

Using the Evidence-Based School Finance Model in Ohio

Presentation to the
Ohio School Funding Advisory Council

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School Finance Adequacy and the Evidence-Based Model

- **Adequacy means the resources needed so all children can meet Ohio's student performance standards**
- **Our Approach**
 - **Double Student Performance**
 - **Without Doubling Costs**
 - **Using research based strategies**

A New Budgeting Paradigm

- **Focus is on ALL of a district's resources**
- **Does not use traditional incremental budgeting or resource allocation approaches**
- **Resources are allocated and used in ways supported by the best research available**

Evidence-Based Approach

- **Not just a funding model**
- **Core academics**
- **Electives including art and music**
- **Teacher professional Development**
- **All aspects of schools**
- **Resources to produce large improvements in student learning**

Three Bases of Knowledge

- **How students learn complex materials:**
How People Learn
- **Resource dimension of individual programs that work**
- **How schools and districts that double student performance use resources**

What We Do

We link state policy with what works in schools

We know what works from studying schools/districts that have doubled performance, reviewing existing research on individual programs, assessing the most effective use of resources in schools, and turning that into a school funding model

States that have used the EB Model to Align Resources with Student Learning

- **Arkansas**
- **Wyoming**
- **North Dakota**
- **Ohio**

Pending in:

- **Wisconsin**
- **Washington**

The Evidence-Based Model in School Districts

- **Strategic Planning in Little Rock, Arkansas**
- **Strategic Budgeting in Beaverton, Oregon**

Ten Steps to Double Performance

- 1. Analyze state tests to understand performance challenge**
- 2. Set higher goals**
- 3. Adopt a new curriculum; view of effective instruction**
- 4. Commit to data-based decision making**
- 5. Invest in on-going professional development**

Ten Steps to Double Performance

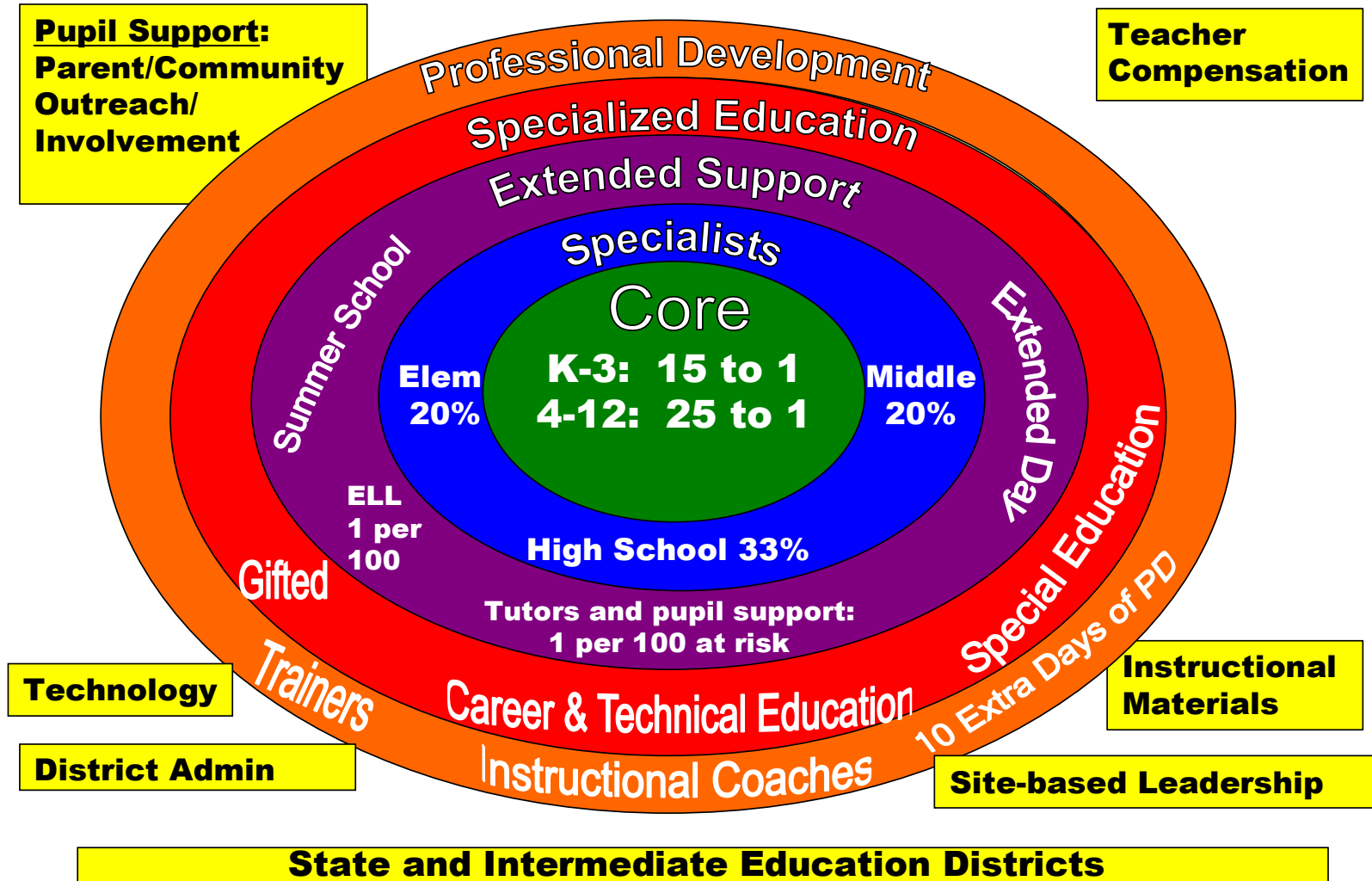
- 6. Focus class time more efficiently**
 - 7. Provide multiple interventions for struggling students**
 - 8. Create professional learning communities**
 - 9. Empower leaders to support instructional improvement**
 - 10. Take advantage of external expertise**
- Plus, teacher and principal talent matter**

