



Informal Gifted Presentation to Ohio School Funding Advisory Committee
Special Needs Subcommittee

April 1, 2010

1. Background and Qualifications

- a. Executive Director of the Ohio Association for Gifted Children for almost ten years.
- b. Advocate for gifted children for sixteen years at the local, state, and national levels.
- c. Educational background
 - i. BBA from University of Michigan – finance and systems
 - ii. MM from Northwestern University – strategic planning and finance
- d. Work background
 - i. Systems Analyst and Project Team Leader – Burroughs Corp (now Unisys)
 - ii. Financial Analyst – NCR
 - iii. Consulting Manager – Price Waterhouse (Pricewaterhouse Coopers)
 - iv. Self-Employed consultant
- e. School Funding/Policy Background
 - i. Conducted two gifted cost studies
 - ii. Wrote three amicus briefs for the DeRolph case
 - iii. Served on the ODE Gifted Advisory Council
 - iv. Led three state-funded grants on gifted education issues
 1. Cost study
 2. Written Education Plans
 3. Acceleration
 - v. Author of numerous gifted advocacy and policy articles including the latest article in the NAGC Parenting for Potential magazine, “Warrior Advocates.”
 - vi. Familiar with:
 1. Traditional public schools
 2. Private and parochial schools
 3. Community schools
 4. Homeschooling
 5. Online schools
 6. Twice Exceptionality
- f. Parenting Background
 - i. Sarah
 - ii. Paul
 - iii. Mary
- g. Why Do I Advocate for Gifted Children?
 - i. Gifted children are the most misunderstood student population in Ohio

- ii. Gifted children are not covered by the cloak of political correctness
- iii. Funding and service for gifted children is a case of zip code roulette in Ohio.
- iv. Without strong public gifted education programs, not all gifted children will “make it on their own.” Gifted children represent 20% of the dropout rate. Guess which gifted children don’t make it?
- v. The voice on the phone.

2. The Ohio Association for Gifted Children

- a. Founded in 1952, OAGC is the oldest gifted association in the country including the National Association for Gifted Children, which was founded in Ohio.
- b. OAGC’s mission statement – “To promote and support the development of gifted students through dissemination of information, advocacy on their behalf, encouragement of affiliate organizations, and to promote research and education for gifted children.”
- c. OAGC has four divisions:
 - i. Coordinator
 - ii. Higher Education
 - iii. Parent and Family
 - iv. Teacher
- d. 1200+ members and over 30 local affiliate organizations
- e. OAGC is run by a governing board. The strength of the organization is the unflinching commitment to children first. Communication is our key strategy.
- f. Website serves as a one-stop shop for gifted information – www.oagc.com
- g. What Can OAGC do for the Special Needs Committee?
 - i. Develop and disseminate surveys
 - ii. Develop cost and policy data
 - iii. Provide case studies from districts and families
 - iv. Communicate information between the Committee and the gifted community
- h. OAGC State of Gifted Survey – What items would the sub-committee like to include?

3. General Gifted Education Funding and Service Facts

- a. Approximately **280,000** or **16%** of Ohio’s students are identified as gifted in Ohio across the four areas of superior cognitive, specific academic (reading, language arts, social studies, and science), creative thinking, and visual and performing arts.
- b. Before the OEEM formula, state funding supported services for about **20%** of all students identified in Ohio. Another **7%** were served through locally funded units.
- c. Not all districts under the previous system received gifted funding. Districts had to request funding. In Ohio, there are huge service inequities for gifted students. The disparity cuts across wealth and race. In essence, parents of gifted students play a form of service roulette. One district in a county may provide services; the district beside it may not. And it may not necessarily have anything to do with the relative wealth or student population of the district.
- d. Only one district and one community school reports that all of gifted students are served in Ohio.

- e. In 1998, **43%** of identified gifted students were reported as served. That percentage has dropped to less than **22%**. State funding for gifted services has been stagnant for over a decade.
- f. ***The number of gifted students served dropped from 70,667 in 2007/2008 school year to 60,733 in 2008/2009. That is a 16% drop in service in one year.***
- g. ***Word from the field is that the drop from 2008/2009 to 2010/2011 could be catastrophic. Gifted coordinators are particularly vulnerable to cuts.***
- h. While state underfunding of gifted staff contributes greatly to the inequitable system of gifted education across the state, the accountability system exacerbates the problem.
- i. Currently, there is no specific mandate to provide services to gifted students. There is no report card measure. We have failed as a state to ensure that students who are above proficient receive appropriate levels of service.

