

DOCUMENT RESUME

ED 315 889

EA 021 626

TITLE Legislative Studies in State Education Policy, 1976-1988: A Final Summary.

INSTITUTION National Conference of State Legislatures, Denver, CO.

SPONS AGENCY Office of Educational Research and Improvement (ED), Washington, DC.

REPORT NO ISBN-1-55516-320-3

PUB DATE Aug 88

CONTRACT 400-85-1004

NOTE 142p.

AVAILABLE FROM Book Order Department, National Conference of State Legislatures, 1050 17th Street, Suite 2100, Denver, CO 80265 (\$10.00 prepaid).

PUB TYPE Reports - Research/Technical (143) -- Information Analyses (070)

EDRS PRICE MF01/PC06 Plus Postage.

DESCRIPTORS Change Strategies; Early Childhood Education; Educational Change; \*Educational Equity (Finance); \*Educational Finance; \*Educational Legislation; \*Educational Policy; Elementary Secondary Education; National Surveys; State Officials

ABSTRACT

During the period from 1976 through 1988, the National Conference of State Legislatures and the United States Department of Education's Office of Educational Research and Improvement collaborated to develop a program supporting educational policy studies for state legislatures. The program contributed 69 studies on a variety of topics. This report is divided in 10 sections. Section headings are as follows: (1) general education finance adequacy and equity; (2) responses to federal education aid policies; (3) educational costs for children with special learning requirements; (4) early childhood special education; (5) property tax revision and alternative sources of local school support; (6) education, job training, and economic development; (7) improvements in schools, teaching, and learning; (8) higher education finance reform and reorganization; (9) management information systems for overseeing school finance policies; and (10) general education reforms and oversights. A listing of cost-sharing award summaries (1976-1988) and a master list of project directors and contact persons are appended. (SI)

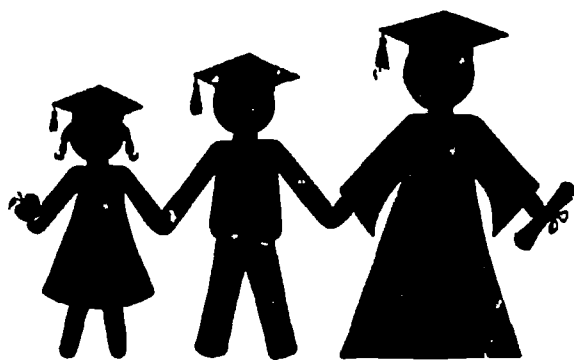
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# LEGISLATIVE STUDIES IN STATE EDUCATION POLICY 1976 - 1988

## A Final Summary



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**The work upon which this publication is based was funded from contract No. 400-85-1004 between the U.S. Office of Educational Research and Improvement and the National Conference of State Legislatures. The contents do not, however, necessarily reflect the views of OERI or the U.S. Department of Education.**

**LEGISLATIVE STUDIES  
IN  
STATE EDUCATION POLICY  
1976-1988**

**A Final Summary**

**Report Prepared by:**

**The National Conference of State Legislatures  
Education Program  
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**August 1988**

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ISBN 1-55516-320-3

## TABLE OF CONTENTS

PREFACE . . . . .	ix
<b><u>COST-SHARING AWARD SUMMARIES, 1976-1988</u></b>	
<b><u>BY CATEGORY OF EDUCATION POLICY</u></b>	
 <b>GENERAL EDUCATION FINANCE ADEQUACY AND EQUITY</b>	
<i>American Samoa (1982-83)</i>	
"Education and Public Finance in the Territory of American Samoa" . . . . .	3
<i>Arkansas (1982-83)</i>	
"Equity in School Finance" . . . . .	5
<i>Connecticut (1985-86)</i>	
"Education Reform Costs in Connecticut" . . . . .	7
<i>Florida (1976-78)</i>	
"Improving Education in Florida: A Reassessment" . . . . .	8
<i>Georgia (1980-82)</i>	
"Georgia School Finance Equalization Study" . . . . .	9
<i>Illinois (1976-78)</i>	
"Effort in Illinois Finance," "Adjustments to Wealth Measurement," "Residential Property Composition," "Effects of Public Act 80-247" . . . . .	11
<i>Illinois (1980-82)</i>	
"Toward the Restoration of Equity in Illinois K-12 Finance" . . . . .	15
<i>Iowa (1982-83)</i>	
"Refinement of the Elementary and Secondary School Foundation Plan" . . . . .	16
<i>Kansas (1976-77)</i>	
"Report on Kansas Legislative Interim Studies to the 1978 Legislature" . . . . .	18
<i>Maine (1982-83)</i>	
"An Examination of the Reform Decade of the 1970's" . . . . .	20
<i>Michigan (1975-76)</i>	
"The Michigan School Finance System" . . . . .	21
<i>Mississippi (1986-87)</i>	
"A Study to Develop a More Equitable Distribution of Education Funds Within Mississippi" . . . . .	22
<i>Missouri (1975-76)</i>	
"Analysis of the School Finance and Tax Structure of Missouri" . . . . .	24
<i>Missouri (1982-83)</i>	
"The Equity of Public School Finance in Missouri: 1977-1981" . . . . .	26
<i>North Dakota (1986-87)</i>	
"A Study of the Special Education Delivery Systems and Transportation Reimbursement Formulas in North Dakota" . . . . .	27
<i>Ohio (1975-76)</i>	
"Income Variations Among Ohio School Districts" . . . . .	29

<i>Oklahoma (1979-80)</i>	
"Oklahoma School Finance Project" . . . . .	30
<i>Oklahoma (1987-88)</i>	
"A Study to Determine if a Statewide Program Cost Accounting System Can Be Implemented". . . . .	32
<i>Pennsylvania (1978-79)</i>	
"Pennsylvania's School Subsidy Formula--The Use of Personal Income" . . . . .	34
<i>South Dakota (1987-88)</i>	
"A Study to Determine the Non-Instructional Costs of Public Elementary and Secondary Education in South Dakota" . . . .	35
<i>Vermont (1982-83)</i>	
"A Study to Assure Equality of Educational Opportunity Through an Equitable Tax and Aid System" . . . . .	36
<i>Vermont (1985-86)</i>	
"Vermont's Program of State Aid to Education" . . . . .	37
<i>Wisconsin (1978-79)</i>	
"Wisconsin State School Aid: A Comparative Analysis of Its Effectiveness in Providing Property Tax Relief". . . . .	38
<i>Wisconsin (1982-83)</i>	
"An Empirical Analysis of Cost Differences Among Wisconsin School Districts". . . . .	39
<i>Wyoming (1986-87)</i>	
"Equity in Education Study" . . . . .	41

**RESPONSES TO FEDERAL EDUCATION AID POLICIES**

<i>Texas (1978-79)</i>	
"Comparative Study of Federal and State Categorical Programs" . . .	45
<i>Washington (1979-80)</i>	
"Federal Aid to Education: Washington State". . . . .	47

**EDUCATIONAL COSTS FOR CHILDREN WITH SPECIAL LEARNING REQUIREMENTS**

<i>California (1986-87)</i>	
"A Study to Determine How to Organize and Expand Public School Programs to Reduce Dropout Rates for High Risk Students: Pregnant and Parenting Adolescents". . . . .	51
<i>Indiana (1980-82)</i>	
"State Special Education Expenditures". . . . .	53
<i>North Carolina (1982-83)</i>	
"Financing Special Education in North Carolina" . . . . .	54
<i>South Carolina (1980-82)</i>	
"Equality of Education for All Handicapped Students" . . . . .	55
<i>Utah (1976-77)</i>	
"Utah Schools' Special Education Study" . . . . .	56

**EARLY CHILDHOOD SPECIAL EDUCATION**

<i>Nebraska (1985-86)</i>	
"Early Childhood Special Education in Nebraska" . . . . .	61

## PROPERTY TAX REVISION AND ALTERNATIVE SOURCES OF LOCAL SCHOOL SUPPORT

### Arizona (1978-79)

- "Arizona Legislature's Special Session on School Finance and Taxation" . . . . . 65

### Georgia (1978-79)

- "Handbook of Government Finance in Georgia" . . . . . 66

## EDUCATION, JOB TRAINING AND ECONOMIC DEVELOPMENT

### Arkansas (1987-88)

- "A Pilot Project to Improve the Reading and Writing Skills of Wage-Earners at Selected Industrial Plants in Arkansas" . . . . . 69

### Illinois (1985-86)

- "Leadership in Education for Employment and Economic Growth" . . . . . 70

### Illinois (1987-88)

- "Assessing the Impact of Education and Workforce Preparation Programs on Illinois' Efforts to Stimulate Economic Development" . . . . . 72

### Kansas (1983-84)

- "Advanced Technology in Kansas" . . . . . 74

### Kansas (1986-87)

- "Report of the Task Force on Business Training of the Legislative Commission on Economic Development" . . . . . 76

### New England (1983-84)

- "Retraining for New England's Mid-Career Work Force" . . . . . 78

### Oregon (1983-84)

- "The Legislative Role in the Job Training Partnership Act and Linking Job Training with Economic Development" . . . . . 80

## IMPROVEMENTS IN SCHOOLS, TEACHING AND LEARNING

### Colorado (1985-86)

- "Evaluation of Certificated Education Personnel" . . . . . 85

### Delaware (1985-86)

- "Teacher Recruitment and Retention in Delaware" . . . . . 86

### Delaware (1987-88)

- "The Delaware Study of Higher Order Thinking for All Children" . . . . . 87

### Florida (1985-86)

- "A Review of the Master Teacher Program, Merit Schools and the Extended School Day" . . . . . 89

### Maine (1985-86)

- "Teacher Recruitment and Retention in Maine" . . . . . 91

### Minnesota (1986-87)

- "New Roles for Teachers" . . . . . 92

### Missouri (1986-87)

- "The Missouri Career Development and Teacher Excellence Plan" . . . . . 94

### North Carolina (1987-88)

- "Increasing the Pool of Minority Teachers" . . . . . 96

### Nebraska (1987-88)

- "Evaluation and Assessment Processes in Nebraska Public Schools" . . . . . 98

### Rhode Island (1985-86)

- "Implementation and Assessment of a Pilot Suicidal Awareness, Identification and Prevention Program Model" . . . . . 100



<i>Tennessee (1983-84)</i>	
"Report of the Select Committee on Education" . . . . .	102
<i>Utah (1987-88)</i>	
"Examination of Eleventh Grade Graduation and Altering the Twelfth Grade Curriculum" . . . . .	104
<i>Vermont (1987-88)</i>	
"Technology, Computers and Learning" . . . . .	106
<i>West Virginia (1983-84)</i>	
"Statewide School Improvement Project" . . . . .	108
 <b>HIGHER EDUCATION FINANCE REFORM AND REORGANIZATION</b>	
<i>Maryland (1980-82)</i>	
"Higher Education Policy Information System" . . . . .	113
<i>Massachusetts (1982-83)</i>	
"An On-Line Higher Education Personnel and Budgeting Data Base" . . . . .	114
<i>Tennessee (1980-82)</i>	
"Improving the Quality of Public Postsecondary Education Institutions" . . . . .	115
<i>Virginia (1983-84)</i>	
"The Issue of Determination of Eligibility for Reduced Tuition Charges" . . . . .	117
<i>Washington (1983-84)</i>	
"Funding Higher Education in the State of Washington" . . . . .	118
 <b>MANAGEMENT INFORMATION SYSTEMS FOR OVERSEEING SCHOOL FINANCE POLICIES</b>	
<i>Alabama (1980-82)</i>	
"The Development of a State-Level Management Information System for Education Data" . . . . .	123
<i>Maryland (1979-80)</i>	
"Legislative Education Policy Information System" . . . . .	124
<i>New Jersey (1979-80)</i>	
"Interactive Support System for Policy Analysis" . . . . .	126
<i>New York (1976-77)</i>	
"The New York State Aid Management Information System for Education" . . . . .	127
 <b>GENERAL EDUCATION REFORMS AND OVERSIGHT</b>	
<i>Alabama (1985-86)</i>	
"A Study of the Needs and Conditions in Alabama Relative to Education Reform...Education Reform Act of 1984" . . . . .	131
<i>New Hampshire (1986-87)</i>	
"Functions and Effectiveness of the School Administrative Unit System of the State of New Hampshire" . . . . .	133
<i>South Carolina (1985-86)</i>	
"An Educational Policy Study to Strengthen Program Evaluation and Legislative Oversight of Education" . . . . .	135
<i>Tennessee (1986-87)</i>	
"Evaluate Progress Toward Achieving the Goals of Section 99 of the Tennessee Comprehensive Education Reform Act" . . . . .	137

**APPENDICES**

*Appendix A*  
State Listing of Cost-Sharing Award Summaries . . . . . 141

*Appendix B*  
Master List of Project Directors and Contact Persons. . . . . 143

## PREFACE

Twelve years ago the National Conference of State Legislatures and the United States Department of Education's Office of Educational Research and Improvement collaborated to develop a program supporting educational policy studies for state legislatures. During the period from 1976 through 1988 this program contributed 69 studies on a variety of topics of importance to legislatures. This report, summarizing those studies, represents one of the final products of that project.

Utilizing state-federal matching grants, over the years this project has been referred to as the "cost-sharing awards." From the start, the intent of this project has been to help legislatures respond to the significant and timely education issues by which they are confronted.

This directory consists of 69 summaries, one for each of the studies conducted since 1976, with many of them containing updates describing legislative actions resulting from the studies. For a complete report, a listing of individual contact persons from the various legislatures is also included in this document. Many of the reports are included in LEGISNET and on a limited basis in print form from the National Conference of State Legislatures.

This project would not have occurred without the generous support of the Office of Educational Research and Improvement (OERI). They have contributed over a million dollars in seed money since its inception. Those funds in turn have been matched by over two million dollars from the states. When compared to the outcomes produced, the cost effectiveness of these studies and the project is readily apparent.

The National Conference of State Legislatures gratefully acknowledges the special contributions of all legislative staff who have worked on each study. In addition, we wish to recognize John Callahan, David Doyle, Bill Harrison, David Mandel, Diane Massell, Lauren Weisberg, and Bill Wilkin for their efforts in initiating the early OERI projects; and the more recent work of Kathy Christie, Ron Field, Jim Fox, Gail Kaplan, Connie Koprowicz, John Myers, Peggy Siegel, and Karen Walker. Their work is reflected in this document.

Mark Weston  
Program Manager  
Education Program  
National Conference of State Legislatures  
August 1988

GENERAL EDUCATION FINANCE ADEQUACY AND EQUITY

**AMERICAN SAMOA  
1982-83 COST-SHARING AWARD**

**TITLE**

"Education and Public Finance in the Territory of American Samoa," a report of the Legislative Reference Bureau

**PROJECT**

This study--the first of its kind in the territory--provided the legislature with a description and analysis of the administration and management of public education and education finance in American Samoa. The study undertook an extensive review of current practices in the states, and took note of those that seemed likely to fit with the territory's present and future needs. The report made numerous recommendations to the legislature for improving education.

**OUTCOMES**

Among its many findings regarding the administration and management of education in the territory, the study reported that:

- o The Department of Education had failed to comply with legislation designating English as the main language of instruction, seeking instead to establish a bilingual system within the schools;
- o Whatever the impact of the bilingual system, scores for graduating high school seniors fall far below American standards in both English and math;
- o The department had failed to project or implement any comprehensive long-range plans for program and facility development; and
- o The department, along with the Community College, had failed to provide meaningful budget information to the Legislature.

The study recommended several solutions to the above problems, ranging from compliance with current law and improved curriculum and instructional review to more comprehensive long range planning by the Department of Education.

Due to the small size of the territory, its limited sources of revenue, and its governmental size and structure, the study determined at the outset that education should be considered as one governmental service to be financed through the general revenues of the territory. Earmarked taxes or revenues would introduce a rigidity into the system and cause unnecessary problems for the territory. The territory derives 45 percent of its revenue from federal grant-in-aid and specific grants, with the remainder from local revenues. There are four main categories of local revenues: 1) corporate and personal income and excise taxes, 2) fees for government services, 3) sales, rents and interest, and 4) enterprise funds.

After a description of alternative planning and finance methodologies, the study suggested that:

- o A finance distribution formula should be adopted for elementary/secondary education to equalize expenditures among schools, based perhaps on a pupil-weighted approach and on an approach that controls allocations at the lower levels;
- o A finance distribution formula should be adopted for the community college based on the student or credit hour;
- o Earmarked taxes or revenues would introduce a rigidity into funds distribution and would cause many problems for the territory;
- o The adoption of property and sales taxes would be impractical alternatives at present; and
- o Additional sources of revenue could include an increase in user fees for governmental services, an increase in current excise tax rates, or an extension of excise taxes to include other imports.

### 1983 UPDATE

While the study was underway, the Governor of American Samoa announced a projected territorial deficit of \$17.9 million for FY83. This discovery came as a surprise, since many had supposed that the territory had surplus revenues. Thus, the report provided critical information to the legislature as they considered alternative methods of funding.

**ARKANSAS  
1982-83 COST-SHARING AWARD**

**TITLE**

"Equity in School Finance"

**PROJECT**

In 1981 the state's Chancery Court declared the current method of school finance unconstitutional. The court held that unequal local effort in both assessment practices and millage rates, hold harmless clauses, and flat grants from the state had resulted in interdistrict school finance inequities. In response to this decision, the Arkansas Legislature met in special session and created the Commission on Public Elementary and Secondary School Finance consisting of fifteen representatives from education, labor, business, agriculture and the general public. This gubernatorially-appointed commission was charged with developing a plan and drafting legislation to implement an equitable school finance formula for the state. The cost-sharing award provided funds for staff, consultants, computer time, travel and dissemination of information from the commission.

**OUTCOMES**

Following extensive local hearings and subcommittee studies, the commission issued its report in December, 1982. The commission recommended that the state alter its current practices by:

- o Calculating local wealth by a variety of factors, including local income and business receipts, until the current overhaul of the property-valuation program is completed;
- o Replacing flat grants and hold-harmless provisions with a weighted per-pupil formula;
- o Adding a "second tier" of state aid for the poorest districts;
- o Adding \$110 million annually (1/3 more) to the present state appropriation; and
- o Establishing incentives for voluntary school district consolidation.

In general the plan required only legislative approval. However, in some cases amendments to the state constitution would be necessary.

## 1984 UPDATE

The Supreme Court upheld the lower court ruling and Governor William Clinton convened a special session of the legislature on October 4, 1983.

In addition to a number of highly publicized school reform measures the legislature implemented the major recommendations contained in this report. Specifically, the legislature:

- o Added a one-cent sales tax which will generate \$150-160 million in new state aid to education per year for three years;
- o Enacted a weighted per-pupil formula;
- o Eliminated the hold-harmless provisions; and
- o Provided several incentives for school district consolidation.



**CONNECTICUT  
1985-86 COST-SHARING AWARD**

**TITLE**

"Education Reform Costs in Connecticut: A Demonstration Project for the Application of the AEFP/RCM System"

**PROJECT**

The Special Select Committee on Education Funding of the Connecticut General Assembly undertook this project as a first step in evaluating present fiscal circumstances and needs facing public schools in the state.

The study explored variations in the actual costs of educational services in a sample of the state's school districts using the Resource Cost Model (RCM) approach developed by the consulting firm Associates for Education Finance and Planning, Inc. (AEFP). The RCM procedures for defining program and services, along with data concerning the actual cost of education at the local level, could eventually help policymakers to: establish standards and indicators to define appropriateness of spending levels; apportion resources; and measure their allocation and effectiveness. This study provided the General Assembly with:

- o A demonstration of the resource cost model approach to school finance;
- o The beginning of data suggesting variation in resource allocation among school districts;
- o Training of legislative staff in the RCM method; and
- o Suggestions about how to proceed further using the RCM.

**OUTCOMES**

The study analyzed cost variation in five diverse school districts, including a partial set of regular elementary and secondary instructional programs, special education programs, and one bilingual program in each sample district. The range of variation between the highest and lowest spending district for the basic fifth grade elementary program was greater than two to one, and somewhat less for the basic high school program.

Suggestions were made for continued application of the RCM model. The select committee adopted the consultant's recommendation to expand the existing data bases for the five sample school districts. The General Assembly's major education bill for 1986 appropriated \$50,000 for the project. AEFP will work with legislative staff to: 1) complete the cost specifications for administration and all educational programs in the five sample districts, 2) add enrollment data for all educational programs, and 3) include a very small district in the sample.

**FLORIDA  
1976-78 COST-SHARING AWARD**

**TITLE**

"Improving Education in Florida: A Reassessment"

**PROJECT**

This study evaluated five main areas:

- o The effectiveness of school-based management in decentralizing decision-making;
- o Major features of the Florida Education Finance Program (K-12);
- o District and individual school center advisory councils;
- o The effectiveness of the State Department of Education in providing technical assistance to school districts; and
- o The role of the legislative staff in carrying out agency oversight duties.

**OUTCOMES**

The legislature implemented the following study recommendations:

- o The creation of special in-service training and planning programs grants to assist districts in more effectively implementing school-based management programs;
- o An annual review and adjustment of weights to reflect program costs more accurately;
- o An annual appropriation of special categorical aid for school districts wanting either to initiate or to improve district-wide or individual school advisory councils;
- o A mandate with accompanying appropriations for extensive management training activities for school administrators or administrator designees; and
- o An evaluation of school district programs once every three years by the state education agency, and the implementation of corrections in state funding should the review find errors in student program service classifications.

**1982 UPDATE**

The legislature was pleased with the results of the new agency oversight responsibilities. In addition, as of 1982-83, it will institute a new factor to its state-funded program which will help equalize the discretionary tax millage levied by local school districts.

**GEORGIA  
1980-82 COST-SHARING AWARD**

**TITLE**

"Georgia School Finance Equalization Study"

**PROJECT**

The Georgia Educational Improvement Council (GEIC) studied selected education programs and conducted computer simulations on the effects of alternative financing plans on Georgia's 187 school districts.

