \$200

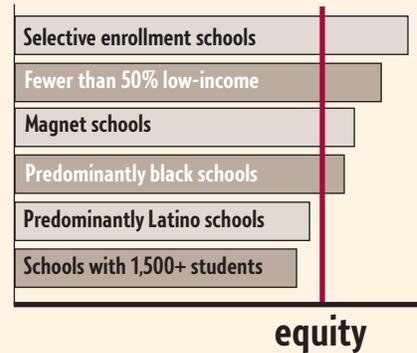
Equity analysis findings

The current CPS budgeting system is more likely to favor selective schools and schools where students' families are better off, according to a Catalyst analysis of the latest budget. Shortchanged are large and overcrowded schools, many of which are predominantly Latino. These funding distribution patterns play out against a backdrop of widespread funding disparities in which nearly half the district's schools get more or less than their fair share.



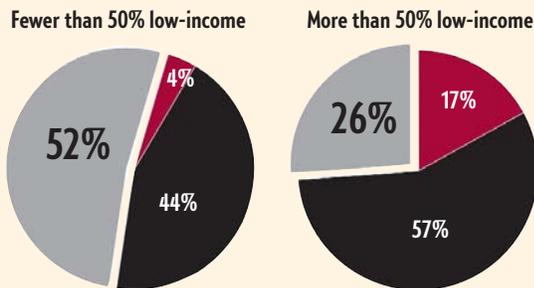
STACKING SCHOOL TYPES AGAINST THE EQUITY BENCHMARK

School types that surpass the equity line are prone to get more than their fair share of money from the district; those below get less.



HIGHER INCOME STUDENTS OFTEN GET MORE

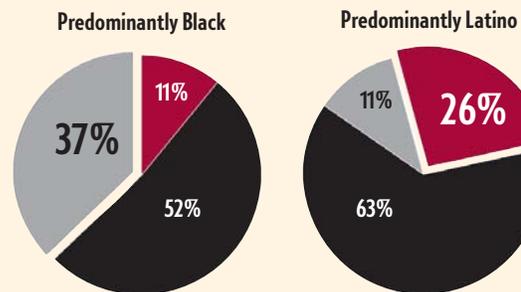
Many of the schools where fewer than half of students are poor have selective enrollment, meaning students must pass a test to be admitted. These schools tend to attract more children from middle-class families and offer a variety of gifted programs.



Source: Catalyst analysis of CPS data

LATINO SCHOOLS MOST LIKELY TO BE UNDERFUNDED

The average enrollment for predominantly Latino schools is 893 students, higher than averages for mostly black and mostly white schools. Under the current budgeting system, these often overcrowded schools are more likely to be underfunded.



million that CPS budgets centrally for citywide services caught the researcher's attention because those funds are spent at schools at the district leadership's discretion. "That's a lot of money and it's worth figuring out where it's going, and to make sure that it's in line with the district's priorities," Roza notes.

CONNECTING THE DOTS

Catalyst found that schools with the fewest poor students are likely to get more funding than the district average. Roza notes this finding indicates that federal and state poverty funds are not giving schools with more poor students a clear financial

advantage—a violation of federal law.

Lauber from the Cross City Campaign was likewise surprised. Connecting the dots, she suggests a tie to another Catalyst finding: That selective enrollment and magnet schools are also likely to get more funding. Almost half of the schools with more students from middle-income families are either selective or magnet schools, compared to only 10 percent in the schools with higher concentrations of poverty.

Selective and magnet schools typically offer a suite of special classes that tend to attract a diverse—and often wealthier—set of students. This relatively small

group of schools also gets nearly a third of the \$60 million for desegregation programs that was analyzed by Catalyst.

At the opposite end of the scale are large and overcrowded schools, which are likely to receive less district funding per pupil. Many of these schools are predominately Latino.

"It shouldn't surprise anyone that overcrowded schools get less because they have larger class sizes," say Lauber.

Sawyer Elementary School, an overcrowded, high-achieving Latino school in Gage Park, gets only 79 percent of the district average funding. The school enrolled some 926 bilin-

gual students last year—the most in the district—and got about \$155 per pupil for supplemental bilingual education in this year's budget. The district average for bilingual, according to *Catalyst's* analysis, is \$639 per pupil.

By contrast, Falconer Elementary in Belmont Cragin got \$515 for each of its 672 bilingual students. Officials in the CPS Office of Language of Culture decide where to budget bilingual funds.

Sawyer's large overall enrollment also trims its per-pupil funding. If the school were one of the new Renaissance schools, it would gain more than \$2,000 per student.

FURTHER DISSECTION

Teacher salaries can also play a part. The district allocates positions, not dollars, when budgeting, creating a wide range of average teacher salaries—from \$44,000 to more than \$65,000—across the schools studied.

Martinez dismisses the impact that teacher salary levels have on equity. "Teachers are not the same as they were 20 years ago," says Martinez, noting the increase in teachers hired by the district through alternative certification programs. Schools, in general, have a relative mix of new and experienced teachers on staff, he explains.

Of special note in the analysis are budgets for 12 small schools recently carved out of three large high schools—Orr, Bowen and South Shore. Small enrollment helps boost the bottom line for these schools, but the funding advantage these schools have over larger regular schools is likely greater than the results in *Catalyst's* analysis.

As part of the Chicago High School Redesign Initiative, these schools received millions in start-up money from grants made by a consortium of funders led by the Bill & Melinda Gates Foundation. Since these grants are made directly to schools, the money doesn't appear in the district's school-level budgets. About \$1 million in competitive grants that were funneled through the district was included in the analysis.

A well-known fact that high schools get more money per pupil

than elementary schools was confirmed by the *Catalyst* analysis. Staffing formulas favor high schools, and books and supplies are more expensive, notes Lauber. Also, high schools are the sole beneficiary of extra funding for vocational education. *Catalyst* found the district average per-pupil funding for vocational programs was \$622.

Political clout is another factor in funding equity, says Roza. In other districts that she's studied, Roza found

that savvy principals who knew how to negotiate with district budget officials had a positive impact on their school's bottom line. "Administrators would tell me, 'Oh yeah, that guy's been doing this for years. He knows how to work the system,'" she recalls.

Lauber believes clout plays a lesser role in Chicago, where local school councils have some authority over school budgets.

Most of the funds examined by *Catalyst* are budgeted according to

Tracking elusive school-level spending

More than \$1 billion of the district's \$4 billion operating budget is allocated to "citywide services," a catch-all pot of money that makes it difficult to track where the money is spent.

Roughly \$200 million of this pot comes from state and federal grants that are distributed to schools at the discretion of the CPS leadership. These grants pay for educational programs, such as the reading initiative and the math and science initiative. Salaries for reading coaches who are assigned to work with schools on probation are paid out of this fund because staffing formulas would not allow for such extra supports.

Other expenses budgeted to citywide services include teacher pensions and student transportation. Also, some lunchroom and facility operations staff who work in schools are budgeted centrally.

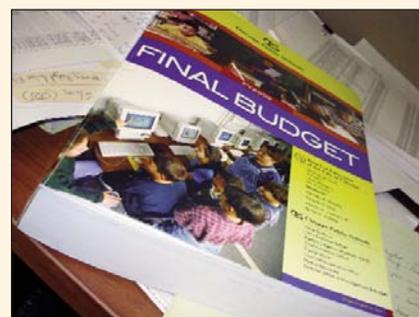
CPS Budget Director Pedro Martinez admits the current system makes it impossible to track all of its school-level spending. "We don't have a cost accounting system," he says. "Most organizations can tell to the unit, to the dollar, the labor and material costs."

Martinez says a new CPS financial system, slated for launch next fall, will help shed more light on how district funds are budgeted, and scrapping staffing formulas for per-pupil budgeting will ensure equity.

However, watchdog groups complain that the CPS budget is "impenetrable" and are skeptical of the planned improvements.

Clearing up longstanding mysteries would be a plus, but "with the CPS budget, just know that you will never know," says Diana Lauber, managing director of Cross City Campaign for Urban School Reform, which supports per-pupil budgeting.

"I'm astounded by all the money that's in [citywide services]," notes Christina Warden, also



CHRISTINE OLIVA

The weighty CPS budget for fiscal 2005.

of Cross City. Warden analyzed CPS small high school budgets and found dozens had circumvented staffing formulas, which meant the official budget was "virtually useless."

