

Appendix A

HOUSE BILL NO. 736 INTRODUCED BY R. BROWN, TESTER, F. THOMAS, WANZENRIED

AN ACT ESTABLISHING A K-12 PUBLIC SCHOOL RENEWAL COMMISSION; PROVIDING AN APPROPRIATION; AND PROVIDING AN IMMEDIATE EFFECTIVE DATE.

WHEREAS, public schools are the foundation of Montana, providing citizens with the tools they need to strengthen our state's way of life and extending the principles of liberty; and

WHEREAS, approximately 16,000 full-time and part-time public school teachers guide over 149,000 students in the state of Montana; and

WHEREAS, as prescribed by Article X, section 1, of the Montana Constitution, a fundamental goal of the State of Montana is to establish a system of quality education that will develop the full educational potential of each person; and

WHEREAS, it is consistently proven on national assessments that Montana's excellent educators instruct superior students, and this fine system should be strengthened; and

WHEREAS, the Board of Public Education, of which the Superintendent of Public Instruction and the Governor are members, is constitutionally charged with general supervision over the public school system and other public educational institutions as may be assigned by law; and

WHEREAS, the first step in developing a competitive economy is a quality education system producing a qualified workforce; and

WHEREAS, due to repeated adjustments, revisions, and court decisions, the statutes governing the education system in Montana are plagued by inconsistent language, conflicting provisions, confusing funding mechanisms, and overlapping organizational structures that make it difficult for educators, parents, the legal community, and the general public to understand; and

WHEREAS, in order for the State of Montana to provide for an effective and efficient system of free quality public elementary and secondary education, a comprehensive renewal of education in Montana would be in the best interests of all of the state; and

WHEREAS, the Governor of Montana, the Board of Public Education, the Superintendent of Public Instruction, and the Montana Legislature should convene a commission to examine the various options available for the renewal of public education in Montana.

BE IT ENACTED BY THE LEGISLATURE OF THE STATE OF MONTANA:

Section 1. K-12 public school renewal commission. (1) There is a K-12 public school renewal commission established to propose changes and new provisions regarding the several components of K-12 public education in Montana, including but not limited to:

- (a) the revenue available for public education;
- (b) the structure of school district governance;
- (c) the methods of funding public education;
- (d) the role of the state government in public education; and
- (e) the role of the federal government in public education.

(2) Core membership of the renewal commission must include the governor, the presiding officer of the board of public education, the superintendent of public instruction, the speaker of the house of representatives, the president of the senate, the minority leader of the house of representatives, and the minority leader of the senate. Core members may select a designee to represent the core member on the renewal commission.

(3) The governor, in consultation with the core membership, shall:

- (a) identify no less than 10 and no more than 25 entities who shall designate a representative to serve on the renewal commission;
- (b) appoint a representative from the juvenile corrections division of the department of corrections to serve on the renewal commission;
- (c) request assistance from other legislative and executive branch agencies; and
- (d) in addition to any legislative appropriation, accept donations for the purposes of carrying out the duties of the renewal commission required in this section.

(4) The members of the renewal commission appointed pursuant to subsection (3)(a) may be reimbursed for expenses.

(5) (a) The renewal commission shall submit a final report of its findings and recommendations to the education and local government interim committee by September 15, 2004.

(b) The renewal commission may recommend legislation to the 59th legislature based on the commission's findings.

(6) As used in this section, the term "K-12 public education" includes a state youth correctional facility, as defined in 41-5-103.

Section 2. Appropriation. There is appropriated \$10,000 from the general fund to the board of public education for the biennium beginning July 1, 2003, to support the K-12 public school renewal commission.

Section 3. Effective date. [This act] is effective on passage and approval.

- END -

Appendix C

Support for the work of the Montana K-12 School Renewal Commission was provided by the following:

Montana K-12 School Renewal Commission Staff Support

Commission Staff:

Steve Meloy	Executive Secretary, Montana Board of Public Education
Suzan Hopkins	Administrative Assistant, Montana Board of Public Education
Kris Goss	Education Policy Advisor and Deputy Communications Director, Office of the Governor
Loran Frazier	Education Policy Advisor, Office of the Governor

Staff from other agencies providing assistance to the Commission:

Office of Public Instruction:	Madalyn Quinlan Cathy Warhank Bob Runkle
Legislative Fiscal Division:	Jim Standaert
Office of Budget and Program Planning:	Amy Carlson Matt Bugni
Department of Revenue:	Larry Finch
Montana State Library, Natural Resource Information System:	Kristine Gurrieri

Montana K-12 School Renewal Commission Funding Sources

Funding to support the work of the Commission was provided from the following sources:

Legislative Appropriation	\$10,000
Federal Relief Funds	\$25,000
Board of Public Education Contribution	\$5,631
Private Donations	\$5,500
Burlington Northern & Santa Fe	\$5,000
Montana Chamber of Commerce Foundation	\$250
Montana Chamber of Commerce	\$250
Total	\$46,131

Montana K-12 School Renewal Commission Overview Remarks 7/11/03

History ...

- In September 2002, following the Board of Public Education planning session in July, and in preparation for the 2003 Legislative Session, the Board began discussion of concerns and responsibilities of our Constitutional charge to provide leadership and direction for the education system in Montana.
- The Board noted problems caused by inadequate school funding leading to disturbing examples of ... schools unable to meet the minimum basic accreditation standards, an educational workforce leaving the state to pursue other opportunities, and the great concern that this erosion affects a generation of students quickly (a child is only a 2nd grader once).
- Our discussions were many faceted and ultimately led us to believe that:
 - Our system is at a critical crossroads in its ability to provide Montana students with the quality education they deserve.
 - Solutions to the complex problems faced by our public schools, including funding, require collaboration to find broad-based answers to ensure progress and stability for K-12 education.
 - Solutions will require a multi-faceted, long-term approach addressing the need for a quality system of education, the ability of our state and communities to support this need, and the benefits of operating the education system in an effective and efficient manner.
 - Montana's educational system and its funding must be comprehensively examined in a collaborative, holistic manner to seek viable long-term sustainable solutions for the future direction of the system.
- In November 2002, the board crafted their thoughts on this topic into a Position Paper on Public School Funding and Structure.
- Realizing time was of the essence if progress was to be made during the 2003 Legislative Session, the Board set about developing collaborative partners in this effort. We approached the Governor's office through Lt. Governor Ohs who was serving as the Education Policy Advisor and had been involved with the ongoing discussions of the Position Paper. The Lt. Governor was receptive to the ideas presented and further pursued this with the Governor's office.
- In January 2003, a meeting was held with Governor Martz and her cabinet to discuss the position of the Board and our request of support for moving forward with a collaborative "call to action" to solve the challenges outlined. The Governor supported the concept and announced her support during the State of the State address to the Legislature.
- Following a great deal of discussion with our education community partners, the concepts in the Position Paper were crafted into legislation. The bill, HB 736, carried by Representative Roy Brown, had support from both Democrat and Republican leadership in the House and Senate. The bill passed and was signed by the Governor creating the K-12 School Renewal Commission.

The Position Paper on Public School Funding and Structure...

- The thoughts of the Board of Public Education are found in the Position Paper on Public School Funding and Structure.
- Since its initial inception, the goals have not changed and have led us to this important kick off today.
- Simply put, the vision of the BPE is to assemble a group of experts from across Montana to work collaboratively to find solutions to four issues. By threading together work that has been completed in the past, along with new concepts and ideas, the resolution of the issues may ultimately lead to the long term solutions necessary to promote the quality system of K-12 public schools that Montanans expect and support. The four issues are:
 1. Adequacy of funding.
 2. Simplification of the funding system so it is understandable.
 3. Stability, equity and sustainability of the revenue stream dedicated to support the system.
 4. Development of an effective, efficient delivery system of services (structure). The end product ... “An understandable, adequately funded, sustainable, efficient system of public schools!”

Making it happen...

Though simple in its concept, the task ahead is daunting and requires the best minds in Montana to come together and work together to develop solutions. The Board believes:

- The support for accomplishing our work is demonstrated in the ground swell of interest from Montanans who support quality public education for our kids.
- Political agendas or other means that hamper our progress will not be welcome at this table. We must effectively ‘check the guns’ at the door and sit as Montanans to find what will work the best for all.
- The nature of the Commission will be to come to the table with the expertise of your constituency and great background of educational and taxation issues, but be fully aware that to accomplish the tasks ahead will likely require everyone to give up special interests for the betterment of quality Montana education.
- Commission members must represent their constituency but take time to identify those things that can be allowed (or given up) by their constituency for the collective good of the whole.

I am a lifelong educator and have spent more than the past year contemplating the needs outlined briefly for you today. From my perspective, there is nothing more important that we can do with our lives, our state’s economy, and a stable future than offering each child in our state access to a high quality education in our system of public schools. I thank each of you before we begin this journey. Failure is not an option as we work to develop a system that meets the education needs of our state’s most precious resource—the future!

