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ABSTRACT

Teaching all students to high standards may not be achievable with the way the vast bulk of schools in the United States are organized and managed. Under current school structures and management practices, marginal improvements are possible; significantly raising student achievement is not. Accomplishing this requires dramatic improvements that involve adopting powerful, high-performance school designs, for example, those offered by New American Schools. This paper focuses specifically on one aspect of this challenge: determining the cost of each New American Schools design and how to pay for it. It covers rethinking funding for reform, and demonstrates why the New American Schools designs are affordable for most schools. (Contains 21 references.) (DFR)

New American Schools

How to Rethink School Budgets to Support School Transformation

ED 450 478

Allan Odden

Can schools and school districts afford the assistance needed to help them transform their schools into high-performance organizations? How would resources be reallocated? How do we rethink funding for reform? Researcher Allan Odden explains why the New American Schools designs are affordable for most schools and offers help in finding the dollars to realize the goal of providing a high-quality education for every student.

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Getting Better by Design

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VOLUME 3



EA 030912



New American Schools

New American Schools (NAS) is a dynamic coalition of teachers, administrators, parents, community and business leaders, policy makers, and experts from around the country committed to improving achievement for all students by dramatically changing America's classrooms, schools, and school systems.

Unlike many reforms that are add-on programs or isolated projects, NAS designs aim to improve the whole school, from curricula and instruction to funding and community involvement.

Recognizing that one size doesn't fit all schools and communities, NAS offers a choice of different designs—blueprints—for helping all students achieve at high levels. (For information on each design, turn to the inside back cover.)

New American Schools has clear and consistent goals:

- ◆ Establish supportive and assistance-oriented school systems.
- ◆ Develop school and teacher capacity to teach all students to high academic standards.
- ◆ Spend resources wisely with an eye to student results.
- ◆ Build broad and deep community support for education improvement and excellence.
- ◆ Make America's public schools places where all students excel.

New American Schools is results-oriented.

In a short period of time, NAS has generated impressive results. In many schools using a NAS design:

- ◆ students are producing higher-quality work, achieving at higher levels, and showing improvement on standardized tests and other measures of performance;
- ◆ discipline problems are down and student attendance and engagement are up;
- ◆ both teacher enthusiasm and community involvement are on the rise; and
- ◆ student achievement is improving quicker than conventional wisdom suggests is possible.

New American Schools helps partner districts restructure.

To overcome traditional barriers to school excellence, NAS provides focused assistance to its district partners in five key areas:

- ◆ rethinking school finance, including investment funding and resource reallocation strategies;
- ◆ revamping professional development infrastructures to support whole-school transformation;
- ◆ setting high academic standards and linked assessments;
- ◆ giving schools authority to make decisions about curriculum, staff, and spending as well as holding them accountable for results; and
- ◆ engaging parents and the public in improvement efforts.

New American Schools believes in shared accountability.

The foundation of NAS is a strong partnership built on shared responsibility for results. Clearly defined roles link partners to one another and to results. All stakeholders in a NAS community—teachers, administrators, district leaders, parents, NAS Design Teams—are expected to take responsibility and to be held accountable for helping to improve student achievement.

NAS partners also commit to regular and rigorous assessment of their performance, resulting in the sound business practice of continuous improvement. The RAND Corporation is the independent evaluator of the New American Schools' effort.



How to Rethink School Budgets to Support School Transformation

Allan Odden

Allan Odden, Ph.D.

Dr. Odden is Professor of Educational Administration at the University of Wisconsin-Madison. He is also Co-Director of the Consortium for Policy Research in Education (CPRE), a national research center funded by the U.S. Department of Education. CPRE is a consortium of the University of Wisconsin-Madison, Pennsylvania, Harvard, Michigan, and Stanford universities. He is director of the CPRE Education Finance Research Program and a principal investigator for the CPRE Teacher Compensation project, funded by the Pew Charitable Trusts and the Carnegie Corporation.

Dr. Odden is an international expert on education finance, school site-based financing, educational policy, school-based management, teacher compensation, district and school decentralization, and educational policy implementation. He is currently directing research projects on school-based finance, school-based management, and teacher compensation.

Teaching all students to high standards is an ambitious goal that may not be achievable with the way the vast bulk of schools in the United States are organized and managed today. Under current school structures and management practices, marginal improvements—“efficiencies”—are possible. But progress on a larger scale—significantly raising student achievement—probably is not. To accomplish this goal, dramatic improvements that involve adopting powerful, high-performance school designs, such as those offered by New American Schools (NAS), will generally be required.

This paper focuses specifically on one aspect of this challenge: determining the cost of each New American Schools design and how to pay for it.

Funding Excellence: The Cost of NAS Designs

To understand the costs involved in implementing a particular NAS design, it's important to understand what a school or district is “purchasing.” First, the school is not buying a program to be layered on top of what the school already does. It's not adding on a few new features. Restructuring to a NAS design involves discarding ineffective practices and building on strong ones to create a more successful school.