**OUTCOMES**

The GEIC drew the following conclusions from its research:

- o *Severely Emotionally Disturbed or Psychoeducational Centers (SEDs)*. The study analyzed a SEDs bill, which was found to have several problems relating to governance, in order to contain a case for possible litigation, and to examine inequities in the way state aid was distributed. Specifically, the proposed bill would have provided unfair incentives for metropolitan areas to identify more special education students. The bill was not placed before the General Assembly for consideration.
- o *Capital Outlay*. The GEIC found that the entitlement system provided unrealistic levels of state support. It was expected that the school systems would request funds for actual needs under a law requiring them to pay a local effort of not more than 25 percent or less than 10 percent for each new project. The law also had an ability-to-pay index which would have provided for greater equity. Additional provisions would reduce local effort for those systems that have bonded themselves for school construction. Forward funding would allow small systems with low entitlements to obtain project costs immediately and to prepay through future entitlements. A disaster provision was included. GEIC monitored the implementation of the law.
- o *Teachers' Salaries and Availability*. The GEIC's research led to further analysis of teachers' salaries and teacher availability, issues which were of primary concern to the 1982 General Assembly.
- o *Compensatory Education Programs (CEPs)*. The study found that the state's funding formula for compensatory education was inequitable because the school districts received aid based on the documented needs of students in only one grade.

GEIC staff also surveyed compensatory education program coordinators and other leadership personnel. They concluded that the lack of uniformity in testing and evaluation made comparisons of program effectiveness impossible. The survey also found that school officials felt they were being forced unnecessarily to comply with Title I comparability requirements to place their CEPs in Title I eligible schools.

o *Vocational-Technical Education.* The study focused on the questions of governance, funding for high technology, associate degrees for technical training, and the general improvement of the vocational-technical education delivery system.

**ILLINOIS  
1976-78 COST-SHARING AWARD**

**TITLE**

Four Studies:

- I. "Reward for Effort in Illinois School Finance: Policy Debate, Empirical Evidence, Legislative Implications"
- II. "A Pilot Study of Possible Adjustments to the Wealth Measurement in Illinois Based on Using Private or Parochial Students in Student Count"
- III. "Residential Property Composition of School Districts: Its Effects on Tax Rate and Per Pupil Revenue"
- IV. "The Effects of Public Act 80-247 (The Land Assessment Act) on Illinois School Finance"

**PROJECTS AND OUTCOMES**

*Study I.* This study analyzed the pros and cons of a "reward for local effort" provision that was passed in the Illinois school finance reform legislation of 1973 which gave school districts a choice between the foundation system and the "guaranteed valuation programs," which was similar to a "district power equalization" system.

In addition to evaluating the "reward for local effort" provision, the study analyzed the effects of the 1973 reforms on school systems and developed policy alternatives for the Illinois General Assembly.

Below are a few of the conclusions that the study drew:

- o The amount of tax rate increase was lower after the 1973 reform.
- o Districts with high tax rates increased their rates by smaller increments than did lower taxing districts, and this tendency increased after reform.
- o Districts with high equalized assessed valuation per pupil increased their tax rates by greater amounts than did those with low property valuations.
- o Districts with low income and low assessed valuation increased their tax rates by smaller amounts than the overall averages.
- o Income, education, and occupation were important determinants of tax rates. However, the study could establish no clear pattern of their impact on tax rate changes.
- o Increases in property valuation and substantial increases in state aid tended to depress local tax rates, while increases in expenditures had the opposite effect.

- o The effect of changes in enrollment on changes in tax rates was mixed. In elementary districts, enrollment increases boosted tax rates; in high school districts, enrollment increases depressed tax rates; and in unit districts, enrollment increases had little effect on tax rates.

Overall, the evaluations conducted for each of the three years after the 1973 reform showed that "reward for local effort" could be compatible with "equalization of educational opportunity."

The study also recognized, however, that low property valuation/low income districts generally could not increase their tax rates enough to take full advantage of the "reward for local effort." It outlined the following policy alternatives for the General Assembly to consider:

- o Abolish the "reward for local effort" factor as currently constituted, and mandate either a local tax rate up to the current maximum level that the state will match, or substitute a "computational" tax rate at the level of the maximum rate in the formula.
- o Keep the "reward for local effort" factor, and give local boards of education the power to mandate local tax rates up to the maximum rates in the formula.
- o Keep the "reward for local effort" factor, and use the notion of a "computational" tax rate but only for the advantage of poor districts.
- o Add an income factor to the grant-in-aid formula if the difficulty with the "reward for local effort" factor is not low property valuation but low income districts.
- o Reformulate the grant-in-aid system into a "two-tiered" system, which would put the foundation system under the "resource equalizer," and raise the foundation system progressively upward until the "resource equalizer" becomes an add-on over the top of a relatively high foundation approach.
- o Extend the property tax "circuit breaker" to low income groups as well as the elderly.

*Study II.* This study explored the possibility of using a different measurement of wealth in Illinois, that is, property valuation per "total child" or "census child" rather than the present wealth per public school child, in calculating state aid. This was an exploratory study and calculations were made for only three districts.

The study projected the effects of the following plans to demonstrate possible alternatives and to reveal potential problems:

*Plan A.* Count all students in ADA in both public and private schools, use this count in determining relative wealth, and then pay the claim amount that this would earn to the public schools; and

*Plan B.* Count all students, both public and private, only to determine the wealth of the district as measured by assessed value for aid purposes and then pay the district money only for the students attending public schools.

This study also discussed future research that the General Assembly would need if it chose to alter the wealth measure.

*Study III.* This report analyzed the effects of residential valuation of real estate property for elementary school, high school, and unit school districts in select Illinois counties on revenue per pupil and on tax rates. The percents of residential property and of residential property values per Weighted Average Daily Attendance with Title I (TWADA) were established from township data.

The study found that the percent of residential property in a school district seemed to have a strong positive effect on the 1976 tax rate for school operating purposes. When it was analyzed with residential value per TWADA, it had a depressing effect on combined state and local revenue per TWADA. A number of variables, particularly a high percentage of residential property and a high median family income, contributed to higher tax rate efforts in these particular districts. Revenues in districts with high percentages of residential property, and with both high- and low-property value per TWADA, were lower than revenues in districts with low percentages in both categories, other property classifications provide more beneficial tax bases for school financing than do residential property bases.

The study concluded that the Illinois "reward for effort" system was, in essence, one which rewarded districts with high percentages of residential valuations, and, in effect, provided "aid to the homeowners."

The study made the following recommendations:

- o Enact circuit-breaker legislation for low-income residential homeowners, in particular, legislation to provide relief for districts with high percentages of low valuation homes.
- o Raise the maximum tax rates which the state would match. This was perceived as an unlikely occurrence, but if enacted, as one which would aid districts with high tax rates and low property values.
- o Limit the tax base of school districts to residential property, giving the state the power to tax other property classifications, and increase the level of state funding to a higher percentage of the combined state and local revenue.
- o Possibly lower the ratio of assessed valuation to market valuation from 33 1/3 percent to a lower figure to lessen the depressing effect on district revenues.

*Study IV.* This study was designed to determine the effects of the "Farm Bill" act on the funding of K-12 public education. The "Farm Bill" introduced a new method for assessing farmland values, and was designed to moderate high assessments. Included was a "hold harmless" clause to insure a sustained level of equalized assessed valuation from 1976 to 1977. The study analyzed the effects of developing the "hold harmless" clause on K-12 education.

The "Farm Bill" was designed as a measure of tax relief for Illinois farmers, and not as an education finance reform bill. On this basis, the study made the following recommendations:

- o Continue to research the effects that noneducational legislation might have on Illinois school finance.
- o Extend the "hold harmless" clause until farmland assessments "catch up" to the 1976 assessment level.
- o Monitor the effects of the "Farm Bill" together with the proposed "hold harmless" extension and increased valuations of the non-farm sector due to inflation and additions.
- o Duplicate this study using family income as a constant measurement of district wealth to determine the statistical measures of fiscal neutrality, to calculate state aid contributions with both a 35 percent increase limitation and with no percentage increase limitation, and to include the updated "Farm Bill" figures.
- o Allow districts to recover any loss resulting from the "Farm Bill" through a supplementary state aid claim and the removal of the percentage increase limitation.

Right after the study was completed, the legislature extended the "hold harmless" provision. The study suggested that the extension would assist farmers with slower assessment increases and would provide a stable tax base for agencies which rely on local tax dollars.

The General Assembly sent a bill to the Governor which specified changes in the grant-in-aid formula, reduction of the maximum tax rates for units and elementary schools, an increase in the state guaranteed aid per pupil and increased aid to schools receiving either the foundation aid or the resource equalizer portions of the funding formula. The bill also guaranteed districts 90 percent of the previous year's state aid.



**ILLINOIS  
1980-82 COST-SHARING AWARD**

**TITLE**

"Toward the Restoration of Equity in Illinois K-12 Finance"

**PROJECT**

The study investigated the causes for and the possible solutions to the deterioration of equity in Illinois K-12 finance. The study defined equity principally in terms of fiscal or wealth neutrality. In that sense, the study determined that the state moved toward equity if expenditures were less a function of local district wealth. The study also explored the consequences of adopting a supplementary, general purpose grant-in-aid program similar to the one established in New York State.

**OUTCOMES**

Various changes in the state's grant-in-aid system tended to offset reforms which had been established in previous years and which had moved the state toward greater equity. Smaller investments of new state aid also tended to offset the trend toward equity. The study determined that responsibility for the decline lay both with local governments and the state.

The study recommended the adoption of a supplementary general purpose grant-in-aid, based upon income rather than property valuations. It rejected a grant-in-aid program that would distribute state aid only to very poor districts as politically unfeasible. In addition, it rejected the concept of "leveling down," which would place caps on locally raised revenues, as inconsistent with the state's commitment to local control. The study pointed out that "leveling down" had led to great attrition among the ranks of district superintendents in other states. The study also ruled out the use of "recapture" provisions, which would redistribute local funds from the wealthy districts to the poor ones.

In addition to the supplementary general purpose grant-in-aid system, the study recommended that the General Assembly increase the state personal income tax rate from 2.5 percent to 3.0 percent and that it earmark the additional funds for K-12 systems.

**IOWA  
1982-83 COST-SHARING AWARD**

**TITLE**

"Refinement of the Elementary and Secondary School Foundation Plan: A Proposal for Improving the Fiscal Adequacy and Equity of the Instructional Program of Iowa Schools," a report of the Legislative Fiscal Bureau.

**PROJECT**

Changes in the economy and school conditions placed new demands on Iowa's efforts to achieve adequacy and equity in school funding through its foundation formula. This study was undertaken for the interim K-12 School Finance Subcommittee to develop a more accurate composite measure of the factors of district costs in order to update the state's foundation plan. With 1979-80 and 1980-81 data, the study statistically tested the curvilinear "U" shaped relationship between school cost and school size--in other words, it tested the theory that cost per pupil in smaller schools is higher than in larger schools, and is higher in very large schools compared to moderately large schools. If the relationship between size and cost per pupil proves to be "U" shaped, then an equitable allocation of funds will also be "U" shaped. The study analyzed total per pupil expenditures for five cost measures--instruction (primarily teacher salaries), administration, instructional services, and central support expenditures. The study also examined the pattern of current state aid allocations to see if they fit the "U" shaped pattern.

**OUTCOMES**

The study found strong evidence to support curvilinear cost curves for the major cost components--instructional and administrative--as well as for the overall average total cost measure. While instructional support, student services and central support expenditures only minimally fit the "U" shaped pattern, linear analysis showed that per pupil expenditure on the total of these items is almost the same from one district to the next. Consequently, these items did not significantly affect the pattern, which the study concluded was a valid way of measuring equity. The study then compared current formula funding and actual revenue with the estimated "U" curve and found that no similar "U" relationship of formula funding or revenue with size (headcount) existed. While there was no systematic over or under funding on specific sized school districts, any deviations which occurred were explained by: 1) the use of weightings for declining enrollment, 2) the level of the original district cost embedded in the formula, and 3) revenue outside the controlled budget.

The study found questionable the equity of the state's current methods of school finance, measured either by the controlled budget or by total general fund revenue. The researchers recommended that the legislature adjust its funding formula by holding harmless existing funding and basing new allocations on achieving a closer relationship to the theoretical "U" shaped curve.

## 1983 UPDATE

In September, 1983, the legislature directed Glen Dickinson of the Legislative Fiscal Bureau to statistically update the study using 1981-82 and 1982-83 data.

**KANSAS  
1976-77 COST-SHARING AWARD**

**TITLE**

"Report on Kansas Legislative Interim Studies to the 1978 Legislature"

**PROJECT**

The study of the Kansas Legislative Coordinating Council was a comprehensive review and analysis of the state's School District Equalization Act (SDEA). It considered the provisions of the SDEA as they related to the following: school district wealth; district sharing of state individual income tax receipts; budget controls and appeals for additional budget or expenditure authority; general fund transfers of districts to certain special funds; the county school foundation fund; general state aid provided under the "grandfather," or the "hold harmless" clauses; deduction of federal impact aid (P.L. 81-874 funds) in the computation of general state aid; and state transportation aid.

The study also reviewed property tax levies made independently of the SDEA, and whether or not these should be "power-equalized."

**OUTCOMES**

The study made the following recommendations to the 1978 Legislature:

1. The levies for five special funds--social security, special education, vocational education, workmen's compensation, and unemployment insurance--should be power-equalized.
2. The income tax rebate should be increased from 20 percent of individual tax liability after credits for income taxes paid to another state, to 40 percent of resident individual income tax liability after all credits.
3. The income tax rebate should be considered as a deduction in computing the general state aid entitlement of a school district.
4. The "grandfather clause" should be eliminated.
5. The definition of district wealth should be modified so that 50 percent rather than 100 percent of taxable income of district residents is included. The four-year averaging of taxable income and adjusted valuation should be continued.
6. A range of 10 percentage points between a defined budget floor and budget ceiling should be maintained as the expenditure limitation for school districts.
7. The county foundation fund should be eliminated.

8. The budget appeal provisions for vocational education and for programs mandated by state or federal laws or agencies should be deleted, because they are rarely, if ever, used.
9. However, a budget appeal provision for elementary guidance programs should be added.
10. P.L. 874 laws and regulations should be modified to prohibit the interruption in the flow of funds to state school districts in FY 1978.
11. The transportation aid law should be amended to remove the "penalty" experienced by some districts that transport pupils less than 2.5 miles.
12. The school laws should be amended to give every school board authority to close or change the use of attendance centers in the interest of improving the districts' educational programs.
13. The obsolete requirement that no school district may, in any year, budget less than \$600 per pupil should be deleted.
14. The law should be amended to require that amounts granted on appeal be budgeted and expended for the authorized purposes.

#### 1982 UPDATE

A majority of the recommendations made under this study were enacted by the 1978 Legislature. Recommendations 1, 2, 3, 7, 8, 9, 11, 12, 13, and 14 were passed in whole or in part that year.

In 1978 the legislature enacted amendments allowing a school district to increase its general fund budget based upon a formula using social security expenditures and budget per pupil percentage increases. Under a 1979 amendment, this formula was used also to provide for utility increases in school district budget.

Recommendation 6 regarding the maintenance of 10 percentage points between the budget control floor and ceiling was passed in 1979. For 1982-83 only, the spread was set at 6.25 percentage points. Subsequent amendments to the 1978 legislation also included the reduction of the income tax rebate as part of local effort from 100 percent in 1978 to 90 percent in 1979, and to 85 percent in 1980. In 1978-79, the rebate was based upon income tax liability after all credits, except withholding estimates, instead of only credits for taxes paid to another state. In 1979, amendments based the rebate on tax liability before the tax credits.

**MAINE  
1982-83 COST-SHARING AWARD**

**TITLE**

"An Examination of the Reform Decade of the 1970's"

**PROJECT**

In 1973 and 1978 the Maine Legislature enacted laws to provide equal educational opportunity to all children, relieve the burden of school expenditures on the local tax base, and equalize the local tax burden between units in the state. Basically, the legislators addressed these goals by: 1) establishing a uniform tax rate across the state, 2) providing "local leeway" to help districts develop new programs and to counteract inflation, and 3) encouraging expenditures on vocational and special education, school construction and transportation.

This study was undertaken to analyze the effects of the reforms. It evaluated the state's system of school finance, which included a two-tiered foundation program that provided local units with a base sum of state aid plus an amount of state dollars to match a level of local effort above the base. This option, called "local leeway," could also be supplemented by an unlimited amount of local dollars above the state's foundation program. In addition, the state funded the employer's share of the teacher pension plan.

**OUTCOMES**

The study found that, in general, the current system of school finance had not met the equity standards set out in the 1973 and 1978 reforms. While the reforms were successful in reducing the local tax burdens for education, they had a more modest effect in terms of equalizing local tax burdens among districts. The study found that after the reforms the amount of educational dollars per pupil was more dependent on the wealth of the communities in the school unit. Only a slight equalization in educational opportunity--defined as dollars spent per student--occurred across the state. Finally, the study found that subsidies in the formula that tried to encourage spending in specific program areas had had little effect.

**1983 UPDATE**

As a result of the study two bills were introduced into the legislature during 1983. One measure was voted down, the other was placed on the calendar for the next session.

**MICHIGAN  
1975-76 COST-SHARING AWARD**

**TITLE**

"The Michigan School Finance System: Fiscal, Programmatic, and Administrative Effects"

**PROJECT**

The study evaluated Michigan's general membership school aid formula by analyzing inter-district distribution of revenue, staff and academic programs. It analyzed the distribution of revenue for special education and funding for special education staff.

**OUTCOMES**

The study developed a new proposal for the allocation of transportation state aid, as well as computerized reports or "profiles" of school district revenues, expenditures, staffing patterns, and academic programs.

**1982 UPDATE**

Until the economic downturn severely reduced the state's tax revenues in 1980 81, Michigan's general membership school aid formula achieved a very high level of equity, based on wealth neutrality, in the inter-district distribution of revenue and staff. However, the general formula was found to discriminate against high tax-effort districts. These tended to be urban school districts with relatively high personnel costs.

While the general membership formula achieved a largely wealth-neutral distribution of revenue and staff, full equality among districts has not been achieved. A substantial variation exists among districts with regard to general revenue, general instructional expenditures, and non-categorically funded instructional staff. It is doubtful whether the present membership formula will narrow the distribution of either revenue or staff.

**MISSISSIPPI  
1986-87 COST-SHARING AWARD**

**TITLE**

"A Study to Develop a More Equitable Distribution of Education Funds Within Mississippi"

**PROJECT**

The purpose of this study was to review a variety of preliminary factors pertaining to the development of a new school funding system for Mississippi. A revised formula was necessary because of certain provisions which were included in the Education Reform Act of 1982. Those provisions, intended to upgrade public school education in Mississippi, will be expensive when finally implemented.

**OUTCOMES**

As a result of this study Mississippi progressed toward the goal of devising a more equitable and adequate funding base for all schools. This study produced the following outcomes:

- o After an investigation of school finance reform efforts in other states, a review of current methods of raising and allocating resources to Mississippi public schools was prepared. Wide variations in educational resources available to Mississippi students (under the current system of education finance) compound the effects of similar disparities in economic opportunity, family life and educational background.
- o A nine-member Legislative Finance Committee was formed in the summer of 1986 and met with the Bureau of Planning and Policy, and the Superintendent of the Mississippi State Department of Education to review and discuss all Bureau activities relevant to developing a new school finance formula in Mississippi.
- o Serving on the Legislative Finance Committee was the chairperson of a four-member School Funding Formula Committee of the Mississippi State Board of Education (SBE). The State Superintendent, and Bureau of Planning and Policy, met regularly with this body to discuss the specific steps involved in developing a means to model the formula.
- o A variety of data were gathered and continue to be identified to help the legislature develop a new basis for Mississippi to generate and distribute funds to allow all school districts to comply with the Education Reform Act of 1982.



## 1987 UPDATE

Since so many legislators and the governor face reelection in 1987 it was decided to not push the costly new formula until the 1988 legislative session. In the intervening period of time it was decided by the legislative committee and the SDE that the SDE would attempt to educate the public regarding the inequities resulting from the present system.

**MISSOURI  
1975-76 COST-SHARING AWARD**

**TITLE**

"Analysis of the School Finance and Tax Structure of Missouri: Background Research of the Educational Finance Committee of the Governor's Conference on Education"

**PROJECT**

This study, conducted by the Education Commission of the States for the Educational Finance Committee of the Missouri Governor's Conference on Education, was a comprehensive analysis of Missouri's school finance system and its state and local taxing structure. This study:

- o Analyzed the various components of the current finance formula in regards to equity and pertinent court decisions. It simulated various alternatives for the state's school finance system.
- o Detailed various concepts of equity in education finance. It compared Missouri to surrounding states on several government and school finance statistics and issues related to property tax assessment including the use and development of assessment ratios.
- o Provided specific analyses of some categorical aid programs, including special education, vocational education, compensatory education and selected categories of other federal aid.
- o Analyzed the state and local tax structure in terms of its burden by income class, its elasticities, and projected the structures' educational revenues and expenditures. It reviewed alternative sources of additional state revenues for education and their burden implications.
- o Presented the results of the University of Rochester's cost-of-education differential study.

**OUTCOMES**

The study resulted in numerous observations and recommendations about Missouri's school finance and tax system. In general, it observed that: substantial inequities existed in both the school finance and tax areas; and that expenditures per pupil differed dramatically among school districts and were largely dependent on the size of the local school district's property tax base per pupil.

The study's primary recommendation to the General Assembly was that Missouri adopt a school aid formula with variables that change as educational costs change and thus stay current over time. It recommended the adoption of a Foundation Equalization Aid Program with a Guaranteed Tax Base add-on effective for the 1977-78 school year.

The study also recommended that the 33-1/3 percent assessment standard be enforced with uniformity on all types of property, and that the state insist on full market value appraisals on all property.

Since equitable and adequate school financing required increased revenues, the study advised that:

- o The state government's share in financing elementary and secondary education should be increased to a higher level in order to finance an equitable school aid formula and to provide for equal educational opportunity.
- o Relatively less reliance should be placed on the property tax, which is regressive for at least lower- and middle-income families.
- o The degree of regressivity of the current state and local tax structure should be reduced in considering new revenue sources.
- o Increases in the individual and corporate income taxes and/or the general sales tax are the most logical sources to pay for major education finance reform.