4. Gifted Funding Then and Now

- a. **Before the OEBM:** The previous funding system provided \$33 million to fund gifted coordinator and intervention specialist units directly to districts, \$8 million to fund units to ESCs and another \$5 million in funds for gifted identification. Total funding equaled approximately \$48 million. While the value of unit was unreasonably low (averaging \$37,000), no state share was applied to any of this funding. Wealthy districts receiving a gifted unit received the same funding as a poorer district. In addition, \$1.8 million was provided for Summer Honors Institutes for gifted high school students.
- b. **After the OEBM:** Arguably, in more than any other area of education, gifted education funding was the most changed element in the OEBM formula. Gifted is now broken into four different components and included in the foundation formula. These elements include gifted Coordinators, gifted intervention specialists, gifted identification, and gifted professional development. Gifted ID and coordinators are fully funded now, and GIS and GIS PD are phased in over the next ten years. For 2010, direct district funding is \$47 million. In FY2011, the amount increases to \$59 million within the formula. In addition, \$8 million of funding is included for ESCs. The big changes in funding are:
 - i. All districts now receive gifted funding.
 - ii. All gifted funding has state share applied.
 - iii. ***Funding is not tied directly to units – even at the ESC level.***
 - iv. Maintenance of Effort provision for gifted unit spending for 2010/2011
 - v. Development of Performance Indicator.

- 5. **There are Significant Issues with the Gifted Transitional Aid Requirements.** These requirements were put in place to ensure that gifted services and staff were protected during the transition from gifted unit funding to these requirements.
 - i. **Because the gifted maintenance of effort provision called for districts to maintain state spending levels rather than service or staff levels, many districts are cutting services.** As gifted unit funding never covered the full cost of a coordinator or intervention specialist, districts are cutting gifted staff even if they are receiving the same amount of funding as they did last year for gifted staff. This is also happening at ESCs that are receiving the same funding as last

year, but the funding is no longer linked directly to a unit. The bottom line is that some districts have cut gifted staff and services even though they received the same or more gifted funding than in past years.

- ii. **Some districts appear to be unaware of what the required minimal level of spending is for each district.** Some districts are not spending anything. Many more are planning to cut spending next year. Examples: Morgan Local – this year Medina – next year
- iii. **Gifted identification funds were not included in transitional aid.** Districts receiving low state share did lose this amount of funding, which impacts the proper identification of students. This is a significant issue for wealthy districts, but it affects all districts as they are not yet required to use the gifted identification formula funds to be spent on gifted identification.
- iv. **Some districts, due to caps or lower transitional aid funding are receiving little or nothing in overall transitional aid even though they have gifted spending requirements based on gifted unit funding that technically should be in transitional aid.** These districts are beginning to cut gifted staff. Example: Lordstown
- v. **Wealthy districts that received services through ESCs received no gifted Transitional Aid** – This is a significant issue for some districts that are at a low or zero state share. The issue is particularly acute for those wealthy districts that received services through the ESC last year as those funds are not included in transitional aid. Example: Olentangy
- vi. **The annual gifted self report should be utilized to track gifted spending for gifted to ensure that**
 1. districts are held accountable for the appropriate amount of required gifted spending and
 2. districts become accustomed to what the spending reports requirements will be in FY2012

6. OEBM Accountability Issues Need to be Clarified Soon or Gifted Education will Decline Further

- a. **A phased-in mandate needs to mirror phased-in funding levels for the protection of both students and districts.** Ohio Revised Code allows the State Superintendent to require districts to implement district gifted plans. Furthermore, HB1 requires a gifted performance indicator to be developed by December 21, 2011. The language gives the State Superintendent and the State Board of Education a good deal of latitude to develop an appropriate mandate for gifted services that can be phased-in appropriately. Without a mandate or some other form of significant accountability, the new gifted formula under HB1 will fail to work as designed. The end result will be that inequity of services will continue across the state. This is a particular concern for urban and rural districts, where services are low overall.
- b. **Gifted education should be one of the Core Academic Strategies that are required of all districts including those rated as excellent.** Language in HB1 already indicates all districts must comply with the spending rules in FY2012, but the spending rules need to be developed (quickly) to reinforce that this is the case.
- c. **Proof of qualified gifted coordinator services should be required before gifted intervention specialist funds flow as is required in the current funding system.** With the new spending formula, the staffing rule that linked coordinator services to gifted intervention specialist funding have been decoupled. These rules need to be re-established quickly.