Second, most NAS designs require some kind of regrouping of students from more traditional

approaches, as well as greater involvement of classroom teachers in managing the school. These changes require different strategies for providing instructional services and for running the school. Teachers and administrators need training in using new strategies; the cost of the design includes such training.

Third, and perhaps most important, the focus of each NAS design is a high-quality, standards-based curriculum. This is not something a school can compromise on; it is the heart of each NAS design. Here, the costs are

“To significantly raise student achievement, dramatic improvements that involve adopting powerful, high-performance school designs, such as those offered by New American Schools, will generally be required.”

the “ingredients”—such as the staffing, instructional materials, teacher training, and time—required to develop and teach the curriculum.

With those key features in mind, let’s examine the 1996–97 costs of seven of the eight NAS school designs. (For a brief overview of each NAS design, see the back cover. The Los Angeles Learning Centers’ design is not included in this examination.) It is important to

note that these costs will vary depending on the resources that are available at a particular school. For example, if a school has sophisticated technology, the cost will be less than for a school with antiquated technology. Also, as designs evolve, costs are likely to change.

The Cost of Staffing and Services Geared to Success: Seven Models

Each NAS design requires a core staff of one principal and 20 teachers for a school of 500 students, with about 25 students per class. That’s significantly less staffing than what exists in most schools across the country. For example, most schools also employ a variety of specialists. In terms of funding, the core staff—at an average of

\$50,000 per teacher, including salary and benefits—is the first priority for use of resources.

In addition to this core staff, each design requires other essential personnel, and some require substantial equipment. The following very briefly describes the major ingredients required by each of the seven NAS designs¹ above the core of a principal and 20 teachers for the 1996–97 school year.

ATLAS Communities

1. a half-time instructional facilitator;
2. a school/health/family liaison team comprised of various combinations of a family liaison, guidance counselor, psychologist, social worker, educational specialist, nurse;
3. \$4,000 for instructional materials;
4. a small amount of technology, including a computer and Internet and e-mail connection;
5. \$28,000 of design-based professional development; and
6. a week-long summer institute for the entire staff that costs \$15,000 for stipends.

Audrey Cohen College

1. a full-time staff resource specialist;
2. \$7,900 for instructional materials and student trip costs;
3. \$36,700 of materials and design-based professional development; and
4. a week-long summer institute for the entire staff that costs \$15,000 for stipends.

Co-NECT Schools

1. a full-time technology coordinator/instructional facilitator;
2. substantial computer technologies, phased in over a number of years, costed at about \$125,000 per year;
3. \$53,500 of design-based professional development; and
4. a week-long summer institute and other activities that cost \$14,000 for stipends, substitutes, or travel.

¹ See New American Schools (1995) for more detailed descriptions of each design. Or visit our web site at www.naschools.org.

Expeditionary Learning Outward Bound

1. an instructional facilitator;²
2. funds for instructional materials and trips, some of which are one-time expenditures for the initial purchase of the items;
3. \$71,000 in design-based professional development; and
4. a week-long summer institute for the entire staff that costs \$15,000 for stipends.

Modern Red Schoolhouse Institute

1. a full-time technology coordinator (half-time in Year 1) and one art and one music teacher;
2. substantial computer technologies, phased in over several years at an annual cost of \$125,000;
3. \$70,000 in design-based professional development; and
4. a week-long summer institute for the entire staff and other training experiences that costs \$29,000 for stipends or substitute teachers.

National Alliance for Restructuring Education

1. a school-leadership team including a lead person for each of the key five task areas: standards and assessment, the learning environment, public engagement, community services, and high-performance management;
2. materials on teaching students to standards and use of the New Standards assessments;
3. participation in a national conference on standards-based teaching and leadership; and
4. work through the district with the National Alliance for ongoing professional development and training at a cost of \$37,000 annually, \$24,000 of which is a district-paid participation fee.

Roots and Wings

1. a full-time instructional facilitator for a school with 100 percent of students from low-income families, or a half-time instructional facilitator for a school with 50 percent of students from low-income families;
2. a half-time family liaison;

3. four tutors for a school with 100 percent of students from low-income families, or two tutors for a school with 50 percent of students from low-income families;
4. \$26,000 in instructional materials; and
5. \$18,000 in design-based professional development.

As shown in Table 1 (pages 4–5) and Table 2 (pages 6–7), these staffing, materials, and professional development costs are much less than the additional ingredients and costs (above the core staff of one principal and 20 teachers) already in place in most schools across the country.

The cost data are based on several assumptions. First, several of the specific components of each design are lumped into major categories; therefore, the descriptive literature for each NAS design should be read carefully for schools to fully understand the nature of each design and the specific ingredients and strategies it requires.

Second, for purposes of discussion, the average cost of a licensed professional in a school is figured at \$50,000, including salary and benefits.

Third, the data represent the first-year costs for each NAS design, although most designs are implemented over a three-year period. Some designs cost more in the first year and then taper off; others cost more once restructuring really gets underway. But none of the design costs vary dramatically over the first three years of implementation, so the figures in the tables provide an overall average estimate of the ingredients and core costs that need to be financed.