The Challenge

Scale up these strategies in all districts by using resources provided by the state's funding model effectively and efficiently

The Evidence Based Model:

A Research Driven Approach to Linking Resources to Student Performance



Prototypical Schools

- These are a way to organize resources for learning

	Elem.	Mid.	HS
Grades	K-5	6-8	9-12
EB	432	450	600
OEBM	418	557	733

Teacher and Instructional Days

- **EB Model calls for 200 day teacher contracts**
 - Minimum of 180 instructional days
 - Ten days for concentrated PD
- **OEBM is silent on contract length**
- **OEBM calls for determination of instructional days by end of 2010**

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Core

K-3: 15 to 1

4-12: 25 to 1

Core Teachers

	Elem.	Mid.	HS
EB	15:1 K-3 25:1 4-5	25:1	25:1
OEBM	15:1 K-3 25:1 4-5	25:1	25:1

- Both EB and OEBM call for full-day Kindergarten

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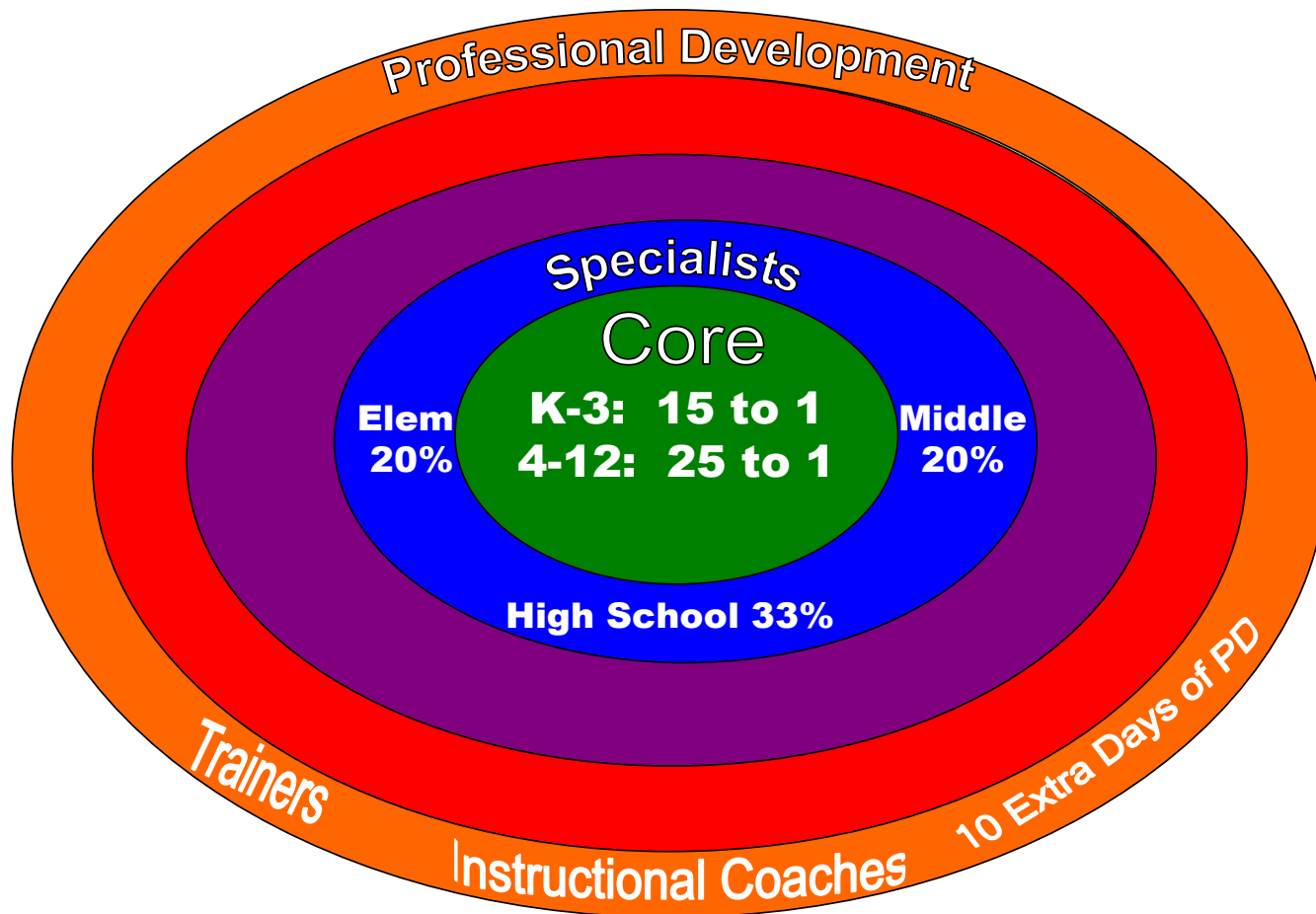