She also explains that small high schools get grant money directly from private foundations; funds that are accounted for in the schools' internal budget, but not in the official district document.

Andrea Lee, who until recently tracked the CPS budget for Neighborhood Capital Budget Group, says monitoring the district's capital funding is a "nightmare." She tracks funding from year-to-year and routinely sees entire projects "disappear" from the capital budget without explanation.

The district's efforts to improving budget transparency is prompted, in part, by pressure from the U.S. Justice Department to comply with an ongoing desegregation consent decree. For the first time last year, for instance, CPS conducted its own analysis of school-level spending by race. Since then, it has embarked on a process to allocate citywide and administrative costs to schools in an effort to figure out how much it costs to educate a child here.

John Myers

strict staffing formulas, but some schools landed extra dollars for special projects. Ariel Community School and Wells Prep, for instance, split \$623,400 for small schools projects. Some 29 schools snared a total of \$4 million for International Baccalaureate programs. Senn High School got \$194,000 for a program to assist refugee children.

IS THERE A SIMPLER WAY?

A proponent of student-based budgeting, Roza says it helps eliminate confusion and forces school leaders and districts to consider equity. But making the switch systemwide is no guarantee those funds will be spent wisely.

“Does it make sense to give [lack-cluster school leaders] more control over their budgets and instructional decision making?” asks Roza.

CPS officials emphatically say no. But as Martinez says, academic performance shouldn’t fluctuate according to financial resources.

Roza says districts that have switched to student-based budgeting have gradually shifted more dollars into school-level budgets. In a student-based budgeting system, principals and LSCs would view differently the \$200 million now controlled by CPS leaders.

“School leaders start imagining their resources in dollar amounts,” she says. “They start getting territorial. ■

Equity analysis methodology

To analyze the equity of funding among Chicago’s public schools, *Catalyst* adapted an online tool created by researchers affiliated with the Annenberg Institute for School Reform at Brown University.

Through research, the Annenberg initiative had determined that most districts do not distribute funds equitably among schools, and are unaware of those inequities because of complex funding formulas and accounting practices that make them difficult to assess.

The tool was created to help school districts and others identify sources of inequity by using their own data. The tool calculates the average base-level amount of money spent per child, and then the average amounts spent per child for every category of data entered, such as bilingual funds and federal and state poverty funds.

In Chicago, we found the district base-level spending for elementary schools was \$3,149 per pupil; in high schools, \$3,746 per student. Per-pupil benchmarks for other categories were:

- \$1,081 for elementary poverty funds; \$995 in high schools
- \$639 for elementary bilingual education; \$832 in high schools
- \$622 for vocational education, which applies only to high schools.

Using these figures, the tool calculates the total amount of money that would be allocated to schools under per-pupil budgeting, and then compares that amount to the schools’ actual budgets. When the comparison is a one-for-one,

indicated by a score of 1, the school is considered to be funded equitably. Scores above 1 would occur when a school’s actual budget is higher than the tool’s per-pupil amount—a sign that the school is getting more than its “fair” share. The inverse would be true for schools scoring below 1—the school’s actual dollars are below the per pupil amount, signifying it was underfunded.

Catalyst analyzed four categories of spending—base-level allocation, poverty, bilingual, vocational education—which comprise 43 percent of the district’s \$4 billion operating budget or 68 percent of the money that CPS allocates directly to schools. Lack of transparency in the existing CPS budget and accounting practices made it necessary to remove more than \$1.1 billion in appropriations for special education, pre-school, building and lunchroom operations and student transportation.

The results of the analysis show Caldwell Elementary in Avalon Park is the most equitably funded school in the district, missing a perfect score of 1 by \$36. By contrast, Hale Elementary in Roseland was found to be somewhat underfunded, scoring just under the low end of the 0.9 to 1.1 equity zone. Clark Elementary in Austin is slightly overfunded at just over 1.1.

For this analysis, *Catalyst* examined budgets from 537 of the district’s 613 schools. The following schools were not included in this study: charter and contract schools, alternative schools, designated special education schools, achievement academies, child parent centers, and new and recently closed schools.

John Myers

Special education tough to dissect

When determining per-pupil figures for Renaissance and charter schools, CPS hit a snag. How would it come up with a fair rate for special education students?

Special education poses the stiffest challenge to per-pupil funding. With a wide range of disabilities and with multiple funding sources, it defies easy calculation.

“Special ed is tough,” says Pedro Martinez, the new budget director for CPS. “Right now, we’re just starting to dissect that.”

In all, the district spends about \$750 million a year on 60,000 special education students. There are dozens of disabilities sorted by type, such as cognitive and behavioral disorders, and by severity within those types.

Excluding the most severe and expensive cases, which can cost up to \$30,000 annually per student, CPS estimates that the additional per-pupil costs of special education range from \$3,000 to \$5,000, and officials say those figures can be further narrowed by factoring in how much special education time each student needs. Over the next year, CPS aims to further refine those estimates and make it easier for schools to estimate per-pupil needs.

A joint CPS-charter school task force is completing a detailed analysis of special education spending in existing charters, which now have two options to pay for special education: They can get a special education teacher from CPS, or they can be reimbursed up to \$50,000 after hiring one of their own.

Next, the task force plans to compare charters’ special education spending to that of regular schools to set a fair per-pupil rate. CPS has also agreed to raise its cap on special education teacher salaries to \$65,000, and promises to deliver by 2007 an online system that will streamline case management.

“That’s a real show of good faith,” says Elizabeth Delany-Purvis, executive director for Chicago Charter School Foundation, which manages seven campuses of Chicago International Charter Schools. “Our goal is to police ourselves to make sure special ed needs are ethically, legally and morally met. And to make sure charters are getting a fair cut.”

John Myers

Seattle, Oakland ensure funding follows students

One district is a pioneer in a tough budget climate; the other a newcomer using a radical approach and fixing it as it goes along

By Elizabeth Duffrin

This fall, a shrinking districtwide budget put the squeeze yet again on tiny Wing Luke Elementary, a low-income school in a racially diverse neighborhood. But a flexible budgeting system that Seattle Public Schools adopted seven years ago made it possible for Principal Ellen Punyon to hire an extra classroom teacher and keep her after-school program intact.

In 1997, Seattle became the first urban district in the country to do away with its staffing formula, which assigned teachers and other personnel to schools based on enrollment. (Here in Chicago, for instance, schools get one teacher for every 28 primary students.) Instead, Seattle adopted a new budgeting system that attaches a dollar amount to each student based on his or her needs, and lets the school decide how to spend it on staff, programs or educational materials.

"It's the best thing that has ever happened to Seattle schools," says Punyon. "It allows for a lot more flexibility and creativity."

Since Seattle's conversion, other districts have followed its lead, including Cincinnati, Houston, Milwaukee, Pittsburgh, San Francisco, Washington, D.C. and most recently, Oakland. The idea is gaining momentum elsewhere as school districts—Chicago Public Schools among them—seek to more wisely and equitably spend limited dollars in a climate ever more focused on improving student performance.

"Traditional budgeting tends to respond to political pressure," notes researcher Marguerite Roza of the University of Washington's Center on Rein-

venting Public Education. Schools with savvy parents or principals—who will ask the district to pay for special magnet or heritage programs, for instance—often end up with the most resources, sometimes from funds earmarked for low-income or other special needs students.

Meanwhile, schools that are serving the neediest students, who also tend to struggle the most academically, are sometimes shortchanged, Roza's research has found.

However converting to a budgeting system where money follows students shifts additional funds to some schools at the expense of some others, and pioneering districts such as Seattle and Oakland have faced considerable political hurdles in doing so.

In Seattle, it was middle-class parents who furiously protested against losing money in their schools. In Oakland, the teachers union maintains that the new budgeting system is unfair to veteran teachers and the schools that employ them, and that some schools are suffering under a hastily implemented system that left them underfunded.

SEATTLE: BUDGETING PIONEER

Seattle Public Schools had fallen on rough times in the early 1990s, with dwindling enrollment, financial woes and declining test scores. Local business leaders rallied to recruit more innovative leaders for the school board, and by 1995, a new reform-oriented school board had installed retired Army general John Stanford to lead the school system.

To restore public confidence, both the board and superintendent decided to replace an unpopular desegregation policy that forced busing with a policy allow-

ing parents to choose their own schools. Some board members floated the idea of a per-pupil funding formula that would attach extra dollars to students who were low-income, bilingual or in special education. The notion was to compensate schools that ended up with the neediest students. With additional financial resources, schools could then create more innovative programs to attract students, school officials reasoned.