Fourth, since the data reflect the additional ingredients and their average extra costs for a school of 500, resource levels and costs will be higher for schools with more students and lower for schools with fewer students. Schools will need to determine how their specific costs will vary depending on their enrollment.

“ . . . the focus of each NAS design is a high-quality, standards-based curriculum. This is not something a school can compromise on . . . ”

²ELOB finds this function is best fulfilled by several individuals working together as a team, rather than by one full-time individual. In some schools, these individuals work on the extra tasks for no extra money; in others, they are paid extra release time, which is a cost item. This figure includes this as a cost at the equivalent of one full-time professional.

Charting Expenses: Design-Based and Operations-Based

There are two types of costs schools face in implementing any NAS design. The first are out-of-pocket expenses paid to the Design Teams for expert design-based technical assistance and the unique materials for each design. One of the major advantages for schools implementing NAS designs is that they are able to retain the services of experts in the design to help them move through the two to four years it will take to restructure.

The second type of costs are operations-based—those for the specific ingredients of the selected design, such as the technology in Co-NECT and the tutors in Roots and Wings. There can be great differences in what a design “costs” depending on whether the school already has ingredients such as technology and tutors.

Table 1, right, shows the costs to engage the NAS Design Teams in providing schools with the design-based technical assistance and professional development that are key for a school to fully and effectively restructure itself, and for NAS design materials. These costs vary from \$32,000 for ATLAS; to about \$45,000 for Audrey Cohen, National Alliance, and Roots and Wings; to \$75,000 for Modern Red Schoolhouse and about \$85,000 for Expeditionary Learning Outward Bound. In staff-slot terms, the costs of design-based technical assistance range from

about 0.64 of a professional slot to 1.7 professional positions.

Table 2, page 6, shows the operating costs and the total overall costs for each design (including the design implementation costs from Table 1). Note that for ATLAS, the first total cost figure is for a school with 50 percent of its students

“One of the major advantages for schools implementing NAS designs is that they are able to retain the services of experts in the design to help them move through the two to four years it will take to restructure.”

TABLE 1

NAS DESIGN	ATLAS Communitie
COSTS	
Costs for Design-Based Assistance	\$28,000
Costs for Design-Based Materials	\$4,000
Total Costs for Design Teams	\$32,000

from low-income families and a half-time health team; the second figure is for a full-time health team in a high-poverty school. The same is true for Roots and Wings.

High-Standards Education at Reasonable Costs

What does Table 2 tells us about the cost of financing a high-quality, high-standards, whole-school design? The results are quite fascinating. To begin, the overall additional 1996–97 costs of these high-performance school designs are quite low. The last two lines of Table 2 summarize the total costs incurred by a school implementing each NAS design, first in terms of dollars, and then in terms of the number of staff slots—again assuming \$50,000 for each staff member—above core staffing. The staff slot version of the costs is the number of staff posi-

1996-97 FIRST-YEAR COSTS OF DESIGN-BASED ASSISTANCE FOR NAS DESIGNS*

Audrey Cohen College	Co-NECT Schools	Expeditionary Learning Outward Bound	Modern Red Schoolhouse Institute	National Alliance for Restructuring Education	Roots and Wings
\$36,700	\$53,500	\$71,000	\$70,000	\$37,000**	\$18,000
\$7,900	—	\$13,280	\$5,000	\$8,000	\$26,000
\$44,600	\$53,500	\$84,280	\$75,000	\$45,000**	\$44,000

*These were costs for 1996-97 school year and are subject to change.

**Includes \$24,000 to be paid by district as a participation fee.

tion dollar equivalents (above core staffing) each design requires. It is the number of staff positions that would need to be “traded” or redefined through resource reallocation to finance the necessary ingredients of each NAS design.

The total additional dollar costs range from just \$106,600 (including the \$24,000 participation fee) for National Alliance and \$114,600 (\$70,000 in operating costs and \$44,600 in Design Team services) for Audrey Cohen College, to \$354,000 (\$279,000 in operating costs and \$75,000 in Design Team services) for Modern Red Schoolhouse.

In terms of staff slots, the costs range from 1.7 for the National Alliance, to 2.2-3.2 for Expeditionary Learning Outward Bound, to 7.0 for Modern Red Schoolhouse. Put differently, the maximum number of extra staff positions beyond a core staff of one principal and 20 teachers, in terms of dollar equivalents, to staff

the most expensive of the NAS high-performance school designs is seven. Most schools employ more staff than this already. These costs are well within the reach of most U.S. schools, particularly schools with Title I funds. More specifics on financing NAS designs are presented later in this paper, beginning on page 9.

Professional Development: Key Cost for Each Design

A consistent aspect of all seven designs is the professional development provided by the Design Teams. Many traditional schools do not make substantial investments in the kind of professional development that research shows is essential to prepare teachers to help all students meet high standards, although training is a key ingredient for successfully implementing standards-based reforms.