Kirk J. Miller, Ed.D.

Chairman, Montana Board of Public Education



Montana Board of Public Education Position Paper on Public School Funding and Structure

The Constitution of Montana, in Article X, Section 9 created the Montana Board of Public Education to ... *“(3)(a) ... exercise general supervision over the public school system and such other educational institutions as assigned by law.”* Inherent in the general supervision clause is the responsibility of the Board of Public Education to provide leadership and direction to the goal of the people established in Article X, Section 1 ... *“(1) It is the goal of the people to establish a system of education which will develop the full educational potential of each person. Equality of educational opportunity is guaranteed to each person of the state.”* Further, *“(3) The legislature shall provide a basic system of free quality public elementary and secondary schools.”*

Based upon the foundation of our Constitution and the need to look at sustainable solutions to current and future challenges in the education of Montana students, the Montana Board of Public Education proposes that the Governor’s Office, the Montana Legislature, and the Board of Public Education collectively commit to collaboration in addressing the complex issues facing Montana public education. Through this collaboration, we will work together to find broad-based solutions to meet the needs of Montana and its citizens in order to ensure progress and stability for K-12 education.

Considerations:

The solutions to the complex problems in the Montana public K-12 education system, including funding, require a multi-faceted long-term approach which takes into account the need for a quality system of education, the ability of our state and communities to support this need, and the benefit of operating the education system in an effective and efficient manner. Thus, it will be essential to review revenues and expenditures, along with structure and service delivery models in this proposed analysis.

The recently-conducted school funding adequacy study outlines the need for approximately \$170 million to help provide our students with a basic education program that meets minimum standards of quality outlined in the state accreditation standards, content and performance standards, and federal requirements. State revenue projections show a deficit between \$200 and \$300 million for the coming biennium. Current taxing jurisdictions and structure have been in place in Montana for many years with the current system of taxation often scrutinized for equity and fairness.

It is important that Montana’s educational system and its funding be comprehensively examined in a holistic manner and essential that we work collectively and collaboratively to seek viable long-term solutions, rather than limiting study to those issues and considerations put forth by special interest groups. To make progress it will be essential that all participants set aside partisanship and vested interests to reach accord on a fair, sustainable system that will set a direction for public education that successfully serves Montana’s present and future needs.

Recommendations:

The Montana Board of Public Education requests that a group with broad educational and taxation expertise be assembled to analyze and make recommendations to the Governor's Office, Legislature, and the Board of Public Education. Although other issues and concerns may arise throughout this proposed study, it is the recommendation of the Board of Public Education that the group consider the following issues and identify appropriate solutions:

1. The development of a school funding system with the intent of simplifying the current system, including the analysis of funding school district base budgets via statewide distribution of a different taxation mechanism developed out of tax reform initiatives, which:
 - May include a combination of property taxes and other taxes dedicated to education along with other sources of existing or potential sources of revenue.
 - Should eliminate the concept of winners and losers via increases and decreases in property taxes (i.e., everyone pays their fair share).
 - Must include funding necessary to address the adequacy of educational needs.
2. The investigation of options to redistribute state funds to a more efficient system, which:
 - Should seek to eliminate scenarios that go against the common sense of the needs of students and the ability of taxpayers to meet those needs.
 - Must include funding necessary to address the adequacy of educational needs.
3. The examination of potential structures/systems that would be more efficient than the currently established school district boundaries, which:
 - Should examine Education Service District concept to provide regional administrative services, professional development services, curriculum development, clerk and school finance services, purchasing of supplies and materials, insurance, and transportation.
 - Should investigate a revised administrative structure for K-12 education across Montana.

The Board of Public Education commits to joining the Governor and Legislature as full partners in this process and, as so, to participate in the selection of a broad-based panel having expertise in taxation and education issues that will analyze the recommendations, and to help further outline the meaning and description of the recommendations forwarded to the experts.

We respectfully await your review and response to these recommendations and the possibility of a "call to action" in solving the challenges facing education in Montana at the current time.

School Renewal Commission: Defining a Basic Education 10/13/03

Thoughts to be considered by the Commission regarding the question:

What is the definition of a basic system of free, quality public elementary and secondary education in Montana?

Key Issues to Consider:

Montana Accreditation Standards

Those rules responsible for establishing and maintaining the basic level of education for public schools in Montana.

Accreditation Standards were reviewed and revised in 1999-2000 by the Montana Accreditation Task Force. Line-by-line consideration of the previous document resulted in the changes recommended after careful, deliberate discussion. The Board of Public Education followed the established public hearing process and finally adopted the changes in 2001.

Chapter 55 – General Accreditation Standards

General provisions - Procedures – 5YCEP, definitions, variance to standards, categories of accreditation [regular, regular w/minor deviation, advice, deficiency w/assistance, nonaccredited], performance based accreditation [flexible School Improvement Plan process]

School leadership – Certification (qualifications) requirements and duties of superintendent, principal, teachers, and specialist staff; class size requirements, professional development

Educational opportunity – Climate, equity, access, Gifted and Talented, Special Education

Academic requirements – Definition of basic education program for elementary, middle grades and high school; graduation requirements, distance learning, school facilities

Program area standards [guidance in identifying subject matter and degrees of sophistication to be emphasized at each level of the education program] – Cross-content and thinking skills, program foundation standards, and program delivery standards by learner area

Chapter 54 – Content and Performance Standards

Standards revision process, which took place from 1997-2001, built a common set of standards, a framework, for all Montana students. These standards are to be used by school districts to develop local curriculum and assessment in all content areas [Communication arts (reading, English language, second language, literature, writing, listening, speaking), fine arts, guidance, health enhancement, library media, mathematics, media, science, social studies, technology, and vocational/practical arts]

Define the general knowledge of what all students should know, understand and be able to do in each subject area.

Sets specific expectations for student learning at 3 benchmarks along the K-12 continuum. These benchmarks are at the end of fourth grade, eighth grade, and upon graduation.

Performance standards describe student expectation of performance at each of the benchmarks at four performance levels: Advanced, proficient, nearing proficiency, and novice.

The content standards, benchmarks, and corresponding performance levels provide teachers, parents, students, and the public with a clear understanding of what students are expected to learn and how well they are able to apply their learning.

Chapter 56 – Student Assessment

Rules for state-level assessment in public schools and those private schools seeking accreditation.

These rules will be affected by the new NCLB (ESEA 2001) act.

Chapter 57 – Licensure

To effect an orderly and uniform system of teacher and specialist certification, the Board of Public Education shall, upon the recommendation of the superintendent of public instruction and in accordance with the provision of this title, prescribe and adopt policies for the issuance of teacher or specialist certificates.

Underwent revision by the Chapter 57 Task Force during 2000-2002 with final adoption by the board of public education, based upon recommendations and public hearings, in 2002. Increased flexibility of licensure while upholding the quality Montanan's expect.

Chapter 58 – Professional Educator Preparation Program Standards (PEPPS)

Standards for the approval/accreditation of educator preparation units. First established in 1979, the board of public education has revised and amended the standards in 1984, 1989, 1994, and 2000.

The review and revision of these standards and procedures is a deliberative and thorough process that happens on a 5-year cycle. The next cycle for review began on September 23, 2003 when the PEPPS Review Advisory Panel met for the 1st time to begin discussion of the process for recommendations in 2005.

The guiding principles of the process include: Quality, equity, diversity, and currency with nationally recognized standards.

Court Decisions

- 1989 Equity Lawsuit Case. Appealed to the state Supreme Court. One of the findings determined that “the Montana School Accreditation Standards are minimum standards only, and do not provide the basis for defining quality education.”
- 1992 Sherlock Decision. Resulted from a legislative challenge to the Board's rule making authority. Opinion delivered by the court was in favor of the Board's inviolate constitutional rule-making authority.

Adequacy and Education Finance

- Educational clause language (in Montana – quality is in the language) in state constitutions has led to litigation in many states. A great deal of work has been done over the past 15-20 years in determining what an adequate education entails

by engaging in standards based reform and looks at methodologies that are intended to determine adequate education finance systems.

- In 2001-02, a group of educational entities (led by the Montana School Board Association) commissioned Augenblick and Myers to engage in a study designed to determine the funding levels necessary for different school districts to produce specific levels of education, or an adequate education. The Professional Judgement approach was used.
- The study results were published in August of 2002.

Legislation

- The most recent legislation intended to define “quality public elementary and secondary schools” was introduced by Senator Glaser during the 58th Legislative Session (2003). Senate Bill 411 attempted to go beyond the basic accreditation standards and define what schools should teach or provide.
- Amendments were offered but ultimately the bill did not make it through the session.

Where we go from here is a charge and responsibility of the School Renewal Commission!

Prepared by Kirk J. Miller, Chairman Montana BPE

10/13/03

Work Plan and Ground Rules for the School Renewal Commission (HB 736) Adopted August 18, 2003

1.0 Introduction

1. The purpose of this document is to set out the common expectations of the participants and agencies involved in this Commission and provide a framework that guides what the Commission wants to accomplish and how it will function.
2. Upon adoption, each participant in the Commission agrees to use this agreement - which may be amended by consensus of the Commission as the work moves forward.