After researching the idea during the summer of 1996, the board held a series of public hearings in the fall to present its proposal. Joseph Olchefske, then the district's chief financial officer, remembers a lot of screaming by angry white, middle-class parents whose schools stood to lose money. "I was creamed in the papers, personally," he recalls.

In January 1997, the board passed the controversial measure despite opposition. "This was wholesale change that hadn't been done anywhere else in America," says Olchefske. "We had a courageous board. We had a strong superintendent."

To help win support for its controversial decision, the school board created a committee of 25 teachers union leaders, central office administrators and educators from a spectrum of schools to devise a formula that was fair to everybody. The committee would decide, given a set budget, how to weight the per pupil allocation for students who were low-income, bilingual or had a specific disability. The per-pupil money would cover a school's teaching and support staff and its educational programs, materials and supplies.

The input was crucial in creating a workable formula, says Punyon of Wing Luke, who served on the committee for many years. School staff know precisely how dollars impact programs at their schools, she explains. "Just having principals there to tell our stories—how would this affect you—makes a big difference in how these decisions get made."

Central office for hire

The budgeting system used by Edmonton Public Schools in Alberta, Canada, is the model for similar per-pupil funding efforts in the United States.

First to launch such budgeting reforms, Edmonton has gone further than any district in turning budgetary power over to its 203 local schools. Ten years ago, the multi-ethnic urban district gradually shifted funds for many central office departments into schools' budgets and gave principals the option of buying back those services. Central office departments that didn't offer products or services that customers wanted faced cutbacks.

"Why would we keep something centrally and pay for it when there really isn't a demand for it?" says Jamie Pallett, the district's budget service director.

It began in the 1970s, when then-Superintendent Mike Strembitsky, a hog farmer and former Edmonton teacher, put forth and later implemented the idea that schools could operate more efficiently if they could control their own budgets.

After Strembitsky's retirement, two successors Emery Dossdall and Angus McBeath took decentralization one step further. They gradually shifted funds that had supported some central office departments, such as curriculum, professional development and building maintenance, into school budgets.

"We went through hell the first couple of years," recalls Neil Usher, a program coordinator at a district environmental center which initially lost staff. The center had formerly hosted students for free instruction in outdoor activities such as canoeing and camping. Now forced to spend their own money, schools opted out, Usher says.

So the environmental center revamped its

program and began to offer on-site training in the district's new elementary science curriculum. Business climbed, and today at least seven or eight other school districts in Alberta pay to use Edmonton's environmental center, too, according to Usher.

Usher says the system has two big advantages: Other districts help support a service that benefits Edmonton, and the service can expand to meet the demand. "If you have a limited budget, you can only hire so many people," he explains. "Now you can hire as many as you need."

Edmonton's curriculum department underwent an even more successful expansion. Using venture capital, the department developed new materials for history, math, technology and 10 foreign languages. It also created eight bilingual programs: Hebrew, Mandarin Chinese, Ukrainian and American Sign Language, among others. Today, those language materials and related services are sold throughout the province and exported to clients in the United States and Australia, generating about \$750,000 a year.

Some of Edmonton's central departments, such as budget and general counsel, are still funded by the district. But Edmonton principals control 92 percent of their schools' budget, according to a recent survey of principals by William Ouchi, professor of management at the University of California at Los Angeles. In contrast, principals in Chicago control only 19 percent of those funds, he found.

The district's budgeting system "truly allows us to make decisions based on our needs," says Principal Carol Symons of S. Bruce Smith Jr. High. "I cannot imagine a principal ever wanting to give that up."

Elizabeth Duffrin

Under the new formula, some schools' budgets swelled by as much as 12 percent; others declined as much as 15 percent, Olchefske says.

Since then, the school board has adjusted the formula annually based on the committee's recommendations. "Many years we made recommendations and they weren't totally followed," Punyon adds. "At least the input was there."

Student-based budgeting had a number of positive impacts on the school system, according to Olchefske who became district superintendent in 1998 and served until 2003. Innovative programs sprang up as principals got creative about using their dollars. (One elementary

school started to teach its math and science lessons in Japanese.) The transparent funding structure reassured the philanthropists that the district wouldn't offset grant money or donations with program cuts, and more donors invested. Student-based budgeting also became a principal recruiting tool, according to Olchefske. "If you're a dynamic person who isn't afraid of performance accountability, it's a very attractive thing."

But now shrinking budgets have tempered some of the initial enthusiasm for student-based budgeting, Punyon observes. The extra work it required seemed more worthwhile when a school committee got to debate whether to add

an extra Spanish teacher or a music teacher. Now the debates concern which positions to cut. "That's less fun. There are some angry feelings."

Despite the tough decisions, Punyon says she wouldn't want anyone making those decisions for her. "I'm sitting here watching the effects [on] the children," she says. "I know what I'm getting for my dollar."

OAKLAND: RADICAL APPROACH

Besides being the newest convert to per-pupil budgeting, Oakland Unified is also the most radical. It is the only district in the country that is charging schools for the actual cost of each teacher's salary, making inexperienced teachers less expensive than veterans.

Poor kids tend to get the least-experienced, lowest-paid teachers, which means less money is spent on their education than on kids with veteran teachers, explains Barak Ben-Gal, special assistant to Oakland's superintendent. "It's an equity issue," he says.

Oakland's switch to student-based budgeting came after the district fell into a multi-million dollar deficit and had to accept a state-appointed administrator to lead the district in exchange for a state loan. Randolph Ward, named state administrator in June 2003, wanted to give local schools more control over their budgets. Oakland had already piloted student based budgeting in 15 schools, and its school board had considered expanding it to all schools.

But the idea for using actual teacher salaries came from research that Ward and his staff reviewed about the funding inequities contained in teacher salaries, according to Katrina Scott-George, Ward's special assistant.

In other districts with student-based budgeting, schools were charged same amount for each faculty position regardless of whether the teacher was a lower-paid novice or a higher-paid veteran.

Analyzing Oakland's budget, George found a per-pupil spending difference of about \$2,000 among Oakland schools that was due mostly to differences in the salaries of new or experienced teachers.

In Oakland, experienced teachers tend to seek jobs in middle-income "hill schools" on the northeast side of the city, while new teachers are concentrated in the lower-income "flatland" schools,

according to Ben-Gal. "You have this completely uneven distribution."

Under the new system, the district no longer subsidizes the additional cost of an entirely veteran staff at hill schools, and most will be forced to hire more inexperienced teachers. (To ease the transition in the first few years, the district is giving "hold harmless" money to schools that can't afford their teachers.)

The district also hopes that schools with an inexperienced staff will spend some of the extra money they receive on professional development and coaching, Ben-Gal explains. With better initial teaching experiences, teachers may choose to stay in the flatlands, he says.

The Oakland teachers' union opposes the new system, according to First Vice President Trish Gorham. For one, they fear that principals will tend to hire the cheapest teachers over the most experienced ones, she explains. Gorham also notes that veteran teachers remain in low-income schools that have good leaders. The new system may penalize these

schools, she says. The highest-paid veterans can earn over \$70,000, where new teachers with only a bachelor's degree earn about \$37,000.

Krishen Laetsch of the Cross City Campaign for Urban School Reform's Oakland office agrees that veteran teachers are not uniformly concentrated in the hill schools. "It turned out that a number of schools with low-performing students have veteran teachers." Cross City was an organizing force in the district's switch to student-based budgeting, but didn't advocate using actual teacher salaries because it could lead principals to favor cheaper teachers over better-qualified ones.

Cherie Ivey is principal of one high-achieving school in a low income area that will be penalized financially for its veteran staff. Out of 29 teachers at Fruitvale Elementary, 17 have more than 10 years experience and only one has less than five years, she says. On the other hand, she still came out ahead because the district turned over to schools some of the money that had supported central services, such

as staff development. With the extra funds, she plans to buy seven computers for a new media center and training programs that her teachers selected.

Overall, Ivey likes the new system because "It gives governance back to the school." Many other principals do, too, says Laetsch. But some, particularly small, underenrolled schools can not afford basic services on their per-pupil allotment. "One couldn't even afford a part time custodian," he remarks.