Specialist Teachers

	Elem.	Mid.	HS
EB	20%	20%	33%
OEBM	20%	20%	25%

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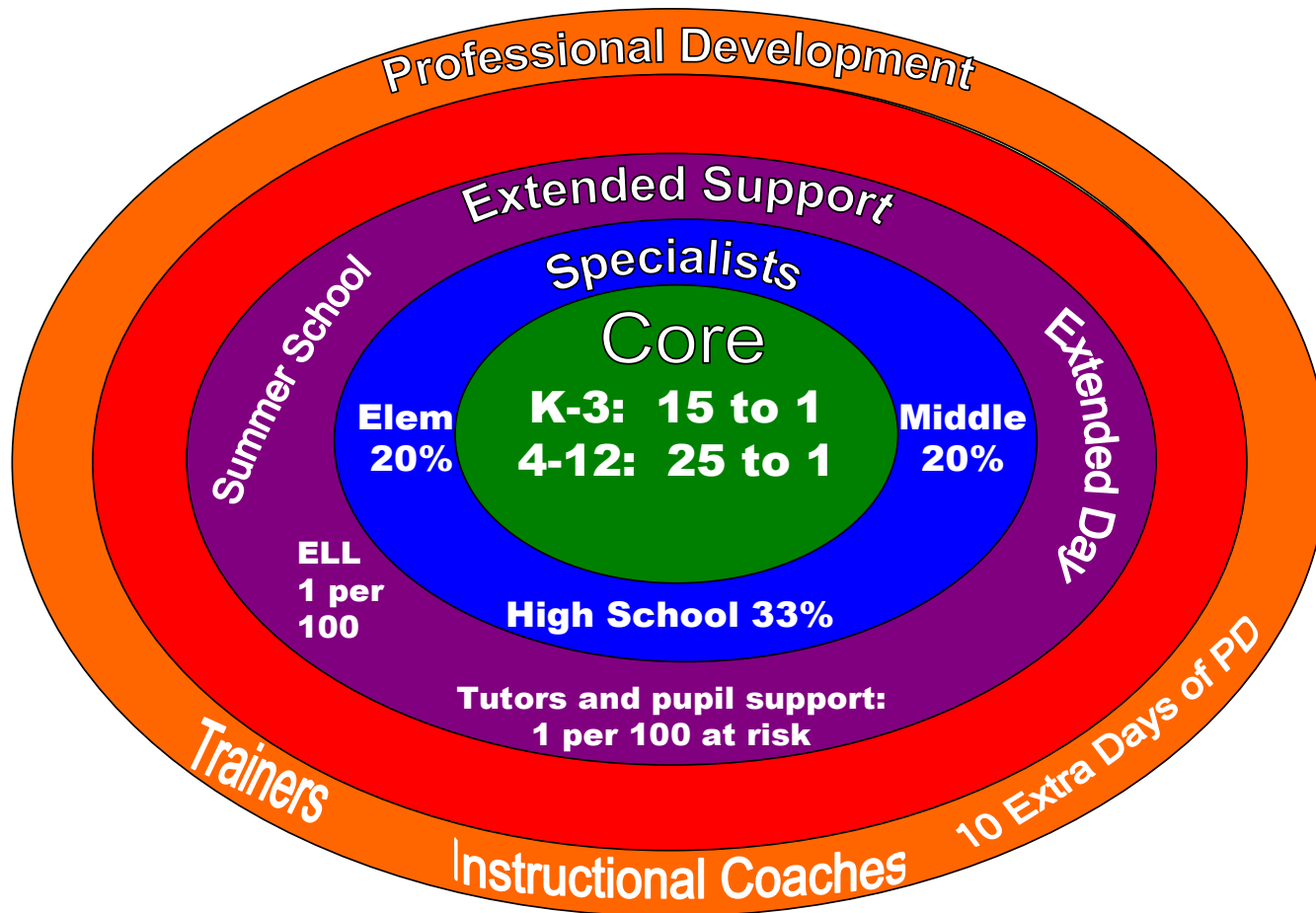


Lead Teachers (Facilitators or Coaches)

	Elem.	Mid.	HS
EB	1 per 200 students	1 per 200 students	1 per 200 students
OEBM	1 per Org. Unit	1 per Org. Unit	1 per Org. Unit

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Strategies for Struggling Students

- **Supplemental Teachers (tutors)**
 - EB -- 1 per 100 poverty students
 - OEBSM – 1 per 100 poverty students (also expected to provide assistance for extended-day)
- **LEP teachers**
 - EB – 1 per 100 LEP students
 - OEBSM – 1 per 100 LEP students

Strategies for Struggling Students

- **Summer Remediation**
 - **EB – 0.25 FTE for each 30 students in poverty (assumes $\frac{1}{2}$ attend for class size of 15)**
 - **OEBM -- \$3,000 per summer school teacher based on $\frac{1}{2}$ the number of economically disadvantaged children and class size of 30**

Strategies for Struggling Students

- **Extended Day**
 - **EB – 0.25 FTE for each 30 students in poverty (assumes $\frac{1}{2}$ attend for class size of 15)**
 - **Part of responsibility for tutors identified above**

Strategies for Struggling Students

- **Family and Community Liaisons (pupil support staff)**
 - **EB – 1 per 100 poverty students**
 - **OEBM – 1 per 75 poverty students**

