

# REGIONAL EDUCATIONAL LABORATORY

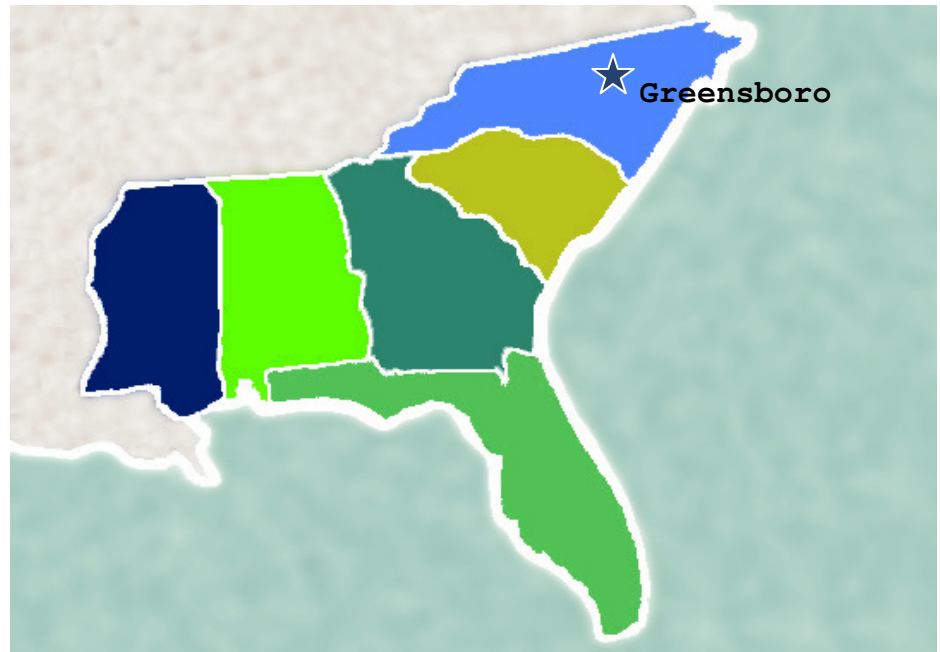
## SOUTHEAST ~ SERVECenter

September 2010, EBE # 722

### EVIDENCE BASED EDUCATION REQUEST DESK

#### OUR GOAL

To assist educators and policymakers in their efforts to apply the evidence base to decisions about policies, programs, and practices they encounter.



**REQUEST:** How have states responded to the recent budget crisis (last few years to current day) in the area of education policy? In other words, what types of education policies (or programs or state statutes) have been changed or modified in efforts to save money (for example, raising class-size minimums, shortening the school week, furloughs of staff, etc.)? Please provide an in depth scan of this issue in the six SE states, plus conduct a search for any national-level policy or research reports on the topic.

### RESPONSE

**1. Provide an in depth scan of state responses to the recent budget crisis (last few years to current day) in the area of education policy in the six SE states.**

The best source of information located on the topic was the Southern Regional Education Board's Legislative Reports series. "SREB's State Services office publishes a series of Legislative Reports during legislative sessions each year. The reports summarize state action on budget proposals and legislation that impacts education." These Legislative reports were used to generate the table below. The table includes a summary of the states' K-12 education budget status for the year indicated (i.e., whether the budget increased or decreased) and includes all statements that indicate a reduction in services provided. While most of these reductions are clearly tied to budget reductions, in some cases it is unclear whether the policy change is due to budget shortfalls or to other factors. In some cases, states expand programs or increased funding; however since this is beyond the scope of the information request, these instances are not recorded in the state scan. Additional details about state budgets and education-funding decisions and program funding levels are available in the source materials.