2.0 Purpose/Results of the Commission

1. HB 736 establishes a K-12 public school renewal commission to propose changes and new provisions regarding several components of K-12 public education in Montana, including but not limited to:
 - (a) the revenue available for public education;
 - (b) the structure of school district governance;
 - (c) the methods of funding public education;
 - (d) the role of the state government in public education; and
 - (e) the role of the federal government in public education.
2. The Commission shall submit a final report of its finding and recommendations to the education and local government interim committee by September 15, 2004.
3. The Commission may recommend legislation to the 59th legislature based on the Commission's findings.
4. If the commission desires to address additional issues beyond those addressed in section 2.1, the commission will use the decision making process defined in section 6.

3.0 Inclusive Participation in This Public Process

From time to time, a jointly agreed upon summary statement on the progress of the Commission may be distributed to the media, general public and/or other interested stakeholders by the Governor's Office and the Board of Public Education.

Draft meeting summaries will be distributed within a week to commission members and you will have 72 hours to respond.

Each Commission member will speak to the media on their own perspectives, or on the consensus perspectives of the Commission. No participant will characterize the views of any other Commission participant in the media.

The following twenty-eight participants are hereby appointed as of (8/4/03) to serve for the period from August 2003 through September 15, 2004. Each participant **may** choose **one consistent** alternate to stay up-to-date with the Commission's work from the beginning of the process and participate in consensus "votes" in the absence of the appointed member.

Alternates are expected to closely follow progress of the Commission from beginning to end. Alternates will be identified at the September 8th meeting and copies of all materials will be provided to all alternates.

All members retain the right to withdraw with an explanation to the Commission about why. Early in the process, any member unable to fully participate is expected to suggest another person who could fairly represent similar perspectives (to maintain on the Commission).

Permanent Commission replacements will be selected by the representing organizations. The Core Group will choose at large member replacements.

When possible, the public will be made aware of opportunities to participate in the process through Commission members being available to give progress reports and listen to concerns and answer questions. All Commission members will be notified when such events are scheduled.

Public Comment rules will be followed at all public meetings of the commission.

NAME		AFFILIATION	ROLE	CITY
Allen	Keith	Montana AFL/CIO	Representing Organized labor	East Helena
Christiansen	Carter		At-large	Miles City
Coulter	Lorri		At-large	
Day	Cathy	Montana PTA	Representing parents	Great Falls
Engellant	Erik	Great Falls High School	Representing students	Great Falls
Feaver	Eric	MEA/MFT	Representing teachers	Helena
Fitzpatrick	John	Montana Taxpayers Assoc.	Representing taxpayers	Helena
Gibson	Steve	Mt. Department of Corrections	Representing youth correctional facilities	Helena
Johnson	Steve	Bozeman School District	Representing school business officials/MASBO	Bozeman
Juneau	Rep. Carol	Montana Indian Education Assoc.	Representing American Indian education	Browning
Keenan	Sen. Bob	Senate President	Senate & Core group	Big Fork
Laferriere	Ron	Special Education Director	Representing special needs education/PLUK/AGATE/.	Bozeman
Lund	Tim	Montana Association of Realtors	Representing the business community	Hamilton
McCulloch	Linda	Superintendent of Public Instruction	Core Group	Helena
McNeil	John	Superintendent of Savage Public Schools	Representing Rural Schools/MREA	Savage
McSpadden	Carmen	Trustee, Anderson School district	Representing school boards of trustees/MTSBA	Bozeman
Messinger	Bruce	Superintendent, Helena Public Schools, MTSBA/SAM	Representing large schools	Helena
Miller	Kirk	Chair, Board of Public Education	Core group	Havre
Mood	Doug	Speaker of the House	Representing the House Core group	Seeley Lake
Murray	Robert	Mt. Indian School Board Caucus	Indian Education At-Large	Poplar
Nicosia	Mike	Superintendent of Columbia Falls Public Schools	Representing education groups	Columbia Falls
Ohs	Lt. Gov. Karl	Lt. Governor's Office	Representing the Governor's Office & Core group	Helena/Harrison

Raser	Rep. Holly	Montana House	House & Core group	Missoula
Rud	Darrell	Executive Director of School Administrators of Montana	Representing school administrators	Helena
Ryan	Sen. Don	Montana Senate	Senate & Core group	Great Falls
Seilstad	Scott	Farmer and schools trustee	Representing agriculture/MFB/MGA/MFU/MSA	Denton
Waber	Jules	Powell County Superintendent	Representing local government	Deer Lodge
Wagman	Rep. Pat	Montana House	At-large	Livingston

Evaluation of progress will be made by Commission members themselves (they will jointly evaluate whether or not they are making acceptable progress) at the end of each agenda and noted adjustments made in the meeting summary.

4.0 Ground Rules

1. Members will recognize the legitimacy of the concerns and interests of others, whether or not they are in agreement with them.
2. Members will seek to clearly state their own (and/or their organizations') concerns and interests, listen carefully to others and explore issues from all points of view before forming respective conclusions.
3. Members accept the responsibility to come to meetings prepared for discussion, and to educate themselves and their constituents on the issues.
4. Members will seek to share discussion time, encouraging everyone to fully participate.
5. Members will enter into dialogue with the intent to identify areas of agreement wherever possible but also to clarify differences when this occurs, listening carefully, sharing discussion time, asking questions, educating each other and searching for common understanding.

5.0 Commission Decision Making

1. The Commission will seek consensus on recommendations. For this Commission, consensus is defined as follows. When at least 20 of the 28 Commission members or alternates are present when the meeting is convened, and each member present can say they support recommendations that address the range of issues being discussed. When less than 20 members are present at a meeting, the discussion may continue, but consensus decisions will be deferred until a meeting convenes with at least 20 members present. Absent members are responsible outside of meetings to be briefed on information covered in a meeting. The participants may not agree with all aspects of an agreement; but they do not disagree enough to warrant their opposition to the overall package. "Support" means the members each put their thumbs up or sideways and no member puts their thumb down.
2. If a commission member cannot attend or is called out during a meeting, the member may give their proxy interests to another member of the commission.
3. Notice of required absence will be given 24 hours in advance.
4. Should any member disagree, they are responsible to:
 - a. Explain the reason or reasons for the disagreement; and
 - b. Propose a constructive alternative that seeks to accommodate all affected interests.
5. Method. When the time is ripe to check for agreement, each Commission member **OR** alternate will either put their thumbs up, sideways, or down.

Thumbs UP means:	I agree and will support this recommendation (or process step or whatever the question is at hand)
Thumbs SIDEWAYS means:	I'm neutral or may not prefer this recommendation or action but I will support it , either because it's not important enough to block, or because it seems to be the best solution at this time and we reached a conclusion fairly and deliberately on this.
Thumbs DOWN means:	I cannot support this recommendation or action , but here is my suggestion on how the Commission might move past or address this disagreement or impasse.

Fallback. When and if the Commission has tried in good faith, but is still unable to reach consensus and still wants to deliver a recommendation on the issue or issues at hand, the fallback is to deliver a **succinct description of points of agreement and disagreement.**

6.0 Neutral Facilitator

Kathy A. van Hook of the Montana Consensus Council was confirmed by the Commission as an acceptable neutral facilitator for this Commission at the August 4, 2003 meeting of the Commission. The facilitator's role includes, but is not limited to:

1. Help the participants design an appropriate agreement building process.
2. Serve as an independent process manager with responsibility to the Commission.
3. Develop agendas and materials Commission members in advance of each meeting.
6. Be the Commission's scribe to record areas of agreement, areas of disagreement and strategies for implementation.
7. Facilitate meetings by enforcing the ground rules adopted by the Commission, focusing the energy of the Commission on a common task, offering options for moving forward when appropriate.
8. Meet with participants in private when needed, holding confidential statements confidential.
9. Conduct a participant evaluation of the process and its outcomes at the end of the Commission's work.

MCC is impartial and nonpartisan; it is not an advocate for any particular interest or outcome. Its mission is to help citizens and officials build agreements and resolve conflict on public policy issues. Since its creation, MCC has helped citizens and officials solve problems related to the delivery of public mental health services, instream uses of water, public access to state school trust lands, federal land management, and other issues.