Laetsch says per-pupil budgeting would have a better chance of benefiting all schools if the district stopped charging actual teacher salaries and consolidated underenrolled schools that it couldn't afford to keep.

Some problems are inevitable in any new initiative, he adds. "If you wait until you have the whole system figured out, you're never going to get started. You push forward and you fix it as you go along."

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BUDGET *Continued from page 10*

running a school, says Angela Miller-Perez, a consultant who helped Little Village. "If you're a seasoned principal, then you would have a sense [of whether] this business of per-pupil funding will be sufficient," says Miller-Perez.

Little Village will eventually have to reverse its position on per-pupil funding, says Martinez, who optimistically anticipates that every school will be converted by September 2007.

But political tensions between the community and the district show no signs of abating.

Jaime De Leon of Little Village Community Development Corp.—the group that organized the hunger strike—says the district's per-pupil budget formula and other policies for Renaissance schools don't fit the community's needs. Neither does the Renaissance label, which he says implies that the district willingly created the new high schools, he adds.

Says DeLeon: "People know very little about Renaissance 2010. But the history of these schools is understood. These schools are a result of common struggle."

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Viewpoints

GUEST COLUMN/DIANA LAUBER

Changing how districts divvy up their budgets

Could you run a business without controlling your budget? Thousands of public school principals face this dilemma every day. Imagine you are a high school principal. You are lauded as the CEO of your building, yet whenever you want to spend more than \$400 on materials or equipment, you need two approvals from central office. Or perhaps you want to hire a reading teacher but you can't because the "system" only allows reading teacher positions in elementary schools.

These scenarios are hardly far-fetched. Principals in Chicago and other districts struggle to be instructional leaders without having control over their budgets. One solution is school-based budgeting, (sometimes called site-based or performance-based budgeting), which allows principals, teachers, and in Chicago, local school councils (LSCs) to control their resources so they can tailor school services to meet student needs. School-based budgeting is a process that moves authority and resources to the local schools. Weighted allocations is a method of distributing those resources.

Traditional, position-based budgeting systems—such as the one in place at the Chicago Public Schools (CPS)—allocate the bulk of a school's resources based on district staffing formulas (e.g., one teacher position for every 28 students.) The Edmonton Public Schools in Alberta, Canada pioneered a budgeting system in 1979 that divvied up money to schools based on enrollment and the needs of each student. Because school-based budgeting alone does not ensure an equitable distribution of resources, a growing number of U.S. districts. Seattle, Houston, Oakland, and San Francisco have decentralized budget authority to the local schools and adopted weighted allocations.

A budgeting system based on weighted allocations would provide CPS with a fair, equitable and effective way to distribute resources among Chicago schools.

GREATER EQUITY. It eliminates the equity gap. Houston Public Schools officials say using weighted allocations means "no school receives a greater share than others with similar numbers and types of students." By comparison, in a district with position-based funding, an elementary school with 400 students could receive the same number of librarians, clerks and counselors as a school with 800 students.

BETTER PLANNING. Using weighted allocations encourages creative and strategic use of resources because most of the budget is built annually from scratch. The school gets its total allocation and school leaders create a budget by aligning their resources with the school improvement plan.

INCREASED SCHOOL-LEVEL AUTHORITY. Under weighted allocations, school leaders have considerable discretion over how to spend their resources, and it pushes districts to provide additional funds previously controlled centrally. Districts like Milwaukee and Houston allocate substitute dollars, energy costs and professional development

dollars to the schools and allow schools to keep any savings.

IMPROVED CENTRAL OFFICE SERVICES. In Edmonton, the school district set up a system of buy-backs where most central office departments, in competition with external vendors, sell their services to schools. Schools receive money for services and can decide which to buy, if any. By competing for school dollars, Edmonton's central offices have provided such excellence services that they have captured most of these school funds.

TRANSPARENT BUDGET INFORMATION. Position-based funding is confusing and fragmented. It's built on multiple formulas that reflect political decisions, rather than instructional decisions. Weighted allocations would make school budgets easier for school staff and LSCs to create and for families and the public to understand.

GREATER ACCOUNTABILITY AND EFFICIENCY. Providing increased dollars to serve students with the highest needs and holding schools accountable for results creates greater school commitment and strategic use of resources. Using weighted allocations frees central office staff from spending time signing off on school purchases and allows them to work with schools to help principals link dollars to instructional priorities.

CPS budget leaders are interested in moving to weighted allocations for the Renaissance 2010 schools. This move is praiseworthy and could be extended to all schools. However, let's be clear. By themselves, school-based budgeting and weighted allocations do not improve student achievement. As Angus McBeath, the superintendent of the Edmonton Public Schools, has said, "[I]t allows

Diana Lauber is managing director of the Cross City Campaign for Urban School Reform where she consults with urban districts on school-based budgeting and district redesign. She has monitored CPS budgets and provided budget training to parents since 1982.

Greater equity, but no additional resources

After three years of research, discussion and development, Cincinnati Public Schools implemented a student-based budgeting system in 1999. This budget process was hailed as a method to offer greater fairness in the allocation of resources to each student. In fact, prior to student-based budgeting, the centrally controlled allocation system did create wide variations in funding levels from school to school.

Sue Taylor has been president of the Cincinnati Federation of Teachers for four years, and will seek a third term this spring. She has lobbied Ohio state legislators against making budget cuts, and serves on the district's budget commission.

For example, in 1998, the school with the highest level of base-level funding averaged \$4,600 per student; the school with the lowest level received only \$2,600 per student. Under the new system, the per-pupil funding that Montessori elementary magnet schools had previously received became the base level for all district schools. That 13 percent increase across the board closed resource gaps between many schools. However, the greater degree of funding equity under student-based budgeting has not solved all resource problems, and other problems were created.

First, the inherent flaws of state funding leaves Cincinnati with a less-than-adequate resource base from the start. Ohio relies heavily on property taxes to fund its schools, a system that the state Supreme Court has declared unconstitutional four times. Because Cincinnati has a "wealthy" property base, our district receives millions of dollars less in state revenue. However, Cincinnati's students come from families whose incomes do not reflect the city's property wealth.

Two years into student-based budgeting, the district reviewed its distribution formula and decided to adopt more "weighted" allocations—supplemental funds for each child with special circumstances. Additional

funds were offered for gifted students, high schools, low-income students and bilingual education. The district also decided to eliminate extra funding that had been allocated to magnet schools. To mitigate those schools' losses, the change was phased in over a three-year period. These revisions provided a greater degree of equity in the per-pupil budgeting system.

Scarce resources and greater authority over spending have forced some schools to become very creative in developing their budgets. At each school, an Instructional Leadership Team, composed of teachers and other school staff, develops the school's budget. The budget is then submitted to the faculty for a vote, as well as to the Local School Decision-making Committee, which includes teachers, parents, community representatives and other school staff. The process ensures that resources will be allocated to meet students' needs.

However, difficult choices must be made when the school's bottom line is less than adequate. With fewer students, smaller schools, for instance, often do not have enough funds to provide for their students' basic educational needs. This year, small schools received a one-time subsidy of \$1 million from the district, which also has had to merge or close a num-

ber of smaller schools.

To save money, some schools have eliminated positions for librarians, counselors, social workers and specialist teachers in art, music and physical education. Many students have suffered as a result. I believe that each and every student deserves a well-rounded education, which includes access to libraries on each campus and instruction in all of the arts. Other schools have trimmed assistant principal positions or cut back on custodial workers, which lowered the quality of building maintenance.

In an attempt to ensure more basic services, the current administration has committed to re-examine the budgeting formula to better provide necessary services.

The combination of inadequate state funding, district charter schools taking \$33 million away from Cincinnati's regular public schools, and student-based budgeting has led to gross inadequacies in funding education for Cincinnati's students. Urban students deserve the same educational services as those provided to their suburban counterparts.

While Cincinnati Public Schools should be commended for developing and implementing a system to provide greater funding equity, it is impossible to do so without an adequate resource base. Absent the necessary resources, significant gaps remain in the quality of education offered in the district's schools. It is regrettable that the wealthiest nation on earth still cannot provide adequate education funding for each student and that, all too often, the students with the greatest needs, suffer from significant educational inadequacies. ■

the school to control enough of the variables that the principal and staff have a chance to be successful."