If you have any questions regarding this document, please contact the  
REL-SE, 1-800-755-3277 or RELSoutheast@serve.org

REL- SE States	2010	2009	2008
AL	<p>"The total appropriation for K–12 education will decrease by 2.9 percent to \$3.8 billion, when compared with the original 2009–2010 budget, with school formula funding accounting for \$3.6 billion of those funds (down 2.9 percent)."</p> <p>"[T]he [Alabama] Legislature passed House Bill 678, which gives state agencies the authority to enact voluntary furlough plans for state employees, if the plans are applicable to the entire agency and approved by the state Personnel Department. Under current law, state agencies do not have the power to furlough state employees."</p> <p>"A few programs administered by the state Department of Education will see slightly less funding, with the agency's overall budget decreasing by 0.5 percent to \$211 million. Funding for the 21st Century Afterschool/Extended</p>	<p>"Formula funding for elementary and secondary education will increase 4.4 percent to \$3.8 billion, including \$179.4 million in federal recovery funds."</p> <p>"Funding for at-risk students will decline 6.6 percent to \$24.5 million, while student transportation funding will decline 2.1 percent to \$299.9 million."</p> <p>"Most programs administered by the Department of Education will see reduced funding, with the agency's overall budget declining 13.6 percent to \$203.6 million. Programs with reduced funding include: teacher and student testing (\$7.2 million, down 7.1 percent); the Alabama Math, Science and Technology Initiative (\$29 million, down 22.5 percent); the local school and school system academic and financial improvement program (\$15 million, down 31.3 percent);</p>	<p>"For elementary and secondary education, funding to school districts will decline 2.7 percent to \$4 billion."</p> <p>"Overall support for programs administered by the state Department of Education also will decline — the \$258 million allocated to the department is a reduction of 4 percent. The budget reduces funding for most programs in this area, such as assistance for at-risk schools and districts, teacher incentive pay, teacher recruitment incentives, the High Hopes program (which provides assistance to school districts with students who fail parts of the graduation examination), principal preparation redesign, and the Principal Leadership Program."</p> <p>Source: SREB Legislative Report, 2008 Final Report, August 2008 (<a href="http://publications.sreb.org/2008/08S07_Fin_Leg_Rep_%2008.pdf">http://publications.sreb.org/2008/08S07_Fin_Leg_Rep_%2008.pdf</a>)</p>

	<p>Day program, online professional development and the principal leadership program was eliminated. Newly implemented programs include Teach for America (\$630,000) and the Positive Behavior Support Coaches program, which provides individualized behavioral support to improve school learning environments (\$150,000)."</p> <p>Source: SREB Legislative Report, 2010 Report No 4, July 2010 (<a href="http://publications.sreb.org/2010/10S05_Leg_Rep_4.pdf">http://publications.sreb.org/2010/10S05_Leg_Rep_4.pdf</a>)</p>	<p>distance learning (\$20 million, down 14.2 percent); English as a second language (\$2.3 million, down 50 percent); career and technical education (\$2.1 million, down 28.3 percent); teacher professional development training (\$1.2 million, down 15.6 percent); and the Governor's High Hopes for Alabama Students program, for students who have failed the state exit exam (\$11.1 million, down 16.3 percent). The teacher mentoring and principal leadership programs were eliminated."</p> <p>Source: SREB Legislative Report, 2009 Final Report, October 2009 (<a href="http://publications.sreb.org/2009/09S10_2009_Final_Leg_rep.pdf">http://publications.sreb.org/2009/09S10_2009_Final_Leg_rep.pdf</a> )</p>	
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<p><b>FL</b></p>	<p>"General funds for K–12 education will increase 12.2 percent to \$9 billion. This includes nearly \$5.9 billion in formula funding for schools, including a funding increase of \$1.22 per student. However, this state portion accounts for less than half of the total formula funding amount; with declining local revenues, the overall increase in K–12 formula funds is only a few percentage points."</p> <p>No reduction in funding or elimination of education programs or teacher positions was reported. No other adverse, budget-related educational policy changes were reported.</p> <p>Source: SREB Legislative Report, 2010 Report No 4, July 2010 (<a href="http://publications.sreb.org/2010/10S05_Leg_Rep_4.pdf">http://publications.sreb.org/2010/10S05_Leg_Rep_4.pdf</a>)</p>	<p>"Overall funding for K–12 education will total \$13.3 billion, a 14.7 increase from the amended prior-year budget."</p> <p>No reduction in funding or elimination of education programs or teacher positions was reported. No other adverse, budget-related educational policy changes were reported.</p> <p>Source: SREB Legislative Report, 2009 Final Report, October 2009 (<a href="http://publications.sreb.org/2009/09S10_2009_Final_Leg_rep.pdf">http://publications.sreb.org/2009/09S10_2009_Final_Leg_rep.pdf</a>)</p>	<p>"During 2007–2008, total funding for the operation of elementary and secondary schools was reduced by 2.9 percent. The 2008–2009 budget provides schools with \$18.4 billion through the finance formula, a further reduction of 1.8 percent."</p> <p>No reduction in funding or elimination of education programs or teacher positions was reported. No other adverse, budget-related educational policy changes were reported.</p> <p>Source: SREB Legislative Report, 2008 Final Report, August 2008 (<a href="http://publications.sreb.org/2008/08S07_Fin_Leg_Rep_%2008.pdf">http://publications.sreb.org/2008/08S07_Fin_Leg_Rep_%2008.pdf</a>)</p>
<p><b>GA</b></p>	<p>"Amendments to the 2009–2010 budget decrease total state general funds for elementary and secondary education to \$6.6 billion, down 10.6 percent from the current year’s original appropriation."</p>	<p>"The K–12 general fund budget for 2009–2010 will decrease 11 percent from the original 2008–2009 budget to \$7.4 billion; however, \$413.1 million in federal recovery funds also are available. Total state funds for local</p>	<p>"[N]early \$8.2 billion for K–12 education, 5 percent more than the previous year."</p> <p>No reduction in funding or elimination of education programs or teacher</p>