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Appendix H

Work Plan School Renewal Commission (HB 736) October 10, 2003

DATE	ACTIVITIES (subject to change)	Preparation Needed	OUTCOME(S)
8/18/03	Organizational meeting to revise and adopt the ground rules & work plan. Introductory grounding in process and relationships.	Draft ground rules for review to staff and Commission members.	Adopt Ground Rules & Work Plan (this document). Increase understanding of participant's interests public schools in Montana.
9/8/03	Identify two issues that the Commission will address and what information will be needed.	Line up resource people to present overview and have copies of handouts available to commission members in advance of meeting. The Commission will consider key questions they have, <i>why</i> it's important to answer those questions, <i>what</i> data is needed to answer those questions from <i>where</i> , by <i>whom</i> and whether or not it's <i>practical</i> to answer those questions by the next meeting date.	Overview information presented on issues 2.1 (b) & (c). Commission discussion of info.
9/29/03	Identify 2-3 issues that the Commission will address and what information will be needed	Line up resource people and have copies of handouts available to commission members in advance of meeting.	There will be more mutual understanding about the issues and data needed to make recommendations. In addition, points of disagreement will be more sharply defined by the Commission with strategies to address those points of disagreement or set them aside (agree to disagree).
10/13/03	Discussion of – What is the definition of a basic system of free, quality public elementary and secondary education in Montana?		

11/3/03	How can the basic system be provided? Work on options. Consider criteria for narrowing options. Seek preliminary agreement.		
11/24/03	Discussion of – Do we have a system that is providing adequate education to every student in Montana?		
12/08/03	What are options for providing an adequate education. Consider criteria for narrowing options. Seek preliminary agreement		
Jan, '04	Discussion of – Do we have adequate funding to fund public education. Are we providing it now?		
Feb. '04	What are options for providing adequate funding to fund public education. Consider criteria for narrowing options. Seek preliminary agreement.		
Late Feb. '04	What is the states' obligation to provide a quality public education to all students in MT?		
March '04	What are the states' options to meet its obligation. Consider criteria for narrowing options. Seek preliminary agreement.		
Late March '04	Discussion of how to develop a predictable and sustainable system of funding.		
April '04	Explore options for developing a predictable and sustainable system of funding. Consider criteria for narrowing options. Seek preliminary agreement.		
Late April '04	Discussion of – How do we develop a simpler, more understandable system than we current have?		
May '04	Develop criteria and apply to options generated. Seek preliminary agreement		
Late May '04	Discussion of – Is there a problem with having the current structure of local and state governance?		
June '04	Develop options for addressing structure. Consider criteria for narrowing options. Seek preliminary agreement.		
Late June '04	Discussion of – Is there a problem with the tax system?		
July '04	Develop options for addressing		

	problems with the tax system. Consider criteria for narrowing options. Seek preliminary agreement.		
Aug. '04	Discussion of other need questions that arise. Draft written recommendations		
	Review draft recommendations		
9/15/04			Submit final report of findings and recommendation to the education and local government interim committee.

SCHOOL RENEWAL COMMISSION

Components of Quality - above accreditation standards

- 1) Professional development of staff.
- 2) Facilities improved to accommodate technology and maintenance of facilities.
- 3) Extra-curricular programs.
- 4) Ability of school to deal with gifted, talented and special education without impacting core education.
- 5) Co-op effort to bring in art and different topics that smaller schools cannot access.
- 6) Defined by product - graduates who can do what you expect them to do.
- 7) Strengthen early childhood education.
- 8) School dropout alternative options. Flexibility for new ways of teaching and learning.
- 9) Basic issue - to graduate from high school.
- 10) Article 10 - Section 1 - (2) in curriculum.
- 11) Programs to support our kids. Support staff have been cut significantly.
- 12) Appropriate parent involvement in classroom and learning.
- 13) Security and safety of children
- 14) See schools become more parent friendly. Parents feel intimidated.
- 15) Challenge our kids more. Today students apply for college online and some don't know how.
- 16) Expansion of measurement of outcomes.
- 17) Performance based budget. Lack accountability.
- 18) All students should have the same opportunity to be involved in subjects of interest to them.
- 19) Accreditation standards are not quality- quality is much more than just accreditation standards
- 20) Adequate teaching tools, materials and equipment.
- 21) Vision statement - perhaps we could come up with to help define quality.
- 22) Quality educators - recruit and retain the best.
- 23) Quality is harder to achieve with reduced finances.
- 24) Accountability is essential. No simple measurement
- 25) Adequate time for teachers to teach.
- 26) School lunches and breakfasts. To be able to learn most effectively, students must have proper nutrition.
- 27) School nurses - school health.
- 28) People to step in to help children in need - school social workers and others.

Generated at the October 13, 2003 meeting of the Commission.

**School Renewal Commission
Parking Lot
As of August 16, 2004**

Parking Lot Item: Quality Infrastructure

- ❑ Facilities: pending further information
- ❑ 2001 School Funding Advisory Council Structure of School Funds Working Group Report
- ❑ Transportation: pending further information

Parking Lot Item: Remove Barriers to Efficiency

- ❑ **Lack of clarity in law with regards to consolidation of K-12 districts**

Recommendation: Provisions for consolidation of one K-12 district with another K-12 district need to be included in statute wherever they are currently absent. Specifically, K-12 districts should be able to consolidate with another K-12 without having to first dissolve. The committee believes that the K-12 structure is the most efficient school district structure and does not recommend allowing K-12 districts to be dissolved to consolidate with a stand alone elementary district.

- ❑ **Lack of clarity in law about appointment of new school board for high school or K-12 consolidations**

Recommendation: Immediately following voter approval of consolidation (elementary, high school, and K-12) a Joint Board, composed of the existing school boards of the separate districts, would be formed to deal with transition issues and would serve as the governing board of the newly consolidated district from the July 1 effective date of the consolidation until the next regular school trustee election. At that election the appropriate number of trustees for the new district would be elected by the voters of the new district, with the lengths of terms to be assigned by drawing of lots.

- ❑ **Lack of clarity in law about effective date of dissolution of existing districts and formation of new consolidated district**

Recommendation: Consolidated Districts become official entities on July 1st Following the successful vote on consolidation in each district.

- ❑ **Lack of clarity in law with regards to the duties and responsibilities of new and old boards of trustees during transition period**

Recommendation: Existing District Boards continue duties and perform closeout duties until July 1st. The new Consolidated School Board (Joint Board) address all planning issues related to the operation of the new district effective July 1st. (Budgeting, contracting, staffing, etc.)

- ❑ **Lack of clarity in law about the status of building reserve and technology levies in the event of a consolidation**

Recommendation: Any ongoing building reserve and technology depreciation levies would accrue to and become the responsibility of the newly formed district as a whole in the same dollar amounts that were originally approved.

- ❑ **Lack of clarity in law about tenure and bargaining status of successor district**

Recommendation: Staff (certified and non-certified) is covered adequately in existing law. The committee does not recommend any statutory changes to address bargaining agreements for the successor district. Collective bargaining of a new agreement should be left to management and labor in the consolidated district under applicable labor laws and under the guidance of the Board of Personnel Appeals.

- ❑ **Is the existence of two separate processes for combining districts (annexation and consolidation) a barrier?**

Recommendation: Leave both Annexation and Consolidation processes Available as they exist in current law. The separate processes are needed to Address differences in district needs.

- ❑ **Is the option of consolidating or annexing with or without assumption of bonded indebtedness a barrier?**

Recommendation: Consolidation and annexation should only be allowed with the assumption of bonded indebtedness. The question of with or with out assumption of bonded indebtedness can taint the process as the new consolidated district is being considered to serve all the students and the capital projects to be used should be decided by the new consolidated board.

- ❑ **Is the requirement for a vote a barrier to consolidation?**

Recommendation: After much deliberation the committee feels a vote by each district is needed for annexation.

- ❑ **Would it be a good idea to allow a period of time during which “deconsolidation” could occur?**

Recommendation: Consolidations should be final. The technical issues involved with de-consolidating districts would be great. Current laws governing co-operative agreements between districts allow districts ample opportunity to experiment with the sharing of programs and staff prior to deciding to consolidate.

Districts can share administration, staff, programs, etc. without consolidation. Cooperative sponsorships of athletic programs also allow districts to explore consolidation without having to take the final binding step.

- ❑ **Does the phasing out of two basic entitlements over 6 years for a consolidated district work against consolidation?**

Recommendation: Retain existing law.

- ❑ **Does the current school funding structure (especially the basic entitlement) constitute a disincentive for districts to combine?**

Recommendation: The Renewal Commission as it examines school funding Needs to make sure that there are not disincentives to consolidation built into Any new funding system.

Parking Lot Item: Regionalization of school services

- The Regionalization Working Group strongly views regional education service agencies as a key component in restructuring and renewing public education in Montana. Through hours of deliberate discussion, research, and analysis of ESA's in other states, working group members have determined that intensive study of this issue is warranted, as the potential benefits of an effective ESA system
- Enhanced opportunities for students and educators
- More streamlined and effective partnerships between state and local education governance significant cost savings; and greater accountability, communication, and coordination between local school districts.

We urge the renewal commission to support our ongoing effort to study and develop a regional, education service agency proposal that best serves the students, educators, and people of Montana.