For most of the designs, the professional development budget includes an average of approximately \$50,000 in design-based technical assistance and training (and some cost much less) and about \$15,000 for teacher stipends, mainly for summer institutes. Assuming schools spend \$6,000 per pupil on average, a 2.1 percent school set-aside would provide the dollars in ongoing training the average NAS design requires. Schools should budget a similar percent of dollars for ongoing professional development even after the NAS design is fully implemented, since teachers need to continuously update and expand their professional competencies to obtain new knowledge, strategies, and skills.

Some districts might choose to create district capacity to provide the professional development the Design Teams now offer. Schools would then “purchase” their design-specific training from the central office. However, structured, ongoing training for each design must be budgeted.

Rethinking Staffing: What Positions Are Essential?

Both NAS and traditional schools have a principal and classroom teachers as the base of their staffing structure and resource requirements. But traditional schools have additional staff members who, over time, have come to be assumed as necessary to run a school. They are not perceived as organizational fat and have been provided to schools for many years because they have been assumed to be critical to accomplishing school goals. The dilemma for schools that choose to implement a NAS design—as well as many other high-performance school designs—is that few, if any, of these resource people are part of the high-performance design. Let’s look at who these staff members are and why they are not considered essential to most NAS designs.

TABLE 2

NAS DESIGN	ATLAS Communities
COSTS	
Total Costs for Design-Based Assistance and Materials	\$32,000
Additional Staff: Instructional Facilitator, Technology Coordinator, Family Liaison, School Health/Family Outreach Team, Tutors	2.6 with 50% poverty; 4.6 with 100% poverty
Transportation for Students	—
Technology/Equipment	\$5,000 per year for 4 years
Teacher Stipends, Substitute Teachers, Travel	\$15,000
Total Operating Costs Converting Each Staff Slot by a Cost Figure of \$50,000	\$150,000–\$250,000
Total Including Design-Based Assistance, Materials, and Operating Costs	\$182,000–\$282,000
Total Costs in Staff Slots Pricing Each at \$50,000	3.6–5.6

1996-97 TOTAL ADDITIONAL COSTS OF EACH NEW AMERICAN SCHOOLS DESIGN

Audrey Cohen College	Co-NECT Schools	Expeditionary Learning Outward Bound	Modern Red Schoolhouse Institute	National Alliance for Restructuring Education	Roots and Wings
\$44,600	\$53,500	\$84,280	\$75,000	\$45,000*	\$44,000
1.0**	1.0	1.0**	2.5	1.0	3.6 with 50% poverty; 6.1 with 100% poverty
\$5,000	—	\$5,000	—	—	—
—	\$125,000 per year for 4 years***	\$10,000	\$125,000 per year for 3 years***	\$2,000	—
\$15,000	\$14,000	\$15,000	\$29,000	\$9,600	—
\$70,000	\$189,000	\$30,000–\$80,000	\$279,000****	\$61,600	\$180,000–\$305,000
\$114,600 (plus one-time district license fee of \$7,000)	\$242,500	\$114,280–\$164,280	\$354,000	\$82,600 (plus \$24,000 participation fee paid by district)	\$224,000–\$349,000
2.3 excluding license fee	4.9	2.2–3.2	7.0	1.7	4.5–7.0

Costs are for a school with 500 students in addition to a principal and 20 regular classroom teachers, or about 1 teacher for every 25 students.

* Includes \$24,000 participation fee paid by district.

** A lower cost figure does not include the school facilitator individual or team as a cost; the high cost figure does.

*** Technology costs could be covered by district or site funds; some technology might already exist, which lowers the cost.

**** Includes one art and one music teacher.

Regular Education Specialists

These are teachers who teach “special” classes, such as art, music, and physical education—particularly in elementary schools—as well as school librarians. At the high school, technical education and home economics teachers may be classified in the specialist category.

Many elementary schools also have reading and writing specialist teachers; some have math and science specialists. Numerous districts provide teachers with instructional aides who are paid from a general fund. There may be other regular education specialists in different districts and school budgets.

Except for Modern Red Schoolhouse, which has standards for art and music, none of these teacher specialists is *required* in NAS designs. This does not mean that NAS programs are not supportive of art, music, or other learning areas,

“The dilemma for schools that choose to implement a NAS design—as well as many other high-performance school designs—is that few, if any, resource people are part of the high-performance design.”

but they may teach these subjects in ways that don’t require a specialist. At the same time, no NAS Design Team would find most of these teacher specialists, such as art and music teachers, at odds with its design.

The key issue is one of priority—NAS and most high-perfor-

mance schools focus on mathematics, science, social studies, writing, and language arts. These specialist teachers simply are not a core element of the design and thus would have a secondary priority for budget resources. They would be funded after the extra NAS ingredients were budgeted and if additional money was still available.

The same would be true of teachers’ aides who, according to research, do not contribute to higher student achievement. It is often

argued that specialist teachers are needed to ensure “prep time” for regular classroom teachers. However, each NAS design includes alternative ways to provide common planning time for teachers that do not depend on specialist teachers.