**MISSOURI  
1982-83 COST-SHARING AWARD**

**TITLE**

"The Equity of Public School Finance in Missouri: 1977-1981"

**PROJECT**

This study evaluated the extent to which Missouri's 1977 school finance reforms succeeded in reducing the dependence of funding on local district wealth and in reducing expenditure disparities. The system was evaluated according to the gains made in educational opportunity as measured by per pupil expenditures, fiscal neutrality as measured by dependence on local district wealth, and taxpayer equity as measured by local effort.

**OUTCOMES**

The study concluded that the reforms made little improvement in the expenditure disparities across districts, and that although the reforms distributed more state aid to poor districts, it was not enough to break the strong dependence on local district wealth. While taxpayer equity has been achieved in the state, the study found that it was not due to the reforms made in 1977.

The study determined that if the hold-harmless and the limited apportionment provisions of the formula had been eliminated, the three measures of equity would have improved. However, this would have required significant funding increases as well.

**1983 UPDATE**

The Missouri legislature passed a statute to phase out the hold-harmless provision at the end of the 1983-84 school year. However, this action was accompanied by two revenue-raising and distribution measures that, according to the author of the study, will have an effect similar to hold-harmless. The revenues from the two taxes will be distributed outside the regular school finance formula, returning the state to a partial flat-grant system for state aid and maintaining existing disparities.

**NORTH DAKOTA  
1986-87 COST-SHARING AWARD**

**TITLE**

"A Study of the Special Education Delivery Systems and Transportation Reimbursement Formulas in North Dakota"

**PROJECT**

The central purpose of this project was to expand the information base within the legislature about the delivery of special education services and the allocation of transportation aid in North Dakota.

This project consisted of reviewing programs within North Dakota and gathering information about programs in other states. Between September and November 1986 project staff collected information in five specific areas. These were:

- o Special education funding schemes used in states similar to North Dakota;
- o Organizational schemes for special education units used in other states to determine what control other states have over the size and number of special education units;
- o How special education cooperative units in North Dakota provide services for handicapped children and what the advantages and disadvantages associated with their current delivery systems are;
- o The range of transportation formulas used in other states; and
- o Stimulated distribution of state transportation aid in North Dakota using the various approaches from other states.

**OUTCOMES**

In the area of special education the principal findings of the study showed that:

- o The make up and capacity of special education units in North Dakota varied considerably. Variances in the number of students served by each unit translated into different staffing patterns among the units. For example, few of the units which served less than 300 students had a full-time director of special education. Almost none of those units employed program experts to provide specialized services to students or assistance to teachers. The large units provided a full range of services to their member school districts.
- o In spite of the fact that the larger units tended to deliver more comprehensive services, there was resistance to reorganizing the smaller units into fewer, but larger units. Other states also

provide services on a regional basis--no single, effective approach for service delivery dominated. No recent evaluations of the effectiveness of regional centers versus other delivery systems was uncovered by this study.

- o Very few states provided fiscal incentives for the reorganization of special education services. Most state systems discouraged regionalization of special education services by encouraging the establishment of district programs.

In the area of transportation the principal findings of the study were:

- o Most transportation procedures could be placed into three broad categories: 1) density formulas; 2) formulas based on a percentage of the expenditures for the prior year; and 3) flat payment procedures for mileage, pupils transported or some combination of these factors.
- o Irregardless of the formula used, the inclusion of current data on expenditures--salaries, benefits, supplies, and other costs--was revealed to be more sensitive to the actual experiences of the school districts than was using an average of the expenditure over time.
- o Virtually all the formulas used by other states as tested in the simulations would produce a more equitable distribution of aid than currently exists in North Dakota. Of all the formulas reviewed, Colorado's appeared to be most applicable to North Dakota.

#### 1987 UPDATE

Three transportation aid bills were introduced during the 1987 legislative session.

*Senate Bill No. 2512* placed a cap on the amount of transportation aid a school district could receive. SB 2512 failed to pass.

*House Bill No. 1385* provided that school districts providing free transportation to all school age children living two or more miles from the district were entitled to aid equal to 85 percent but not more than 100 percent of the district's actual expenditures for the previous year. House Bill no. 1385 failed to pass.

*Senate Bill No. 2002* as passed required the creation of an interim legislative council committee to study education finance issues.

**OHIO  
1975-76 COST-SHARING AWARD**

**TITLE**

"Study of Income Variations Among Ohio School Districts"

**PROJECT**

The Joint Education Review Committee, with the assistance of Dr. Bruce Gensemer, a consultant to the committee, examined two major issues through the use of multiple regression analyses. The study:

- o Identified variation in personal income among Ohio school districts, and explored their implications for the Ohio Guaranteed-Yield Formula for state aid; and
- o Identified regional factors within Ohio associated with variations in the uncontrollable costs of operating school districts.

**OUTCOMES**

The study found that median family income had such a powerful effect on both operating millage and expenditures per pupil in school districts, that if all districts had similar income, their operating millage and expenditures per pupil could be expected to be the same. It found a significant time lag in the effect of income on millage rates and expenditures per pupil.

The study found that the average weekly wage in all industries in the home county of the school district was the best predictor of variations in the uncontrollable costs of operating school districts.

Based on the research, Dr. Gensemer and the committee staff, at the committee's request, proposed a cost-factor adjustment and an income-factor adjustment to the wealth measure of the Ohio Guaranteed-Yield Formula for state aid. In its January 1977 report the committee recommended incorporating both factors into the state aid formula.

**1982 UPDATE**

The General Assembly did not adopt either factor in 1977 or in 1979 when the committee again recommended them. In 1981, however, the legislature adopted a modified version of the cost factor at the same time that it removed the guaranteed-yield feature from the formula in the face of mounting fiscal constraints.

**OKLAHOMA  
1979-80 COST-SHARING AWARD**

**TITLE**

"Oklahoma School Finance Project"

**PROJECT**

Under its award Oklahoma developed a computer-based education data system and school finance simulation model intended to be used as an analytical tool for the Oklahoma legislature and staff. Specifically, the legislature developed an extensive data base and purchased user-oriented software designed especially for analyzing school finance issues. The software were the Interactive Support System for Policy Analysis (ISSPA) and the Interactive Modelling and Planning System (IMPS).

Concurrent with the implementation of the education data system the staff for the Oklahoma Citizens' Commission on Education prepared a fact book which analyzed several education issues, including four finance reform proposals--full state assumption, the foundation approach, power equalizing, and a combined foundation-power equalizing approach.

**OUTCOMES**

The final result of the Commission's study was the passage of HB 1236, which dramatically overhauled Oklahoma's equalization formula. The previous formula allowed even the wealthiest districts to receive a minimum amount of state aid per pupil and the legislature had often bypassed the formula entirely through the use of line item flat grants, including those for salary increases for teachers.

The new formula eliminated the majority of flat grants and replaced them with a weighting structure which utilizes both Average Daily Attendance (ADA) and Average Daily Membership (ADM), a teacher experience and degree factor, and a weighting for economically disadvantaged students. HB 1236 is summarized below.

- o *Foundation Aid.* State dollars are distributed to schools on the basis of weighted ADA. The weights are for grade levels, special education categories and small schools. District funding is based upon pupil counts in each category. Local funds such as ad valorem and auto license revenues are considered "chargeable items" and are subtracted from the district's funding.
- o *Transportation.* State aid will be based on the current density table. The bill raises the transportation factor from 1.31 to 1.85.
- o *Incentive Aid.* Additional state dollars are distributed to the schools on the basis of weighted ADM. The weights are for grade levels, economically disadvantaged children, small schools, and teacher experience and degrees used. Grade level weights are the same as in Foundation Aid. Economically disadvantaged children



who qualify for free or reduced lunches are given an additional weight of .25.

- o *Hold Harmless Clause.* This clause simply guaranteed that funding will remain at least equal to that received in the previous year.
- o *8 Percent Cap.* No district may receive a state aid increase through the new formula which is greater than 8 percent of its previous year's budget. This does not include increases for teacher salaries. The cap is for one year only.
- o *Teacher Salary Increases.* The law increases the appropriations for this line item, while equalizing previous year teacher salary line items through the formula. Each district will receive a base of \$1,600 per teacher.
- o *Support Personnel Salary Increases.* The law increases appropriations for this line item equivalent to a 10.6 percent increase for every full-time and part-time employee in the state.
- o *Additional Line Item Appropriations.* Additional money was made available for such items as textbooks, school lunch matching, Homebound Education, and other pilot programs.

**OKLAHOMA  
1987-1988 COST SHARING AWARD**

**TITLE**

"A Study to Determine if a Statewide Program Cost Accounting System Can Be Implemented"

**PROJECT**

The primary reasons for undertaking this study were to:

- o Assess educational program costs in order to make appropriation decisions;
- o Generate consistent, comparable and accountable data from Oklahoma for the federal government; and
- o Develop a management system for handling information on accountability, budgeting, and planning for local school districts.

The project utilized a Financial Accounting Advisory Committee which developed in-state and out-of-state surveys on financial accounting systems. In order to facilitate the objectives of the study, three sub-committees were also formed to work simultaneously on various aspects of the proposal. The three subcommittees were:

- o The **Legal Sub-Committee**, which studied Oklahoma laws regarding school financial accounting and budgeting and made recommendations for change in House Bill 1935, which was signed into law in March 1988. They also developed State Board of Education regulations for implementing this new law.
- o The **Coding Sub-Committee**, which completed an in-depth study of other states' financial accounting systems and drafted the chart of accounts for revenues and expenditures so that it conformed with the federal government's most recent handbook.
- o The **Implementation Sub-Committee**, which developed a master plan for implementing conversion of Oklahoma's schools to the management system. They are currently selecting "test" schools, determining training needs for staff, and developing a manual for in-depth training to begin this conversion by May of 1988.

**OUTCOMES**

The outcomes of the study can be summarized as follows:

- o Legislation and State Board of Education Regulations will effect a change in how school districts account for and budget funds;
- o The State Board of Education will approve the "testing" of a new chart of accounts for school districts' education program costs that will determine whether or not the data collected will meet federal, state, and local needs; and

- o All Oklahoma public schools will ultimately convert to this system by July 1, 1990, with financial data for program costs available June 30, 1991. With the completion of this implementation phase, local school districts will have the ability to capture costs for local planning and budgeting, provide the state with more detailed program costs for reporting to the legislature, and submit to the federal government reports which will be comparable to the reports of revenues and expenditures of the other 45 states utilizing similar versions of the Federal Handbook.

In summary, the project has introduced a new classification in reporting revenues and expenditures for Oklahoma schools.

**PENNSYLVANIA  
1978-79 COST-SHARING AWARD**

**TITLE**

"Pennsylvania's School Subsidy Formula--The Use of Personal Income"

**PROJECT**

Pennsylvania's study evaluated the desirability of expanding the definition of "personal income" used in the state aid formula to include inter-governmental cash transfer payments.

**OUTCOMES**

The study concluded that incorporating intergovernmental cash transfer payments into the definition of personal income would penalize needy school districts. Such action would run counter to the state's basic school aid formula, which is designed to allocate funds where need is greatest. The study made the following recommendations to the legislature:

- o Exclude all types of income exempt from state income taxation when calculating a school district's personnel for use in the basic subsidy formula;
- o Use certified data not less than one year old when calculating each district's aid ratio;
- o Remove legislative appropriation caps and fully fund the state's school finance act in order to achieve an equitable funding balance between urban and other school districts;
- o Take steps to insure that income tax returns contain only one verifiable school district code;
- o Develop more equitable methods for local governments to tax income to finance education; and
- o Place a greater emphasis on the personal income factor in the aid formula if: school districts are given the option to tax income; piggyback provisions with state tax forms are permitted; and the state subsidy is not reduced below the 1978-79 level.

**1982 UPDATE**

The legislature considered these proposals but largely because of revenue shortages were unable to act on most of them.

**SOUTH DAKOTA  
1987-88 COST-SHARING AWARD**

**TITLE**

"A Study to Determine the Non-instructional Costs of Public Elementary and Secondary Education in South Dakota"

**PROJECT**

The purpose of this study was to identify costs associated with the non-instructional aspects of education. This information would enable the legislature to better direct the state's educational aid to instructional functions in the schools.

An Interim Education Committee reviewed existing statutes and accreditation rules to distinguish between instructional and non-instructional areas of elementary and secondary education. An analysis of the employment practices of the school districts was conducted to determine whether some administrative positions could be shared by school districts through cooperative arrangements. Also, the committee examined the role of extra-curricular activities in the educational system and the non-instructional costs associated with those activities.

**OUTCOMES**

While the committee identified the costs associated with instructional and non-instructional activities in the elementary and secondary schools, a consensus regarding an equitable distribution of state aid money was not reached. There was a reluctance to redirect state aid money away from non-instructional educational activities. This reluctance was the result of a realization that non-instructional activities, such as guidance and counseling administration, were necessary for the instructional activities to be effective.

The committee was concerned about the use of state funds for athletics and other co-curricular activities. However, they discovered that only three percent of total expenditures were used for these activities and that redirecting these funds to instructional activities would only result in an increased burden on real property taxes. Therefore, a consensus concerning the redirection of state aid to education away from co-curricular programs was not reached.

Lastly, the committee learned that administrative staff are employed in more than one capacity by some school districts. This is something which the committee feels should be encouraged in other districts.

**VERMONT  
1982-83 COST-SHARING AWARD**

**TITLE**

"A Study to Assure Equality of Educational Opportunity Through an Equitable Tax and Aid System"

**PROJECT**

This study examined state-local taxation and education finances in the context of the recently passed school finance reform legislation, the "New Federalism" and shrinking resources. In addition, the study evaluated the state's fiscal structure, analyzed current tax issues and trends, and reviewed the potential of the property tax system.

To carry out its goals, the legislature established a special legislative study committee, held 20 public forums related to the above issues, hired three consultants (one of whom developed a computer model to simulate aid-to-education funding alternatives), and sent a survey to all of the state's superintendents.

**OUTCOMES**

In 1982 the legislature adopted a new school aid formula for FY83 which increased state aid to education by 40 percent. This measure was funded by additional sales and income taxes rather than by more property taxes since one of the primary goals of the new state aid formula had been to alleviate pressure on the local property tax as well as to make up for the potential loss of federal funds. This new formula was based on the relative wealth of each school district measured by local property values and personal income. The formula also accounted for the number of children, the average daily attendance, and per pupil costs in each district. The state paid 25% of per pupil costs that fall above the state average. To measure the effects of the new formula on school districts during the year, the legislature sent a survey to all superintendents. The survey found that 88 percent of the increased aid was used to reduce local property taxes or to slow the rate of increase in property taxes. The study also identified a number of additional tax sources that could be used to help finance the new school finance formula.

**VERMONT  
1985-86 COST-SHARING AWARD**

**TITLE**

"Vermont's Program of State Aid to Education: Alternatives and Accountability"

**PROJECT**

The purpose of the study was to determine the fairness and adequacy of the state school aid program, scheduled to sunset in 1987. A consultant was retained to review the school finance system, identify critical issues, and to recommend ways to improve the way state school aid was distributed.

**OUTCOMES**

The consultant's legislative recommendations and outcomes were:

- o *Change the structure of the school finance formula and establish a statewide "Blue Ribbon" study group.* A study group of ten legislators and five gubernatorial appointees was authorized by the 1986 appropriations act. The group was charged with examining issues relating to property taxation and state aid to education. The group conducted meetings throughout the summer and fall, and developed a single bill to be introduced into the 1987 legislature. Public hearings on that bill were held. The committee examined all major options in restructuring Vermont's state aid system. The committee has available to it appropriated funds to support research and the retention of consulting assistance.
- o *Evaluate the equity of the system on computer print-outs.* Computer work done during the 1986 session included estimates of how changes in the law would change equity for taxpayers and equity for students.
- o *Do not increase the "flat grant" of \$100.00 per pupil.* A proposal made to increase the flat grant was defeated in the House. The consultant's recommendation was quoted during the debate.
- o *Change the system of funding special education.* No legislation passed during 1986 on this point.
- o *Tax certain property at the state level.* A proposal to create a uniform statewide property tax for education was studied in detail in the Senate Finance Committee, but ultimately was not reported out of that committee. Whether such a tax should be created was a principal issue of the study group.
- o *Monitor a number of important issues.* The Department of Education has undertaken a revision of its annual statistical reporting forms, and has instituted new data checking processes suggested by legislative staff. This system took effect in school year 1986-87.

**WISCONSIN  
1978-79 COST-SHARING AWARD**

**TITLE**

"Wisconsin State School Aid: A Comparative Analysis of Its Effectiveness in Providing Property Tax Relief"

**PROJECT**

This study examined several major school finance and tax issues including: 1) the distributional impact of increases in school aid; 2) the portion of school aid increases likely to result in tax reductions; 3) the portion of aid increases likely to result in greater education expenditures; and 4) the distributional and tax relief effects of the homestead tax credit of general property tax relief and of shared revenue.

**OUTCOMES**

In general, the study concluded that, rather than expand state support, school finance efforts should fine tune current support mechanisms and ensure an equitable distribution of funds. The study drew the following conclusions:

- o The "leveling up" nature of the power-equalization formula and the absence of major disequalizing provisions may limit the effectiveness of general school aid in targeting further aid funds to low-valuation, low-spending areas.
- o If all aid increases were allocated for tax relief, levy rates would be reduced by a constant percentage statewide. Districts with higher costs and levy rates would experience the largest property tax reduction.
- o Spending limitations may be necessary to ensure levy reductions.
- o A substantial portion of any school aid increase would benefit districts with higher property valuations in which individual incomes also tended to be high.
- o Since the homestead tax credit was administered on an individual basis, it could be targeted easily to specific groups of taxpayers. School aid, general property tax relief and aidable revenues provide broader benefits, which would go to higher income taxpayers with larger property holdings.
- o Further increases in general state support would tend to benefit districts with above average wealth and currently, with the least state assistance. The formula may have diminishing returns in equalizing fiscal capacity.



**WISCONSIN  
1982-83 COST-SHARING AWARD**

**TITLE**

"An Empirical Analysis of Cost Differences Among Wisconsin School Districts"

**PROJECT**

This study took an in-depth look at cost differentials among the state's school districts in an effort to determine:

- o To what extent costs were affected by demographic/economic characteristics of communities and by school district organization and staffing patterns;
- o If classifying districts into types--based on an assumption that organization and staffing patterns are related to community characteristics--would improve the state's ability to predict costs; and
- o If a cost-of-education index should be used in the general school aid formula.

**OUTCOMES**

The study determined which combination of independent variables most accurately predicted costs through a stepwise regression analysis. This analysis accounted for 65 percent of the variation in total operational costs for all school districts.

Researchers there grouped the state's school districts into three categories based on income and occupation: Pattern 1 was a rural, low income type; Pattern 2 was an urban/suburban and relatively higher income type; and the last, "Nonpattern" type included all the remaining districts. When the first two patterns were used in the regression model, their ability to predict costs was increased well beyond the 65 percent level. School characteristics appeared to be the best predictor of costs, especially teacher/pupil ratios and the education and experience level of the teachers. While this was expected, the study found that the relative importance of these factors in predicting costs for the three patterns yielded important policy information. For instance, in low-income Pattern 1 districts, the experience and education level of a teacher did not enter the model at all. More important cost variables for this type were K-8 enrollment, the number of schools, and the average membership decline. By contrast, the education and experience levels of teachers was quite important in determining costs for the wealthier Pattern 2 districts, as well as demographic and economic factors, which did not play an important role in Pattern 1 districts. The study found that economies of scale were the clue to many of the differences between costs for the districts.

Methodological concerns and data problems caused the researchers to reevaluate the development of a cost-of-education analysis and index. Some of these concerns revolved around the absence of curriculum data, of census data aggregated by school district rather than municipality, and of consensus on quantifiable measures of quality. The researchers warned against using their typology of district types to modify public policies affecting school district expenditures or state aid payments. They argued that equally valid and different distinctions among school districts could result from different defining criteria. Funding an individual school district on the basis of its placement in a category and index rather than on its actual expenditures could interfere with equalization goals by possibly giving higher income areas more aid than lower income areas. Using broad-based demographic/economic indicators should wait until state policymakers can develop adequate methods for evaluating the relationships among policy objectives, educational products, and cost.

**WYOMING  
1986-87 COST-SHARING AWARD**

**TITLE**

"Equity in Education Study"

**PROJECT**

Like many states Wyoming faced a disparity in funding school districts due to variations in the wealth of local districts, the number of students in each district, and geographic size of districts. Designed to uncover information with which to address those inequities, this study had four objectives. They were:

- o To determine program offerings in rural schools;
- o To review program costs in selected districts;
- o To determine the extent to which the current school finance system provided equal education opportunities across the various school districts; and
- o To determine the efficacy of using cooperative programs, computer study courses, and statewide television courses to increase course offerings in rural states.

**OUTCOMES**

The primary result of the study was to focus attention on the lack of data regarding the disparities among the various Wyoming school districts. It served to encourage the legislature and other policymakers to formulate ideas regarding the establishment of a system for obtaining and manipulating data so that meaningful comparisons can be made.

Two major bills were adopted during the 1987 session. One was sponsored by the Joint Senate Education, Health, and Welfare Committee and the House Education Interim Committee which conducted this study. It was House Bill 125A, the School Finance Amendments. A response to a 25 percent reduction in the assessed valuation of the state for the purposes of property taxes, this legislation: 1) diverted a substantial amount of money from other funding sources; 2) placed a moratorium on certain capital construction activities and funding; and 3) made a three and one-half percent across-the-board cut in the foundation amount guaranteed each school district. Specific equity issues addressed in this law were: 1) providing funding for gifted and talented programs on a district basis; 2) amending the amount, including the foundation for education of handicapped and children with special education needs, to reflect the amount spent during the previous rather than the current year; and 3) using the assessed valuation of the district on a specific date, thus removing the need for several recalculations. These changes were intended to make the analysis of equity in education--at least from a fiscal standpoint--less complicated.