- d. **Coordinator and GIS services need to be limited to a maximum ADM or organizational unit level.** This is a particular problem in ESCs where a gifted coordinator may be contracted to support multiple districts.
7. **The Old Gifted Unit Funding system did not Apply State Share to the Gifted Components. The New System of Gifted Funding does Apply State Share to Gifted Funding Components.** This is a significant issue. If there is some way to maintain the gifted component in the OEBM formula but allow full funding (no local share) of the component, it will allow all districts to remain whole on gifted funding.
 - a. **There is considerable confusion about whether districts are required to spend to the gifted formula amount in FY 2012 or only to the amount covered by state share.** If districts need only spend to the state share amount, many districts with low or zero state share will gut gifted services. These districts are currently the districts that have supported gifted services under the unit funding system.
 - b. **The State Board School funding sub-committee report included a plan to phase-in new gifted funding in a way that would allow wealthier districts to be held harmless.** Perhaps, the mechanics of that plan can be reviewed and adopted in the gifted spending rules. As a side note, the weights developed under this model were both on an ADM and gifted basis. Certain activities (e.g. program development, identification) go beyond the gifted student population.
8. **Specific Formula Changes that May/Will Require ORC Changes**
 - a. **Need to include phased-in mandate language in ORC to ensure that gifted services are not reduced even as more state funding is provided.** At a minimum, conflicting spending requirements language needs to be resolved. Regardless, of the funding system (e.g. organizational units, weights, or the old model) without accountability for the funds, gifted children will not be served.
 - b. **In order to maintain consistency in the funding model, the gifted coordinator formula should be changed from ADM to the organizational unit basis.** The optimal number can be developed through district cost surveys or the gifted self-reports.
 - c. **The salary levels for gifted coordinators and gifted intervention specialists may be insufficient.** These salaries should be evaluated based on district cost surveys and salary data already captured by ODE.
 - d. **Maintenance of Effort for Districts and ESCs Needs to Relate Back to Level of Gifted Services/Staff** – If ESC funding is maintained for the next biennium, it should be on a unit basis. Maintenance of effort for districts needs to relate to 2009 service levels to gifted students rather than state spending levels.
 - e. **The gifted identification spending formula may be low.** Again, cost surveys could capture the correct amount. Also, as stated before, perhaps no local share factor should be applied to this component of the formula.
 - f. **In early versions of HB1, community schools were provided gifted funding.** This funding was not included in the final bill. Community schools providing gifted services based on the operating standards should be allowed to access gifted funding.
 - g. **The enrichment language needs to be clarified to exclude gifted references to ensure access to AP and PSEO courses.**
9. **Clarifying Misconceptions – Response to Odden and Picus and Jack Pierson**
 - a. **Odden and Picus \$25 Per Student Gifted Formula**
 - i. The Odden and Picus model does not take into account that gifted personnel are needed to support the needs of gifted children in each district. In fact, their

funding model doesn't follow their own summary of the elements needed for gifted education which included:

1. Funding to identify hidden talents in diverse populations;
 2. Funding to provide access to appropriate curriculum;
 3. Funding to support accelerated opportunities, and
 4. Funding to provide access to appropriately trained teachers.
- ii. Odden and Picus chose not to use these research based elements *they describe in their own textbook* to devise a funding system. Instead, they arrived at a figure of \$25 per ADM figure, which was derived from a seat license fee for an enrichment computer program. Interestingly, they neglected to include the annual site license fee, which would run approximately \$5300 per school building in Ohio. There are roughly 3,700 school buildings in Ohio. Even using their bizarre approach to serving all gifted children, Odden and Picus cannot defend this figure as an adequate method for funding gifted students.
 - iii. Without gifted coordinators and gifted intervention specialists, gifted services in Ohio will be dubious at best in districts.
 - iv. The \$25 per ADM for gifted education recommended in the Odden and Picus funding model does not reflect the Ohio experience with respect to gifted services and funding. Nor does it reflect the research that does exist regarding gifted funding and policy.
 - v. Odden and Picus clearly have no understanding of the depth and scope of research based gifted education practices.
- b. Response to Jack Pierson's Concerns about Gifted Funding in the OEBM – please see draft outline under separate cover.**
- i. **Points Mr. Pierson did not Include in his Memo that Should be Considered by the Sub-Committee**
 1. Akron currently identifies 2402 gifted students but only serves 242 or approximately 10%. This level is far lower than the state average of 21%.
 2. Akron is also identifying significantly fewer gifted students (10.78%) than the state average of approximately 16%.
 3. The number of minority gifted students identified in Akron appears to be under-represented. (4 % of the African American student population is identified as gifted, 6% of the Hispanic student population is identified as gifted, 19% of the white student is identified as gifted, 3.66% of the LEP population is identified as gifted)
 4. The low service percentage indicates that gifted services are terribly underfunded and understaffed.