Weighted allocations, as part of school-based budgeting, can be a

powerful tool for driving educational reform when it is coupled with other essential elements including: transparent budget information, high quality, school-based training,

increased school control over centralized resources, and the unflagging commitment of superintendents and boards of education to equity and instructional improvement. ■

Earning diploma a nearly impossible dream

Special education students often present the most problems with discipline. Yet too often, they don't get the help they need.

By Maureen Kelleher

John, a 20-year-old special education student, is still struggling to earn his diploma. In and out of five high schools since 1999, John has racked up multiple suspensions, one expulsion, four arrests for school-related offenses and a conviction for misdemeanor battery as a result of the fight for which he was expelled. Now he faces a possible second expulsion for alleged sexual harassment of a female student. Though John skips school frequently, unlike many of his peers he has not dropped out, and says he is determined to graduate. (John's name has been changed for reasons of privacy.)

Paul Fagen, a licensed social worker and one of John's former counselors, insists he is not just a troublemaker. "He's a good kid in an impossible situation," says Fagen.

Experts say special education students with behavior problems, like John, need more support to manage their behavior. But under recent changes in federal law, some advocates contend, John and hundreds of other students like him will be more likely to face expulsion and other stringent discipline, and less likely to get help.

When Congress reauthorized the federal Individuals with Disabilities Education Act last year, it changed provisions in the law governing how schools handle

discipline of special education students. Under current law, schools must prove that the student's misbehavior is not due to his or her disability before instituting severe levels of discipline, such as expulsion or reassignment to another school.

With the new law "the burden of proof lies on the parent" to demonstrate that misbehavior is linked to the student's disabilities, says Elliot Marks, a special education advocate with Designs for Change and the parent of a learning-disabled student. "It's a lot of work."

In John's case, proving the link might not seem like a lot of work. In addition to a disability, John has repeatedly struggled with mental health issues, according to hospital records.

One expert notes that learning-disabled students often misbehave when they become frustrated with their academic struggles. "Inability to cope with the learning environment often leads to aggression," observes Fabricio Balcazar, a professor of special education at the University of Illinois at Chicago.

But in practice, making the link between disability and poor behavior is difficult without a lawyer or another savvy advocate in the student's corner.

JOHN'S STRUGGLE IS TYPICAL

Through interviews with John and his mother, school and hospital records and interviews with school staff, *Catalyst* reconstructed John's story. Several

experts say his situation is typical of many special education students.

In 4th grade, John was referred for a special education evaluation because of poor performance in reading and problems paying attention in class. But the assessment failed to pinpoint what blocked his ability to read, suggesting that the evaluation was poorly done, says Balcazar.

The referral for John's evaluation also noted his behavior problems. And twice during elementary school, outside groups recommended John for psychiatric evaluation and services, but his mother failed to follow through. Though this was noted in school records, there is no indication school staff attempted to pursue psychiatric evaluation for John.

A more thorough evaluation might well have determined John had emotional problems as well, which could have shielded him from harsh discipline.

Wallace Winter, an attorney and expert on disability rights with the Legal Assistance Foundation of Metropolitan Chicago, defends more than 50 special education students each year who are facing expulsion. Students like John often have undiagnosed emotional or behavioral disorders, Winter says. But without a formal diagnosis, proving the crucial link between disability and misbehavior is virtually impossible.

"When we've got a kid who's only diagnosed LD [learning disabled], we know we've got an uphill battle," says Winter.

HIGH SCHOOL TROUBLES

By the time John reached Farragut High in Little Village in fall 1999, he was reading at only a 3rd-grade level. Farragut

proved a poor match for a student with John's problems. According to a report from the Illinois State Board of Education based on a site visit in April 2000, classroom teachers were not collaborating with special education staff to learn more effective ways of handling special education students in regular classes. Four of 11 special education teachers were not fully certified, and 41 percent of the regular faculty lacked full credentials.

A report written by John's special education teacher as part of his application for Social Security disability benefits states that by Spring of 2000, John had received two out-of-school and seven in-school suspensions for failure to obey school rules, cutting class, sexual harassment and gang activity.

By the end of his first year, John and his mother were so frustrated they applied to North Lawndale College Prep, a small charter school. There, John had to start over as a freshman because he had earned so few credits. In his two years there, John still struggled with managing his behavior, but received only two two-day suspensions, both for fighting.

North Lawndale's smaller, more personal environment gave staff more flexibility with disciplining John. When he disrupted class, special education case manager Lorna Wilson took him into her office to do his work, allowing him to avoid suspension. Other North Lawndale staff members say they were also reluctant to suspend John, saying that doing so only made his truancy problems worse.

"When [John] is stressed, he skips," says Fagen. John would also skip school if staff even mentioned to him, in an effort to ward off trouble, that he might be suspended if he continued misbehaving.

John says his experience at North Lawndale was positive and "a good opportunity for me to try something new." But he was still not able to keep up academically and earned less than four credits in two years.

AFTER EXPULSION, FEW ALTERNATIVES

During the second half of his second year at North Lawndale, John, his mother and the school agreed it might be best for him to try an alternative school because he was so far behind in credits. He and his mother chose Lincoln's Challenge, a boot-camp-style GED program in Rantoul, Illinois. But he lasted only a short time—"a



MAUREEN KELLEHER

Special education student "John" has problems with truancy as well as discipline. After being suspended late last year, he became discouraged and skipped school more frequently, often playing video games instead.

good three days" in his words—and was asked to leave for fighting.

Students with disabilities are poor candidates for GED programs, notes Balcazar. "It's absolutely impossible for them to pass," he asserts. "It's only for people who are very good at reading."

By the time John and his mother called North Lawndale to ask to return, his seat had been filled. So John returned to Farragut a second time, and immediately began getting in trouble again. In February 2003, he was expelled for knocking out a Latino student in a fight.

While he was expelled, John attended Richard Milburn High School in West Town and says he had no discipline problems there. (Milburn Principal Calista Winford did not return calls for this story.) When his term of expulsion neared its end, John and his mother attended a meeting at Milburn to determine where he would go next. Records show everyone present agreed he would be best served by one of the alternative schools within Youth Connections Charter.

Even so, an alternative school was not

necessarily a good option. Alternative schools have too few expert teachers to meet the needs of special education students, Balcazar says. For instance, Youth Connections Charter must share seven special education teachers, who travel among the charter's 24 sites.

BACK TO FARRAGUT

John ended up going back to Farragut last year for a third time. Last spring, he also attended Austin Evening School. According to Farragut's special education case manager Freida Garth, John's mother said it would be temporary, until John took the test for alternative school placement. But John's mother says he never went for the testing.

Once again, John's problems with truancy and behavior resurfaced. He missed more than 30 days of school during first semester of this school year. By the winter break of this school year, records show John had been suspended for eight days in the fall and for another 10 days in December. The 18-day total exceeds CPS'

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Too few top-notch libraries

One CPS school has two rooms and 12,000 books and videos. Other schools have mobile carts, outdated collections—or no library at all

By Leslie Whitaker

Excitement about books is the norm at Norwood Park Elementary on the far northwest side. Here, students often bring a tower of books to librarian Nancy Volkman, who reaches over to feel the child's muscles and asks if the student can carry them before checking the books out. Many schools tie the number of books students can check out to their grade level, but Volkman rarely imposes such a ceiling.

During her 11 years on the job, Volkman has garnered tens of thousands of dollars in matching grants from the CPS Department of Libraries and Information Services to update the collection, now at more than 12,000 books and videos. The well-stocked library takes up two rooms, with large windows, handsome furnishings and five computers with Internet access.

Along with maintaining the collection, Volkman engages in tasks that experts say help both teachers and students, such as working with teachers to develop curriculum-enriching activities—for instance, classroom exercises that teach research skills to 1st-graders.

In an ideal school system, all CPS school libraries would be like Norwood Park's. In reality, many schools have meager collections or no library at all.

One such school is Graham Elementary in Canaryville, where two libraries were closed four years ago

when the former principal couldn't find a librarian. Current Principal John Katzberger hopes to find a suitable candidate at an upcoming CPS job fair, but he and other principals face a district-wide librarian shortage. Meanwhile, the libraries have been converted into special education classrooms.

At sister schools Fleming and Grimes in Clearing, lack of space forced the schools to turn one library into a classroom and the second into a computer lab.

Librarian Deborah Cottonaro, who stores books on shelves in the lab and in the assistant principal's office, spends her days wheeling a selection of books from classroom to classroom on a mobile cart.

"I make due with what we've got," says Cottonaro with resignation.