The second law was House Bill 987A, State Board of Education. This bill was in response to several issues discussed with the State Department of Education as a result of this study. The primary thrust of this bill was to consolidate in one section the duties of the state Superintendent of Public Instruction who administers the public school system and the State Board of Education. Clarifying the state superintendent's responsibilities became necessary because the State Board was authorized to promulgate rules for 1) temporary employment of non-certified personnel in districts where certified personnel are not available, and 2) courses to be taught by electronic transmission. House Bill 97A also requires the State Department of Education to provide and enforce a uniform system of cost accounting and reporting for school districts.

**RESPONSES TO FEDERAL EDUCATION AID POLICIES**

**TEXAS**  
**1978-79 COST-SHARING AWARD**

**TITLE**

"Comparative Study of Federal and State Categorical Programs"

**PROJECT**

This study analyzed the relationships between selected federal and state categorical programs and recommended specific actions to coordinate them. The study explored:

- o To what degree state and federal categorical programs in compensatory education, special education, vocational education, bilingual education and general education were intended to serve the same or different objectives;
- o To what extent state and federal categorical programs were administered and delivered through separate programs;
- o How many federal dollars were distributed through federally mandated formulas in Texas;
- o To what extent the state was free to supplant state and local funds with federal funds;
- o To what extent consideration should have been given to federal comparability and maintenance of effort requirements in determining the state funding distribution; and
- o To what extent the relationship between federal programs met the educational and fiscal purposes of the state's basic school finance program.

**OUTCOMES**

The study concluded that although state categorical programs were perhaps as restrictive as their federal counterparts, there was less resentment and vocal opposition to the state programs. It identified excessive paperwork and burdensome accountability requirements to be the major administrative problems, and suggested the modifications outlined below.

- o The study recommended that the state's education agency group all compensatory education programs together to streamline their administration. It advised the state agency to distinguish clearly the roles of federal and state dollars, to design joint approval mechanisms, and to use federally authorized multi-year applications for districts. The study also recommended that the agency eliminate policies which exceed or duplicate federal requirements, and that it use standard program applications with special subsidiary schedules attached as needed.

- o The study recommended that the legislature not reenact federal law into state law. It advised the legislature to appropriate federal funds in broad categories, and to consider the potentially dis-equalizing effect of federal funds once state funds have been equalized.
- o The study urged that Congress combine compensatory education programs into one flexible program and consolidate or eliminate some categorical programs. It suggested that all federal education aid flow through and be administered by state education agencies, that the number of federal categoricals be reduced, and that compliance requirements be substituted by a signed statement of state assurances. It likewise urged Congress to provide the needed funds if it should mandate any new state and local programs, and to limit the authority of federal agencies to exceed and exceed statutes through the regulatory process. Finally it suggested that Congress issue a less restrictive definition of supplement and non-supplement measures.
- o Finally, the study recommended that local districts carefully review the statutes and regulations of federal discretionary programs before applying for aid, and that they involve the local school board in this process. It advised districts to proceed with caution when making exceptions to federal rules, but also to appeal rulings on regulatory requirements where appropriate.

**WASHINGTON  
1979-80 COST-SHARING AWARD**

**TITLE**

"Federal Aid to Education: Washington State"

**PROJECT**

The report reviews the recent history of federal education grants, identifies current problems in their administration in Washington state, and suggests improvements in program and administration. It addresses primarily the impact of four major flow-through grant programs and the direct grants flowing to the districts in Washington state. The study consisted of: 1) interviews with a sample of large, medium and small local school districts; 2) questionnaires of all local districts; and 3) interviews with state and federal education and management officials. Additionally, other state and national organizations were contacted.

**OUTCOMES**

The results from the survey led to the following federal and state recommendations and changes in state policy:

*o Recommendations to the Federal government:*

1. Functional consolidation of the numerous categorical grants into a smaller number of broader purpose ones, responsible to national priorities, but with greater management flexibility delegated to the states and local school districts.
2. Multi-year and forward funding to provide states and local districts with a more reliable base of federal funds.
3. Administrative improvements including consolidation; simplification; and greater consistency in guidelines and regulations and their interpretation, application forms, and data requirements.
4. Simplified and consolidated audit and monitoring requirements, to restore the prior emphasis on program development and management.
5. Support of the principles and provisions of Senate Bill 1780, the Optional Educational Simplification Act, introduced in Congress in 1978, and its successor legislation.

*o State recommendations and reforms:*

1. Continued emphasis by the Office of the Superintendent of Public Instruction and the Washington Grants Management Association on integrated grants management. This includes efforts in the areas of notification of grant opportunities,



single application and centralized application control, overview of grant programs, integrated reporting, and standardized audit forms and procedures.

*o Washington consolidated and modified the financial report on a monthly basis.*

*o Auditors are instituting the A102p process to standardize procedures*

2. Development of programmatic and funding integration of federal flow-through grant programs with state funded programs, for a totally integrated and comprehensive state support program.

*o The Legislature enacted the state remediation act in conformance with federal Chapter I requirements, with some levels of integration.*

*o The Legislature proposed an integrated state-federal accounting system, but this cannot be implemented unless Congress removes federal barriers.*

3. Emphasis on staff and resource development in the state's central budget and management agencies, both executive and legislative, in the complex and growing area of federal grant programs; and support by these agencies for improved grants management efforts in the operating agencies.

*o The state de-emphasized the role of support agencies in grants management, which reflected the consolidation of numerous federal education grants into Chapter II.*

**EDUCATIONAL COSTS FOR CHILDREN WITH SPECIAL LEARNING REQUIREMENTS**

**CALIFORNIA  
1986-87 CCT-SHARING AWARD**

**TITLE**

"A Study to Determine How to Organize and Expand Public School Programs to Reduce Dropout Rates for High Risk Students: Pregnant and Parenting Adolescents"

**PROJECT**

The purpose of this study, coordinated by the Senate Office of Research, was to collect data needed to organize and expand California school programs for pregnant and parenting adolescents and to most effectively provide educational intervention to allow students to complete a high school education. A survey of school districts and county offices of education was used as the primary method of collecting data about students served, unmet needs, and the costs of programs. Secondary data for the study came from information available from the Department of Education and the Department of Health Services. In addition, the study utilized information gathered from state and local program experts.

**OUTCOMES**

There is growing recognition in California of the many serious educational, social, and health implications of teenage pregnancy. One negative impact is that teenagers who become pregnant are much more likely to drop out of school. Plus if these students remain in school through pregnancy, they encounter even more difficulties trying to combine the demands of parenthood and school.

California has three important state-funded programs to help pregnant or parenting teens finish their high school education: Pregnant Minors (PM), a school-based program for pregnant students; School-Age Parent and Infant Development (SAPID), an education and child care program for school-age parents and their babies; and Adolescent Family Life (AFL), a health-based case management program.

Prior to this study it was not possible to obtain statewide data on the number of students and babies being served by either the PM or SAPID program. Information on program funding, organization, and evaluation was either extremely difficult to obtain or nonexistent.

According to this study, there were a total of 157,000 school-age young women who could have benefited from a special program for pregnant and parenting students. Only 11.7% were enrolled in such a program, leaving 139,000 teen mothers without the special services they needed to complete high school.

This study also found that successful school-based programs served young women--through their pregnancy and during parenthood--until graduation from high school. Such programs provided comprehensive services such as: academic instruction, parenting instruction, child care, health services, counseling, transportation, and services for fathers.

This study also found that the availability of child care was a critical factor in teen mothers' successful return to school after birth. Many local programs had waiting lists of young women who could not return to school until a child care slot in the program became available. Other factors frequently mentioned were the student's need for transportation services, on-site health services, and counseling.

This study identified three major cost centers associated with comprehensive programs: Child care, transportation, and support services and personnel. Average annual costs per student enrolled in a comprehensive program are estimated at \$6,000 - \$8,000, with roughly \$5,000 attributed to child care.

It was also determined that if current trends in teen pregnancy and childbirth continue, California would have 252,000 school-age mothers in 1992. That means California will need to serve 11,000 more teens in 1992 than are currently enrolled, just to maintain current services directed to keeping pregnant and parenting teens in school.

#### **1987 UPDATE**

As a result of this study, a statewide conference on teen pregnancy will be held in January 1988. A data source book is currently being developed for that conference.

S.B. 1660, Comprehensive Teen Pregnancy Program, was introduced in March, 1987. The bill will be reviewed by the Senate Policy Committee in January, 1988. It would expand programs available for pregnant and parenting teens.

**INDIANA  
1980-82 COST-SHARING AWARD**

**TITLE**

"An Analysis of State Special Education Expenditures"

**PROJECT**

The staff visited approximately 30 school corporations of various sizes, interviewed officials in the Department of Public Instruction, and sent a questionnaire to each of the 304 school corporations in Indiana.

The on-site visits to local schools provided information on the local administration of state and federal special education laws. The interview with Department of Public Instruction officials revealed how they monitored and collected relevant data on special education activities. The questionnaire, a key feature of the study, was designed to arrive at an estimated accounting of the state's total special education expenditures, which have burgeoned in recent years.

**OUTCOMES**

During the study the Department of Public Instruction implemented a computer system to assure proper certification of all special education teachers in the state. The computer system also revealed inappropriate student counts and classifications in four school systems. While the legislature's bill mandating special education cooperatives to issue regular financial reports was defeated, cooperatives promised to provide the necessary data. The bill, in addition, had the effect of alerting all school systems of the need for more rigorous accounting procedures. Outlay of special education funds have moderated this year, largely because the state did not experience as rapid a growth in pupil counts as it did in the three previous years.

**1982 UPDATE**

The state appointed two committees to study education finance. The first, appointed by the governor, studied school finance in general. The second, designated by the legislature, studied funding alternatives for local schools, including a local option income tax. Major issues were: equity, adequacy of funding, and equalization of tax effort.

**NORTH CAROLINA  
1982-83 COST-SHARING AWARD**

**TITLE**

"Financing Special Education in North Carolina"

**PROJECT**

The overall goal of this study was to provide the General Assembly with an improved data base on the costs of special education services in the state. The study examined the expenditures of a representative sample of fifteen local education agencies, as well as the costs, financing methods and accounting procedures used by three other southeastern states. To accomplish its goals, the study set out to: 1) determine the relative contribution of state aid from regular average daily membership allotments and special allotments to the actual costs of educating exceptional children in North Carolina, 2) develop a method for collecting information on the costs of special education, and 3) develop a method for estimating the costs of providing appropriate services to these pupils.

**OUTCOMES**

Among its many findings, the study reported that the total average expenditure per pupil was about fifty percent more for exceptional than for non-exceptional children in the state, or \$2,655 as opposed to \$1,744. It found that virtually all of these excess costs were being paid for by the state and federal governments. However, the ratio of special education to general education expenditures per pupil was less in North Carolina than the nationwide average. The study also reported a substantial disparity in special education expenditures between districts--some spend half as much as others--a fact apparently related to the proportionate numbers of exceptional children in a district. Those with a high percentage of children with special needs spent less than those with a low percentage, a statistic due in part to the hold-harmless clause in the state's formula. In other words, the districts tended to spend the funds earmarked for this purpose on whatever eligible students they had. If they had a high percentage of handicapped pupils, the expenditure per pupil tended to be less than if they had a low percentage of handicapped pupils.

The study made several recommendations to the legislature to address the above problems. Some of those included: 1) eliminating the hold-harmless provision and fully implementing the state's 1979-80 formula; 2) allocating additional monies; 3) creating more uniform procedures for identifying exceptional children, auditing districts on-site; 4) providing training for local education agency staff; 5) and considering matching fund requirements with a built-in equalization formula.

**1983 UPDATE**

On July 15, 1983 the General Assembly enacted legislation implementing the recommendations contained in the report.

**SOUTH CAROLINA  
1980-82 COST-SHARING AWARD**

**TITLE**

"The Elusive Ideal: Equality of Education for All Handicapped Students"

**PROJECT**

This study sought to identify solutions to the problems of effectively and efficiently coordinating and funding educational programs in rural areas for elementary/secondary students with special learning problems.

It developed cost comparisons between school districts and state residential facilities providing services to low-incidence handicapped students. It then compared those to the weights currently being used in the state's Educational Finance Act. The study identified gaps in the delivery system and made efforts to close them.

**OUTCOMES**

The South Carolina legislature passed two handicapped education measures as riders to a 1982 appropriations bill. One proviso mandated that the Department of Education review all Education Finance Act weights to see whether they accurately reflect cost differences among programs, as well as to assess the feasibility of redefining the weights for exceptional high school and vocational students.

The second bill provided appropriations for the education of children in group or foster homes, the School for the Deaf and Blind, private placements of handicapped school-age children, and programs for emotionally disturbed adolescents. It also mandated that the district where a handicapped child resided in a foster home was responsible for that child's education. It also called for the state to provide funds for special education costs in excess of foundation and federal aid to the school district where such children were in school.

The legislature also authorized the School for the Deaf and Blind to charge local districts a fee equal to the district's required weighted share of the cost under the Education Finance Act for each new student entering the facility after June 1, 1982. It further allowed the school the average state share of the required weighted student cost for each new pupil.

Under a new provision which covered the costs of private placement, the appropriation measure called for the district where the child resided to pay 30 percent of the excess costs, and the State Department of Education to pay 40 percent of the remaining excess costs.

**UTAH  
1976-77 COST-SHARING AWARD**

**TITLE**

"Utah Schools' Special Education Study: A Report to the Education Study Committee of Utah Legislature"

**PROJECT**

The purpose of the study was to determine: 1) an appropriate weighting system to equalize educational opportunity for handicapped children; 2) the most effective method for funding special education programs for pre-school and post-school aged children who did not fit into the regular school program; and 3) the financial and educational impact of P.L. 94-142 mandates on Utah's pupil weighting program, with special emphasis on evaluating alternative special education funding plans.

**OUTCOMES**

The study proposed revising the handicapped identification procedures. Staff recommended reducing the prevalence limits and incorporating new maximum percentages into Utah's school finance laws.

The study proposed revising the service patterns to include a maximum bus-  
ing time of one hour for handicapped pupils unless the Utah State Board of Education (USBE) approves extended travel time.

The staff also made several recommendations pertaining to special education funding and to accountability procedures. These included:

*Funding:*

- o Appropriating funds for approved direct cost estimates for all properly identified special education pupils and deleting from the law the ceiling on weighted pupil units (WPU) and on revenues for special education;
- o Appropriating \$3.5 million from the legislature for special education programs, and distributing a base of \$10,000 to each district plus a proportionate amount of the remaining \$3.5 million;
- o Continuing the current system of ADM weightings, but considering changing the FTE weightings;
- o Establishing a single weighting for the severe learning disabled and developing an appropriate service pattern;
- o Appropriating funds for pre-school and for post-high school handicapped programs, if funded by the legislature, separately from the K-12 handicapped programs; and



- o Revising the hold-harmless clause for special education so that districts do not receive less than the amount for which they were eligible in the previous year.

### *Accountability*

- o Ensuring strict compliance with definitions of handicapping conditions as approved by USBE through audits of special education programs;
- o Holding districts accountable for only the "direct costs" as listed in the USBE Rules and Regulations for handicapped pupils, but providing accounting instructions for listing indirect costs; and
- o Continuing USBE development of standards, rules and regulations for handicapped programs and service patterns.

In addition to the above recommendations, the study highlighted the advantages and disadvantages of each proposal.

### **1982 UPDATE**

While the legislature did not subsequently accept all the recommendations, it did adopt a formula with weighted pupil units based on various handicapped categories. It established prevalence limits, which set ceilings on the percentage of pupils in each handicapped category per school. A school can claim that 12 percent of its total enrollment is handicapped.

The legislature then turned its attention to fine tuning the pupil weighting mechanism. It established a new committee in 1982 to seek a resolution to the problem of the misclassification of handicapped students and to reassess the funding levels attached to each weighted pupil unit.

**EARLY CHILDHOOD SPECIAL EDUCATION**

**NEBRASKA  
1985-86 COST-SHARING AWARD**

**TITLE**

"Early Childhood Special Education in Nebraska"

**PROJECT**

The study was designed to provide state legislators, policymakers and service providers with: a portrait of the early childhood special education system in Nebraska; a map of the relationship of other health and handicapped services to early childhood special education; and a process for overseeing, coordinating, and evaluating special education services.

The Select Committee of the Nebraska Legislature met on four occasions to participate in and direct the study. The Select Committee's staff reviewed court opinions, the literature, statutes, and interviewed nearly 70 Nebraskans involved with special education and related services. The Select Committee and forty interviewers participated in a two-day workshop, where selected problems were evaluated at length through a "likelihood-impact" group analysis. The purposes of the meeting were 1) to identify problems with Nebraska related to service provisions to handicapped children and their families and 2) to develop preliminary recommendations and ideas for achieving greater efficiency and effectiveness in providing services statewide. Solutions and effects were examined and formed the basis for legislative consideration.

**OUTCOMES**

Based on the recommendations of the Select Committee on Early Childhood Special Education to improve the delivery of special education services, the legislature:

- o Affirmed support for early childhood, ages 0-5, special education;
- o Abolished the Nebraska Coordinating Council for the Handicapped and assigned special education oversight responsibility to the Education Committee; and
- o Provided for regional assessment teams to identify and verify students for special education services, and provided for cooperative school district - ESU special education services with reimbursement to the cooperatives.

**PROPERTY TAX REVISION AND ALTERNATIVE SOURCES OF LOCAL SCHOOL SUPPORT**

**ARIZONA  
1978-79 COST-SHARING AWARD**

**TITLE**

"A Summary of the Research and Findings of the Arizona Legislature's Special Session on School Finance and Taxation"

**PROJECT**

Under this study, the staff of the House, Senate, and the Joint Committee on Tax Reform and Education Finance used computer simulation models to illustrate the impact of various tax and education finance reform proposals for Arizona's 1979 Special Session.

**OUTCOMES**

The legislature reduced property taxes through major reform of the property tax system that included:

- o Limiting the Full Cash Value (FCV) growth for locally assessed properties;
- o Reducing the Assessment Ratios that defined the percent of FCV subject to property taxation for each class of property; and
- o Dropping the Inflation Adjustment Factor.

In addition, the legislature enacted provisions to equalize and generally lower tax rates, including expenditure limits on counties, cities, towns, schools, and community colleges. It also increased basic aid to schools; transferred financial responsibility for funding teacher retirement and Old Age Survivors' Insurance from the county to the state; modified extension of the state's property tax reduction program for homeowners; and placed levy limits on counties, cities, towns and community colleges. The state passed two individual tax reform measures which limited homeowners' liability to 1 percent of FCV and reduced homeowners' actual property taxes by 5 percent in 1980. Further, the legislature repealed the state sales tax on food.

**1982 UPDATE**

In conjunction with the tax measures, 1979 Arizona Legislature enacted a school finance package designed to equalize operational revenues and, through block grant legislation, to increase local school board authority and budget responsibility.

**GEORGIA  
1978-79 COST-SHARING AWARD**

**TITLE**

"Handbook of Government Finance in Georgia"

**PROJECT**

The Georgia Educational Improvement Council (GEIC) developed a legislator's handbook to provide information on Georgia's state and local tax structure, additional sources of state and local revenue, and state government expenditures.

The handbook contains general information about the counties of the state, significant features of the state-local revenue systems, the adequacy and equity of the state-local tax system, and the level of revenue collections. It identifies the state's tax instruments, which include sales and use taxes, personal income taxes, corporation income taxes, motor vehicle fees, estate taxes, state property taxes, and corporation franchise taxes, among others. It also lists the local tax instruments, which include property taxes and the local option sales tax.

In addition, the handbook presents information on federal revenue, total state revenue receipts, selected economic indicators, dispersal of state revenue receipts by purpose, and expenditures by the state's spending units for 1975-77.

**OUTCOMES**

For the first time Georgia revenue and tax information was collected in a concise and convenient format accessible to both legislators and citizens. The handbook was used to provide an overview for developing school tax legislation and school finance reform measures.

**EDUCATION, JOB TRAINING AND ECONOMIC DEVELOPMENT**

**ARKANSAS  
1987-88 COST-SHARING AWARD**

**TITLE**

"A Pilot Project to Improve the Reading and Writing Skills of Wage-Earners at Selected Industrial Plants in Arkansas"

**PROJECT**

The goal of the Arkansas project was to provide convenient cost-free literacy tutorial services to industrial workers who have not completed high school. The project, conducted by the Bureau of Legislative Research for the Legislative Subcommittee to Reduce Adult Literacy, planned to interview and evaluate participants and place them in appropriate grade level instruction groups. The project team intended to survey literacy students after they had been involved in the program for several months in order to assess their progress. The team expected that successful literacy training would improve self-confidence, interpersonal relationships, job performance and, eventually, salaries.

**OUTCOMES**

The project team, comprised of representatives from the Bureau of Legislative Research, the Literacy Council of Pulaski County, the Department of Vocational Education - Adult Education Section, and Area Marketing Research Associates, an independent marketing firm, held meetings at several industrial sites throughout the state to select literacy program locations. One site, the Baptist Medical Center in Little Rock, was chosen.

The number of participants involved in the program was significantly lower than expected. Although eight employees initially volunteered, only one person successfully enrolled in literacy training. This person has continued enrollment in the program and will complete a post-program survey when appropriate. Of the four persons who expressed an interest in tutoring others, three are currently undergoing a tutorial training program at the Literacy Council of Pulaski County.

Two principle obstacles were encountered by the project team in their attempt to establish literacy programs at work sites: difficulty in cooperatively engaging the various groups which serve the adult learner, and bureaucratic problems in establishing programs on industrial work sites.

Due to the low participation, the program generated little data on which to base substantive project conclusions. Nonetheless, interest in this topic remains high.



**ILLINOIS  
1985-86 COST-SHARING AWARD**

**TITLE**

"Leadership in Education for Employment and Economic Growth"

**PROJECT**

Illinois' project was to evaluate and coordinate its state and federal "education for employment" programs. The general goals of these programs are to provide individuals with the skills they need to attain economic freedom and to enhance the productivity of local, state and national economies. One of the study's objectives was to search the most recent literature relating to educational strategies appropriate to such target groups.