Strategies for Struggling Students

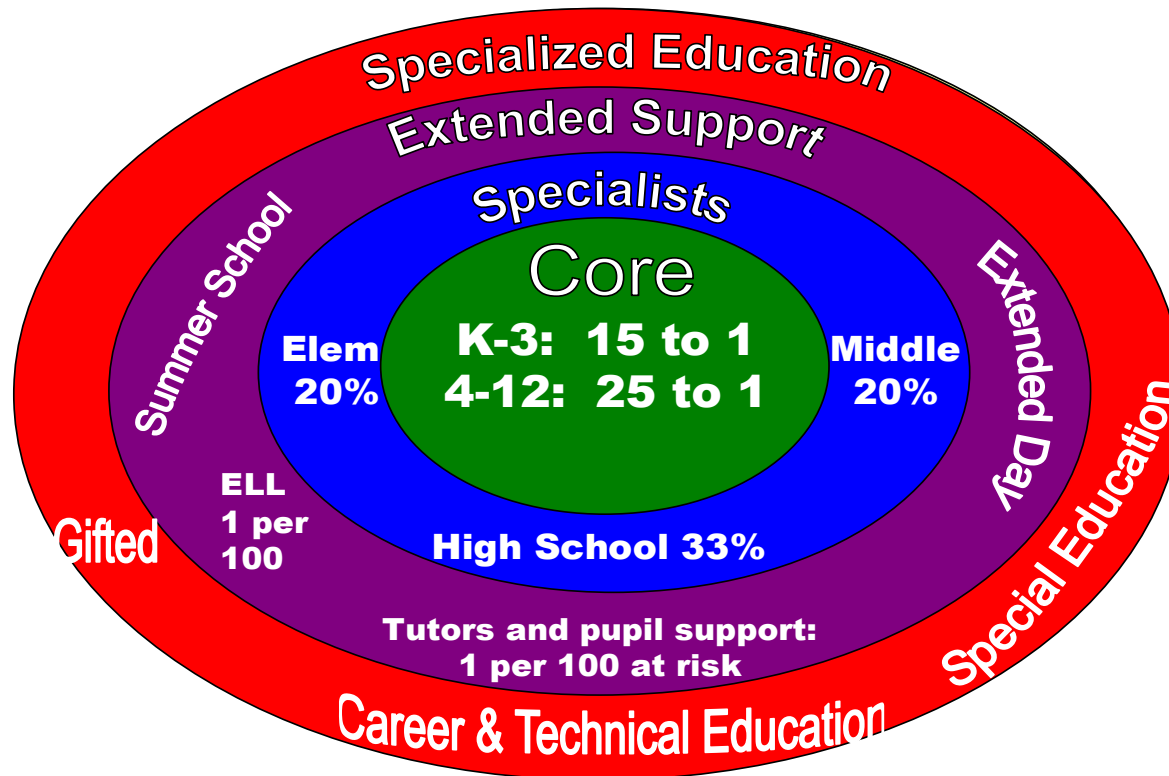
- **Counselors**
 - **Elementary**
 - Not included in either model
 - EB model suggests they could be funded with pupil support resources
 - **Middle**
 - Both models – 1 per 250 students
 - **High School**
 - Both models – 1 per 250 students
 - ***Note that OEBM does not fund counselors for 2010-11***

Strategies for Struggling Students

- **Student Wellness Coordinators**
 - EB – not included
 - OEEM – 1 per organizational unit
- **District Health Professionals**
 - EB – not included
 - OEEM – 1 per school district

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Specialized Education

- **Special Education Teachers**
 - **EB -- ~1 per 150 students in a school for mild and moderate disabilities**
 - **OEBM – 1 per 20 weighted special education students (funded at 90%)**
- *Note that the EB model assumes 100% state (and Federal) funding for children with severe disabilities*

Specialized Education

- **Special Education Aides**
 - **EB – 1.5 positions per 150 pupils in a school**
 - **OEBM – 1 aide per 2 special education teachers (funded at 50% in 2010-11)**