	<p>"Although many teachers and all state employees were furloughed three days earlier in the current budget year, state agency budgets were further reduced in the amended 2009–2010 budget to reflect three additional furlough days for state employees and, possibly, teachers. The state Department of Education has the authority to issue a waiver allowing local systems to decide individually whether to furlough teachers or transfer budget funds to avoid teacher furloughs."</p> <p>"Funding for various programs was reduced: the academic coach program that provides teacher mentoring to schools in need of science and math improvement (\$2.1 million, down 20.2 percent), central office operations (\$29.7 million, down 11.6 percent), career and technical education (\$14.6 million, down 10.5 percent), and student transportation (\$141.4 million, down 16 percent)."</p> <p>"House Bill 908 provides budget fund flexibility for local school districts and allows school systems to increase class</p>	<p>school systems will fall to \$6.4 billion, down 6.5 percent. The Department of Education will operate with \$2.6 million, down 18.4 percent."</p> <p>"Funds for classroom supply cards (for teachers to purchase supplies) and foreign language instruction were eliminated. Dropout prevention funding of \$49.2 million was transferred to the local school system budget to assist with budget reductions. As a result, the graduation coach program will fund (at \$3.7 million) only middle grades graduation coaches, who also will serve high schools with graduation rates at or below 85 percent."</p> <p>"The school nurse program (\$29.1 million), regional education service agencies (\$12.1 million), and career and technical education (\$16.3 million) budgets will decrease by about 3 percent each. Charter schools received \$2.6 million, down 8.2 percent. Funds for bonuses to National Board Certified teachers decreased 41.4 percent to \$7.2 million for next year."</p>	<p>positions was reported. No other adverse, budget-related educational policy changes were reported.</p> <p>Source: SREB Legislative Report, 2008 Final Report, August 2008 (<a href="http://publications.sreb.org/2008/08S07_Fin_Leg_Rep_%2008.pdf">http://publications.sreb.org/2008/08S07_Fin_Leg_Rep_%2008.pdf</a>)</p>
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	<p>sizes through 2012–2013."</p> <p>"During the 2010–2011 budget year, state funding for school improvement will decline by 30.9 percent to \$5.8 million. Initially up for elimination, Regional Education Service Agencies (RESAs) will continue to operate by overseeing the Information Technology Centers and the Math Mentor program. State funding for RESAs in the original 2009–2010 budget totaled \$12.1 million; due to an elimination of RESA funding and program transfers, the RESA budget will fall to \$9.3 million, a decrease of 23 percent. The Governor’s Honors Program will operate over four weeks, instead of its typical six weeks, due to funding reductions of 22 percent (\$1.1 million) in 2010–2011."</p> <p>Source: SREB Legislative Report, 2010 Report No 4, July 2010  <a href="http://publications.sreb.org/2010/10S05_Leg_Rep_4.pdf">http://publications.sreb.org/2010/10S05_Leg_Rep_4.pdf</a></p>	<p>"HB 193 allows local districts to implement an alternative calendar of 180 days or an equivalent number of hours."</p> <p>Source: SREB Legislative Report, 2009 Final Report, October 2009  <a href="http://publications.sreb.org/2009/09S10_2009_Final_Leg_rep.pdf">http://publications.sreb.org/2009/09S10_2009_Final_Leg_rep.pdf</a> )</p>	
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<p><b>MS</b></p>	<p>"Total state funding for elementary and secondary education in 2010–2011 falls just below \$2.3 billion, down 11.4 percent compared with the 2009–2010 original budget."</p> <p>"To assist local school districts with budget shortfalls, House Bill 1170 provides local districts with the option of furloughing all instructional, non-instructional and administrative personnel for a maximum of three days during the 2010–2011 school year and three days during the 2011–2012 school year. Furloughed personnel with contracts of at least 187 days must take one-half day of personal leave without pay on non-instructional days."