Two previous studies had been undertaken in Illinois to review the process of agency interactions and of state government involvement in training and education for employment. They were "Review of Illinois State Agency Plans" (May 1982) carried out by the Illinois Employment and Training Council, and "Interagency Relationships Study" (January 1983) prepared by the staff of the State Board of Education for the Board's Planning and Policy Committee.

Starting from these studies, staff surveyed the Illinois state agencies seeking information on their involvement in assisting their client groups to find employment, gain training or reenter the educational system.

**OUTCOMES**

Based on the surveys and a general discussion of problems inherent in the federal legislation relating to vocational education/job training, recommendations were made toward problems addressed at the state level. Recommendations were:

- o The goal of training and education for employment should be to enhance human potentials and development, especially in the area of economic development;
- o The State Occupational Information Coordinating Committee should develop and maintain a statewide information system of service delivery related to training and education for employment. The project should involve the General Assembly and legislative agencies;
- o The General Assembly should establish a task force to provide recommendations on strategies and methods to develop a delivery system in Illinois which would coordinate existing service systems and include a common intake and assessment process and a common evaluation system;
- o The General Assembly should establish a temporary board, composed of relevant governmental and private sector segments of the job

training and education field, and charge them with the responsibility for recommending statewide goals. (Problem: there appears to be no generally accepted statewide goals for purchasers or providers of job training and educational services. This results in duplication of service, gaps in service, and differing standards.)

- o The General Assembly should develop legislation relating to the purchase of job training and education services that requires one planning process for all purchasers, and generate one statewide plan and one regional plan for each subunit. (Problem: there are numerous planning procedures presently in effect for the purchasers of job training and education.)
- o The General Assembly should develop legislation that requires unified planning by all elements involved in job training and education. (Problem: the governmental providers of job training and education services are tied to a system of local school district planning that is not large enough to adequately evaluate future needs of the area.)
- o The General Assembly should require the purchasers of job training and education services to develop one standardized intake and evaluation system. (Problem: the performance of job training and education programs is not known due to the lack of adequate data and differing standards for the various programs.)
- o A standardized intake system should be developed so the basic educational needs of all participants can be determined. (Problem: In both the JTPA and other job training and education programs, there appears to be a lack of basic educational development.)
- o Hopefully, more sharing of equipment, facilities and faculty will take place. (Problem: job-training and education staff are in need of additional and continued updating of their knowledge to keep abreast of changes in the marketplace.)

Each legislator received copies of the recommendations when the legislature convened in November, 1986. A task force was established to determine ways to implement recommendations.

**ILLINOIS  
1987-1988 COSI-SHARING AWARD**

**TITLE**

"Assessing the Impact of Education and Workforce Preparation Programs on Illinois' Efforts to Stimulate Economic Development"

**PROJECT**

Even though Illinois has many economic development strategies, initiatives, and programs, it has lacked an overall policy that integrates existing programs or defines goals on education for employment.

The purpose of this study was to assess the impact of education and workforce preparation on Illinois' efforts to stimulate economic development. To accomplish this, the Illinois Joint Commission on Legislative Support Services appointed an Education for Employment Task Force to develop a comprehensive, statewide policy on education for employment. The Task Force gathered data through surveys, follow-up interviews, contacts with ten comparable states regarding their programs, bibliographic searches, and discussions with state agencies that administer education for employment programs.

**OUTCOMES**

Recommendations from the Task Force concerned three key elements:

1. The Illinois Education for Employment System (EES) must be client-based and provide opportunities for all who need assistance.
  - o The EES should offer easy, "one-stop" access to an entire range of programs and services available from any point in the system.
  - o The EES must provide equal access for all citizens who seek assistance.
  - o The programs and services offered should be tailored to the employment needs of each individual.
  - o The EES should help citizens to decide what education, training, and employment options will best prepare them for the future.
  - o A common set of intake, assessment, guidance and career planning methods should be established for use by all state agencies involved in the system.
  - o The EES must increase adult literacy.
  - o The EES must emphasize early intervention.

2. The Education for Employment System must follow up on programs and clients.
  - o Uniformity in performance outcomes needs to be developed and implemented to determine both short and long-term program accomplishments.
  - o Tracking needs to occur on a client basis to determine how training relates to job placement and length of employment.
  - o Labor Market Information should be collected and made available to the entire education for employment community.
3. The Education for Employment System must be coordinated to provide the best possible level of services.
  - o The EES must institute strong staff training and development.
  - o Strong ties must be forged between the EES and economic development activities.
  - o The state role in the EES should be to set policies, develop standards, insure coordination, and monitor and evaluate the performance of the system.
  - o The state should develop a coordinating mechanism of existing state agencies at the state and local levels.
  - o Coordination must occur at all levels, including service planning, service delivery, financing, and evaluation.
  - o Gaps between programs and agencies must be bridged and unnecessary duplications identified and eliminated.
  - o Employers' interests need to be represented when developing policy.
  - o Proprietary training establishments must be required to meet public institutions' standards.

Legislation to implement the recommendations will be introduced in the 1989 session of the General Assembly. The Task Force recommended wide publicity of the proposals, realizing that the enactment of them will depend on broad support from business, education, state agencies, and the governor.

**KANSAS  
1983-84 COST SHARING AWARD**

**TITLE**

"Advanced Technology in Kansas and Technological Programs at the Sub-Baccalaureate Degree Level?"

**PROJECT**

The Legislative Educational Planning Committee, created in 1974 and designated the 1202 Commission for Kansas, was directed by state statute to plan for postsecondary education. The Committee was authorized to introduce legislation and conduct a variety of studies and projects relating to postsecondary education.

The purpose of this study was to determine the appropriateness of the state's current system of advanced technology programs, to define what the future needs will be, and to develop recommendations relating to the coordination, approval, and funding of these programs. The primary focus of the study was upon the state's public two-year institutions, area vocation-technical schools, and two-year occupational programs offered by the state's public universities, the municipal university, and the independent colleges and universities. In conducting its study the Committee served as a public forum for the discussion of issues relating to emerging technological issues and the evaluation of efforts being made to develop information, offer programs, and coordinate job training activities in the state. The committee held two-day meetings each month from May to December 1983. A two-day conference was held for state and local education governing board members, legislators, educators, and other interested parties. It prepared a report for the 1984 Legislature which included the information it had developed, its conclusions and recommendations, and proposed legislation. By mid-1984 the committee had achieved the following results:

- o Development of a more complete data base pertaining to industrial needs and educational programs which brought some order to an information system that generally has been incomplete and fragmented;
- o Strengthening of coordinating mechanisms that linked state agencies with each other and the private sector to provide a more efficient and comprehensive job training system for high-cost and specialized technology programs; and
- o Development of recommendations to the legislature and to state agencies relating to the funding and coordination of technical education programs.

**OUTCOMES**

Based on the Legislative Educational Planning Committee's recommendations, the Kansas Legislature took the following actions:

- o Appointment of a task force which developed a consensus definition of "high technology." The task force also reviewed the activities of various agencies that collect data and develop inventories of high tech occupations, to insure that the state develop educational programs to teach students specific occupational skills regardless of where they work.
- o Institutionalizing and continued funding of a program administered jointly by the Kansas Department of Economic Development and the State Department of Education which provides flexible job training programs at a school, plant site or other location, for companies that are either locating or expanding in Kansas.
- o Enacted legislation requiring schools to match state funds for instructional equipment, with at least half of the dollars coming from private sources.
- o Considered but failed to adopt legislation to provide an income tax credit for donating instructional equipment, including computer software, to public post-secondary educational institutions.

**KANSAS  
1986-1987 COST-SHARING AWARD**

**TITLE**

"Report of the Task Force on Business Training of the Legislative Commission on Economic Development"

**PROJECT**

Created by the Kansas Legislature and Legislative Commission on Kansas Economic Development, the Task Force on Business Training was charged with assessing the publicly supported job training system.

The work of the task force was carried out through a series of two-day meetings that were held monthly between July and November 1986. During this period the task force:

- o Developed an in-depth understanding of Kansas' job training system;
- o Solicited input regarding ways to improve the job training system; and
- o Evaluated the analysis and recommendation provided by the consultants retained by the task force.

**OUTCOMES**

At the conclusion of their deliberations the task force produced a report that featured eleven recommendations for enhancing the job training system. The recommendations were that:

1. An appointed and independent policy board be created to supervise all community colleges and public vocation training institutions;
2. A customized training program be created to meet--at no cost to the employer--training needs of new or expanding employees in Kansas, and retrain--on a shared cost basis--employees who may be threatened by displacement;
3. A competitive financial awards program, totalling \$150,000 annually, be created to provide incentives to public educational institutions that have exemplary performance in training or placing handicapped or disadvantaged persons in employment;
4. A program be enacted that provides financial awards totalling \$150,000 to public vocational or technical training programs for exemplary performances in job creation, entrepreneurship, and job upgrading in rural Kansas;
5. The multiple for funding community college vocational programs be fixed at 2.0 for all institutions;

6. The vocational school outlay program be expanded to include community colleges and that \$2.0 million be provided for this program in FY 1988 and thereafter;
7. The Kansas Training Information Program be implemented to provide consumer information about placement and earning rates of each job training program;
8. The state policymaking board for community colleges and vocational schools should increase the accountability for job training programs under its jurisdiction by initially considering data on enrollment, placement, and earnings as a means of evaluating programs for continued support and ultimately develop meaningful performance criteria for those programs;
9. The House and Senate Education Committees and the Legislative Educational Planning Committee should regularly review the major job training programs;
10. The State Board of Education should oversee the review of approval procedures and standards for community college and vocational training programs that result in the award of certificates, credit hours, or degrees, in order to identify any barriers that may prevent them from providing rapid and effective responses to the business and industry community; and
11. The Department of Commerce should act as an information resource to business and industry regarding training programs.

#### 1987 UPDATE

The recommendations of the Task Force were considered by the Legislative Commission on Kansas Economic Development. The commission adopted recommendations to : and four without change. They rejected recommendation number one and modified all others.



NEW ENGLAND STATES  
1983-84 COST-SHARING AWARD

**TITLE**

"Retraining for New England's Mid-Career Work Force"

**PROJECT**

Coordinated by the Caucus of the New England State Legislatures and the New England Board of Higher Education, the goal of this study was to design and implement an effective, coordinated system of regional retraining programs responsive to the workforce demands of a highly technological, knowledge-intensive economy.

To achieve this goal the study sought to:

- o Build a data base on the retraining needs of New England's work force;
- o Utilize the institutions of higher education to retrain and upgrade the skills of established, mid-career workers whose jobs have become obsolete; and
- o Focus policy makers' attention on the retraining issue by giving legislators good information on analysis.

Efforts focused on sponsoring several conferences for governmental, business, labor and educational leaders on the key training issues and conducting several surveys of opinion leaders.

**OUTCOMES**

The study heightened legislative awareness of the retraining issue. It also revealed the limitations and lack of concrete data on operations under the Job Training Partnership Act.

The study's initial recommendations included the following:

- o Create a regional council to centralize and coordinate information and planning on retraining issues.

*Update: A modified Legislative Advisory Council composed of education committee chairs and key leaders was created.*

- o Convene a special regional conference for legislators, government officials, business executives, and university managers to work on specific solutions for retraining.

*Update: A meeting occurred December 1, 1984 and focused on high tech, shoe and tool industry lay-offs.*

- o Encourage public-private partnerships, with business and industry doing most of the retraining. Retraining should be job-specific rather than general in nature.

*Update: Bay State Skills Corporation was founded, providing customized job-training.*

- o Combine occupations that require a college degree with on-the-job training. Promote co-op programs where students work while enrolled in college, with the company having the option to hire the student upon completion of his or her academic program.

- o Provide state tax incentives to industry as a means of encouraging retraining.

*Update: Both Massachusetts and Maine have passed tax incentives benefitting small business.*

- o Reorganize the state systems of job market forecasting 1) to provide coordinated, unified, centralized data collection and dissemination; 2) to use common data deadlines both within and among states; and 3) to establish common time frames for job projections.

The Caucus of New England State Legislatures and the NEBHE held special hearings on the issue in each of the six New England States.

**OREGON  
1983-84 COST-SHARING AWARD**

**TITLE**

"The Legislative Role in the Job Training Partnership Act and Linking Job Training with Economic Development"

**PROJECT**

The Oregon legislative leadership created the Joint Interim Task Force on Job Training and Economics Development, to evaluate implementation of the new federal Job Training Partnership Act (JTPA). The study was designed to result in two products: 1) an active role for Oregon's Legislative Assembly in the oversight and implementation of JTPA and 2) a stronger linkage between job training programs and state and local economic development efforts.

The task force conducted hearings with each of the state's eight Private Industry Councils (PICS) to consider specific issues posed by JTPA implementation. These issues included the provision of support services as well as the act's impact on target populations, such as minorities and women.

The task force identified eight general areas of concern. Definitive answers to these concerns were not readily available due to the recent implementation of JTPA and to incomplete data. However, the task force was able to address these concerns in their recommendations. The eight general areas of concern and the task force's findings were:

- o Is the private sector genuinely involved with the implementation of the act?* The task force concluded that private sector involvement in each of the PICS had been adequate, but recommended that all representatives file statements of economic interest to ensure that federal conflict of interest requirements are being met.
- o Are the Local Service Delivery Areas (SDAs) organized logically to reflect the state's labor markets?* While the legislature had no control over the SDA's organization, the task force recommended that several SDAs improve their coordination. At a later date two SDAs merged into one SDA.
- o Are trainees receiving necessary support services such as child care and transportation?* The task force found that the SDAs had spent only 5% of the available 15% for support services; it therefore recommended legislation to require spending the full 15% as well as providing child care to all AFDC clients enrolled in JTPA training and to all other JTPA trainees once support services are no longer available.

- o *Are JTPA programs duplicating services and conflicting with other programs?* In order to direct the SDAs to use local education institutions in providing training services, the task force recommended legislation requiring the Governor to appoint the Commissioner of the Bureau of Labor and Industries to the State Job Training Coordinating Council. This later occurred. It also recommended legislation transferring responsibility for administering JTPA recommended legislation transferring responsibility for administering JTPA to the Bureau.
- o *Are JTPA trainees placed in jobs with a potential for long-term employment and opportunities for promotion?* The task force expressed concern that JTPA programs were being used merely as a placement service for low paying jobs, rather than to provide trainees with needed skills for long-term employment and opportunities for promotion.
- o *Are special target populations such as women and minorities receiving adequate services?* Lack of data precluded a definitive answer to this question; however, the task force recommended several pieces of legislation to insure that minorities populations would be served.

*on-the-job training providing meaningful training or merely a subsidy for business?* While the placement statistics are favorable, preliminary data did not indicate how long trainees were retained after termination of the wage subsidies to employers. The task force then recommended that the SDAs be more aggressive in reducing the wage subsidies and to insure that the training was for higher skilled jobs.

- o *Is the executive branch facilitating inter-departmental cooperation that welfare recipients are not precluded from receiving training?* The task force found that the State Welfare Assistance Agency had restricted the availability of training for AFDC recipients by requiring them to seek work for six months before enrolling in JTPA programs. It therefore proposed legislation to restrict the agency from determining the eligibility of its clients to participate in JTPA programs. The task force also criticized the State Economic Development Department for its lack of effort to improve coordination with JTPA programs at the state level.

## OUTCOME

Based on the task force's recommendations a package of bills was drafted and approved for introduction during the 1985 legislative session. The bills were intended to establish a stronger role for the Legislature in determining JTPA policies in Oregon. One bill passed which required the Governor to appoint legislators to the State Job Training Coordinating Council.

**IMPROVEMENTS IN SCHOOLS, TEACHING AND LEARNING**

**COLORADO  
1985-86 COST-SHARING AWARD**

**TITLE**

"A Study to Develop an Implementation Model for the Evaluation of Certificated Education Personnel"

**PROJECT**

The Colorado General Assembly required local school districts to adopt evaluation procedures of all their certificated education personnel with the enactment of House Bill 1338 in 1984. The purpose of this study was to develop an implementation model for performance evaluation for use by all school districts in the state.

**OUTCOMES**

A number of districts had already developed elaborate models of evaluation, since a series of workshops providing inter-district assistance had previously been conducted throughout the state.

In addition, the Colorado Department of Education developed a series of regional conferences to assist local evaluation councils in understanding their roles. The conferences provided a setting where they could receive support and assistance in their task of examining district evaluation procedures and practices. The NCSL/ED grant provided a resource to continue this process.

Four pilot projects assessed evaluation models:

1) The Northeastern Colorado Small Schools Demonstration Training Project showed the need for flexibility in adapting mandate at the local level as standardized training models, or evaluation models, often conflicted with the culture, history and norms of each district. 2) The East Central Board of Cooperative Education Services (BOCES) Time Management Project, employed a consultant to "shadow" each administrator in the district to analyze his/her use of time. 3) The West Central BOCES Teacher Remediation Project provided a remediation model not previously available to small districts. 4) The San Louis Valley Training of Trainers project singled out participants who would subsequently become master trainers (ongoing throughout the summer of 1986). Results of these projects were integrated to form specific recommendations for the evaluation systems of small or rural districts.

In summary, the combination of technical assistance and training activities provided by the Colorado Department of Education facilitated both procedural and substantive compliance with the requirements of the state evaluation act. Since Colorado has a particularly strong history of local control of schools the process of decision-making and problem-solving occurring at the local level was especially important.

A detailed analysis of the state of evaluation practices in Colorado was undertaken. The report was available in June, 1986.

**DELAWARE  
1985-86 COST-SHARING AWARD**

**TITLE**

"Teacher Recruitment and Retention in Delaware"

**PROJECT**

Delaware used its cost-sharing award to hold a retreat in January 1986 to encourage dialogue among state education leaders and organize an information gathering effort focusing on teacher recruitment, retention, and salaries. Those in attendance included a select group of legislators from both the House and Senate; members of the education community representative of the major education groups in the states; staff from the legislature and governor's office; NCSL staff; and a consultant to facilitate the meeting. The retreat followed the defeat of a career ladder bill during the previous legislative session.

**OUTCOMES**

The retreat resulted in the formation of a follow-up committee consisting of one representative of each retreat group. The follow-up group contracted with the University of Delaware to survey former and present teachers to ascertain why they left teaching or contemplated leaving teaching, and what they felt were the most negative and positive aspects of teaching in Delaware. Salary was named the dominant source of dissatisfaction, followed by lack of appreciation and lack of influence, attitudes toward disciplinary policy, after-hours schoolwork, and clerical duties.

In addition, the University of Delaware conducted a survey of students in higher education institutions to find out why they were or were not planning to enter the teaching profession. Also, the Delaware Development Office worked closely with the personnel officers of the various school districts to develop a short-range and long-range marketing plan to attract teachers to Delaware.

The follow-up committee conducted a public hearing at which 14 members of the business community discussed teacher recruitment and retention issues. The Committee expanded on the idea of developing a computer link-up between relocation specialists, personnel officers and school districts to help "spouse teachers" who may be moving to Delaware.

A state panel on education issues looked at the philosophical basis of Delaware's salary system. This study group presented a comprehensive salary proposal to the legislature in January, 1987.

**DELAWARE  
1987-88 COST-SHARING AWARD**

**TITLE**

"The Delaware Study of Higher Order Thinking for All Children: A Cooperative Effort Between the General Assembly and the Department of Public Instruction"

**PROJECT**

The Delaware General Assembly and the Department of Public Instruction created this study, referred to as "A Study in the Content, Purpose, Use, and Evaluation of Curricula that Develop Students' Use of Higher Order Thinking Skills," which focused on higher order thinking skills for all children.

The goals of this study were to: 1) review Delaware's curriculum; 2) identify attitudes and practices regarding the teaching of higher order thinking skills; and 3) determine what may be needed to continue focusing on instructional improvement.

Involved in this project were a Study Committee, an Advisory Task Force for Higher Order Thinking, and Research for Better Schools (RBS), an independent research organization. With the guidance of the Task Force, RBS was to:

Develop and analyze surveys assessing knowledge, attitude, and practice regarding higher order thinking skills, interview and observe teachers during classroom instruction; and gather together a set of background readings on research related to teaching higher order thinking and related skills.

**OUTCOMES**

A survey of teachers, chief school officers, school board members, and community leaders, along with classroom observation, resulted in the following:

- o Most people surveyed felt that the enhancement of students' thinking abilities was an important educational goal for all students, and that this enhancement could be accomplished through certain teaching strategies. School board members, chief school officers, and community leaders said that the teaching of higher order thinking skills was most appropriate for students who were "academically talented"; chief school officers felt that these skills should be emphasized in higher grades, while others felt that thinking skills should be emphasized in all grades. School board members reported that there was limited interest in higher order thinking skills in their communities.
- o Teachers need more opportunities to utilize available resources to teach higher order thinking skills.
- o Teachers reported including problem-solving skills in instruction more than decision making and critical thinking skills. The teachers who were observed, however, tended to focus on critical thinking, while problem-solving received less emphasis.



- o Many teachers felt that thinking skills were appropriate for all subject areas, though some placed less emphasis on art, music, and health.

After a strong public awareness campaign, this study received the support of key community and education groups.

The Task Force recommended that the final study report be distributed to all appropriate constituencies with a statement about the value of higher order thinking for all children. It was also recommended that the Task Force sponsor a statewide conference to raise awareness and support for the teaching of higher order thinking skills.

**FLORIDA  
1985-86 COST-SHARING AWARD**

**TITLE**

"A Review of the Master Teacher Program, Merit Schools and the Extended School Day"

**PROJECT**

The Florida Legislature enacted comprehensive educational reforms during 1983 and 1984. The purpose of this study was to analyze the implementation of three of the more controversial reforms: the Master Teacher program, Merit Schools and the Extended School Day.

A comprehensive questionnaire was sent to each school district in the state. Responses were received from 58 of the 67 districts which represented over 94% of the students in the state.

In addition, site visits to six school districts provided information from schools board members, district administrators, principals, teachers and students.

**OUTCOMES**

*The Master Teacher Program*

The Master Teacher Program received an overwhelmingly negative reception by superintendents, administrators and teachers. Of the 58 districts responding to the legislative survey, all but two said that the program should not be continued as it currently existed.