Parking Lot Item: Revenue and Taxation Modernization

- ❑ Implement a statewide equalization plan with an emphasis on homeowner equity and uniform property taxation.
- ❑ Fund the base budget using statewide equalization.
- ❑ Use weighted guaranteed tax base (GTB) or power equalization to fund 80-100% of budget.
- ❑ A balanced taxation approach that includes existing statewide taxes such as property taxes, income taxes, and natural resource taxes and also considers new revenue such as a general statewide sales tax to be used as a mechanism for equalization.
- ❑ A balanced taxation approach that includes existing taxes such as property taxes, income taxes, and natural resource taxes and also considers new revenue such as a

general statewide sales tax should be used as a mechanism for funding quality public schools.

Parking Lot Item: Modern Funding System

At –Risk Students Discussion as per July 19th minutes. Wagman/Messinger

SCHOOL RENEWAL COMMISSION
REGIONALIZATION WORKING GROUP
PEER STATES DISCUSSION
JUNE 14, 2004

ITEM 1 Introductions

- Dr. Edward Schmitt - Oregon Multnomah ESD
- Ron Fiedler - Iowa Grant Wood Area Educational Agency 10
- Jack Harmon - Arizona Pinal County Education Service Agency (Pinal Co. School Supt. Office)
- Wayne Bell - Nebraska Educational Service Unit 10
- Brian Talbott - Executive Director of AESA.
- Kirk Miller, Kris Goss, Bruce Messinger, Steve Meloy, Erik Burke, Linda Peterson, Cathy Day, Holly Raser, Ron Laferriere, Dave Puyear, Jules Waber, Bud Williams, Madalyn Quinlan.

ITEM 2 Overview and Goals

- Brief description of the School Renewal Commission effort in Montana and the work of the Regionalization Working Group given by Kirk Miller.
- Discuss with Peer states the concepts of regionalization that are working for their school children.
- Goal is to begin to determine which of the discussion areas will work in Montana, to make connections with peer states for future assistance, and to further establish services and governance structure that would work for Montana.

ITEM 3 Peer States Surveys

- Brian Talbott to lead the discussion with peer states and the discussion questions that were submitted previous to the conference
- Open questions from members of the Montana Working Group.

DISCUSSION:

What about current fiscal status of states and that effect on the ESD

- OR and NB are being scrutinized to serve larger populations because of \$\$\$. NB ESD are created by legislature and they can take it away. Basic push to reduce administration and serve larger areas.
- IA were created first by combining Co. Supt. offices. Likely downsizing from 12 to 10 or so.
- AZ uses Co. Supt. Changed the service expectations of Co. Supts. and placed more responsibility and accountability on the office and became official ESA's.
- OR believes that 20 ESD's are not needed but when analyzed the windshield time required to downsize the admin operation because of geography

Discussion of what other structures exist that were consolidated to make the ESD possible (Kirk Miller)

- IA eliminated all other coops to centralize services. Co. Supts. were encouraged to join together to become more efficient.
- AZ would like more services in metro areas. Movement from Co. Supt. to ESA is more effective.
- NB - no other coops or Co. Supts, this set up is necessary to show efficiency. Loss of Co. Supt. was evolutionary and is appeared to be more effective as an ESA.

How are the finances accounted for (Jules Waber)

- AZ - write all warrants and filter \$\$ through Co. Supt. offices.
- OR - districts do their own business services - lots of inequality.
- IA - no connection to Co. Treasurer office. Subsidize operation by sales and service and grants. Largest part of funding is federal grants. They get Fed Part B special ed \$\$\$. No taxing authority. Created an in-house package that does all data warehousing and financial operation. Now beginning to sell all the packages throughout the state. Business, student assessment.
- NB used to have a central based system but lost \$\$ because of the admin of the centralized services. They collect taxes (1.5 Cents on a dollar). Some fee or service. Much funding from federal grants. NCLB. Cooperatives are the name of the game.

Concern about the downsizing of the structure in the states (Steve Meloy)

- Answers that there is strong need to show the legislature the efficiency of structure that saves \$\$ -- a big issue for MT

Are you mandatory for membership and do you allow services outside your service area?

- IA - legislatively developed. Don't let anyone state that they are big and don't need the services.

Governance structure, CEO qualifications based on what criteria (Jules Waber)

- OR - It is a Supt and requires a Supt license.
- IA - Chief administrator can allow experienced people from a flexible background.
- AZ - Need a regular teaching certificate. Have a great variety of experiences out there.
- NB - Ed Admin and Supervision Certificate.

Opinion on whether it is a good idea to expand coop services in MT to be bigger (Ron Laferriere)

- OR - Resolution to develop services must be approved by 2/3 of the boards that are members.
- IA - Good idea to add more functions to the cooperatives. Call them whatever you want but get the services out there. Starting over is likely not going to work. Get to point B doesn't matter, just do it.
- AZ - Developed a value added service. Getting \$8 of value for each \$1 invested. No purchasing coop, but buy from other ESD.
- NB - Special, professional development, and technology are what started it. The power is the blending of these to provide services. Cost per student study who believe that.

Governance of what it takes to offer a service (Erik Burke)

- OR - Resolutions that must be approved by 2/3 vote. Advisory council for each service. Must be approved annually by the local boards to continue service - requires support of districts with at least 50% of the students. Power structure is the 8 local supts. Elected board reviews the issues and the work is to keep the Supt and elected board on the same page.
- IA - Monthly elected oversight Advisory board from the districts. Advisory committees of users around specific areas like technology, professional development.
- AZ - Advisory groups for the services out there. Volunteer supts. who are interested. Monthly meet with member supts.
- OR - Legislature requires that an advisor be from the business sector and private sector.
- NB - Little bureaucracy. 11 member advisory council who develop menu of services. Need to have 2/3 of the schools with over 50% of the students to make decisions or changes. 15 member board.

Charter Schools, how do they fit? (Jules Waber)

- AZ - Charter schools can choose to participate, but most don't. Accommodation schools are operated in areas when no one wants to operate the school based on the needs of the area. Expanded to homeless schools, and alternative schools, and secure care schools -- flexibility. ESA exec operates as the Board for the accommodation schools.
- OR - Opted out of legislation. Only way they serve is if a district within their members establishes a charter school.
- NB - Not involved.
- IA - Private and parochial schools are strong but don't participate

What would you do if you could start with a clean slate

- OR - A huge amount of accountability. Built into the K-12 funding system of the state - benefit.
- IA - Developed a data system to tell others how they are doing. Start with those things built in. Developed an accreditation system for with the State Agency with core standards neutralizes any argument that some are doing good and other bad (legislature). Develop a way of talking about how the value effects the statewide system. Funding necessary. Stand for something - equity, efficiency and ??.
- AZ - Evolving. Come a long way in changing the attitudes of the schools. Biggest problem is the funding structure - would like to see that the ESA is looked at as serving an area and the needs in that area. Have gone from 1 staff to 12. Be willing to pay for personnel and get the very best in the area you want the service - right qualifications.
- NB - Be proactive. Let people know who we are and what we do. Accountability and a united front. Need a sense of purpose to get behind - core ingredients - special ed, training and technology. Off shoots like tech software development. School districts have found us to be indispensable. Have to be seen as problem solvers. Adept at taking the toughest tasks and getting solutions.

Relationship with state department (Brian Talbott)

- OR - Currently downsizing SEA in OR. ESA's are to be the arms and legs of implementing NCLB (Rod Paige).
- NB - Arms and legs of the SEA. Work with a State Chief that is an innovator (Christiansen).
- AZ - Good communication. ESA is close to the schools and the SEA realizes this. This is movement in the right direction. More and more cooperation.
- IA - Relationships. Has to do with the relationship built with the SEA Chief. Connected at the hip through statute.

Montana Codes Annotated Title 20, Chapter 1, Section 5, American Indian Studies

This Title is the codification of House Bill 528, passed in the 1999 Legislative Session, which was an Act implementing Article X, Section 1(2), of the Montana Constitution regarding the State of Montana's Recognition of the distinct and unique cultural heritage of American Indians and the state's commitment to establish educational goals that will preserve the cultural integrity of American Indians.

20-1-501. Recognition of American Indian cultural heritage -- legislative intent. (1) It is the constitutionally declared policy of this state to recognize the distinct and unique cultural heritage of American Indians and to be committed in its educational goals to the preservation of their cultural heritage.

(2) It is the intent of the legislature that in accordance with Article X, section 1(2), of the Montana constitution:

(a) every Montanan, whether Indian or non-Indian, be encouraged to learn about the distinct and unique heritage of American Indians in a culturally responsive manner; and

(b) every educational agency and all educational personnel will work cooperatively with Montana tribes or those tribes that are in close proximity, when providing instruction or when implementing an educational goal or adopting a rule related to the education of each Montana citizen, to include information specific to the cultural heritage and contemporary contributions of American Indians, with particular emphasis on Montana Indian tribal groups and governments.

(3) It is also the intent of this part, predicated on the belief that all school personnel should have an understanding and awareness of Indian tribes to help them relate effectively with Indian students and parents, that educational personnel provide means by which school personnel will gain an understanding of and appreciation for the American Indian people.