</p> <p>Source: SREB Legislative Report, 2010 Report No 4, July 2010 (<a href="http://publications.sreb.org/2010/10S05_Leg_Rep_4.pdf">http://publications.sreb.org/2010/10S05_Leg_Rep_4.pdf</a>)</p>	<p>"Elementary and secondary education will receive over \$2.1 billion in state funds in 2009–2010, a decrease of nearly 6 percent."</p> <p>"Funds for the middle grades mentoring program will decrease almost 50 percent to \$1.8 million. High school redesign (vocational technology) also will see a cut of 77 percent to \$3 million."</p> <p>"SB 2050 allows school districts to negotiate the salaries of teachers receiving retirement benefits from another state, as opposed to using the state salary formula to determine the teacher's pay."</p> <p>Source: SREB Legislative Report, 2009 Final Report, October 2009 (<a href="http://publications.sreb.org/2009/09S10_2009_Final_Leg_rep.pdf">http://publications.sreb.org/2009/09S10_2009_Final_Leg_rep.pdf</a>)</p>	<p>"Elementary and secondary schools will receive \$2.5 billion, up less than 1 percent."</p> <p>No reduction in funding or elimination of education programs or teacher positions was reported. No other adverse, budget-related educational policy changes were reported.</p> <p>Source: SREB Legislative Report, 2008 Final Report, August 2008 (<a href="http://publications.sreb.org/2008/08S07_Fin_Leg_Rep_%2008.pdf">http://publications.sreb.org/2008/08S07_Fin_Leg_Rep_%2008.pdf</a>)</p>
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<p><b>NC</b></p>	<p>"General funding in 2010–2011 for the Department of Public Instruction, which includes formula funding for K–12 education, declined 5 percent from the preceding year to under \$7.1 billion, 3.7 percent less than originally budgeted for 2010–2011."</p> <p>"The revised budget permits furloughs of no more than two days for public school personnel in 2010–2011. Teacher furloughs may occur only on non-instructional days, and employees who make less than \$32,000 annually may not be furloughed."</p> <p>"[G]eneral funds totaling \$30.6 million for the More at Four prekindergarten program were replaced with funds from the federal Temporary Assistance for Needy Families (TANF) program; those funds will provide prekindergarten services to TANF-eligible children."</p> <p>"Other downward adjustments made to K-12 funding in 2010-2011 include \$3.3 million from instructional supplies funding (down 3.5 percent from the</p>	<p>"K–12 education will receive \$7.5 billion in 2009–2010, 4.4 percent below the original 2008–2009 appropriation."</p> <p>"[T]he governor instituted a “flexible furlough plan,” reducing all teacher and state employee salaries by 0.5 percent for the remainder of the fiscal year, while in return providing each employee with 10 hours of time off that may be used from the beginning of June to the end of December."</p> <p>"Other funding reductions during the biennium include a temporary reduction in funds for noninstructionalsupport personnel at schools (\$379.7 million and \$373.3 million), postponing the adoption of new mathematics textbooks for grades six through 12 until the next biennium (\$48 million and \$115.4 million), a \$5 million reduction in each year for the More At Four prekindergarten program, and a \$38.3 million reduction in funds for activities to help students who do poorly on certain state tests. State-funded positions at the</p>	<p>"Elementary and secondary schools will operate with \$7.8 billion in general funds, an increase of 1.2 percent over the budget originally adopted for 2008–2009." "Funding for Learn and Earn Online, which gives high school students access to online college credit courses, will decline from the original appropriation of \$10.1 million to \$6.5 million—this still is more than twice the amount spent during 2007–2008."</p> <p>Source: SREB Legislative Report, 2008 Final Report, August 2008 (<a href="http://publications.sreb.org/2008/08S07_Fin_Leg_Rep_%2008.pdf">http://publications.sreb.org/2008/08S07_Fin_Leg_Rep_%2008.pdf</a>)</p>