Numerous examples were given of outstanding teachers who were not selected, and many districts cited "low morale of teachers" as the major impact of the program. District responses to the implementation of the Master Teacher Program centered on four aspects: 1) the performance evaluation, 2) the subject area tests, 3) implementation concerns, and 4) conceptual problems.

*The Merit Schools Program*

The Florida District Quality Instruction Incentive Program, or "Merit Schools," was enacted during the 1984 Legislative Session. District interviews in Dade and Broward Counties produced markedly different accounts of the merit schools program. The strengths of the merit schools program -- its emphasis on teamwork, and the promotion of local involvement through negotiation at the district level -- was most evident in Dade County. All employees had the opportunity to participate. Decisions, responsibilities, and rewards were shared by all participants -- principals, teachers, and staff members.

The weakness of the program -- its restriction of winners to the upper quartile and its reliance on standardized test scores as the sole measure of the quality of a school -- showed up in the implementation of the merit schools program in Broward County. Broward County used a different system for determining "upper quartile" by using a regression analysis to determine an expected level of achievement for students based on past achievement and on student demographic information. Schools in various socioeconomic neighborhoods were designated as merit schools. This mixture, however, created serious political problems. As one administrator explained, "How do you explain to an irate parent from an affluent neighborhood that his child's school is not a merit school?"

### *The Extended School Day*

The 1983 Legislature enacted a number of major reforms known as the Raise Achievement in Secondary Education (RAISE) bill. This bill established state high school graduation requirements for the first time, and mandated a seventh period of instruction, which was later changed to be an option for the local districts.

Problems encountered during implementation of the seven-period day included: scheduling and providing extracurricular activities; teacher burn-out from teaching an additional period; bus scheduling; lack of time for teachers to confer with parents and students, and pressures on student athletes. Despite these drawbacks, the legislative survey of superintendents and school board chairmen revealed that a majority of the districts favored continuation of the seven-period day.

### **UPDATE**

During the 1985-86 legislative session, the Master Teacher Program was abolished and a career ladder program was established. The selection of Merit Schools was broadened beyond the upper quartile of district schools pursuant to a local school district plan.

**MAINE  
1985-86 COST-SHARING AWARD**

**TITLE**

"Teacher Recruitment and Retention in Maine"

**PROJECT**

In 1985 the Maine Legislature passed a two-year, staged increase in teacher base salaries. The increase addressed one of the major documented areas of dissatisfaction with teaching as a profession. However, concern remained that other areas of the profession also needed to be addressed if teaching was to become a profession which both attracted and retained the caliber of individuals needed to maintain a high quality educational system.

In response to those needs Maine's Joint Standing Committee on Education undertook a statewide study of Maines' current teachers, former teachers and college bound high school seniors. Study methods included a statistical analysis of current trends in teacher turnover in Maine's education system and an analysis of responses to 1200 questionnaires mailed to participants in that system.

**OUTCOMES**

The major findings from the study were:

- o Teachers were attracted to the profession and derived satisfaction from their desire to "be of service to others" and to "help students develop their talents";
- o Low economic rewards in teaching detracted individuals from entering teaching and were a source of dissatisfaction to those in the profession, but they do not explain why some stay in teaching and others leave;
- o Former teachers were more likely than active teachers to cite their relationship with the school administration as a source of dissatisfaction;
- o Turnover rates in Maine were not generally high. Problems were confined to specific subject areas and to limited areas of the state. Other states should assess their own turnover experiences before they assume the "national crisis" in teacher retention applies to all areas of their state.

These findings were used to continue discussions with representatives of the Maine Teachers Association, the Maine School Management Association, the Maine Department of Education and professors and students from the University of Maine System concerning the most effective policies to attract and retain a quality teacher workforce.

**MINNESOTA  
1986-87 COST-SHARING AWARD**

**TITLE**

"New Roles for Teachers: Can They Improve Retention in the Teaching Profession"

**PROJECT**

Administered by the Higher Education Coordinating Board, the goal of this project was to gather survey data about four areas of interest. The purpose of the surveys were to measure:

- o The general attitudes of Minnesota teachers toward their careers;
- o The attitudes of Minnesota teachers and principals toward the alternative roles for teachers that were being discussed nationally;
- o The attitudes of teachers and principals toward the value and implementation of the career teaching role; and
- o The potential of a loan forgiveness program for career teachers as a strategy for improving student learning and the attractiveness of teaching careers.

**OUTCOMES**

Surveys were mailed to samples of Minnesota teachers and principals to gather the information needed to successfully complete the goal of the project. Based on the survey the following results were determined:

- o Another teaching or administrative role in education could provide educators with more job satisfaction.
- o In general, teachers were more attracted to alternative teaching roles than to administrative or support positions as a means for career enhancement.
- o Teachers who were less satisfied with teaching are more likely to be attracted to alternative teaching roles than teachers who are happy in their present roles.
- o The development of alternative career paths for teachers might help retain teachers who might otherwise leave the profession.
- o Since no one alternative teaching role emerged as the overwhelming favorite of the respondents, a variety of career options should be made available to teachers.
- o Principals perceive the career teacher position as potentially enhancing student learning.

- o The primary barriers to implementing a career teacher program were funding, collective bargaining, and teacher qualifications.
- o A loan forgiveness program for career teachers would only address a teacher's lack of preparation for the responsibilities of being a career teacher.
- o Unless more employment opportunities are available for career teachers the loan forgiveness program would be difficult to promote.

Based on this study the coordinating board recommended that "the state not establish a loan forgiveness program for career teachers under the Minnesota Improved Learning Law."

#### **1987 UPDATE**

As a result of the findings of this project the loan forgiveness program was not pursued during the 1987 legislative session. The coordinating board was asked however, to draft legislation that would provide fellowships rather than loans for teachers to pursue graduate studies consistent with the objectives of the improved learning law. This legislation was introduced but not adopted.

Legislation was passed during the 1987 session which addressed other issues studied in the project. Specifically the Minnesota State Department of Education was authorized and funded to plan teacher centers for professional development and to make grants to school districts for the establishment of mentor programs.

**MISSOURI  
1986-87 COST-SHARING AWARD**

**TITLE**

"The Missouri Career Development and Teacher Excellence Plan: An Initial Study of Missouri's Career Ladder Program"

**PROJECT**

The Missouri House of Representatives contracted with the Office of Research and Development of the University of Missouri College of Education to conduct this study about Missouri's career ladder program for teachers. The purposes of the study were:

- o To determine why districts chose to implement or not implement career ladder programs and the methods used to make those decisions;
- o To determine the attitudes of Missouri educators regarding career ladders; and
- o To determine educators' perceptions of the potential impact that the career ladder program would have on education in Missouri.

**OUTCOMES**

The study consisted of surveying educators--teachers, superintendents, principals, and school board presidents--from 66 school districts that were participating in the career ladder program and 66 school districts that were not participating in the program. The non-participating group was used to test for contrasting differences. In addition superintendents and school board presidents from all the remaining school districts were also surveyed. Furthermore a group of 50 superintendents were interviewed by phone.

Over 1,700 surveys were returned and tabulated during the first three months of implementation of this program. The data from the surveys, telephone interviews, and descriptive data from each district were analyzed. This provided the Missouri legislature with a snapshot of what was occurring in the school districts regarding the new career ladder plan. The data indicated that:

- o Most of the school districts participating in the career ladder program implemented the model suggested by the State Department of Elementary and Secondary Education (SDESE). This called for teachers, superintendents, and patrons to be involved in the decisionmaking process. Only a few districts made modifications to the model plan.
- o Money was the overriding factor in school districts determining whether or not to implement a career ladder program.

- o Significant difference existed between the participating and non-participating school districts. The participating districts tended to be smaller and poorer than the non-participating districts. People surveyed in the participating districts had a more positive attitude about career ladders than their potential impact on education.
- o Despite an initial low participation rate, there were indications that this rate would increase over time. These indicators include reports that: 1) a significant number of districts are considering implementation of the program in future years; 2) in some cases non-participation was a result of natural caution about the new program; and 3) the decisionmaking method recommended by the state was inefficient and consequently would take time to work itself out.

#### 1987 UPDATE

As a result of this study several additional outcomes have occurred since the release of the report. These included: increased media coverage of the career ladder program; initiation of subsequent research studies; and holding six Joint Committee on Education meetings to discuss the Excellence in Education Act of 1985.



**NORTH CAROLINA  
1987-88 COST-SHARING AWARD**

**TITLE**

"Increasing the Pool of Minority Teachers: The North Carolina Teaching Fellows Model"

**PROJECT**

Known as "Project Teach," this study was designed to test the idea that a campaign aimed towards parents of talented minority students would result in an increased number of minority students who apply for state-funded teaching scholarships. The North Carolina Legislature collaborated with the Public School Forum on this campaign.

Volunteer committees contacted parents of targeted students. The parents and children were invited to attend meetings designed to inform and interest them in the teaching profession and in state-funded scholarships. Students who attended were offered free workshops in taking tests, interviewing for college admissions applications, and coaching for a competitive scholarship screening process.

**OUTCOMES**

The results of this study were very encouraging. Over 100 minorities from eight communities volunteered to work on the contact committees, and 500 parents and students responded to these initial contacts. Seventy of the students applied for North Carolina's Teaching Fellows Scholarship, and 27 have been included among the 600 finalists. Other students are still contending for various state-funded awards.

The following conclusions were drawn from this study:

- o Schools need assistance in communicating with minority parents and students. Volunteers from the community, working with parents, can influence students in ways that schools cannot.
- o Community-based teams focusing on support from parents, guidance counselors and teachers, provide maximum support to students.
- o It is necessary to improve the perception of teaching as a profession. Making the field more rewarding and providing scholarship programs that make entry into the profession easier are two possible long-range solutions.
- o To combat the declining interest of the minority community in the teaching profession, recruiting and identification efforts need to begin in the early junior high school years.

Legislation is being planned as a result of this study. Some of the ideas which will be considered are:

- o Institutionalizing an effort similar to this study on a statewide or greatly expanded basis;
- o Making minority recruiting a major and on-going focus of the recently created Office of Teacher Recruiting;
- o Focusing on getting information to talented minority students and their parents; and
- o Continuing to focus on high school seniors, as well as experimenting with projects aimed at minority students in lower grades.

**NEBRASKA  
1987-1988 COST-SHARING AWARD**

**TITLE**

"Evaluation and Assessment Processes in Nebraska Public Schools"

**PROJECT**

This project, Legislative Resolution 181, was designed to study school evaluation procedures. Nebraska rates highly on Secretary Bennett's Wall Chart in terms of ACT scores, teacher/pupil ratios, and high school completion, but there have been no reliable evaluation models which policymakers at the state and local level can use to assess school effectiveness or performance. Specifically, the goals of this project were to generate information about:

- o How local schools evaluate themselves;
- o How local schools are evaluated by the state's accreditation and approval processes;
- o How the results of these evaluations are used by policymakers, educators, and citizens; and
- o How the legislature evaluates Nebraska's schools through the current data collection and retrieval system.

**OUTCOMES**

Outside of the accreditation process, evaluations are not widely conducted in Nebraska public schools. They are done on an ad hoc basis, with little or no concerted, coordinated sharing of information.

In examining the differences between accreditation and evaluation, the project concluded that evaluation should answer two questions: how are we doing, and what can we do better. The accreditation process in Nebraska largely ignores these questions.

Methodology utilized by the LR 181 staff included surveying 350 accredited school districts, interviewing districts undergoing accreditation, and examining assessment and evaluation processes in other states.

The study determined that:

- o Over half of the local schools surveyed had *not* conducted any evaluation over the past two years, other than the accreditation evaluation, which is required only once every seven years. When they *did* conduct evaluations, the primary subject was curriculum. A majority of respondents judged the available data as sufficient, but this study determined that more substantive evaluation was needed.
- o Nebraska's present data base is weak and does not provide an accurate picture of the condition of education in the state.

- o The highest priority recommendation for change was the need to improve communications inside and outside of school.
- o Next to the State Department of Education, respondents said, the most important sources of information relevant to evaluations were other schools.

In response to this study the legislature drafted Legislative Bill 1116 to establish a special Education Data Planning Committee to develop a plan for improving the educational data system in the state. The bill also called for the State Department of Education to develop or designate a student assessment system to measure the status and progress of Nebraska schools. Although the bill did not pass, this legislation created strong interest in school evaluation procedures.

The legislature did adopt Legislative Resolution 426 to urge the State Board and the Commissioner to establish an evaluation and assessment division separate from the school accreditation and approval division, and to implement a statewide system of student assessment.

In summary, the study determined that Nebraska needs to devote more attention to evaluation and assessment--in the classroom as well as in the district--and needs to construct a data base that will assist local schools in going beyond the present accreditation process.

**RHODE ISLAND  
1985-86 COST-SHARING AWARD**

**TITLE**

"Implementation and Assessment of a Pilot Suicidal Awareness, Identification and Prevention Program Model for State and National Utilization"

**PROJECT**

Administered by the Rhode Island Task Force on Teenage Suicide Prevention and The Samaritans, a non-profit agency from Providence, Rhode Island, this project's purpose was to describe the training curriculum for a pilot suicide project and the measures used to assess effectiveness.

Four Rhode Island high schools served as experimental schools in which the suicide curriculum was implemented, and four served as control schools. A two-day workshop on suicide information and attitudes toward death and suicide was attended by teachers from the four high schools participating in the program. The program called for these teachers, in turn, to educate approximately 300 students.

Four different measures were used as assessment tools for this project.

- o *Knowledge*: This instrument assessed the group's understanding of the basic knowledge regarding adolescent suicide, including identification, intervention, and referral sources and processes. The instrument was administered before and after a prevention program using standardized instruction at the experimental schools.
- o *Attitudes*: An instrument devised to measure attitudes, beliefs and feelings about suicide, death, and emotional distress was administered before the program and several months after completion.
- o *Student's personal knowledge regarding aspects of suicide*: The first questions focused on the incidence of suicide attempts as known to a particular student and the last questions were derived from the curriculum aimed at encouraging certain helping behavior.
- o *A self report measure of emotional state*: This instrument assessed hopelessness which was thought of as a concomitant of adolescent suicide and addressed the question often posed by concerned parents and administrators that suicide awareness curriculum can have an adverse effect on the emotional health of students.

Although the intervention took place in the fall of 1985, the most important follow-up data was collected towards the end of the school year. Initial results showed significant increases in post knowledge scores. Both teachers and students reported an increase in their helping behaviors.

## OUTCOMES

- o The Department of Health gave the Rhode Island Task Force on Teenage Suicide Prevention a three year step down grant to implement the program with teachers.
- o The Department of Education incorporated suicide prevention into their mandatory health curriculum.
- o The Task Force coordinated department heads in their efforts to implement statewide programs.
- o A bill was submitted to the 1986 General Assembly for a suicide awareness program for public school students in grades 9-12 accompanied by workshops developed and provided by the Samaritans for those public school teachers who are designated to teach the suicide prevention awareness program.
- o A statewide conference on teen suicide was planned in the winter of 1987.

**TENNESSEE  
1983-84 COST-SHARING AWARD**

**TITLE**

"Report of the Select Committee on Education"

**PROJECT**

Having elected not to enact a major education reform package during 1983, the Tennessee Legislature instead adopted Senate Joint Resolution No. 96 which created a bipartisan, house-senate Select Committee on Education to study teacher compensation and the ancillary issues of college preparation and in-service training for teachers. The committee was divided into three subcommittees. Each member of the committee served on two subcommittees.

During the course of this study the Select Committee on Education convened four times. It received testimony from 34 witnesses, representing the diverse experiences of educators in seven states. From this testimony each subcommittee adopted a series of recommendations which were voted upon by the full committee and drafted into legislation to be submitted to the Tennessee General Assembly early in 1984.

The committee was particularly concerned about the pending shortage of well-qualified teachers during the coming decade. In response, the committee recommended repealing the current single salary schedule in favor of a performance-based career ladder for teachers, principals and supervisors. Their recommendations included:

- o Voluntary participation for current teachers and mandatory participation for every teacher certified after July 1, 1984;
- o Salary supplements allocated for each of three steps in the career ladder for teachers;
- o No quotas on participation, but evaluations every five years for teachers to remain at the same professional level;
- o Testing prior to entering teacher training at state universities and receiving state certification; completing one year as a probationary teacher for certification; and passing upper-level coursework and a performance evaluation, emphasizing staff development, for certification renewal;
- o Lengthening the number of instructional days from 175 to 180 each school year, including five days for administrative duties and five days for in-service training, with mandatory participation by education faculty members from state universities;
- o Creation of a new Principals Academy, under the Tennessee Department of Education, to provide a variety of education and training programs for school leaders.

The committee report also included each of the subcommittee's findings, the list of witnesses, policy papers commissioned from consultants, the committee's recommendations, a minority report, and the draft bill.

## OUTCOMES

Following adoption of the committee report, the Tennessee General Assembly met in special session in January, 1984 and enacted the "comprehensive Education Reform Act of 1984." The law: 1) included a new professional career ladder for full time teachers, principals and supervisors; 2) established the State Certification Commission to set certification standards and criteria, as well as three regional commissions to review applications, assign evaluation teams, and make recommendations to the State Certification Commission; and 3) created a special joint committee of the General Assembly to review and oversee implementation of the career ladder and certification procedures.



**UTAH  
1987-1988 COST-SHARING AWARD**

**TITLE**

"A Study of Educational Delivery Systems in Utah: Examination of Eleventh Grade Graduation and Altering the Twelfth Grade Curriculum"

**PROJECT**

This study was undertaken by the Office of Legislative Research and General Counsel (OLRGC) largely in response to legislation passed in 1987 (Senate Bill 228). The intent of S.B. 228 was to resolve two problems in Utah's public education: over-crowding (with limited financial resources to prepare for anticipated growth), and students' misuse of their senior year. Because of the widespread belief that students were wasting their senior year of school, legislators had determined that early graduation would reduce inefficiencies and costs in the education system. As a means of correcting these problems, the bill required that the State Board of Education initiate eleventh grade graduation programs in Utah's public schools by the 1989 school year.

This study was conducted as a follow-up to this legislation in order to:

- o Design an intensified educational delivery system that prepares public high school students for graduation at the conclusion of the eleventh grade;
- o Modify the existing twelfth grade curriculum to allow students to participate in concurrent enrollment; earn certain technical school credits from the state's technical education institutes; and develop job skills necessary for successful employment; and
- o Establish guidelines for requiring student education plans such as career and curriculum counseling to be developed at the ninth grade.

**OUTCOMES**

The Office of Legislative Research and General Counsel conducted a survey of high school students' attitudes on issues of counseling, eleventh grade graduation, and the use or misuse of the twelfth grade. In addition to the survey, the OLRGC reviewed and analyzed seniors' transcripts in order to determine how they utilized their final year in high school. These efforts yielded results which discounted previous theories that twelfth graders wasted time, and showed that the senior year is actually productive.

Given the conditions and requirements for high school graduation, this study concluded that eleventh grade graduation was not feasible for most students. The study outlined ways that the twelfth grade should be modified to allow ambitious students to participate in proficiency programs such as Advanced Placement, concurrent enrollment and International Baccalaureate.

It was also determined that student education plans should be developed for ninth graders to help them make wise academic and vocational choices early in the education process, thus benefiting both students and schools.

This study recommended that the legislature consider:

- o Requesting or requiring the State Board of Education to modify current state and local graduation requirements in order to allow most students to meet graduation requirements by the end of eleventh grade;
- o Encouraging the State Board of Education to: 1) develop outcome-based and other proficiency instruments to allow students to accelerate graduation schedules, and 2) expand programs which allow twelfth grade students to earn college credit; and
- o Clarifying mandates in S.B. 228 which require implementation of minimum school standards to allow students to graduate from high school at the end of eleventh grade.

By providing students with opportunities to accelerate their graduation schedule and earn college credit, some students could finish high school and college more quickly and consequently save money both for themselves and the state. While these efforts could enhance use of eleventh and twelfth grades, the study determined that eleventh grade graduation should not be encouraged until more research was conducted to decide if reducing the curricular and graduation requirements necessary for early graduation would negatively affect chances for Utah graduates to meet college admission standards.

**VERMONT  
1987-88 COST-SHARING AWARD**

**TITLE**

"Technology, Computers and Learning - A Plan of Action for Vermont"

**PROJECT**

The Vermont Educational Technology Study Committee, on behalf of the Commission of Education and the Vermont General Assembly, conducted this study. It had three goals:

- o To identify how technology is currently used in Vermont schools;
- o To identify the skills children will need to compete in the economic marketplace; and
- o To present a plan of how technology can be used to meet those needs.

**OUTCOMES**

All three goals were accomplished.

Vermont students, parents, educators, business representatives and state legislators were surveyed through questionnaires and group interviews. Results showed that: educational use of computers and other forms of technology clearly help children learn; there is an inadequate supply of computers and funds to purchase them; access to computers is inequitable at the district and school level; and there is insufficient training to help teachers use technology in education.

The study committee identified that children need skills which will help them prepare to adapt to life's changes and efficiently access, select and analyze information which will help them make decisions. Technology must be used as a tool to help children seek information throughout their learning process.

Ten recommendations were submitted to the legislature, as well as a corresponding implementation plan and budget. The recommendations were that:

- o The State of Vermont ensure that by 1993 all students throughout Vermont have equal access to technology and information;
- o Curriculum development and staff development programs throughout the state focus on improving learning through applications of technology to all curriculum areas;
- o By 1989 there be a minimum of one computer with a printer and appropriate software in every classroom throughout the state, by 1990 there be one computer and modem for every teacher throughout the

state, by 1993 every child will have access to a technological workstation, and by 2000 every child will have a technological workstation;

- o The State Board of Education establish: 1) a state Educational Technology Council to oversee the implementation of this report; 2) keep the State Department of Education, the State Board and Vermont Legislature advised as to the progress of its implementation, and 3) supervise the regional center network described below;
- o A network of seven state-funded Regional Technology Centers be established to support local teachers, provide instructional programs and workshops, and assist in developing plans for using technology to improve student learning;
- o Each school district provide time and resources for a planned staff development program in the use of, and implementation of, technology in their educational programs;
- o The State Board of Education require that, by 1990, any teacher applying for certification or re-certification must be "technology capable";
- o The state government and Vermont industries provide funds for recognition and incentive grants to individuals and districts for developing innovation programs using technology to promote learning;
- o The state government provide grant funds for the establishment of model schools/programs in each region to evaluate and disseminate information about new approaches to learning through applications of technology;
- o A statewide technology purchasing program for individual schools and districts be implemented immediately by the State Purchasing Department.