Categorical Program Remedial Specialists

A second category of resources not generally required by NAS designs includes teachers and instructional materials or equipment financed with categorical funds from federal Title I, state compensatory education, desegregation, bilingual education, and a portion of the learning disabilities component of the special education budget. Most schools use these funds for specialists who provide extra math and reading assistance to small groups of students, for instructional assistants, and for basic-skills computer laboratories. Research has shown that this use of staff does not contribute to higher student achievement. None of the NAS designs requires any of these ingredients, and nearly all NAS designs explicitly urge schools to trade these resources for the ingredients of their unique programs.³

Pupil-Support Specialists

A third category of personnel generally not found in the NAS designs are pupil-support specialists—such as guidance counselors, deans, social workers, psychologists, and nurses. These staff actually comprise about 10 percent of the average school district budget but, except for ATLAS, are not core ingredients of NAS designs. That’s largely because the NAS designs have teachers working with a smaller number of students over more than one academic year and have moved the guidance and counseling function into teacher teams.

³Special services would need to be maintained for the severely disabled and other categories of disability that require separate pull-out service, i.e., legal requirements under IDEA would need to be fulfilled. But research indicates that a large portion of handicapped students in the learning disabilities category are not best served by these strategies.

Making Teachers Core Service Providers

Figure 1, below, shows in brief how the approach to staffing and resourcing taken by NAS designs is different from that of most traditional schools. As indicated, in addition to the core staff of one principal and 20 teachers for a school of 500 students, districts usually provide a series of specialists to address issues outside the “regular” classroom. NAS designs, in contrast, require the core staff plus an instructional facilitator to help teachers continually improve the instructional program, and substantial investment in ongoing, high-quality professional development to promote new skills and competencies. Teacher responsibilities expand to include many of the tasks formerly performed by the various specialists, making classroom teachers the core service providers to smaller classes of students.

These are big differences—the traditional school makeup representing a more bureaucratic approach and the NAS designs a more efficient, high-performance approach to organization and management. The NAS model is exactly how corporations restructure and reorganize for higher performance and how they produce better results with current or even reduced resources. The number of specialists is reduced, the responsibilities of the core service providers are expanded, and there is increased emphasis on ongoing training. To implement a NAS design, a school needs to restructure itself, changing the way it does business—including the resources it purchases with its budget. And because the power of each design depends on its being fully implemented, the ingredients of each NAS design must take funding priority.

Funding NAS Design Implementation

Implementing each NAS design requires finding money to finance the unique ingredients of the design beyond the core staff of principal and

regular classroom teachers. Although the costs are generally modest (from \$100,000 to \$350,000) when compared to the total budget of a school, few schools have these levels of unallocated or unused funds. Thus, a critical issue is how schools can find the dollars to finance their chosen NAS design.

There are three major financing strategies that can be used either in conjunction or separately. All three represent challenges for districts and schools because they require changes in the ways resources, including staff, are used. One, available to schools eligible for Title I schoolwide programs, is to dedicate Title I funding to design costs. A second strategy involves reallocating current resources to fund the required NAS ingredients. A third is to create an investment fund to cover at least the initial costs of transforming a school over a two- to three-year period, along with reallocation of some of the school’s existing resources, which is necessary for true reform to be sustained over the long term. The remainder of this paper will examine these strategies in detail.

FIGURE 1

Core Funding for a School of 500 Students, with Average Class Size of 25 Students

1 Principal
20 Teachers

Additional Ingredients in Traditional Schools	Additional Ingredients for NAS High-Performance School Designs
Regular Education Specialists	A Schoolwide Instructional Facilitator
Categorical Program Specialists	Teachers with Multifunctional Roles
Pupil-Support Specialists	\$65,000 Design-Based Assistance/Teacher Stipends
	Design-Specific Resources: Tutors, Health Team, etc.

Dedicating Title I to Finance Whole-School Designs

Many schools with high concentrations of students from low-income families may actually be in the best position to implement a high-performance design. For the 1995–96 academic year, schools with 60 percent of students from low-income families were allowed to use Title I funds for schoolwide programs. Beginning with the 1996–97 academic year and for the remainder of this authorization, schools with 50 percent of low-income students are allowed to do the same.

These expanded opportunities were made available because research showed that traditional Title I pull-out programs did not have the desired impact on student achievement and that more coherent, schoolwide strategies may have more powerful effects. In fact, core components of two NAS designs—the School Development

program portion of ATLAS and the Success for All portion of Roots and Wings—had their beginnings as schoolwide Title I programs, and each has been proved to produce a significant impact on student achievement.

Another rationale for more powerful, whole-school designs is to expose Title I students to curriculum that teaches both basic skills and higher-level problem-solving and thinking skills. For years, research has shown that most Title I programs provide intensive instruction in basic skills only. By contrast, each NAS design features a rigorous curriculum

and high student-performance standards that encompass higher-order thinking skills as well as basic skills and knowledge.

Finally, both federal and state Title I staff are urging districts to help schools with at least 50 percent low-income students to “restructure” their use of Title I funds to implement schoolwide programs designed to teach all students to high standards. Indeed, many of the jurisdictions implementing NAS designs have encouraged Title I schools to shift these funds away from pull-out remedial specialists, basic-skills computer labs, and instructional assistants to support their high-performance designs.