Specialized Education

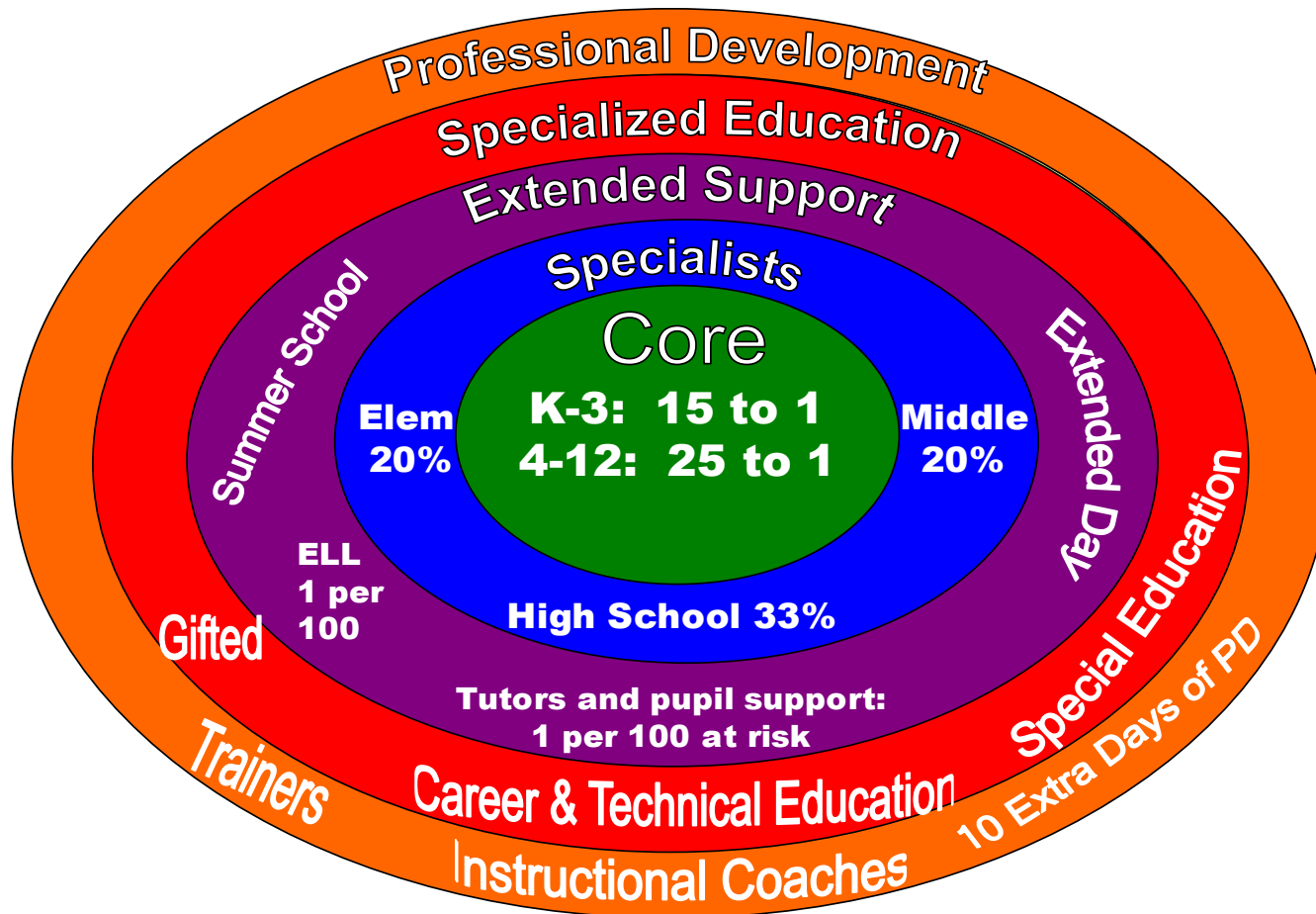
- **Gifted and Talented**
 - **EB \$25 per student in each school**
 - **OEBM**
 - **Identification \$10 per student**
 - **Coordinators – 1 per 2,500 students**
 - **Gifted Intervention Specialists – 1 per organizational unit (funded at 20% in 2010 and 30% in 2011)**
 - **GIS PD -- \$1833 per GIS (funded at 20% in 2010 and 30% in 2011)**

Specialized Education

- **Career and Technical Education**
 - **EB – strategy in some states to provide resources for smaller classes and additional funds for materials**
 - **OEBM – 0.75% increase over prior year formula for middle and high schools**