LIBRARIES NOT A GIVEN

CPS' library department says it does not have current records on the conditions of school libraries.

But a 2002 internal study on the size and age of library collections, found that 71 percent, or 410 of 576 schools, had book collections rated only 'fair' or 'poor,' or no library at all. Another 20 percent (116 schools) had collections rated "good." Only 9 percent (50 schools) had "exemplary" or "excellent" book collections.

Librarian Patti Foerster of Vaughn Occupational High School in Portage Park conducted her own survey of 46 elementary schools that were large enough to qualify for a full-time librarian. She found that only two of

the 46 had a collection at or above the national average of 18 books per student (as calculated by the National Center for Education Statistics). Three had no library at all.

"Libraries are one of the most poorly institutionalized things in the public school system," says Keith Curry Lance, a researcher at Colorado State University who has conducted studies on school libraries and is scheduled to release an Illinois-based study this month. "If you question the need for a sports program, a counselor or a cafeteria, people think you're nuts. [But] in too many schools, libraries are not a given."

Schools with a certified full-time librarian post reading scores that are 10 to 20 percent higher than other schools, Lance reports. Reading scores also rise as the number of books, periodical subscriptions, and electronic reference titles per student increase.

Those findings hold true even after controlling for other factors, such as family income, parents' education and per-pupil spending. "Libraries exercise a demonstrable impact on test scores that can't be explained away by other things," says Lance.

The ancillary activities good librarians provide are crucial, he points out. "The hours spent planning cooperatively with teachers, teaching cooperatively, providing in-service training to your teachers—these things correlate with test scores."

GRANTS FILL FUNDING VOID

After the 2002 internal study, CPS began providing schools with "poor" and "fair" libraries with money and new books, spending more than \$5 million. The department also began giving matching grants to schools that



JOHN BOOZ, JASON REBLANDO

Norwood Park's two-room library (left) stocks thousands of books and videos. During "library period," students can play educational games or browse through the collection. **Students at Fleming Elementary** (above) cluster around librarian Deborah Cottonaro's mobile cart, which serves as a traveling library. The libraries at Fleming and sister school Grimes were turned into classrooms and a lab.

spent at least \$5,000 in discretionary funds on books and other resources.

This year, the department has given out almost \$1 million; so far, 140 schools have qualified for the current round of grants. The matching grants help schools that can only spend a few thousand dollars, CPS contends. But schools without a central library are not eligible to apply, even to augment classroom libraries or provide books for a mobile cart.

Paul Whitsitt, director of the library department, says grants act as an incentive for schools to dedicate their own funds to libraries. But he advocates reinstating a line in the district's budget solely for library spending; the line was scrapped when the department was dismantled for five years in 1991.

"It's still an obligation of the principal to fund the library. But without the line, the level of funding [schools provide] ranges across the board," Whitsitt says.

Sandra James, principal of Mark Twain Elementary in Garfield Ridge, has received matching grants from CPS over the past several years and is building the school's collection in anticipation of a larger library in a new wing. But finding enough

resources is a challenge.

"There are always other needs," says James. "Sometimes it's just the basics, like text books, that we have to spend money on."

In a study funded by the Institute for Library and Information Literacy Education at Kent State University, Foerster interviewed principals and teachers in Chicago. Principals reported that "general lack of funding" was the top factor keeping them from creating the "best possible library" for their schools.

But when asked to choose up to six features that "would have the most positive impact" on their school's situation—including computers in the library, an enhanced collection, a professional librarian, a full-time aide, flexible scheduling, and collaboration of librarians with teachers—more principals checked "collaboration with teachers" than any other item. Computers and an enhanced collection came in second and third.

Foerster says teachers reported wanting more time to work with colleagues. But only three mentioned librarians as potential partners. "That raises our hackles because our job is to work with the teachers," says Foerster.

LIMITED CONCEPTIONS CHANGING

One expert points out how principals make a difference.

"Much of the responsibility for library programs seems to rest on the shoulders of the principals," says Gail Bush, director of the School Library Media program at Dominican University in River Forest. "When principals understand how qualified librarians support the curriculum and impact student achievement, their support of the library increases dramatically."

Lance notes that principals and other educators still have a limited conception of what school libraries should look like. "You remember what there was in the mid-'70s," he says.

But, says Whitsitt, "more and more high-energy, creative people" are entering the profession. And at its best, the librarian's job is the best in the school, he adds. "You have control over your work day, you're an administrator and a teacher, and you have the best physical space."

Catalyst intern Alejandra Cerna Rios contributed to this report.

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Faculty integration an elusive goal

CPS targets schools to do more to achieve a racial mix of teachers

By Debra Williams

When Warren Elementary, a predominantly African American school in Calumet Heights, needed to fill three vacant teaching positions this year, Principal Christine Ogilvie specifically sought out and hired white candidates.

On the other side of town in West Ridge, Principal June Shackter of mostly white Decatur Elementary plans to hire two teachers in February—both of them minorities.

These two examples illustrate a long-standing problem in Chicago schools: achieving racially mixed school faculties.

CPS has made strides meeting that goal. Last fall, 56 percent of schools met the integration requirements, 8 percent more than the previous year. “This is our best single year increase,” says Nancy Slavin, CPS’ teacher recruitment manager.

The district created an initiative last year targeting 93 schools that were almost in compliance with the consent decree’s requirements. According to a CPS report from May 2004, those schools were required to take a number of steps to improve integration, including publicizing all vacancies; developing recruitment strategies to attract diverse candidates; and keeping records on all candidates interviewed, including their qualifications, race or ethnicity and reasons why they were hired or turned down.

But with 44 percent of schools still out of compliance, CPS has stepped up its efforts. This year, 149 schools are included in the Target Schools Initiative.

SMALL HIRING POOL, LONG COMMUTE

Placing African American teachers in white schools is especially difficult. For one, Slavin says, “the pool of African American teachers, period, is shrinking.”

When schools do find candidates, they are often reluctant to make the commute to schools that can be miles across town from where they live, principals say.

“No one wants to be traipsing all over to

DIVERSITY ON THE RISE

To be in compliance with the desegregation decree, the racial composition of school faculties must be within 15 percentage points of the racial makeup of the teaching force, now 47 percent white and 53 percent non-white.

YEAR	SCHOOLS IN COMPLIANCE	SCHOOLS NOT IN COMPLIANCE
2002	282	305
2003	279	309
2004	326	258

Source: CPS Department of Human Resources

another area to teach if there is another [school] closer to home.” says Shackter at Decatur, whose two pending hires, both of them black, live on the Near North Side.

Stock Elementary Principal Richard Smith agrees.

“The candidates I’ve been interested in live really far south, and it just wasn’t worth their effort to come all the way out here,” says Smith, whose school is only two blocks from the northwest suburbs of Niles and Park Ridge. “I can’t blame them. I live in the city and I’ve been here for 15 years and each year, the commute gets worse.”

Sarah Vanderwicken, a staff attorney for the Chicago Lawyers Committee for Civil Rights, says the board can only do so much to control hiring at the school level, and is battling Chicago’s entrenched housing segregation, which typically keeps African American and white teachers living and working on opposite sides of the city.

The district is concentrating on doing more to place white teachers in minority schools, which are more likely to be out of compliance with the consent decree, according to CPS officials.

“Central office sends us resumes, which we go through all the time,” says Ogilvie at Warren. “But I always know what I need by going through the computer to check on

our compliance status, and if a Caucasian teacher retires, I try to replace that teacher with another [white] one.”

But getting white teachers to minority schools is a hard sell, some administrators say, because white teachers, especially those from the suburbs or rural areas, often have preconceived ideas that African American schools and neighborhoods are unsafe.

Beyond safety, white teachers “are concerned about whether they will be welcome,” says Slavin. “In some cases, we not only have to sell the teacher, but fiancés and parents who are concerned about their daughter working in an urban area.”

CPS has won over some white teachers by taking them on bus tours of African American schools and surrounding neighborhoods to allay fears.

“Manley High School [a predominantly black school on the West Side] is always a pleasant surprise to many [white] teachers,” says Slavin. “They always love that school and if they don’t end up teaching there, it makes them open to look at other schools in the area.”

MORE INCENTIVES NEEDED?

Last year, 19 percent of schools asked for waivers to hire new teachers who did not improve integration.