Figuring the Numbers to Leverage Title I

Districts could speed the more productive use of Title I and other federal funds by requiring schools to use this money for high-performance design costs. And in many cases, these supplemental funds would be sufficient to fully finance NAS designs.

For example, in many districts, a 500-student school with 80 percent of its population in poverty receives \$900 per low-income student. That produces a total of \$360,000 ($0.80 \times 500 \times \900), more than what is required by any NAS design.

If just 50 percent of the school’s students were eligible for Title I funds, and the school received only \$700 per low-income student, the school would receive \$175,000. That amount would nearly cover the Roots and Wings or ATLAS programs and would be more than enough for less expensive NAS designs.

Districts and schools should look carefully at dedicating Title I and other supplemental funding to high-performance design implementation. In many cases, those dollars alone would be sufficient for a school to finance a powerful, whole-school program created to teach all students—including Title I students—to high academic standards.

“Many schools with high concentrations of students from low-income families may actually be in the best position to implement a high-performance design. For the 1995–96 academic year, schools with 60 percent of students from low-income families were allowed to use Title I funds for schoolwide programs.”

Reallocating Existing Resources

A second major funding strategy is to redirect current money to NAS requirements. This may be the most difficult approach for many schools, because it usually involves “trading in” or redefining the positions of current educational specialist staff for the needed NAS ingredients; however, in terms of actively promoting and sustaining real reform, it is the most powerful and effective approach.

Before examining resource reallocation in detail, it’s important to mention another reallocation strategy that asks schools to “find efficiencies”—to accomplish current tasks with less money. While this may seem preferable to eliminating or redefining positions, “finding efficiencies” is the wrong approach to funding NAS designs. It cannot be said too many times: New American Schools is not about helping schools do what they now do a little better. Each design requires a school to shed ineffective practices and restructure into a new entity geared toward high student achievement.

The challenge is to find excess resources above the core staff of one principal and 20 teachers to trade in for the ingredients needed for a particular NAS design. These resources could become the funding source for NAS designs; they would be the reasons NAS designs could be implemented with the current school resources. Trading in these resources is the resource reallocation task for schools that have to implement a NAS design without new money. And as previously discussed, most traditional schools have staffing resources that are not required by NAS designs.

Comparing Resources in Four Schools

Table 3 (see pages 12–13) profiles four traditionally structured schools—all real schools—in different districts around the country. The table shows the resources these schools have above the base level of one principal and 20 teachers,

and it illustrates how the resources can be used to support the implementation of NAS designs.

First, it’s interesting to note what these schools do not have—resources for professional development and technology. The two schools with the most technology have only basic-skills computer laboratories. These schools would probably all argue that they need more resources for training and better technology.

The schools in this table organize students into age-based groups, manage through a hierarchical model with the principal in charge, and follow a schedule that provides little common planning time for teachers. By contrast, NAS high-performance designs feature multi-age student groupings, substantial management by teacher decision-making teams, and a schedule that provides planning time that averages at least one hour a day.

- **Category 1 School** typifies a school in a district with above-average spending and substantial numbers of students both from low-income families and with limited English proficiency. Class sizes are small, averaging 22 students, which is below the base of 25 per class. And this school has numerous resources above the base number of regular classroom teachers—nine regular education specialists, nine categorical program specialists, 10 instructional aides, and two pupil-support specialists, for a total of 20 extra teacher professionals and 10 instructional aides. In dollar terms, this represents an extra \$1,089,500, which would fund implementation of any NAS design.

“It cannot be said too many times: New American Schools is not about helping schools do what they do now a little better. Each design requires a school to shed ineffective practices and restructure into a new entity geared toward high student achievement.”

TABLE 3

- **Category 2 School** is in an average district, with about 50 percent of its students eligible for either federal Title I money or state compensatory education money. It has four regular education specialists (one each for art, music, physical education, and library services), four teachers and 10 instructional aides paid for by categorical program funding (about \$800 for each low-income student), and no pupil-support services positions. In total, this school has eight teacher positions and 10 instructional-aide positions above the base core of the principal and 20 classroom teachers. It also has a small amount of dollars for instructional materials and student trips, none for ongoing professional development, and a smattering of technology. Pricing each teacher position at \$50,000 and each instructional-aide position at \$7,500, the school has a total of \$489,500 above its core base—substantially more than the cost of any NAS design.
- **Category 3 School** has no special-needs students and only a modest level of resources above the core: two art and music teachers, one guidance counselor, 10 instructional aides, and a small amount of instructional material money. Yet, the total of these resources—\$230,000—would completely finance three of the designs and fund a major portion of three other designs.
- **Category 4 School** provides a more complex situation. It's a bare-bones school in a bare-bones district with no specialist resources, only 16 teachers, and classes of more than 30 students. Unfortunately, it's typical of most elementary schools in California, and perhaps in other states as well, and it represents the situation faced by schools that do not have excess resources to cash in for NAS designs. A category 4 school would need to make a strong case for additional money from