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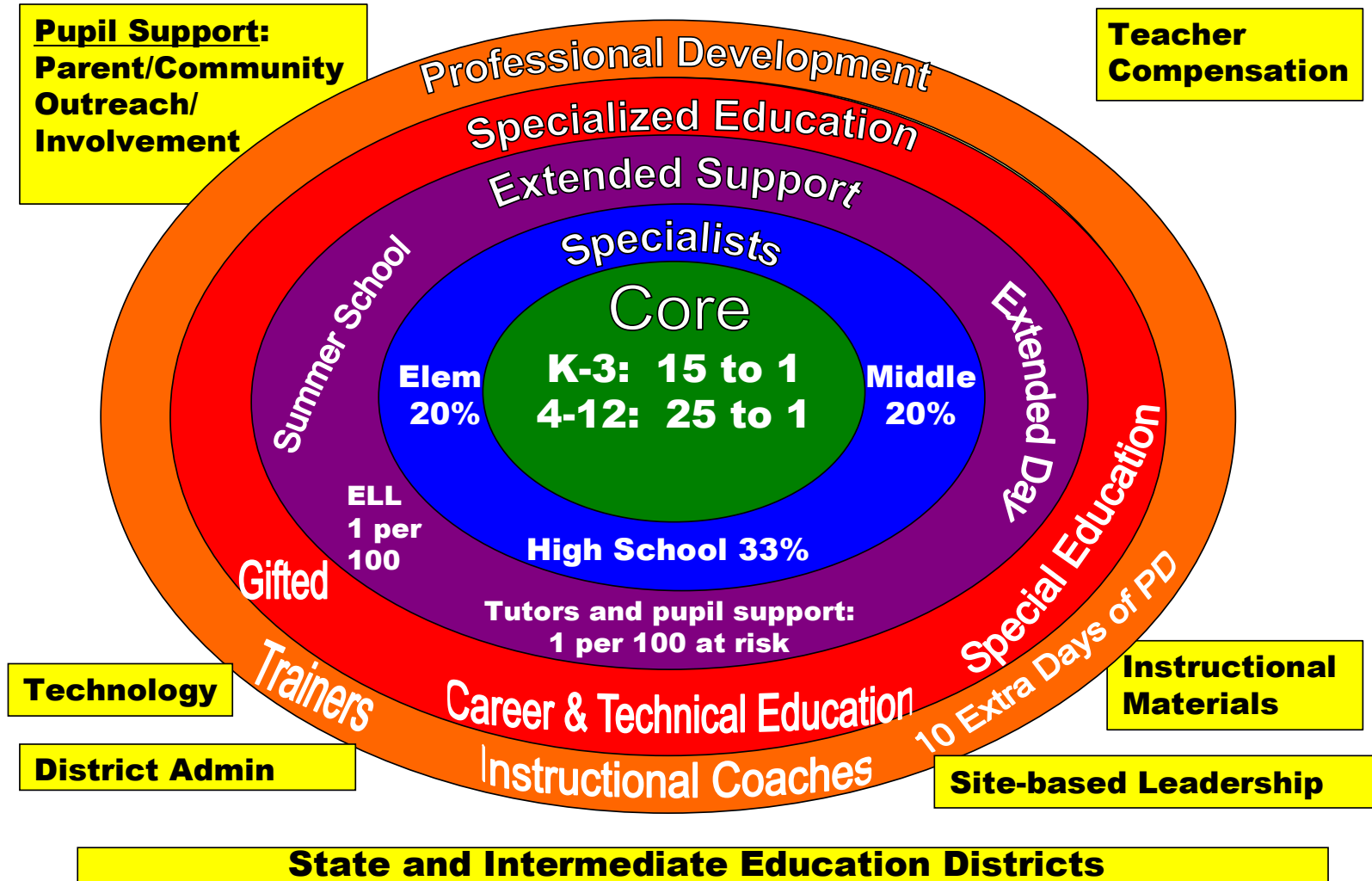


Professional Development

- **EB**
 - Coaches/Facilitators – identified above
 - Additional 10 days for teacher planning
 - \$100 per pupil for trainers, workshops, etc.
- **OEBM**
 - \$1,833 per core, specialist, lead and special education teacher which averages \$127.29 per pupil