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	<p>original budget), \$2.4 million from funding for school district central office salaries and benefits (down 2.2 percent), a \$10 million reduction in transportation funding (down 2.4 percent), the elimination of \$11.9 million allocated for the purchase of new school buses, and the elimination of \$9.2 million allocated for school district mentoring programs."</p> <p>Source: SREB Legislative Report, 2010 Report No 5, August 2010 (<a href="http://publications.sreb.org/2010/10S06_Leg_Rep_5.pdf">http://publications.sreb.org/2010/10S06_Leg_Rep_5.pdf</a>)</p>	<p>Department of Public Instruction will decrease by 64 in 2009–2010, and by another 75 in 2010-2011."</p> <p>Source: SREB Legislative Report, 2009 Final Report, October 2009 (<a href="http://publications.sreb.org/2009/09S10_2009_Final_Leg_rep.pdf">http://publications.sreb.org/2009/09S10_2009_Final_Leg_rep.pdf</a>)</p>	
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<p><b>SC</b></p>	<p>"General funds for K–12 education in 2010–2011 are \$1.8 billion, down 13.4 percent from the original 2009-2010 appropriation."</p> <p>"Proviso language in the budget permits school districts to enact furloughs and suspends the requirement that high schools provide driver education courses."</p> <p>"House Bill 4823 implements several cost-saving measures. It waives the requirement that the state Department of Education provide printed copies of 2010 report cards for schools and districts, instead requiring schools and districts to provide the information via the Internet. (Parents are still entitled to receive free printed copies of the report cards from schools and districts on request.) The bill also suspends writing assessments for grades three, four, six and seven in the 2010–2011 school year."</p> <p>"To provide potential savings to school districts, the Legislature approved House Bill 4838, permitting local</p>	<p>"Elementary and secondary schools took general fund reductions during 2008–2009 that totaled 12.2 percent. The 2009–2010 general fund budget will provide schools and other programs with \$2.1 billion, about the same amount as the reduced prior-year budget. Since the original 2008–2009 appropriation, general funds have declined 13.9 percent. In addition, \$187 million in recovery funds are allocated, most of which (\$184.9 million) will be distributed to schools though the finance formula."</p> <p>"Districts may suspend professional staffing ratios and spending regulations as well as delay the date (from April 15 to May 15) that contracts are required to be issued to teachers for the upcoming school year."</p> <p>"Districts also may authorize furloughs for teachers of up to five non-instructional days, provided that administrators are furloughed for twice the number of days. In addition, some non-essential student assessments are suspended."</p>	<p>"General funds for K–12 education will increase 4.1 percent to \$2.4 billion, including \$2.2 billion in funding to school districts (up 4.6 percent)."</p> <p>No reduction in funding or elimination of education programs or teacher positions was reported. No other adverse, budget-related educational policy changes were reported.</p> <p>Source: SREB Legislative Report, 2008 Final Report, August 2008 (<a href="http://publications.sreb.org/2008/08S07_Fin_Leg_Rep_%2008.pdf">http://publications.sreb.org/2008/08S07_Fin_Leg_Rep_%2008.pdf</a>)</p>
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<p>school districts (on a vote of their boards of trustees) to not give teachers a scheduled years of service salary increase in 2010–2011—and instead, pay them the same salaries they earned in 2009–2010. This must apply uniformly to all teachers within the district and does not have a negative impact on a teacher’s experience credit. A district that votes not to provide longevity increases to all teachers in 2010–2011 also must pay district administrators and school administrators the same salaries they earned in 2009–2010."</p> <p>Source: SREB Legislative Report, 2010 Report No 4, July 2010  <a href="http://publications.sreb.org/2010/10S05_Leg_Rep_4.pdf">http://publications.sreb.org/2010/10S05_Leg_Rep_4.pdf</a>)</p>	<p>Source: SREB Legislative Report, 2009 Final Report, October 2009  <a href="http://publications.sreb.org/2009/09S10_2009_Final_Leg_rep.pdf">http://publications.sreb.org/2009/09S10_2009_Final_Leg_rep.pdf</a> )</p>	
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## 2. Conduct a search for any national-level policy or research reports on the topic.