Ingredient

Design Team Liaison

District Coordinator/Facilitator

Instructional Facilitator

Technology Coordinator

Family Liaison

Curriculum Developer

Assistant Principal

Management Approach

Full-Day Kindergarten

Student Grouping

Class Size

Number of Regular Classroom Teachers for School of 500

Regular Specialists

Elementary Schools:
art, music, PE, reading, and writing teachers, etc.; librarian

Secondary Schools:
instructional aides

Categorical Specialists

All schools:
Title I, Special Ed., State Comp. Ed., ESL, Desegregation, etc. instructional aides

Nurse/Health Specialist

Social Worker

Psychologist

Guidance Counselor

Dean

Planning Time for Teams (assuming this is provided through creative scheduling at no cost)

Tutors

After-School Tutoring

Technology

Instructional Materials

Transportation/Trips

Professional Development training/design technical assistance subs/released time stipends

Staff Slots Above Classroom Teachers

Total Additional Dollars Excluding Additional Staff

Total Dollars for Reallocation (converting each staff position as \$50,000, and each aide as \$7,500)

TYPICAL SCHOOL STAFFING AND RESOURCES

Category 1 School	Category 2 School	Category 3 School	Category 4 School
none	none	none	none
curriculum coordinators	curriculum coordinators	curriculum coordinators	curriculum coordinators
none	none	none	none
none	none	none	none
none	none	none	none
none	none	none	none
1	1	none	none
hierarchical	hierarchical	hierarchical	hierarchical
yes	yes	yes	half day
age-graded	age-graded	age-graded	age-graded
22	25	25	32
23 for class sizes of 22	20 for class sizes of 25	20 for class sizes of 25	16 for class sizes of 31
9 teachers numerous in many categories	4 teachers art, music, PE, and librarian	2 teachers music or art, and librarian	none
none	none	10 aides	none
9 teachers numerous in many categories	4 teachers 2 remedial Title I, 2 pullout Special Ed.	none	none
10 aides	10 aides	none	none
1	none	none	none
none	none	none	none
none	none	none	none
1	none	1	none
none	none	none	none
little or none	little or none	little or none	little or none
none	none	none	none
none	none	none	none
none	scattered old computers	scattered old computers	scattered old computers
\$25 per student	\$25 per student	\$5,000 per year	\$25 per student
\$2,000	\$2,000	none	\$2,000
all by district	all by district	all by district	all by district
20 teachers, 10 aides	8 teachers, 10 aides	3 teachers, 10 aides	0 teachers, 0 aides
\$14,500	\$14,500	\$5,000	\$12,500
\$1,089,500	\$489,500	\$230,000	\$12,500

its district or local community to implement a NAS or other whole-school design.

Facing Reallocation Realities: Retraining and Regulations

Resource reallocation is a possible route to financing a high-performance design for many but not all schools. However, it must be done thoughtfully, sensitively, and legally, for this funding strategy faces special hurdles that others do not.

First, resource reallocation involves eliminating jobs—and perhaps the people who performed them. Schools should tap all possibilities for redeploying specialists to new roles, such as retraining them as instructional facilitators and tutors. Districts should explore developing cooperative programs with local

colleges and universities to train instructional assistants as fully certified teachers. And normal teacher turnover, such as when teachers move or retire, can be a first choice for modifying position responsibility.

Second, there are local, state, or federal rules, regulations, and requirements that limit—in some cases, severely—a school's ability to reallocate any of its specialist resources.

Fiscal reallocation of existing resources can produce the dollars needed to implement NAS

designs. However, districts and states must assess the limitations now in place and consider changing codes, providing waivers, or otherwise lifting the legal limits on a school's ability to spend dollars differently.

For example, Individual Education Plans (IEPs) for disabled students might need to be changed to provide services within the regular instructional program. State requirements for specific extra staffing, such as for guidance counselors in every elementary school, or specific class sizes, would need to be waived. Collective bargaining contracts would need to be altered to allow teachers in each school to provide the conditions specified by the design.

In sum, the process of resource reallocation must be done carefully and legally. It will likely take schools two to four years to complete the process, during which time rules, regulations, traditions, and even politics might have to change. However, at the end of this process, schools will have transformed themselves into high-performing educational organizations, will be implementing a high-quality, rigorous curriculum, and should have students achieving to much higher standards. Such results should make the resource reallocation efforts worthwhile and rewarding.

Investment Funding to Begin Implementation

Creating the conditions for schools to reallocate their resources and change staffing patterns can take two to four years. However, many districts and schools are unwilling to maintain the status quo for that period of time. Instead, they want to quickly begin the process of creating an environment that supports improved student performance. During this transition period, investment funding can provide the means to support the first phases of transforming a school and keep staff interest and commitment strong.

For example, an important feature of each NAS design is intensive professional development provided by Design Teams. Consequently, during the first year, a school invests in design-based training as a way to orient its teachers to the substance of each design and

“ . . . resource reallocation involves eliminating jobs—and perhaps the people who performed them. Schools should tap all possibilities for redeploying specialists to new roles, such as retaining them as instructional facilitators and tutors. Districts should explore developing cooperative programs with local colleges and universities to train instructional assistants as fully certified teachers.”

prepare them for the changes to come once full restructuring is underway.