Based on the results of this project, the Vermont General Assembly allocated \$200,000 in the 1988 session specifically for telecommunications in schools. Their goal in developing technology in education is to begin by building a computer network which will include every school in Vermont.

**WEST VIRGINIA  
1983-84 COST-SHARING AWARD**

**TITLE**

"Statewide School Improvement Project"

**PROJECT**

This study by the state legislature's Joint Standing Committee on Education evaluated the standards of a "thorough and efficient" public education that the West Virginia Supreme Court of Appeals adopted in 1983. An earlier ruling by the Court had found the state's method of funding public education wanting, according to the state constitution's "thorough and efficient" clause. It later adopted explicit standards by which to measure "thorough and efficient." Specifically these standards required the state to: raise the salaries of teachers and service personnel, hire new professional educators and service personnel, construct new buildings, buy new equipment, and improve salary and per-pupil equity between districts.

The legislature ordered the Standing Committee to review these standards. The legislature also felt that the emphasis on "input" rather than "output" variables needed review. It asked the Standing Committee to develop other activities by which the legislature could meet the need for a high quality, efficient system of education in the state. To carry out this task, the committee reviewed effective schools research, participated in seminars at the Michigan State University Institute on Teaching, and reviewed the results of several projects conducted in West Virginia. It also looked at how education could meet the current and future economic needs of the state.

**OUTCOMES**

Five essential ingredients for effective schooling in West Virginia were identified: 1) strong instructional leadership; 2) a climate of high expectations; 3) a safe and orderly school environment; 4) a clearly focused mission with an emphasis on academic goals; and 5) frequent monitoring of student progress, including feedback on expectations and achievement levels.

The recommendations and the subsequent legislative action were:

- o *Implementation of Effective Schools Research.* Schools in the state should be measured against a definition of effective schools which takes into account the a) performance of the individual school, b) performance of each grade level, c) pupil achievement scores, and d) specific groupings of students within the student body. Confidential school profiles would be sent to each school principal, and would be used as an improvement tool. Expertise and technical assistance would be provided by an assessment team. The legislature would provide matching incentive grants to individual schools to develop and implement plans for creating effective schools.

**Update:** The Legislature appropriated funds to establish the Office of Effective Schools in the State Department of Education.

- o **Principal's Academy.** The academy would be a clearinghouse on new research and management techniques, would provide information on professional growth activities, and would screen out individuals least likely to make good managers or instructional leaders.

**Legislative Response:** The legislature appropriated \$136,000 for start up funds for a principal's academy.

- o **Educational and Economic Opportunities.** The study recommended a number of education and job training activities to help those who did not or cannot easily take advantage of the traditional educational system.

- o **Equalization of Salaries Among Counties.** A sliding scale should be added to the foundation program to address inequalities in revenue-raising capacity of regular levies. A spending cap should be placed on the wealthiest counties until salaries have been equalized across the state. Allowing a five percent inequality rate may be the most feasible alternative.

**Legislative Response:** The legislature earmarked \$29 million for the first step of salary equalization. The Senate introduced Joint Resolution 4, which placed a statewide excess levy before the electorate in November, 1984. The levy did not pass.

- o **Program for Gifted Students.** Summer programs for gifted and talented youngsters and a two-year residential high school for gifted students in particular fields should be established.

**Legislative Response:** The legislature appropriated \$77,978 for summer camps for gifted students in 1984.

- o **Writing Project Centers.** The study recommended that Writing Project Centers for Teachers be formed at the state's three graduate education centers. A Teacher's Center was established at Marshall University.

- o **Improvement and Equalization of School Facilities Among Counties.** The study recommended that staff be added to the Division of Facilities Planning. Should the state decide to establish a statewide building authority, it should be funded on a statewide basis from a school bond referendum.

**Legislative Response:** The legislature appropriated funds to add staff to the Division of Facilities Planning. A bond issue for facilities equalization appeared on the November 1984 ballot.

**Update:** The bond issue was defeated, but an architectural position was added to the the Division of Facilities Planning in the State Department of Education.

HIGHER EDUCATION FINANCE REFORM AND REORGANIZATION

**MARYLAND  
1980-82 COST-SHARING AWARD**

**TITLE**

"Higher Education Policy Information System"

**PROJECT**

Under this study, staff developed a centralized, uniform data base, called the Higher Education Policy Information system (HEPIS), to evaluate the state's higher education system.

The central feature of the system is the Statistical Analysis System (SAS) software package which handles expenditure data by program area and responds quickly and flexibly. A "user friendly" software package was created concurrently at the University of Maryland which handles detailed line item expenditures and appropriation data.

**OUTCOMES**

The data base format and contents were responsive to staff needs.



**MASSACHUSETTS  
1982-83 COST-SHARING AWARD**

**TITLE**

"An On-Line Higher Education Personnel and Budgeting Data Base"

**PROJECT**

In March, 1981, the legislature created a Board of Regents to govern the state's public higher education institutions. The board was vested with control over the allocation of a unitary budget. Since the appropriation for personnel accounts for roughly 85% of annual maintenance appropriations, the board set out through the NCSL/NIE grant to develop and refine a computerized personnel and budgeting system. The system they developed was called an "open book" because it could be accessed by all participants in the process--the colleges, the Regents, the Governor's office, the House and Senate Ways and means committees and others. The researchers reported that it was only the third known operating instance of the open book concept in an application.

**OUTCOMES**

During fiscal year 1983, a paper-based model was developed through the evaluations and suggestions of the participants in the budget process. The continual feedback provided during this period was used to develop the computer-based system funded by the grant. The budget model worked on matrix principles, in which blocks of information are manipulated by smaller or larger data sets. Broad categories could be referenced and broken down into smaller units, such as student data, personnel data, financial data and so forth. It is a flexible system. For instance, a user may inquire about new instructional programs and obtain aggregated information on personnel for any part of the state's public higher education system. A user could also investigate a new engineering degree program, or even a specific college program in the same way. Items in the budget can be tracked to the individual level so that any changes in the budget that occur during negotiations can be reflected in every part of the system at every stage in the negotiations process.

Due to fiscal problems in the state and the difficulty of putting together a FY84 budget for higher education, the legislature and the governor turned to the system for analyses and scenario exploration at an early stage in its development. During the joint budget hearing in the legislature, everyone had access to his/her own printout package. While some of the software was designed under this pressure situation and clean-up work remains to be done, the system has already become a vital and important tool for setting higher education policy in the Commonwealth.

**TENNESSEE  
1980-82 COST-SHARING AWARD**

**TITLE**

"The Utilization of Financial Incentives for Promoting Efficient and Effective Management and Improving the Quality of Public Postsecondary Education Institutions"

**PROJECT**

The Tennessee Higher Education Commission's (THEC) study identified new financing policies which promoted good management, and aspects of existing policies which posed barriers to good management.

The THEC staff focused on the following management areas and finance policies: the management of utilities and energy conservation; the management of support services and communications; preventative facilities maintenance programs; and athletic programs.

**OUTCOMES**

The study drew the following conclusions and related recommendations:

- o Tennessee's public higher education institutions and their governing boards had substantial budgetary flexibility due to the absence of state level controls over certain expenditure decisions and the ability of institutions to carry over unspent funds from year to year.
- o Any new financial incentive policies should not undermine currently effective policies, and should avoid needless duplication of effort.
- o Adequate financial incentives already existed which contained or reduced the costs of institutional support activities like computer operations, fleet management, telecommunication systems, and purchasing. No special inducements were necessary.
- o On the other hand incentives to curtail the expansion of intercollegiate athletics, which tend to drain the resources of most institutions, did not exist. The THEC proposed that institutions which eliminated or curtailed these activities should be given the full athletic allowance as calculated in the formula, and that they be allowed to reallocate these funds to other programs or activities.
- o The THEC proposed that since some institutions did not fully utilize all their facilities, they should be encouraged to "mothball" them, i.e., take them out of service until they are truly needed. Institutions should continue to receive credit for the square footage in the formula and these funds, plus any savings in utilities, could be shifted to other programs.

c The THEC also recommended the following proposals for further study and possible implementation in 1983-84: 1) incentives to eliminate small facilities from inventory; 2) incentives to develop innovative solutions to management problems; 3) modifications in the "age of facilities" factor and the "intensity of use" factor; 4) revisions in the method of calculating the utilities base; 5) and incentives to increase alumni giving.

#### 1982 UPDATE

A state commission was established to look into developing new statewide policies in energy conservation. The commission explored the role of the state and of the institution in developing greater conservation measures. The commission also considered more detailed audits on energy consumption by institutions, and set up an energy advisory committee consisting of representatives of the institutions, the state architect's office and the THEC.

**VIRGINIA  
1983-84 COST-SHARING AWARD**

**TITLE**

"The Issue of Determination of Eligibility for Reduced Tuition Charges in the Commonwealth's Institutions of Higher Education"

**PROJECT**

The legislature charged the Joint Subcommittee Studying the Issue of Determination of Eligibility for Reduced Tuition Charges to examine in-state and out-of-state tuition rates. These rates had frequently come under attack due to changes in financial aid policies, fiscal pressures on the state, and large populations of federal employees, military personnel and their dependents.

The objectives of this study were to:

- o Clarify the Commonwealth's policy on eligibility for reduced tuition charges;
- o Establish a uniform due process procedure for determining eligibility for reduced tuition charges;
- o Cooperate with the Council of Higher Education in revising the "Resident Tuition Guidelines"; and
- o Examine the interaction of the Commonwealth's policy on eligibility for reduced tuition charges and the State Council of Higher Education's proposed "percentage of cost" tuition and fee plan which would have out-of-state students bear 75 percent of the pupil share of costs. In-state students would bear the remaining 25 percent.

The study examined the laws and procedures of other states, and collected data on in-state and out-of-state students, appeals of residency status, due process procedures used by each institution, and the difficulties encountered in administering the reduced tuition policy.

**OUTCOMES**

The numerous problems encountered by the state and the institutions of higher education with the statute were identified.

An issues and alternatives paper was developed based upon the problems voiced by the various participants in the process. The paper, after much discussion and revision, evolved into House Bill #214 which was passed in March 1984.

**WASHINGTON  
1983-84 COST-SHARING AWARD**

**TITLE**

"Funding Higher Education in the State of Washington"

**PROJECT**

The formula for financing higher education in Washington had remained essentially intact since it was instituted in the mid-1960s. Conditions in the state which influence the operation of the formula, notably declining enrollments, have changed. These changes, coupled with new developments in the field of higher education finance and different state priorities, led the Temporary Committee on Educational Policies, Structure and Management to review the state's higher education policies.

The study focused on the following policy issues:

- o The need for enrollment policies;
- o Ways to provide positive incentives;
- o Ways to determine adequate support;
- o Ways to improve quality; and
- o Ways to redefine accountability along lines appropriate for the 1980s.

The committee hired two consultants for the study. Their analysis and subsequent legislative policy recommendations are based upon an extensive review of fiscal and enrollment data in Washington, an analysis of changes in the state's 1983-85 budget, numerous interviews, and a review of recent state and national proposals for change in higher education funding policy. The consultants also visited five state--Colorado, Florida, Kentucky, Tennessee, and Minnesota--to study their new higher education finance systems.

**OUTCOMES**

The authors found that formula funding for higher education in the nation had moved away from tight state controls toward more institutional autonomy. Most formulas relied heavily on costs, a budgetary concept in higher education which had come increasingly under attack. Their research indicated that institutions generally spent what they're given to spend. Furthermore, there was no conclusive evidence that institutions most subject to formulas were better managed, more productive, or more responsive to the public.

The consultants made extensive recommendations to the committee. The committee endorsed the findings and sent them to the legislature. The list of recommendations are as follows:

- o *Establishing State Policies and Goals.* The state should define the basic roles and missions of each branch of the higher education system, define and clarify the interrelationships between them, provide for governance and coordination within the total educational system, and affirm these policies through statutory means after extensive discussions with the public and with representatives of higher education.

- o *Measuring Adequacy and Quality.* The state and institutions of higher education should use measures of support that are significant indicators of adequacy, such as faculty salary levels, student/faculty ratios, and/or expenditures for administration, instruction, plant operations and the like. Adequate funding for each institution or subsystem of institutions should be an amount approximately equal to the average amount in a group of comparable institutions from other states. Enhanced quality should be defined as support levels for selected measures that is greater than the average for the same measures in the group of comparison institutions.
- o *Monitoring Policies for Higher Education.* The state's Council for Postsecondary Education should be given authority to adopt regulations that will carry out the statutory and budgetary intent of the state, to gather data on pertinent aspects of education, and to monitor the implementation of recommendations in this study. The state should also establish a forum for inter-organizational agreements on the data used to implement policies, and the applications of such data.
- o *Clarifying Policies for Funding Sources.* Institutions should be required to impose user fees to cover the costs of their research, community services, and other activities. All institutions should be allowed to increase their fees to all students 10 percent beyond the level of charges for Operating Student Fee Revenues, which should continue to be established by the legislature and the governor.
- o *Improving the Allocation of Resources.* The state should discontinue use of the traditional higher education finance formula and eliminate the appropriations controls established in the 1983-85 state budget. It should replace it with a simplified approach to appropriations that will permit maximum flexibility to the institutions for expenditure of funds. The state should appropriate all funds within specified categoricals.
- o *Funding Enrollment Changes.* The state should define an enrollment policy which eliminates purely fiscal incentives for growth and which is flexible enough to accommodate unanticipated demand. The policy should recognize the large proportion of fixed costs in the short run, and not inflict punitive reductions for enrollment declines. However, the institutions should not be "held harmless" for declines. Funding should remain constant for each fiscal year unless enrollment changes exceed 2 percent.
- o *Exploring New Alternatives for Quality Cooperation.* The state should provide monetary awards to institutions which provide superior programs. Funds should also be allocated to institutions to carry out joint projects.

**MANAGEMENT INFORMATION SYSTEMS FOR OVERSEEING SCHOOL FINANCE POLICIES**

**ALABAMA  
1980-82 COST-SHARING AWARD**

**TITLE**

"The Development of a State-Level Management Information System for Education Data"

**PROJECT**

The goal of this project was to develop a pilot program for an information management system for the local school system. Staff interviewed legislators and legislative committees, and searched data files from the State Department of Education and the Legislative Fiscal Office to ascertain the types of information that the legislature routinely requested. After developing a summary of the raw data needed, a data system consultant was brought in to design computer software to collect and program the information.

**OUTCOMES**

The study found that the State Department of Education already was collecting the data required by the legislature. The project was revised from one of data collection to one of centralization of timely data at the state level. Data systems programmers are in the process of designing an access to the raw data. In addition, an agreement has been reached to assure the timely input of raw data into the computer files. The study is developing a data dictionary to permit the Legislative Fiscal Office to manipulate the raw data and respond quickly to legislative information needs. The system will be operational on October 1, 1982 in time for the state's next budget cycle.



**MARYLAND  
1979-80 COST-SHARING AWARD**

**TITLE**

"Legislative Education Policy Information System"

**PROJECT**

The Legislative Policy Information System (LEPIS) is a computer software system which the state purchased to analyze education finance data. LEPIS is a combination of the School Finance Equalization Management System (SFEMS), developed by the Educational Testing Service, and the Statistical Analysis System (SAS). SFEMS has an aid allocation program which provides school finance simulations and a statistical analysis program unique to school finance. SAS provides correlations between economic, revenue, and other governmental expenditures; statistical treatments of various combinations of educational expenditures; information to help define costs and to determine any disparities in per pupil expenditures among districts; and formula analysis not preprogrammed on SFEMS.

Staff used the system to test various alternatives for the state's current expense formula, targeted aid, special education formula aid, and community college aid. The system also was used to obtain a composite picture of all aid, to analyze various budgets, and to analyze the net effects of the proposals outlined below.

**OUTCOMES**

The analyses produced on LEPIS were critical in developing a Joint Subcommittee on Education report for the Task Force on State-Local Fiscal Relationships. The Subcommittee made the following education finance policy recommendations:

- o *Current Expense Aid Formula.* The Subcommittee recommended changing from a real property assessable base adjusted to 50 percent of market value to an unadjusted data base. This would make the wealth component consistent with the method of property valuation conducted every third year and would accurately reflect taxable property wealth. It also suggested increasing current expense aid, based on the Governor's budget, by elevating the per pupil program level beyond \$1,017.
- o *Targeted Aid.* The Subcommittee recommended continuing the targeted aid program's current selection method, but suggested that the legislature modify distribution methods. It recommended that the local maintenance of effort requirement be based on a per pupil rather than an aggregate basis.
- o *Special Education Aid Formula.* The Subcommittee suggested phasing in a new formula, to replace the one based on total school enrollment and a 1976 special education cost index, that would equalize aid based on handicapped enrollment.

- o *Vocational-Technical Set-Asides.* The Subcommittee recommended that the state continue to earmark current expenditure aid in each subdivision based on a wealth equalization formula. It recommended continuing local maintenance of effort provisions, but suggested substituting the current requirement that local expenditures in this category be escalated by a percentage equivalent to local education budget increases, with the option of increasing spending either on a per pupil or on an aggregate basis.
- o *Teacher Social Security "Recycling."* The Subcommittee recommended sustaining the 1981 funding level for this program, and basing distribution on enrollment modified by the education revenue/expenditure index. In this way, jurisdictions making less than an average effort can be distinguished from those with low wealth.
- o *Community colleges.* The Subcommittee recommended modifying the current formula for community college funding by adding two new flat grants, and by increasing the existing per full-time equivalent student aid rate. They also recommended further study in the area of remedial education.
- o The Subcommittee prioritized its recommendations based on the current state-local fiscal relationships, and suggested a one-year safety net for one jurisdiction which would receive less state aid than previously under the Subcommittee's proposals.

**NEW JERSEY  
1979-80 COST-SHARING AWARD**

**TITLE**

"Interactive Support System for Policy Analysis"

**PROJECT**

This project established an information system for education data and led to the purchase of a computer software system for education policy analysis called the Interactive Support System for Policy Analysis (ISSPA). ISSPA is a flexible data management system which legislators and staff can use with a minimum of instruction and can easily access to update material. It is capable of analyzing the impact of formula changes on local school districts and of providing complex information for legislators in usable formats.

**OUTCOMES**

The state utilized the computer software in several ways:

- o The Office of Legislative Services analyzed the impact on school districts of the influx of Cuban and Haitian refugees. When it became apparent that districts with less than 1500 refugee pupils would not receive federal refugee aid, ISSPA was used to test alternative aid formulas under very tight timelines in order to supplement the lost Federal aid.
- o The Office conducted an analysis of a previously commissioned report on "budget caps" for schools. Staff found that although budget caps were an effective mechanism for fiscal restraint, because of varying rates of enrollment decline, they did not promote statewide equalization of per pupil expenditures. The commissioned report recommended certain formula changes to counterbalance this problem, but did not show legislators how the alterations would affect local districts. Staff entered the proposed changes into the ISSPA system and projected the funding difference.
- o Legislative staff used ISSPA to project the effects of a change in budget cap calculations on local districts.
- o Staff was also able quickly to arrange and display data to back up a debate on the relative amount of state aid provided to each county and region.
- o On a quick turnabout basis, staff projected the impact on districts on the Governor's 1981 proposal to trim \$64 million dollars from the state "minimum aid" program.

In addition this pilot project opened up the possibilities of using ISSPA for more in-depth analysis and long-range oversight activities.

**NEW YORK  
1976-77 COST-SHARING AWARD**

**TITLE**

"The New York State Aid Management Information System for Education"

**PROJECT**

The New York Joint Legislative Task Force on Education State Aid Information Needs was established to develop 1) a school finance data base and 2) and on-going system to analyze the state's education policies.

In its study the Task Force detailed the reasons for establishing a computerized data base for education finance policy and outlined the data needed to build an efficient system. Its goals were: 1) to develop a computerized data base accessible to legislators and staff, and 2) to design a readable computer format understandable to those without an extensive background in various state aid distribution methods.

In addition the Task Force also developed a Federal Aid Project to review the relationship between federal and state aid in New York and to develop legislators' knowledge of federal education aid policies.

**OUTCOMES**

The legislature contracted with the Applied Research Center (ARC) to supervise the installation of the computer software system called the State Aid Management Information System (SAMIS). SAMIS operated from a comprehensive data base which contains four main functional modules: the Simulation/Projection Module; the Information Retrieval Analysis Module; the Glossary of School Finance Terms Module; and the Data Base Update and Editing Module.

The Task Force activities for reviewing state education aid were divided into four parts:

- 1) The construction of a state education aid data base specifically designed for state legislators.
- 2) The outline of a handbook which showed the effects of state aid.
- 3) The publication of a policy paper about the federal role in education, its growth, and the issues of educational control.
- 4) A Roundtable Series on Federal Education Aid to New York State designed to expand legislators' knowledge of federally-aided education programs in the state.

## 1982 UPDATE

Beginning in 1974, the legislature was faced with numerous court challenges to its school finance law. This project was one of the legislature's initial attempts to develop a system for assessing finance alternatives. Though not fully utilized, it provided new ways to view state aid information, to understand the workings of the aid formula, and to refine the state education agency's data. Importantly, it helped to assess the real challenges in developing an adequate simulation model for predicting the consequences of a wide range of policy alternatives.

**GENERAL EDUCATION REFORMS AND OVERSIGHT**

**ALABAMA  
1985-86 COST-SHARING AWARD**

**TITLE**

"A Study of the Needs and Conditions in Alabama Relative to Education Reform as Set Forth by the Education Reform Act of 1984"

**PROJECT**

Alabama's Education Reform Act of 1984 created the Governor's Education Reform Commission. Five major committees formed by the commission were charged to make recommendations to the governor and legislature on how to best improve education in Alabama. They were: the Criteria and Performance Committee, the Educational Finance Committee, the Committee to Study Critical Needs, the Committee to Study Teacher Training Programs and Institutions, and the Committee to Look at Revising the State Tenure Laws.