History: En. Sec. 1, Ch. 527, L. 1999.

20-1-502. American Indian studies -- definitions. As used in this part, the following definitions apply:

(1) "American Indian studies" means instruction pertaining to the history, traditions, customs, values, beliefs, ethics, and contemporary affairs of American Indians, particularly Indian tribal groups in Montana.

(2) "Instruction" means:

(a) a formal course of study or class, developed with the advice and assistance of Indian people, that is offered separately or that is integrated into existing accreditation standards by a unit of the university system or by an accredited tribal community college located in Montana, including a teacher education program within the university system or a tribal community college located in Montana, or by the board of trustees of a school district;

(b) inservice training developed by the superintendent of public instruction in cooperation with educators of Indian descent and made available to school districts;

(c) inservice training provided by a local board of trustees of a school district, which is developed and conducted in cooperation with tribal education departments, tribal

community colleges, or other recognized Indian education resource specialists; or

(d) inservice training developed by professional education organizations or associations in cooperation with educators of Indian descent and made available to all certified and classified personnel.

History: En. Sec. 2, Ch. 527, L. 1999.

20-1-503. Qualification in Indian studies -- trustees and noncertified personnel. (1)

The board of trustees for an elementary or secondary public school district may require that all of its certified personnel satisfy the requirements for instruction in American Indian studies. Pursuant to Article X, section 8, of the Montana constitution, this requirement may be a local school district requirement with enforcement and administration solely the responsibility of the local board of trustees.

(2) Members of boards of trustees and all noncertified personnel in public school districts are encouraged to satisfy the requirements for instruction in American Indian studies.

History: En. Sec. 3, Ch. 527, L. 1999.

K-12 Renewal Commission – Full Day Kindergarten

Background and Proposal:

At the January 12 Renewal Commission meeting a vote was taken on Full Day Kindergarten. At that time, there were 3 dissenting votes to moving forward with support. The summary of the meeting stated: “The Commission members who could not agree with the proposal on the table were asked, under the Commission Ground Rules, to work on a revised proposal for consideration of the members.”

At the June 28 Renewal Commission meeting another vote was taken in support of the option of providing statutory and budgetary flexibility so school districts can offer full day kindergarten if they choose to do so and receive credit for a full ANB. Again, there were dissenting votes.

The key element of the dissenting votes appeared to be financial – the ability of the State to fund Full Day Kindergarten. There was also some question over the available research into the benefits of Full Day Kindergarten.

A summary of some of the voluminous research into full-day kindergarten is presented below to try to address some of the reservations expressed at the Renewal Commission. Consideration should be given to an investment in full-day kindergarten that could return as much as seven times the investment. As was discussed by the Renewal Commission, some Montana school districts would like to expand their kindergarten offering beyond .5, but face barriers (e.g., facilities) to do so. Therefore, the recommendation below suggests a flexible approach – between .5 and full-day kindergarten as best fitting the needs of Montana students. Based on this additional information, we would suggest the following language for consideration by the Renewal Commission:

The Montana Legislature should strongly consider the benefits of expanding kindergarten services to improve student learning and achievement and should provide the statutory and budgetary flexibility to school districts so they can offer additional kindergarten services for all students. School districts should receive state funding proportionate to the level of service they provide for kindergarten students ranging from half time to full time programming.

Economic Benefits of Full Day Kindergarten:

<http://www.nwrel.org/scpd/sirs/3/topsyn3.html>

This link describes what is called “perhaps the most influential study of the positive effects of quality early education” and was a longitudinal study. The summary results include:

- Significantly higher monthly earnings at age 27:

- 29% of those with early childhood education opportunities earning \$2,000 or more per month vs. 7% of those without access to early childhood education.
- Significantly higher percentages of home ownership:
 - 36% of those with early childhood education opportunities owning a home vs. 13% of those without access to early childhood education.
- A significantly higher level of schooling completed:
 - 71% of those with early childhood education opportunities completing high school or higher vs. 54% of those without access to early childhood education.
- A significantly lower percentage receiving social services:
 - 59% of those with early childhood education receiving services at some time in the previous 10 years vs. 80% of those without access to early childhood education.
- Significantly fewer arrests by age 27:
 - 7% of those with early childhood education opportunities having five arrests or more vs. 35% of those without access to early childhood education. 7% of those with early childhood opportunities having arrests for crimes of drug making or dealing vs. 25% of those without early childhood opportunities.

There were also a number of educational benefits listed from the study:

- Average or better literacy rates at age 19:
 - 61% of those with early childhood education opportunities vs. 36% of those without early childhood opportunities.
- Higher school achievement test results – 9th percentile +:
 - 49% of those with early childhood education opportunities vs. 15% of those without early childhood education opportunities.
- 90 or higher IQ at age 5:
 - 64% of those with early childhood education opportunities vs. 27% of those without early childhood education opportunities.
- Less participation in programs for educable mental impairment:
 - 15% of those with early childhood education opportunities vs. 34% of those without early childhood education opportunities.
- Significantly higher report of homework completed at age 15:
 - 68% of those with early childhood education opportunities vs. 40% of those without early childhood education opportunities.

The findings of this study are viewed as important because of the length of the study period and because it reflects the benefits to adults and society in economic terms. The most dramatic revelation of this study is the attempt to quantify the value realized for the cost of the program. “Over the lifetime of the participants (through age 27), the preschool program returns to the public an estimated \$7.16 for every dollar invested.”

In a summary of Benefits of Full-day Kindergarten (June 2004) from the Children’s Action Alliance, researchers in a Philadelphia study of 3rd and 4th graders who had attended full-day kindergarten, calculated a savings of \$2 million for every 1,000 kindergarteners in improved retention rates

http://www.ksbe.state.ks.us/pre/full_day_kindergarten.html

The link above provides recent research on All-Day Kindergarten, citing a number of different studies. This report states that in 1988, about 23 percent of kindergarteners attended full-day K. In 1993, 55 percent of kindergarteners were in full-day programs.

Conclusions from this report are:

“Research shows that most full-day kindergarten students demonstrate somewhat higher academic and social achievement than half-day kindergarten students; however, the higher academic achievement seems to diminish somewhat over time. Full-day kindergarten programs that are appropriate for kindergarten age children have been found to provide cognitive, social, physical, and emotional benefits for children. The majority of teachers and parents of kindergarten children favor full-day programs. Now that half of the nation's kindergartners are in full-day programs, research should be able to show which children benefit the most and if the benefits last throughout a student's school career.”

<http://www.kidsource.com/kidsource/content3/full.day.kinder.p.k12.3.html>

What Does the Research Show?

Research studies confirm that attendance in full-day kindergarten results in academic and social benefits for students, at least in the primary grades. Early studies seemed to offer little reliable evidence one way or the other because they used small samples or unique populations, failed to use rigorous standards, or concentrated almost exclusively on academic outcomes (as opposed to children's attitudes toward school, for example). Some researchers have found a broad range of effects, including a positive relationship between participation in full-day kindergarten and later school performance. After comparing similar half-day and full-day programs in a statewide longitudinal study, Cryan and others (1992) found that full-day kindergartners exhibited more independent learning, classroom involvement, productivity in work with peers, and reflectiveness than half-day kindergartners. They were also more likely to approach the teacher, and they expressed less withdrawal, anger, shyness, and blaming behavior than half-day kindergartners. In general, children in full-day programs exhibited more positive behaviors than did pupils in half-day or alternate-day programs. Similar results have been found in other studies as well.

<http://www.ericfacility.net/ericdigests/ed453982.html>

Recent Research on All-Day Kindergarten. ERIC Digest.

THIS DIGEST WAS CREATED BY ERIC, THE EDUCATIONAL RESOURCES INFORMATION CENTER. FOR MORE INFORMATION ABOUT ERIC, CONTACT ACCESS ERIC 1-800-LET-ERIC

In the fall of 1998, of the 4 million children attending kindergarten in the United States, 55% were in all-day programs and 45% were in part-day programs (West, Denton, & Germino-Hausken, 2000, p. v). The growing number of all-day programs is the result of a number of factors, including the greater numbers of single-parent and dual-income families in the workforce who need all-day programming for their young children, as well as the belief by some that all-day programs better prepare children for school.

Research during the 1970s and 1980s on the effects of all-day kindergarten yielded mixed results. In a review of research on all-day kindergarten, Puleo (1988) suggested that much of the early research employed inadequate methodological standards that resulted in serious problems with internal and external validity; consequently, the results were conflicting and inconclusive. Studies conducted in the 1990s also produced mixed results; however, some important trends appeared. This Digest discusses the academic, social, and behavioral effects of all-day kindergarten, as well as parents' and teachers' attitudes and the curriculum in all-day kindergarten classes.