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Other Components

- **Substitute Teachers**
 - EB – 5% of instructional components
 - OEBM – silent
- **Student Enrichment (Student Activities)**
 - EB -- \$200 per pupil Elem. and Middle, \$250 per pupil HS
 - OEBM -- \$100 per student (funded at 20% in 2010 and 30% in 2011)

Other Components

- **Librarians/Media Specialists**
 - EB -- 1 per prototypical school
 - OEBS -- \$60,000 per organizational unit (funded at 20% in 2010 and 30% in 2011)
- **Technical equipment/technology**
 - EB -- \$250 per pupil
 - OEBS -- \$250 per pupil, (funded at 20% in 2010 and 30% in 2011)

Other Components

- **Instructional materials**
 - **EB -- \$165 per pupil Elementary and middle schools, \$200 per pupil HS**
 - **OEBM -- \$165 per pupil (funded at 20% in 2010 and 30% in 2011)**

Other Components

- **Operations and Maintenance**
 - EB – funded at the state average per pupil
 - OEBM -- \$844 per pupil (funded at 45% in 2010 and 2011)
- **District Administration**
 - EB – 9 professional and 9 clerical positions for a district of 3,500 students
 - OEBM – 1 position per district

Other Components

- **Site Administration**
 - **EB – 1 per prototype school; assistant principals pro-rated above prototypical school size**
 - **OEBM 1 per organizational unit**

Other Components

- **Secretaries/Building Managers**
 - **EB – 2 at elementary and middle school, 3 at HS**
 - **OEBM – 1 secretary and one building manager per organizational unit in elementary and middle schools; 3 secretaries and one building manager for high schools**

Other Components

- **Non-Instructional Aides**
 - **EB – 2 at elementary and middle school, 3 at HS**
 - **OEBM -- 2 at elementary and middle school, 3 at HS (not funded in 2010)**

Pupil Transportation

- **EB**
 - Based on past expenditures
- **OEBM**
 - ODE formula

Adjustments by District

- **EB**
 - Hedonic Index, or
 - Comparable Wage Index
- **OEBM**
 - Ohio Educational challenge Factor

Our comparison of the core EB model with the OEBM

- Overall the two are very similar
- Areas of difference:
 - Professional development – EB has ten pupil free days for teachers for professional development and more instructional coaches – **OEBM moves to a 200 day school year**
 - Central office staffing
 - Hedonic v. Instructional Quality Index (Education Challenge Factor)
 - Organizational units v. actual school enrollments
 - Others (i.e. pupil support, specialist teachers at high school)

Accountability Issues

- **States have substantial leeway to modify core recommendations**
 - **Arkansas, Wyoming and North Dakota made changes to our initial recommendations**
 - **Courts in Arkansas and Wyoming upheld these legislative changes**
 - **Ohio can also modify and adapt the model to its own specific needs**

Implementation Questions

- **How proscriptive should a funding formula be?**
 - **Block v. categorical grants**
- **What will schools do with unrestricted funds?**
- **What can we learn from existing evidence?**

Few Schools Use Total Resources for Evidence-Based Reforms

- Less focus on core subjects – more electives than in the model
- Limited professional development, under use of school-based instructional coaches
- Few tutors or other strategies to help struggling students
- Numerous instructional aides

Challenge: not to mandate spending patterns but to create a statewide strategy to engage all schools in doubling student performance

Bottom Line

- **Know much about how to improve schools – double performance in 4-7 years**
- **Costs of funding those strategies are reasonable**
- **Most states and districts can do this now**

Key Implementation Challenges

- **Willingness to focus on “core” subjects not electives?**
- **Sufficient sense of urgency**
- **Educator knowledge and belief in approaches**
- **Leadership to launch, support and fund these efforts?**

Resources

- **Odden, A.R. and Picus, L.O. (2008). *School Finance: A Policy Perspective, 4th edition*. New York, NY: McGraw-Hill.**
- **Odden and Archibald (2009). *Doubling Student Performance ... and finding the resources to do it*. Corwin.**

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