10. Non-Funding Issues

- a. **Accountability System Overhaul** – It is clear that the focus of Ohio's accountability system on minimum levels of proficiency has created perverse disincentives for districts to support the needs of all children safely above the proficiency line, particularly high ability students. Until the accountability system is overhauled to reflect true excellence, we do a disservice to students, the public at large and the districts that truly are offering excellence across a spectrum of needs. Specific areas of concern include the following:

- i. **Many districts with excellent ratings have appallingly little to offer students** by way of Advanced Placement courses, gifted services, and acceleration opportunities. Some of these excellent rated districts are pushed to this rating by a curious use of value added measures whereby some districts that have negative value added growth for two of five grade levels are still bumped up from a lower ranking due to an inflated value added growth ranking.
 - ii. **Cut scores for accelerated and advanced scores are misleading.** First, there is no accelerated or advanced material on any of the grade level Ohio Achievement or Ohio Graduation tests. Many parents wrongly are receiving the impression that their children are accelerated or advanced on test scores were the percentage of passage to reach these levels are surprisingly low. For example, a cut score equivalent of 59% is required for a student to be labeled as accelerated in 8th grade math. These misleading scores help drive state level policies that exempt districts from best practices and mandates due to “high” level performance.
 - iii. **Excellent rankings in Ohio do not reflect any true measure of excellence.** The rating simply means that many districts are excellent in moving the majority of their students over a minimum proficiency line. The accountability system should be redesigned to reward districts that are truly offering excellent opportunities for all students of various needs across a continuum of services. Districts that are merely good at producing large numbers of students who achieve at levels of minimum proficiency should be ranked no higher than proficient.
 - iv. **Districts should be rewarded for promoting acceleration opportunities in the accountability system.** This recommendation is necessary to ensure that the model state acceleration policy is put into practice across the state. Small districts in particular are loath to accelerate students in many cases for fear of hurting their performance ratings.
- b. **Credit Flexibility and Course Mastery Exams** – The Credit Flexibility Plan is a good start, but falls short of what is needed in Ohio. It is disappointing that the one element of the original credit flexibility plan – state set cut scores on existing national exams (e.g. Advanced Placement, ACT end of course exams etc.) -- so that districts don’t have to all set the scores was not implemented. Some students need to show course mastery to eliminate coursework altogether. OAGC is also concerned that some districts plan to charge for credit flex options.
- c. **Assessment on Demand** – Students should be allowed to take required state assessments when they are ready to show mastery. The rigid adherence to age/grade level assessments unnecessarily impedes the continuous progress of many Ohio students.
- d. **Lack of Technological Innovation** – Ohio recently received a ranking of D+ in the use of technology from the most recent Education Week’s technology ranking, largely due to the lack of a statewide platform for K – 12 virtual opportunities. The only viable options for Ohio students are local area opportunities or community e-schools that don’t allow for a blended virtual/brick and mortar experience. Under Ohio’ rigid system, students are often denied access to the coursework that they need. The movement to bring virtual Advanced Placement courses to each district is a welcome advance. However, OAGC believes Ohio should develop a virtual, web-based school that would allow all K –

12 students appropriate access to the coursework when they need it. The Florida virtual school movement could serve as a possible model for Ohio.

- e. **NAEP data and the Other Achievement Gap.** – A recent study released by the University of Indiana provided ample evidence that the emphasis on proficiency has exacerbated the other achievement gap between high achieving low income and minority students and their higher income, non-minority peers. Based on NAEP and Advanced Placement data, it is clear that what advocates have long suspected is true in Ohio as well as most other states: the gap is widening between Ohio’s high achieving low-income and minority students are losing to their higher income, non-minority peers. This is a direct result of an accountability system that has no incentives for the performance of high achieving students. When public schools de-emphasize the needs of high achieving students, the students who suffer are those whose families cannot afford other options for their children.