### Results

Research articles that deal specifically with changes or proposed changes to educational policy as a result of budget reductions:

**Alm, J., & Sjoquist, D. (2009). The response of local school systems in Georgia to fiscal and economic conditions. *Journal of Education Finance*, 35(1), 60–84. Retrieved from ERIC database.**

Article abstract: The 2001 recession had a major effect on Georgia's fiscal condition. We explore how economic conditions affected state and local financing of K-12 education in Georgia. We find that the magnitude of postrecession cuts in state real revenue per student varied widely

across the local school systems in Georgia. We then examine whether and how cuts in real revenue per student at the state level affected local real revenue per student, and we find weak evidence that local real revenue per student is lower when state real revenue per student is higher—that is, local school systems in Georgia seemed to respond to changes in economic conditions and changes in state real revenue per student by increasing local real revenue per student in order to offset decreases in state real revenue per student. We also find no support for the position that the reaction of school systems in Georgia to changes in state revenue was more pronounced in the years immediately following the 2001 recession. We discuss the implications of our findings for the current economic environment.

Items that appear in peer-reviewed journals but are discussion pieces rather than research studies:

**Donlevy, J. (2010). Continuing financial challenges as districts face budget year 2010–2011. *International Journal of Instructional Media*, 37(1), 1–2. Retrieved from Academic Search Premier database.**

Article abstract: As the deepest recession in many years continues to cause difficulties, the strain on schools and districts is growing worse. School boards and administrators are beginning to budget for 2010–2011. Income and expenses numbers will prove difficult to balance. This article looks at the implications for schools and districts as the consequences of the recession continue to unfold.

**Donlevy, J. (2008). Funding dilemmas after the Wall Street calamity: Navigating the new financial waters. *International Journal of Instructional Media*, 35(4), 357–359. Retrieved from Academic Search Premier database.**

Article abstract: With dire credit market conditions prevailing, and a severe recession looming, there will be fewer dollars available for state and local spending. School districts, in particular, will face budget downsizing as school boards and administrators try to cope with dwindling resources. This article discusses some steps school districts might take to help reduce spending in the current environment.

Note: The relative scarcity of materials is likely a result of the fact that the recession is too recent a phenomenon for its effect on educational policy to have undergone much scholarly, peer-reviewed research.

### **Methodology**

Because the request is for information about responses to the recent recession, it was necessary to define a date range to limit the information provided. The date range of the recent budget crisis was set as December 2007–Present. The start date is based on a National Bureau of Economic Research (NBER) determination of the start of the current recession

(<http://www.nber.org/cycles/dec2008.pdf>), since the impacts of the recession did not begin to substantially affect state budgets until the 2008–2009 budget year. Budgets for K–12 in all REL-SE states increased in the 2007–2008 budget period, although Florida did implement a mid-year state budget cut ([http://publications.sreb.org/2008/08S11\\_Focus\\_on\\_Budget.pdf](http://publications.sreb.org/2008/08S11_Focus_on_Budget.pdf)).

Databases searched for articles related to the question: ERIC, Academic Search Premier, EconLit, Wilson Web, ProQuest, NBER Working Papers.

Sites searched for policy documents related to the question: Education Commission of States (ECS), National Governors Association (NGA), Council of Chief State School Officers (CCSSO), Regional Education Laboratories (RELs), National Conference of State Legislatures (NCSL), National Association of States Boards of Education (NASBE).



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For more information or to make a request, contact:

**Karla Lewis**  
**1.800.755.3277**  
**klewis@serve.org**

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