So, while it might take a district several years to fully reallocate its resources, for the first year or two districts could create an investment fund for financing initial professional development. A fund of \$1.5 million, for example, could allow from 30 to 50 schools in a large district to begin NAS implementation.

Funding Sources for Initial Implementation

There are many possible sources of money for such an investment fund. Here are a few to consider:

- Pool the district's teacher-focused professional development money.
- Apply for funds from state categorical programs, such as the Ohio Venture Capital Fund or the Washington Twenty-First Century School Fund.
- Dedicate school-improvement funds already provided by the state—such as in California—to NAS implementation.
- Make investment fund dollars the first draw on any natural or inflationary increases in a district's budget.

There are even more aggressive strategies districts could take to find investment funding, similar to strategies they would adopt if they faced a real budget crunch and *had* to cut their budget. They could cut the budget and put the dollars into a NAS investment fund. In fact, given the potentially high payoffs from having schools implement the different high-performance school designs, districts should take extraordinary steps as quickly as possible to identify money to support NAS implementation.

Financing the Bulk of NAS Design Costs for Some Schools

Given the real and potential payoffs in higher student achievement from a high-performance school, NAS designs make attractive arguments for new investment money, to jump start the NAS implementation process or to fully fund each NAS design.

States and districts should also consider raising or using new money to finance most of the NAS design costs. This approach would support schools that simply have no resources to reallocate. However, it's not necessarily a strategy for schools with many resources to trade in, for changing the structure of the school and the programs it offers is part of the New American Schools approach to creating higher-achieving schools.

Although raising or using new money may seem like a long fiscal reach, particularly in some communities, on average, funding for public schools has steadily increased. For example, spending per pupil adjusted for inflation increased by about 65 percent in the 1960s, 25 percent in the 1970s, and about 48 percent in the 1980s. Although inflation-adjusted funding per pupil stayed pretty much the same from 1990–95, the National Center for Education Statistics predicts a nearly 25 percent per-pupil increase over the next decade. So, unless history reverses itself, new money should slowly creep into the public education system over the next five to ten years.

Each high-performance NAS design offers a particularly attractive use for such new money—much higher results for modestly increased costs. The NAS additional costs range from about \$100,000 to \$350,000, or about \$200 to \$700 per student. At a national average expenditure of \$6,000 per student, those costs range from an extra 3.3 to an extra 11.7 percent. Since a significant portion of the highest-cost NAS designs could be financed by existing

federal Title I dollars, one could argue that the NAS costs are more in the range of \$200 to \$500 per pupil, or 3.3 to 8.3 percent more.

Thus, a state or district could make the case that a small increase in education spending could produce a large increase in student achievement—an argument that would likely have strong public and political appeal.

Spending Wisely on a Better Education for Every Student

The costs of the high-performance designs created by New American Schools are not high relative to what is currently spent in schools. Because the designs offer great potential for dramatically increasing student achievement, they make attractive targets for new money.

Reallocating existing resources is also a route many schools could take to fund the extra NAS costs. While there are special problems associated with reallocation, it's worth stating again what is at stake—a quality education for every student. Schools could safely promise that every dollar reallocated to paying for a high-performance design would be money well spent on realizing higher levels of student achievement. ♦

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As of Fall 1997, New American Schools (NAS) is at work in over 700 schools around the country.

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For more information: (617) 969-7100;

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For more information: (617) 576-1260;

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For more information: (213) 622-5237;

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This design strives to help all students achieve high standards through the construction of a standards-driven curriculum; use of traditional and performance-based assessments; establishment of effective organizational patterns and professional-development programs; and implementation of effective community-involvement strategies. Students master a rigorous curriculum, develop character, and promote the principles of democratic government. These elements of the traditional red schoolhouse are combined with a high level of flexibility in organizing instruction and deploying resources; use of innovative teaching methodologies; student groupings for continuous progress; and advanced technology as a learning and instructional management tool.

For more information: (888) 275-6774;

e-mail: skilgore@mrsh.org; www.mrsh.org

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This partnership of schools, districts, states, and leading national organizations works to change the education system from classroom to statehouse through a five-point set of priorities. Known as “design tasks,” they are: standards and assessments, learning environments, high-performance management, community services and supports, and public engagement. The National Alliance seeks to enable all graduating high school students to attain the Certificate of Initial Mastery, a credential representing a high standard of academic accomplishment.

For more information: (202) 783-3668;

e-mail: nareinfo@ncee.org;

www.ncee.org/OurPrograms/narePage.html

Roots and Wings

This elementary school design builds on the widely used Success for All reading program and incorporates science, history, and mathematics to achieve a comprehensive academic program. The premise of the design is that schools must do whatever it takes to make sure all students succeed. To this end, Roots and Wings schools provide at-risk students with tutors, family support, and a variety of other services. While the “roots” of the design refer to mastery of basics, the “wings” represent advanced accomplishments that students achieve through interdisciplinary projects and a challenging curriculum provided by the design.

For more information: (410) 516-0274;

e-mail: rslavin@inet.ed.gov; http://scov.csos.jhu.edu/sfa

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