Joseph Edmonds, the principal of Columbus Elementary in West Town, has no African American teachers and only one Latino, and says hiring minorities has had to take a back seat to the pressing need for bilingual teachers who speak Polish and Ukrainian.

“We hire the people [who speak] the languages of our students,” Edmonds says.

Vanderwicken suggests several ways to foster more teacher diversity, including offering monetary and housing incentives; easing the residency requirement, which could help move whites in neighboring suburbs to minority schools; working with colleges of education to recruit more minority teachers; and adding diversity in hiring to the principal evaluations conducted by area instructional officers.

To contact Debra Williams, call (312) 673-3873 or e-mail williams@catalyst-chicago.org.

First Renaissance schools chosen as charter leaders depart

John Ayers, Greg Richmond bow out as newcomers assume authority

By Maureen Kelleher

Renaissance 2010, Mayor Richard M. Daley's signature effort to turn around failing schools, has kicked into gear amid leadership turnover both inside and outside the school system.

John Ayers, who as executive director of Leadership for Quality Education (LQE) was a leader in charter school law and development, tendered his resignation in December. Greg Richmond, who spearheaded charter school development inside the system, resigned in early February.

Multiple sources say both decided to quit after they saw significant parts of their portfolios moved elsewhere.

Instead of LQE, New Schools for Chicago, a new business-civic venture, will serve as the school system's major external partner for Renaissance 2010, raising funds for and helping open new schools. New Schools for Chicago is based at the Civic Committee of the Commercial Club of Chicago, which launched LQE in the late 1980s. Phyllis Martin, the executive director of another Civic Committee offshoot, the Financial Research and Advisory Committee (FRAC), began working with New Schools behind the scenes in November, and was tapped to lead it.

Meanwhile, within the Chicago Public Schools, a project team was put in place to oversee Renaissance start-ups, limiting the authority of Richmond's team to the selection process. Lisa Schneider, who managed the public housing redevelopment plan for the Chicago Housing Authority, then joined CPS and led the short-lived Mid-South Initiative (another new schools effort that was bundled into Renaissance), was chosen to head the new team. Another key player on the team is Karen Daniels, a former Boston principal who joined CPS last summer to work on Mid-South.



JOHN BOOZ

Surrounded by new school operators and community residents, Arne Duncan announces the winning applicants for a dozen new Renaissance schools. Though only one out-of-state operator was approved, Duncan encouraged national design teams "to come back and stay committed to working in Chicago." A list of new schools can be found online at www.catalyst-chicago.org.

Martin insists hiring a new project manager was not her doing, but says she thinks it is a good idea. "I'm sad that Greg's leaving, [but] now you're trying to do 100 schools," says Martin. "It requires more than one person to make that happen."

Richmond will leave his CPS post March 4 to become the full-time president of the National Association of Charter School Authorizers, an organization he co-founded in 2000.

The leadership changes came on the heels of the first concrete actions under Renaissance 2010. Here are the highlights:

JAN. 18 NEW SCHOOLS CHOSEN. The School Board presents the first 18 schools to be opened under Renaissance 2010—seven charter schools, eight regular schools and three so-called "performance schools," which will operate inside the system but with greater flexibility.

The charter community was surprised

at a number of the board's choices. Neither Perspectives nor Chicago International, charters often praised by the administration, won its bid to take over Uptown's Arai Middle School. Instead, the board chose a team of Arai teachers who partnered with some faculty members at Best Practice High to open a performance school that will extend through 12th grade.

Ald. Helen Shiller, whose ward includes Arai, acknowledges that she is not a charter-school fan, but she says, "I went into this with a willingness to look into everything." Shiller says she was "really turned off" by the charter applicants because she felt they were more concerned with promoting their philosophies and replicating their programs than with the particulars of the community and its children. "It was all about their philosophy, even before the children," she says.

The Arai teacher team initially proposed a performance middle school, but

the board insisted that the new school be a high school, says team member Chor Ng. Best Practice, one of the city's first free-standing small schools, had fallen on hard times with changes in leadership.

Perspectives will continue to search for a site where a new school could open next fall, says Diana Shulla-Cose, who co-founded Perspectives and is spearheading its replication efforts. Since Perspectives is among the charters allowed to have multiple campuses, it could expand simply by getting board approval to amend its charter.

The seven new charters are broadly distributed across the city: three on the West Side, three on the South Side and one on the Northwest Side. This pattern is in contrast to a December report by the Chicago Tribune, which identified five charters likely to make the cut, all but one of them on the West Side. Insiders speculate Mayor Richard M. Daley raised concerns about the geographic concentration, prompting the board to spread out the schools. In the end, only three of the five applicants named by the Tribune got charters.

Meanwhile, another school effort named in the Tribune article is still percolating. "We were pretty jarred by a news story that said we were about to be approved for a charter at Flower, when we were still in the application process," says Lila Leff, executive director of Umoja Student Development Corporation.

Umoja's school proposal is one of a number under consideration by the Flower Transition Advisory Council, which will make recommendations to Chief Executive Officer Arne Duncan. Duncan decides which schools go to the board for approval.

Meanwhile, leaders of the small high schools that will be housed in the new Little Village facility are jousting with central office over whether to operate as a regular small schools or performance schools, which get greater flexibility in return for meeting standards set in a five-year contract. The local leaders want the new schools, which emerged from the Chicago High School Redesign Initiative, not Renaissance 2010, to be regular small schools, in part for financial reasons. (See story on page 6.)

JAN. 25 CHARTER FAILING. Meanwhile, one charter applicant that launched its program in September under the umbrella of another charter was falling apart. City as Classroom High School, which started the school year with 45 freshmen under the umbrella of the Youth Connection Charter School, failed to get a charter of its own and withdrew its application. At a Youth Connection Charter board meeting in late January, executive director Sheila Venson said the school was already losing students and might have to close before the end of the school year.

JAN 28. CLOSING GUIDELINES. The School Board announced guidelines for closing schools under Renaissance 2010, addressing both academic and logistical issues. Elementary schools will be eligible for closing if they fall into all of these categories:

- For the previous four years, fewer than 25 percent of students scored at or above national norms in reading on the Iowa Tests of Basic Skills (ITBS).
- For the previous four years, fewer than 25 percent met standards on the Illinois Standards Achievement Tests.

- Their average yearly gains in reading on the ITBS were less than nine months.
- The school was on probation for more than one year.
- The principal was in place for more than two years.
- The school is located near a better-performing school that can accept students.

The criteria for high schools are the same except in the area of test scores and proximity to alternative attendance centers. For high schools, the test-score standard is fewer than 10 percent of students meeting standards on the Prairie State Achievement Test. And, while elementary school alternatives must be within safe walking distance, CPS does not specify how close alternative placements must be for high schools.

Moreover, schools that fall into all the categories would be spared if closing them would spell multiple moves for students within two years, as happened with other recent closings.

Senior policy advisor Lisa Scruggs says the guidelines reflect community concerns arising from previously announced closings and garnered through a public comment process that brought in more than 500 responses.

FEB. 1 SCHOOL CLOSINGS. The board announced that three elementary schools—Bunche on the South Side and Grant and Howland, both on the West Side—would be closed in June, and that Englewood High would stop taking in freshmen.

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DREAM *Continued from page 21*

limit on out-of-school suspension of special education students.

Schools are required to contact the Office of Due Process and Mediation before suspending a special education student beyond 10 days in one school year. (The office receives "between 600 and 800" such calls each year, one official says.) But until contacted by *Catalyst*, CPS lawyers were unaware that John had been suspended beyond the limit.

On November 10, 2004, with Farragut seeking to expel John a second time, a special hearing was held to rule on the

critical question: whether his behavior was linked to his disability.

According to records, John did not attend the crucial meeting, and his mother "came and left." No lawyer or other outside advocate, who might have pleaded John's case, was present. At the meeting, it was determined that his behavior was not connected to his disability.

In January, Garth said Farragut had requested an expulsion hearing for John. At *Catalyst* press time, the request had not yet been approved at the area office. John says he plans to attend alternative school, but has yet to enroll.

In most instances, students whose behavior is found to be linked to their disability would get extra help. The school would be expected to create a behavioral intervention plan for the student, says Winter, or modify any existing plan.

Winter notes that schools often don't have the resources to provide the level of support John and other students need to succeed. "These kids have all kinds of problems that I think most of us don't have the dimmest glimmer of."