The cost-sharing grant was awarded to the Governor's Education Reform Commission for information gathering by consultants hired for each of the committees.

In the case of the Criteria and Performance Committee, one consultant summarized major findings of effective school research as it related to school operations and the evaluation of the teacher/learning process. Kentucky and Tennessee consultants discussed the administrator/supervisor evaluation system in their states. These experts and the information they provided facilitated dialogue among the differing education factions in Alabama, enabling policymakers to reach consensus on an evaluation plan. A major responsibility of the committee was to develop and establish a performance-based career incentive program for public school administrators in Alabama.

The Committee on Educational Finance studied three topics. The first, studying revenues from a state lottery system, led to an introduction of a bill in the legislature, allowing an Alabama state lottery. This drew heavy opposition.

The second study, on calculating wealth indices for each county and/or school system, was contracted out to the Center of Business and Economic Research at the University of Alabama, and is near completion.

The third topic, on financial incentives to improve education quality in local systems, led to a call for further study to identify systems which provide inadequate instruction, for cost estimates on consolidating schools and for a commitment to providing funds to bring deficit school systems to an acceptable level.

The Critical Needs Committee identified computer learning/literacy as the number one subject for in-service programs offered at the eleven regional in-service centers for the state's 34,000+ teachers and administrators.

## OUTCOMES

Recommendations from the Committee on Teacher Education and Preparation were:

- o A \$5 million fund to provide low interest loans should be established;
- o Academic support for students who wish to become teachers must be provided to insure entry into programs of teacher education;
- o There must be no funding of discrimination;
- o Rigorous academic programs must be maintained for all prospective teachers;
- o College credit must not be given for non-college-level academic study; and
- o Programs which graduate fewer than ten students in the teacher education program or in the related academic areas over any two consecutive two-year periods should be considered for elimination.

The Committee on Tenure Law hired two attorneys to advise the committee on tenure laws. Their drafts incorporated extensive changes including abolishing measures to reduce costs.



**NEW HAMPSHIRE  
1986-87 COST-SHARING AWARD**

**TITLE**

"Comprehensive Study of the Functions and Effectiveness of the School Administrative Unit System of the State of New Hampshire"

**PROJECT**

In response to a request from the Joint Legislative Committee of the New Hampshire General Court, the Center for Resource Management (CRM) conducted a study of the functions and effectiveness of the School Administrative Unit (SAU) system. The study was designed to: 1) review and analyze the current structure and functions of the SAU system and its relationship to the State Board of Education; 2) examine the causes and effects of recurrent requests for withdrawals of school districts from SAUs; 3) analyze the potential impact of restructuring the SAU system; and 4) recommend criteria and procedures for SAU organization and dissolution or reorganization.

**OUTCOMES**

The CRM study team acquired extensive evidence from public hearings, surveys, site visits, case studies, and interviews with New Hampshire stakeholder representatives at the state and local levels, as well as from existing studies and reports. This evidence yielded an array of findings which reveal essential features of SAU services, staffing, and funding, the primary benefits associated with existing SAU structures, and the types of problems that have emerged in specific situations. The CRM study also analyzed SAU reorganizations over the past decade as a way of determining the rationales used to justify reorganization petitions and the structural and financial results of reorganization.

Based on the study findings, the CRM study team developed recommendations in five major areas: SAU Staffing; SAU Services; School Effectiveness and SAU Organization; SAU Reorganizations; and, Funding and Related Decision-Making. The recommendations were:

*SAU Services:*

- o The State Board of Education should establish minimum requirements for SAU services.

*SAU Staffing:*

- o The State Board of Education should revise minimum staffing standards for SAUs.
- o Certification standards for superintendents should be revised.
- o SAU boards should be authorized to offer multi-year contracts (not tenure) to superintendents.

### ***School Effectiveness and SAU Organization:***

- o The Governor and legislature should strengthen the capacity of the State Education Agency (SEA) to provide technical assistance and support to SAUs as part of New Hampshire's school improvement initiative.
- o The State Education Agency should provide technical assistance for SAUs in several key areas that influence the effectiveness and efficiency of administrative and instructional services.

### ***SAU Reorganization:***

- o The New Hampshire General Court should address several areas that affect the structure and operations of SAUs including: raising the number of SAUs to 75 (from 60); confirming the state board's responsibility for making reorganization decisions; requiring the state board to conduct a study of the SAUs.
- o The State Board of Education should address several areas that affect the operations of SAUs including: developing planning guidelines for SAU reorganization; encouraging the formation of Cooperative School Districts and voluntary collaboratives; and expanding reorganization procedures and existing SAU regulations to require a more detailed planning process for the withdrawal of a district from an SAU.

### ***Funding and Related Decision-Making:***

- o The General Court should appropriate sufficient funds to support specific recommendations from this study including: 1) reinstating the provision of direct financial assistance to SAUs on an equalized basis; 2) providing funds necessary to meet any additional costs to some SAUs/districts that would result from mandating proposed minimum staffing standards for SAUs; 3) providing funds for one SEA staff person whose full-time responsibility is provision of technical assistance to SAUs; 4) providing funds to support technical assistance visitation teams to examine and to assist SAUs and member districts in problem solving and planning.
- o The General Court should: 1) revise the formula for determining districts' proportional shares of an SAU budget; 2) retain existing language in RSA 189:26 regarding use of the weighted vote in SAU decision-making; 3) revise RSA 189:47 to specify that the SAU board in adopting the SAU budget shall not add any new service to the budget unless a majority of the member school districts representing not less than a majority of the total pupils in the SAU have voted favorably on the establishment of the service.

**SOUTH CAROLINA  
1985-86 COST-SHARING AWARD**

**TITLE**

"An Educational Policy Study to Strengthen Program Evaluation and Legislative Oversight of Education"

**PROJECT**

The purpose of this study was to identify and describe strategies by which legislative oversight would be effectively conducted, with focus on the Select Committee to Oversee the Implementation of the Education Improvement Act of 1984, created "in order to assist in, recommend, and supervise the expenditure of funds for the Education Improvement Act."

The Select Committee has defined its role as being active in the implemen-  
tation of the programs, and not just the review of the programs after  
implementation.

As strategies used by the Select Committee were reported and gaps in oversight activities were identified, recommendations were made to fill the gaps. Model legislation establishing the membership, responsibilities, and operational parameters of a legislative oversight committee was developed from the statutes of South Carolina, Tennessee and Texas and the recommendations resulting from this study.

**OUTCOME**

The recommendations were:

- o The Select Committee should review the statutory grant of the authority to the committee and recommend an amendment of the statute which clearly establishes the committee's responsibility and authority.
- o The Select Committee should (a) develop a system of oversight that is more proactive than reactive in nature--that is, define the issues and concerns of the Committee beyond initial implementation of specific program components; and (b) establish guidelines for staff to follow in setting the agenda--especially, for the inclusion of the programs for which the Select Committee does not have a specific, statutorily assigned responsibility.
- o The Select Committee should establish procedures for (a) monitoring action by state agencies and their governing boards upon the Committee's recommendations; and (b) monitoring the activities of the standing committees.
- o The Select Committee should adopt a formal procedure by which task forces, professional organizations and committees or groups of private individuals may express their concerns and positions to the Committee and may request an opportunity to appear on the committee's agenda.

- o The Select Committee should involve, whenever possible, the members of the standing committees in the activities of the Select Committee.
- o The Select Committee should develop a system of on-going distribution of information to the members of the General Assembly in addition to the Committee's annual report.
- o The Select Committee should (a) develop a philosophy about the various programs of the Education Improvement Act to assist the Committee's members in responding to amendments which the Committee has not had an opportunity to review; and (b) establish a procedure for addressing amendments to the Education Improvement Act which have not been presented to the Select Committee.
- o The Select Committee should implement a staff structure that utilizes the talents and resources of other agencies, institutions of higher education and consultants to evaluate the concepts and specific proposals presented by sponsoring agencies.

In summary, the study recommended that clear lines of authority and a more proactive approach to legislative oversight be initiated in South Carolina and in other states utilizing implementation oversight committees. Other states are advised to provide staff to the committee as well as develop resource staffing relationships with other agencies of state government. Oversight committees are advised to communicate more frequently with the other members of the General Assembly and to provide information on specific programs in addition to the annual report prescribed by law.

**TENNESSEE  
1986-87 COST-SHARING AWARD**

**TITLE**

"A Study to Evaluate Progress Toward Achieving the Goals of Section 99 of the Tennessee Comprehensive Education Reform Act"

**PROJECT**

The Tennessee Project, implemented for the Tennessee Legislative Oversight Committee on Education by the State Board of Regents, had two goals.

*Goal #1.* To establish a mechanism by which legislators and educators are provided feedback about student mastery of basic academic competencies as set out in Chapter II of Academic Preparation for College, the College Board.

*Goal #2.* To establish a collaborative network enabling legislative and education personnel to devise strategies for the effective use of feedback data in improving the quality of K-12 educational programs.

**OUTCOMES**

Both of the goals of the project were accomplished.

The first goal was accomplished through the development of a database consisting of test data collected by administering the Academic Assessment and Placement Program (AAPP) to incoming freshmen at the 20 Tennessee state colleges and universities. Ultimately to be used as the baseline for future comparison, this data was compiled in a report that was widely disseminated in the form of an AAPP Feedback Report. Subsequent reports will be issued annually from 1987 through 1979 and will be used as one indication of the "measurable progress" intended in section 99 of the CERA.

The second goal was accomplished through activities of the Tennessee State-wide School-College Collaborative for Educational Excellence. This collaborative held nine feedback workshops during the fall of 1986 to share data generated by the AAPP. Over 500 educators participated in the workshops. Workshop leaders were trained for each of the nine workshops. They have continued to help the high schools develop ways to effectively use the reports. Since many of the workshop leaders were also active in other activities of the collaborative the network was effectively established and linked to other related educational initiatives in Tennessee.

In summary, this project provided assessment data to the legislature, and usable information to high schools. It also established ongoing communication channels among the various agencies.

## 1987 UPDATE

Even though legislative action based on the comparative data will occur during the 1988 session at the earliest, several other constituent groups have already begun using the data. They include:

- o Principals and teachers who used the information to identify areas of academic strength and weakness in existing programs based on the performance of their graduates. For example, individual schools are using the data to determine whether a student placed in remedial mathematics had completed an algebra course during high school.
- o School district curriculum supervisors and specialists who used the data to identify particular skill areas in which their curricula appear most-least effective. For example, are students more successful at categorizing ideas or at making analogies on the Logical Relationships test?
- o State Department of Education curriculum consultants who used the data to plan 1987-88 inservice programs and develop curriculum guides for public school teachers.
- o State Board of Regents' college and university faculty who used the data to plan Remedial/Developmental curricula which focused on removing student deficiencies in mastery of the competencies that were identified by the College Board and measured by the AAPP examinations.

**APPENDICES**

**APPENDIX A**  
**STATE LISTING OF**  
**COST-SHARING AWARD SUMMARIES, 1976-1988**

Alabama (1980-82)	123
Alabama (1985-86)	131
American Samoa (1982-83)	3
Arizona (1978-79)	65
Arkansas (1982-83)	5
Arkansas (1987-88)	69
California (1986-87)	51
Colorado (1985-86)	85
Connecticut (1985-86)	7
Delaware (1985-86)	86
Delaware (1987-88)	87
Florida (1976-78)	8
Florida (1985-86)	89
Georgia (1978-79)	65
Georgia (1980-82)	9
Illinois (1976-78)	11
Illinois (1980-82)	15
Illinois (1985-86)	70
Illinois (1987-88)	72
Indiana (1980-82)	53
Iowa (1982-83)	16
Kansas (1976-77)	18
Kansas (1983-84)	74
Kansas (1986-87)	76
Maine (1982-83)	20
Maine (1985-86)	91
Maryland (1979-80)	124
Maryland (1980-82)	113
Massachusetts (1982-83)	114
Michigan (1975-76)	21
Minnesota (1986-87)	92
Mississippi (1986-87)	22
Missouri (1975-76)	24
Missouri (1982-83)	26
Missouri (1986-87)	94



Nebraska (1985-86)	61
Nebraska (1987-88)	98
New England States (1983-84)	78
New Hampshire (1986-87)	133
New Jersey (1979-80)	126
New York (1976-77)	127
North Carolina (1982-83)	54
North Carolina (1987-88)	96
North Dakota (1986-87)	27
Ohio (1975-76)	29
Oklahoma (1979-80)	30
Oklahoma (1987-88)	32
Oregon (1983-84)	80
Pennsylvania (1978-79)	34
Rhode Island (1985-86)	100
South Carolina (1980-82)	55
South Carolina (1985-86)	135
South Dakota (1987-88)	35
Tennessee (1980-82)	115
Tennessee (1983-84)	102
Tennessee (1986-87)	137
Texas (1978-79)	45
Utah (1976-77)	56
Utah (1987-88)	104
Vermont (1982-83)	36
Vermont (1985-86)	37
Vermont (1987-88)	106
Virginia (1983-84)	117
Washington (1979-80)	47
Washington (1983-84)	118
West Virginia (1983-84)	108
Wisconsin (1978-79)	38
Wisconsin (1982-83)	39
Wyoming (1986-87)	41

## APPENDIX B

### NCSL/OERI Cost-Sharing Awards

#### MASTER LIST OF PROJECT DIRECTORS AND CONTACT PERSONS

Alabama (1980-82) Ms. Joyce Bigbee, House Fiscal Officer, Legislative Fiscal Office, Room 7, State Capitol, Montgomery, AL 36130 205/261-3057

Alabama (1985-86) Mr. Rex Cheatham, Governor's Education Reform Commission, 231 Montgomery St., Montgomery, AL 36104 205/261-3225

American Samoa (1982-83) Ms. Sara Elans, Office of the Legislative Counsel, POB 127, Pago Pago, American Samoa 96799 011-684/633-4694

Arizona (1978-79) Ms. Sally Arellano, Research Analyst, Senate Education Committee, 1700 West Washington St., Phoenix, AZ 85007 602/255-3174

Arkansas (1982-83) Mr. Earl Willis, Coordinator, Commission on Public Elementary/Secondary School Finance, POB 591, Dewitt, AR 72042 501/371-2907

Arkansas (1987-88) Mr. Tony Minicozzi, Bureau of Legislative Research, Room 315, State Capitol Bldg., Little Rock, AR 72201 501/371-1937

California (1986-87) Ms. Kim Connor, Education Policy Consultant, Senate Office of Research, 1100 J. St., Ste 650, Sacramento, CA 95814 916/445-1727

Colorado (1985-86) Dr. Calvin Frazier, Commissioner of Education, Colorado Department of Education, 201 E. Colfax Ave., Denver, CO 80203 303/866-6806

Connecticut (1985-86) Mr. Allan Green, Director, Office of Legislative Research, Legislative Office Bldg, 18-20 Trinity St., Hartford, CT 06106 203/566-8400

Delaware (1985-86) Ms. Paula Lehrer, Administrative Asst., Democratic Caucus, House of Representatives, 4 Legislative Hall, Dover, DE 19901 302/736-4182

Delaware (1987-88) Ms. Peggy Dee, State Supervisor, Department of Public Instruction, Townsend Building, POB 1402, Dover, DE 19903 302/736-4667

Florida (1976-78) Mr. Herman Myers, Staff Director, Senate Education Committee, Room 38, Senate Office Bldg, Tallahassee, FL 32301 904-488-7609

Florida (1985-86) Ms. Dorothy Routh, Policy Analyst, Office of the Senate Pres. Pro Tem, 405 Senate Office Bldg, Tallahassee, FL 32301 904/487-5068

Georgia (1978-79; 1980-82) Dr. James Mullins, Executive Director, Georgia Educational Improvement Council, Room 656, 7 Martin Luther King, Jr. Drive, S.W., Atlanta, GA 30334 404/656-3206

Illinois (1976-78) Dr. G. Alan Hickrod, Director, Ctr for Education Finance, DeGarmo Hall, Illinois State Univ., Normal, IL 61761 309/436-5415

**Illinois (1980-82)** Dr. David Elder, Exec. Director, Illinois School Problems Commission, 300 W. Monroe St., Springfield, IL 62706 217-782-6900

**Illinois (1985-86)** Mr. Ralph Nickell, Sr. Research Assoc., Ill. Commission in Intergov'tal Coop., 707 Stratton Bldg, Springfield, IL 62706 217/782-3374

**Illinois (1987-88)** Mr. David Griffith, Commission on Intergovernmental Cooperation, 707 Stratton Bldg., Springfield, IL 62706 217/782-6924

**Indiana (1980-82)** Mr. Chuck Mayfield, Budget Analyst, State Budget Office, Rm 212, State House, Indianapolis, IN 46204 317/232-5627

**Iowa (1982)** Dr. Virginia Sheffiels, Utilities Specialist, IA State Commerce Comm., Lucas Office Bldg, Mes Moines, IA 50319 515/281-3621

**Kansas (1976-78)** Mr. Richard Ryan, Director, Legislative Research Dept., Room 545-N, State House, Topeka, KS 66612 913/296-4396

**Kansas (1983-84)** Ms. Carolyn Rampey, Principal Analyst, Kansas Legislative Research Dept., Rm 545-N, State House, Topeka, KS 66612 913/296-4404

**Kansas (1986-87)** Mr. Ben Barrett, Assoc. Director, Kansas Legislative Research Dept., Rm 545-N, Statehouse, Topeka, KS 66617 913/296-3181

**Maine (1982)** Dr. Lars Rydell, Legislative Assistant, Office of Legislative Assistants, State House, Augusta, ME 04333 207/289-1670

**Maryland (1979-80)** Dr. Nick Wilson, Admin. Analyst, Dept. of Fiscal Services, Leg. Services Bldg, Rm 200, Annapolis, MD 21401 301/858-3766

**Massachusetts (1982-83)** Dr. Roger Schinness, V. Chancellor, MA Bd of Regents of Higher Ed., 1 Ashburton Place, Boston, MA 02108 617/727-0616

**Michigan (1975-76)** Dr. James Phelps, Assoc. Superintendent, Bureau of Elementary/Secondary Educ., POB 30008, Lansing, MI 48909 517/373-3909

**Minnesota (1986-87)** Ms. Nancy Bunnett, Sr. Planning Assoc., MN Higher Educ. Coordinating Bd., Suite 400, 550 Cedar St., St. Paul, MN 55101 612/296-9665

**Mississippi (1986-87)** Dr. Ronald Love, Bureau Director, Bureau of Planning & Policy, MS State Dept. of Ed., POB 711, Jackson, MS 39205 601/359-3598

**Missouri (1975-76)** The Honorable Wayne Goode, State Representative, 7335 Huntington Drive, Normandy, MO 63121 314/751-2151

**Missouri (1982)** Dr. Darrell Jackson, Director, House Research Staff, MO House of Representatives, Jefferson City, MO 65101 314/751-2979

**Missouri (1986-87)** Mr. B. Darrell Jackson, Dir. of Research/Anne Walker, Asst. Dir. of Research, MO House, Jefferson City, MO 65101 314/751-2979

**Nebraska (1985-86)** Mr. Dick Hargesheimer, Dir. of Research, Legislative Research Division, State Capitol, Lincoln, NB 68509 402/471-2221

**Nebraska (1987-88)** Mr. Dick Hargesheimer, Director, Legislative Research Division, 7th Floor, State Capitol, Lincoln, NE 68509 402/471-2221

**New England (1983-84)** Ms. Carolyn Morwick, Dir., Caucus of New England State Legislatures, 45 Temple Place, Boston, MA 617/357-9588

**New Hampshire (1986-87)** Ms. Ann V. FitzGerald, Committee Researcher, House Educ. Committee, Legislative Office Bldg, Concord, NH 03301 603/271-3600

**New Jersey (1979-80)** Mr. Harold E. Berkowitz, Research Associate, Office of Leg. Services, Rm 103, State House Annex, Trenton, NJ 08625 609/292-4661

**New York (1976-78)** Mr. Frederick Goossen, Society Hill Linens, 7 Glove St., Gloversville, NY 12078 518/725-7338

**North Carolina (1982-83)** Ms. Hilda Highfill, Sr. Fiscal Analyst, Leg. Services Commission, State Leg. Bldg, Raleigh, NC 27602 919/733-4910

**North Carolina (1987-88)** Mr. John Dornan, President, The Public School Forum, 117 Glenwood Avenue, Raleigh, NC 27603 919/832-1584

**North Dakota (1986-87)** Mr. Merle T. Pederson, Counsel, Legislative Council, State Capitol, Bismarck, ND 58505 701/224-2916

**Ohio (1975-76)** Mr. William Harrison, Director, Educ. Program, NCSL, 444 N. Capitol St., NW, #203, Washington, DC 20001 202/624-5400

**Oklahoma (1979-80)** Ms. Beverly Blake Borthick, Fiscal Analyst, Rm 305, State Capitol, Oklahoma City, OK 73105 405/521-3201

**Oklahoma (1987-88)** Ms. Pam Deering, State Department of Education, 2500 N. Lincoln Blvd., Oklahoma City, OK 73105-4599 405/521-3467

**Oregon (1983-84)** Mr. Jock Mills, Research Assoc., Oregon Leg. Assembly, RM S420, State Capitol, Salem, OR 97310 503/378-8871

**Pennsylvania (1978-79)** Dr. Sigmund Smith, Executive Director, Legislative Office for Research Liaison, 223 S. Office Bldg, POB 218, Harrisburg, PA 17120 717/787-8948

**Rhode Island (1985-86)** Ms. Carolyn Benedict Drew, Executive Director, The Samaritans of RI, 33 Chestnut St, Providence, RI 02903 401/272-4243

**South Carolina (1980-82)** Ms. Joy Sovde, Consultant, Box 11205, 1306 Main Street, Columbia, SC 29211 803/254-0041

**South Carolina (1985-86)** The Honorable E. Crosby Lewis, Chair, Select Committee on Implementary Ed. Improvement Act of 1984, Rm 519, Blatt Bldg, Columbia, SC 29211 803/758-3833

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