ACADEMIC ACHIEVEMENT

Despite the generally mixed results concerning the effect of all-day kindergarten on academic achievement in the 1970s and 1980s, consistent findings appeared concerning the positive effect on academic achievement for children identified as being at risk (Housden & Kam, 1992; Karweit, 1992; Puleo, 1988). Research reported in the 1990s shows more consistent positive academic outcomes for all children enrolled in all-day kindergarten (Cryan, Sheehan, Wiechel, & Bandy-Hedden, 1992; Elicker & Mathur, 1997; Fusaro, 1997; Hough & Bryde, 1996; Koopmans, 1991). Cryan et al. (1992) conducted a two-phase study that examined the effects of half-day and all-day kindergarten programs on children's academic and behavioral success in school. In the first phase of the study, data were collected on 8,290 children from 27 school districts; the second phase included nearly 6,000 children. The researchers found that participation in all-day kindergarten was related positively to subsequent school performance. Children who attended all-day kindergarten scored higher on standardized tests, had fewer grade retention's, and had fewer Chapter 1 placements.

Hough and Bryde (1996) looked at student achievement data for 511 children enrolled in half-day and all-day kindergarten programs in 25 classrooms. Children in the all-day programs scored higher on the achievement test than those in half-day programs on every item tested.

In a study of the effectiveness of all-day kindergarten for the Newark, New Jersey, Board of Education, Koopmans (1991) looked at two cohorts of students: one in its third year of elementary school and the other in its second year. There were no significant differences in reading comprehension and math scores on the California Test of Basic Skills (CTBS) for the first cohort; however, both reading comprehension and math scores were higher for students in the second cohort who had attended all-day kindergarten.

Elicker and Mathur (1997) also found slightly greater academic progress in kindergarten and higher levels of first-grade readiness for children in an all-day kindergarten program. Teachers reported significantly greater progress for all-day kindergarten children in literacy, math, and general learning skills.

Finally, in a meta-analysis of 23 studies on all-day kindergarten, Fusaro (1997) concluded that children who had attended all-day kindergarten achieved at a higher level than children in half-day kindergarten programs. According to Fusaro, all-day kindergarten accounted for approximately 60% of the variance in outcome measures.

SOCIAL AND BEHAVIORAL EFFECTS

Most studies on all-day kindergarten have focused on academic achievement; however, some researchers have also examined social and behavioral effects. Cryan et al. (1992) asked teachers to rate half-day and all-day kindergarten children on 14 dimensions of

classroom behavior. According to researchers, a clear relationship emerged between the kindergarten schedule and children's behavior. Teachers rated children in all-day kindergarten programs higher on 9 of the 14 dimensions; there were no significant differences on the other 5 dimensions. Other researchers who have studied social and behavioral outcomes found that children in all-day kindergarten programs were engaged in more child-to-child interactions (Hough & Bryde, 1996) and that they made significantly greater progress in learning social skills (Elicker & Mathur, 1997).

http://www.nwrel.org/cfc/newsletters/vol2_is2.asp

Overviews

This ERIC document, *Frequently Asked Questions about Full-Day Kindergarten*, provides an excellent overview of the issues. It includes information on scheduling the day, characteristics of effective programs, and the prevalence of full-day Kindergarten.

ericee.org/faq/fullday.html#common

Research

This article from the April 17, 2002 issue of *Education Week*, highlights a longitudinal study of 17,600 children in Philadelphia showing a variety of benefits of full-day Kindergarten lasting into 4th grade. Among them are less grade retention and better attendance.

www.edweek.com/ew/newstory.cfm?slug=31kinder.h21

ERIC Digest (2001) on Full-Day Kindergarten by Patricia Clark. It includes findings related to academic achievement, social and behavioral skills of children, attitudes of teachers and parents, and curriculum.

ericee.org/pubs/digests/2001/clark01.html

This 2001 legislative policy brief from the Indiana Superintendent of Public Instruction includes a brief overview of research on the positive effects of full-day Kindergarten

ideanet.doe.state.in.us/legwatch/2001/03.html

A Longitudinal Study of the Consequences of Full-Day Kindergarten through Grade Eight. Completed in 1988 in Evansville-Vanderburgh Schools, Indiana, this summary report found many benefits of full-day Kindergarten lasting into middle school as compared to children who attended half-day Kindergarten. These benefits included higher report card grades and higher reading achievement scores.

www.evsc.k12.in.us/evscinfo/kindergarten/stdy1988.html

Is Full-Day Kindergarten More Stressful on Children? Here is a summary of findings from a 1997 study by James Elicker of Purdue in which he found that a full-day developmentally appropriate kindergarten reduces stress on children compared to half-day programs. He also found greater parent satisfaction. The full report can be found in the *Early Childhood Research Quarterly*, Vol.12 No.4, 459-80, 1997.

www.purdue.edu/UNS/html4ever/9711.Elicker.kindergarten.html

Effects Of All-Day, And Half-Day Kindergarten Programming On Reading, Writing, Math, And Classroom Social Behaviors by Charlene Hildebrand, University of Nebraska-Kearney. This study found significantly better reading scores (but not math or writing) for children who attend full-day Kindergarten as compared to half-day or alternate day Kindergarten. However children in half-day Kindergartens did better on measures of classroom behaviors that facilitate learning and had fewer negative behaviors.

www.nationalforum.com/HILDEaer10e3.html

The Public Policy Perspective

Learning to Learn: Full-day Kindergarten for At-risk Kids. This policy briefing from perspective of the State of Pennsylvania has clear implications for all states, as the needs and challenges are similar.

www.papartnerships.org/fulldaykind.html

The estimated cost of full-day Kindergarten for the Cleveland School District is described. It is included in a publication from the American Federation of Teachers on the voucher program in that city and show the relative cost per child of vouchers versus full-day Kindergarten.

www.aft.org/research/reports/clev/apdxd.htm

"Why We Need Rigorous, Full-Day Kindergarten", an essay by Jerry D. Weast, Superintendent of Montgomery County, MD Schools, from the May 2001 issue of Principal Magazine.

www.naesp.org/comm/p0501a.htm

The Nitty-Gritty

An experienced teacher shares two detailed full-day schedules including hot links to more information about her curricular approaches. There is also a link to information about classroom management.

www.geocities.com/Athens/Aegean/2221/fdk.html

This is a detailed description of the full-day Kindergarten program in Florence County, South Carolina (which they call extended-day). It included information on the community context, funding sources, organizational structure, hours, schedule, curriculum, and more.

www.ed.gov/pubs/Extending/vol2/prof4.html

Support and Resources

The National All-Day Kindergarten Network is an association of early childhood educators started in 1987. It serves to guide policy and provide access to expertise and materials. It includes many links to web sites created by Kindergarten teachers

www.siue.edu/~snall/kdtn/

And finally, a study from the Pennsylvania Partnerships for Children provides the perspective of one state on full-day K.

http://www.papartnerships.org/resources_kindergarten.asp

The greatest impact: Full-day kindergarten and vulnerable children

Full-day kindergarten works best for kids who need it most - children at risk of later-life failure because of detrimental circumstances in their homes, communities, and schools. Implemented properly, it's a booster seat for learning, giving low-income children a chance to match the educational achievements of their more affluent peers, who usually receive quality early care and preschool experiences. It can position them for school success from the beginning, averting the educational frustrations that compound year after year and add up to long-term school failure. Full-day kindergarten can be the last step in a child's school readiness. In Pennsylvania, however, it is a missing step for seven out of every 10 children. Full-day kindergarten gets no additional state funding, so school officials on tight budgets often relegate it to a wish list. "We'd be the first to sign up," said one educator when asked whether the state should increase funding. Half of all American kindergartners go to school all day, but in Pennsylvania, only three in 10 kindergartners are enrolled full-day. And about 44 percent of the state's full-day kindergartners live in just one school district - Philadelphia. Why should we care? There are the physiological reasons - the early childhood development research proving that stimulating activities help a young brain build the neural connectors that will carry learning and independent thought. There are the educational reasons - the first-grade teachers who see first-hand the difference that full-day kindergarten made in their students' school readiness. And there are the economic reasons - the need to keep Pennsylvania a leader in a global economy. Nationwide, 15 states require that all students be offered full-day kindergarten. Combining full-day kindergarten with other educational innovations, these states may be in a stronger economic position than Pennsylvania because their future workforce will be school-ready and prepared for the years of learning to follow. Full-day kindergarten programs, especially for low-income children in communities with high concentrations of poverty, can provide both immediate and long-term benefits. In full-day programs, teachers have more time for both formal and informal instruction and can provide children with more individualized attention and reinforcement for positive behavior. School officials also have more opportunities to spot learning and behavioral problems and address them promptly when kindergartners attend school all day. In addition, full-day kindergarten results in fewer disruptions and transitions in a child's life. All of these factors contribute to the fact that full-day kindergartners are more creative and cooperative, more involved in classroom work with other children, and learn and think more independently than their peers in half-day programs. Finally, and of particular importance for low-income children, the longer school day provides increased opportunities for good nutrition. These are important factors, but if full-day kindergarten is considered as a public investment strategy, it must pay benefits in children's future academic success, too. An Ohio study of the effects of full-day kindergarten showed full-day kindergartners scored higher on first grade reading readiness tests, reading tests in the early elementary grades, and achievement tests administered in third, fifth, and seventh grades. Full-day kindergartners receive better report cards, experience fewer grade retentions, require less remedial instruction, and receive fewer special education placements than their peers who attend half-day programs. These effects seem most dramatic for children from low-income or educationally disadvantaged families. The Philadelphia School District made full-day kindergarten available to all children in racially isolated and high-poverty schools in

September 1995. By the time these children were in third grade, the district's tests for reading, science, and math all showed significant increases over the previous year. Reading score increases were most pronounced for African-American students, and math and science increases were most pronounced for African-American and Latino students. Children in families receiving TANF did even better than the districtwide gains in reading and math and showed equal gains in science. Full-day kindergarten is a tool schools can use to level the academic disparities among students entering first grade. "I've seen kids in the system, 5 or 6 years old, who can read, and some who can't tell red is red and blue is blue," said one Pennsylvania school board president. Through full-day kindergarten, districts can help more children approach the skill levels needed for initial academic success. Citizens statewide back full-day kindergarten. In a 1998 poll, 74 percent of Pennsylvanians said that all families should have the full-day kindergarten option, and 65 percent support state funding to help its local implementation.