To contact Maureen Kelleher, call (312) 673-3882 or e-mail kelleher@catalyst-chicago.org.

The John D. and Catherine T. MacArthur Foundation

- \$2 million over two years to the University of Chicago's Center for Urban School Improvement to support work on CPS' plan for transforming schools in the Mid-South area.

The Joyce Foundation

- \$684,822 to the Center for Urban School Improvement to expand the New Teachers Network, a support program for newly certified CPS teachers.
- \$434,500 to the College of Education at the University of Illinois at Chicago to analyze alternative certification in Chicago.
- \$100,000 to Business and Professional People for the Public Interest to organize and co-sponsor, with Leadership for Quality Education, the Chicago School Alliance for Innovation and Excellence, a union of small charter and contract schools.

The Spencer Foundation

- \$75,000 to the University of Chicago's Training Early Achievers for Careers in Health program, which helps prepare Chicago Public School students for post-secondary training and work.

The Chicago Foundation for Education

- \$175,000 to 552 CPS teachers who received \$400 grants for innovative classroom projects.

Polk Bros. Foundation

- \$90,000 to Youth Guidance for the Comer School Development Program in 11 schools. (First payment of a two-year grant.)
- \$80,000 to Associated Colleges of Illinois for the College Readiness Program, Minority Scholarship Program and the ACI Partnership for Multi-Cultural Student Achievement.
- \$60,000 to Loyola University for the Center for Science Education's curriculum training program for CPS middle school teachers.
- \$50,000 to Chicago Cares for the Discovery program, a Saturday morning academic and mentoring program at three Chicago public schools.
- \$50,000 to the Jewish Council for Youth Services for the Adventure Education program in three Chicago public high schools.
- \$50,000 to the Logan Square Neighborhood Association for the Parent-Teacher

Mentor Program at seven Chicago public schools.

- \$40,000 to the Golden Apple Foundation for the Alphabet Bus, which provides elementary schools, day care centers and community-based organizations in Pilsen and Little Village with literary activities. (First payment of a two-year grant.)
- \$30,000 to Street-Level Youth Media for media arts programs in 10 Chicago Public schools.
- \$25,000 to Community Organizing and Family Issues for the Family Focus Organizing Project in Austin, which trains parents of students at eight Chicago public schools to organize for better education and community safety.
- \$25,000 to the East Village Youth Program for the College Readiness and Support Program for students at six Chicago public schools.
- \$25,000 to Target Hope for the Saturday Academy, which provides college readiness and support services to Chicago public high school students.

MacDougal Family Foundation

- \$75,000 to the Erikson Institute for professional development for early childhood teachers.
- \$70,000 to Metropolitan Family Services for early learning programs in the Sullivan Elementary School community in South Chicago.
- \$70,000 to the Rochelle Lee Program for reading programs, evaluation and technology enhancements.
- \$65,000 to Art Resources in Teaching for art workshops for teachers at eight schools and an arts integration institute.
- \$50,000 to Metropolitan Family Services to support a community school partnership with the New Sullivan Elementary School.
- \$50,000 to Reading in Motion for a literacy program for 3rd-graders.
- \$25,000 to the Bureau of Educational Research with the University of Illinois at Urbana-Champaign, to examine early reading assessments.
- \$25,000 to the Chicago Community Foundation for an arts education initiative.
- \$25,000 to the Chicago Public Education Fund for general operating support.
- \$15,000 to the Campaign to Expand Community Schools, for general operating support.

Additional grants can be found online at www.catalyst-chicago.org

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ON THE WEB Back issues, a timeline history of school reform, citywide education statistics, school improvement resources, phone directories and more.

"CITY VOICES" Consulting Editor Lorraine Forte 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.

COMINGS & GOINGS To submit items for Comings & Goings, e-mail editorial@catalyst-chicago.org

MOVING IN/ON The creation of New Schools for Chicago by the Civic Committee of the Commercial Club of Chicago has prompted several personnel changes. New Schools for Chicago is the organization that will raise private funds for Renaissance 2010 schools and oversee distribution of private funds to Renaissance 2010 schools.

PHYLLIS LOCKETT MARTIN, executive director of the Civic Committee's Financial Research and Advisory Committee (FRAC), has become executive director of New Schools for Chicago. **JOHN AYERS**, executive director of Leadership for Quality Education, which focused on charter schools, has resigned but will do some consulting for the group. He has been succeeded by Senior Associate Director **PAMELA CLARKE**. ... **SARAH VANDERWICKEN**, director of the children's health and education project for the Chicago Lawyers' Committee for Civil Rights Under Law, has resigned. The position, the last remnant of the Lawyers' School Reform Advisory Project, was eliminated due to funding cuts. The group was first launched in 1995 to provide free legal assistance to local school council members. ... **RICHARD FRIEDMAN** has been named executive director of Art Resources in Teaching (A.R.T.), a non-profit educational arts organization. Friedman, a one-time teacher, was a fundraising consultant and an independent theatre producer. He succeeds **JEANNE BECKER**, who resigned to pursue a writing and consulting career. ... **WANDA NEWELL**, former education program director at the McCormick Tribune Foundation, has joined the Center for the Study of Social Policy, a think tank in Washington, D.C., as a senior associate. **KATHLEEN PRAZNOWSKI**, assistant director, will be acting in Newell's place until a replacement is found. ... **MARY NELSON**, founder and president of Bethel New Life, a community group that has been active in school improvement, will step down in July after 25 years.

A successor has not been named. ... **ANDREA LEE**, former director of the schools initiative for the Neighborhood Capital Budget Group, has joined the Grand Boulevard Federation as education and community organizer. **JOHN PAUL JONES**, NCBG's director of community outreach, will take on Lee's duties until a replacement is hired. ... **APRIL ERVIN** has been promoted to executive director of New Leaders for New Schools, an alternative principal certification program. **KATHLEEN WEAVER** has taken over Ervin's previous post as deputy director. ... **CRAIG WACKER**, former program examiner for the education branch of the White House Office of Management and Budget under the Clinton and Bush administrations, has been named program officer for human and community development for the John D. and Catherine T. MacArthur Foundation.

PRINCIPAL CONTRACTS Interim principals **CARLOS AZCOITIA** at Spry and **DEBORAH EDWARDS** at Piccolo have been awarded contracts. ... **SONIA CABAN**, previously a New Leaders for New Schools principal intern at Daniel Boone Elementary, is the new principal at Mozart. Caban replaces **LOUIS LOUSORDO**, who retired. ... **CHRISTINA GONZALEZ** has had her contract at Emilio Zapata renewed.

AT CLARK STREET **PHIL HANSEN**, former chief accountability officer at CPS and assistant to the superintendent at the Illinois State Board of Education, has joined Princeton Review as national director for urban schools, a new position. Hansen has also joined Solomon Consulting, Inc., a new educational consulting group, as senior advisor. ... **MAURICE WOODS**, a project manager in the CPS Office of Technology Services, has been promoted to deputy chief information officer. Woods replaces **JAMES DISPENZA**, who is now director of

the CPS School Demographics and Planning department. ... **DEREK BLAIDA**, former assistant to Mayor Richard M. Daley, has been appointed director of intergovernmental affairs in the CPS Office of External Affairs

NEW LOCATION Parents United for Responsible Education (PURE) has moved its office to 100 S. Morgan St. on the Near West Side. PURE has two new telephone numbers: (312) 491-9101 and toll-free (877) 491-PURE. The email address remains www.pureparents.org. PURE will host an open house on Friday, Feb. 18 from 4 to 7 p.m.

EDUCATOR'S AWARD **TIMUEL BLACK**, a veteran Chicago educator, civil rights activist and author, received an award for teaching excellence from the Oppenheimer Family Foundation.

COLLEGE COUNSELING Students seeking information on colleges, scholarships and financial aid can get help through March 10 at a CPS Online College & Financial Aid Center. The centers are located at 19 high schools and Gallery 37, at 66 E. Randolph St. Students can participate in online workshops and discussion groups, and improve their writing through online essay writing. For more information, go to www.postsecondary.k12.il.us or contact the Office of Postsecondary Education at (773) 553-2108.

ARTS ED STUDY A study by the 3D Group of Berkeley, Calif., found that 84 percent of students in schools with the Chicago-based Reading in Motion program were reading at or above grade level, compared to only 27 percent of students in comparable schools. The program, formerly known as Whirlwind, uses music, dance and drama to help teach reading skills.

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