The Pennsylvania picture

Most Pennsylvania schools don't offer full-day kindergarten. In 1999-2000, 314 of the state's 501 school districts did not have full-day kindergarten at all. In the remaining 187 districts, full-day kindergarten is:

- Universal: Offered to all kindergartners (87 districts).
- A major educational program offered to between 50 percent and 99 percent of kindergartners (17 districts).
- A significant educational program offered to between 10 percent and 49 percent of kindergartners (41 districts).
- A minor educational program offered to fewer than 10 percent of kindergartners (42 districts). The 187 districts that offer full-day kindergarten are diverse and geographically scattered across 55 of Pennsylvania's 67 counties. They include very poor and very wealthy districts, very small and very large districts. Some districts that are urban, some that are rural, and some that are suburban, offer full-day programs. In addition, all 20 of the state's charter schools that included kindergarten in 1999-2000 provided full-day programs to 100 percent of their kindergartners. Making Progress Pennsylvania Partnerships for Children has been tracking full-day kindergarten in recent years, raising awareness of the value of full-day programs, especially for at-risk youngsters, and developing policy recommendations to encourage more districts to offer full-day programs. There have been some encouraging trends between 1996-1997 and 1999-2000:
 - 187 districts (37 percent) offered full-day kindergarten in 1999-2000, compared to 154 districts (31 percent) in 1996-1997.
 - 87 districts (17 percent) offered universal full-day kindergarten in 1999-2000, compared to 75 districts (15 percent) in 1999-2000.
 - Almost 36,000 children attended full-day kindergarten in 1999-2000, compared to almost 33,000 in 1996-1997.
 - 29.3 percent of kindergartners attended full-day programs in 1999-2000, up from 24.7 percent in 1996-1997. These encouraging trends are even more pronounced in districts with high concentrations of low-income children - those 65 districts where at least one-third of students are eligible for free lunch:
 - 63 percent of low-income districts offered full-day kindergarten in 1999-2000, compared to 37 percent among all Pennsylvania districts.
 - 32 percent of low-income districts offered universal full-day kindergarten in 1999-2000, compared to 17 percent statewide.
 - 68.5 percent of kindergartners in low-income districts and charter schools attended full-day programs, compared to 29.3 percent of kindergartners statewide. Still, the outlook for many at-risk children remains bleak. In 27 of the 65 highest poverty districts, fewer than 10 percent of kindergartners receive the school-readiness advantages of full-day programs.

The obstacles to full-day kindergarten

So far, two obstacles have blocked further implementation of full-day kindergarten in Pennsylvania schools: money and attitudes. The major obstacle is money. Because Pennsylvania's school subsidy system has not recognized enrollment as a significant factor in generating additional state funds for many years, except for some recent and modest supplemental payments, many school districts cannot afford to double their kindergarten enrollments by shifting from half-day to full-day. The costs of doing so will include additional teachers and materials, and, in many communities, additional space. Under the current state subsidy system, most districts would need to bear 100 percent of these additional costs with local revenues. The median instructional expense per pupil for all districts in 1998-1999 (the latest year of actual data) was \$5,216, so adding half a day of school would cost an average of \$2,608 per student. As school districts struggle with increasing financial pressures - rising special education costs, falling state share of

reimbursements, stagnant tax bases, citizen resistance to property tax hikes - their program options are constrained. Districts that offer full-day kindergarten must find the money in their budgets, even if it means sacrificing other worthwhile programs. With additional funding, schools could tackle the costs of space and staffing - full-day kindergarten's biggest expenses. Hiring an entry-level teacher to transform two half-day classes into two full-day would cost districts about \$40,000 in additional salary and benefits, and the cost rises significantly with a teacher's years of experience. Renting and equipping modular space to accommodate each new class would cost \$10,000 or more annually, while new building construction runs \$200,000 or more per classroom. In some districts, administrators and school boards have used a transformation to full-day kindergarten as a selling point in gaining community support for elementary school renovations and expansions. In others, the baby boomlet that has increased enrollments in recent years is beginning to move into the middle and high schools, which might make additional elementary school space available for full-day kindergarten. The other primary obstacle to widely available full-day kindergarten is attitudinal. Some school district officials have expressed their own reservations or repeated objections they'd heard: that 5-year-olds tire too easily for full-day programs, that they should be at home with family at this young age, that parents will simply view full-day kindergarten as free child care. However, studies show that fatigue is generally not a factor in full-day programs, and most kindergarten-age children no longer need daytime naps. Educators experienced in administering full-day kindergarten programs report that concerns about children's endurance usually fade when programs are in place. Objections dissipate, they say, when parents see their children enjoying school, eating a nutritious lunch, getting any rest they might need during the day, and grasping new reading and math concepts. A couple of districts that began operating full-day kindergarten in the past two years initially offered parents a choice of half-day or full-day programs, and virtually all parents selected the latter.

Recommendation: State incentives

In poverty-stricken areas, the risk factors that dampen a child's learning potential also contribute to schools' higher costs for remedial and special education, health care, and security. Full-day kindergarten is proven to minimize a child's risk factors and overcome obstacles to learning, but it requires a substantial financial commitment that many districts cannot afford. In low-wealth districts where revenue pressures are strongest and the educational need is greatest, state assistance can be the catalyst for offering a beneficial program. To extend full-day kindergarten to more at-risk kids, Pennsylvania Partnerships for Children recommends a state incentive subsidy to school districts and charter schools with high concentrations of low-income students. This should be a permanent feature of the state subsidy system to encourage school districts and charter schools with high concentrations of low-income students to offer or maintain full-day kindergarten programs. These grants would ease some of the cost concerns that continue to separate at-risk children from the benefits of full-day kindergarten, and would also help ease the financial burden for school districts that have implemented full-day kindergarten at the expense of other priorities. The following districts and charter schools would be eligible:

- During the first three years, the program would be open to districts where at least one-third of students are eligible for free lunch. This covers 65 districts and five charter schools with a total kindergarten population of 34,871 students.
- Beginning in the fourth year, eligibility would expand to include districts in which at least one-quarter of students are eligible for free lunches - adding 64 more districts with a combined kindergarten population of 9,290 students. How would such a subsidy be calculated?
- For each full-day kindergarten student, an eligible district would receive its per-pupil instructional costs divided by 2 (accounting for one-half day of additional instruction) and multiplied by the district's aid ratio, as a measure of the district's wealth and a way to give poorer districts a larger share.
- In year 1, the per-pupil amount would be capped at \$1,000 for students currently in full-day programs. In year 2, it would be capped at \$1,500. In year 3, it would be capped at \$2,000. In year 4, the cap would be eliminated
- The same phase-in would apply for the first four years the subsidy applies to districts with 25 percent to 33 percent of students free-lunch eligible. This state subsidy is designed to help districts and charter schools offer full-day kindergarten. It would not cover the full costs of the program, so local dollars still would be required. And in districts that do not have the space, even this subsidy may keep them from offering full-day programs unless they can be creative about renting classroom space.

A piece of the school-readiness puzzle

"Many students come into kindergarten without the readiness skills needed to be successful," said one Pennsylvania full-day kindergarten teacher. "Full-day kindergarten gives teachers the time to do what is needed with each child to ensure success."

That extra time for student-teacher interaction can give disadvantaged children the school-readiness skills that their better-off peers learned in preschool and from their parents. Pennsylvania must join the states that see a lifetime benefit from full-day kindergarten for at-risk children. It is not the entire answer to academic underachievement, but it can be a key piece of the puzzle. With full-day kindergarten behind them, children can enter school ready to absorb the maximum educational benefits that the next 12 years will offer.

Or as another full-day kindergarten teacher said in praise of her program, "all students receive more time for educational purposes, not just those in a good day care."

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