Welcome Task Force Members & Guests

A few notes prior to the meeting starting:

Task Force Members, if possible, please change your screen name to be TF_Your_Name, please have your camera on and relevant documents available at the beginning of the meeting.

- Welcome to the public who are watching the meeting via Live Streaming. We will have a breakout session in today's meeting that will not be streamed. These discussions will not involve any decision making and a readout from each breakout will be provided when the full meeting resumes.

- If the public has any questions or comments, these can be sent via email to Amy Carman at carman_a@cde.state.co.us

SB 23-287 School Finance Task Force

COLORADO Department of Education

September 12, 2023

Virtual Meeting

DILLINGER RESEARCH & APPLIED DATA INC.

SCHOOL + STATE FINANCE PROJECT

Overview of Today's Agenda

1. Welcome & Norms Review (10 mins) (Info & Awareness)
2. Common Questions (5 mins) (Info & Awareness)
3. Vision Setting (10 mins) (Discussion)
4. Project Plan Buildout (30 min) (Discussion)
5. Review of Roberts Rules of Order (15 mins) (Discussion / Action)
6. Break (10 mins)
7. Adequacy Studies Parameters Development (80 mins) (Discussion)

Technical Etiquette

Microsoft Teams Etiquette:

- Task Force Members, if possible, please have your screen name as **TF_Your_Name**. All other Participants please have your screen name as **Your_Name_Role**.
- Please do not utilize the chat function
- If you wish you to comment, please use the raise hand function within Teams and wait to be called on by the facilitator
- Please do not interrupt someone as they are speaking

Guidelines for Interaction, Deliberation and Collaboration

- Appreciate that a variety of perspectives are represented throughout this Task Force
- Task Force Members should assume good intentions from other Task Force members
- All Task Force Members should strive to understand the intent of what has gone before and what didn’t work
- When introducing or discussing new topics, please endeavour to provide a clear, concise breakdown of factors, what policies drive them and the funding that goes into each one
- Task Force Members are responsible to set aside sufficient time between meetings to accomplish all readings and work
- Please appreciate that Task Force Members are performing different roles then their day to day positions

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Common Questions

1. Why are we meeting just virtually?
2. Why are we meeting for only 3 hours?
3. Is there a complete list of participants?
4. Can 2 Task Force Members talk about the Task Force?
5. Shouldn’t we wait for the Adequacy Studies to be completed?

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Visioning: A Note From Chuck

- Let the *Task Force* be a *Task Force*
- Do our best at accomplishing the job we were asked to do
- Role of the Chair, Facilitator, CDE, & Staff

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Task Force Input Survey Review

Take 5 mins to review and discuss the survey results

Small Group Discussion Topics

- What were your takeaways from the Input Survey Results?
- What surprised you?
- What comment or question would you like further clarification around?

Please be prepared to share out a summary of your conversation with the Whole Group

Project Plan Feedback

Sep

Tuesday, 12th
- Vision Setting
- Project Plan Buildout
- Adequacy Study Parameters Design

Friday, 29th
- Adequacy Study Parameters Vote
- Revisit At-Risk Task Force Decisions & No Decisions
- Unpack student need & additional costs associated
- Discuss & Review current and alternative ways to fund based on need (i.e. categorical funding)
- Develop 2 proposals to model

Oct

Tuesday, 17th
- Proposal Review/Refinement
- Review and discuss current history and purpose of Cost of Living
- Review and discuss effect on PPR, Avg Staff Salary, and other district characteristics
- Develop 2 Proposals to model

Tuesday, 31st
- Proposal Review/Refinement
- Review and discuss current indexes utilized in formula understanding history, affect, and intended purpose
- Discuss and review alternative options to address concerns
- Develop 2 proposals to model
- Review basics and funding for Institutional Charter Schools and how they differ from other Charter Schools

Nov

Tuesday, 14th
- Proposal Review/Refinement
- Review current challenges & effects of mill levy overrides
- Devel 2 proposals to model
- Review and discuss current size factor
- Discuss alternative methods to adjust for size & geography
- Develop 3 proposals to model

Model Development & Buildout

Dec

Tuesday, 5th
- Review & discuss models and the interplay between proposals-
- Refine & align on proposals (identify additional modeling requirements)
- Vote on Recommendations for
  - Prioritizing Student Need
  - Cost of Living Factor
  - Multiplicative Indexes

Tuesday, 12th
- Review & discuss models
- Vote on Recommendations for
  - ICSs
  - Size Factor
  - Undecdied AT RISK proposals

Jan

Friday, 12th
- Discuss and provide feedback (In person) for the Final Report

Note: Task Force Members will be able to provide feedback outside of the optional Jan meeting

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Context

Task Force Charge

- ***Examine and make*** *recommendations concerning making the school finance formula simpler, less regressive, and more adequate, understandable, transparent, equitable and student-centered*
- ***Generate Report:*** *Incorporate recommendations into one report*

Why is it important?

- *Draw on a wide range of expertise*
- *Attempts to remove politics from the equation*
- *Allows for space to discuss and dive deeper on particular subjects*

But what about…

- *Timing can be challenging…*
- *There might not be a good answer…*
- *Too many good ideas….*

Deciding on a Recommendation

There are a few ways for the work group to get to a recommendation

- Unilaterally
- Consensus
- Majority Rule

Things to consider

- *Ensuring all voices are heard*
- *Collaborating around a solution*
- *Giving space for meaningful discussion & revision*
- *Coming to a decision within a timely manner*

Helpful Tools

Robert's Rules of Order

Created in 1876 as a way to establish a Constitution and Bylaws for organizations through a

- Structure of the meeting Agenda and debate.
- Motions; including making, seconding, debating, modifying and amending motions.
- Sufficient majority and simple majority and which decisions are appropriate to them.
- Establishment of a quorum.
- Definition of membership.
- Voting rights of presiding officer and voting procedures.

Multiple Ways of Providing Input

With today's technology and facilitation, there are many inclusive ways to ensure input and ideas are collected from all parties. The following are some examples:

- Surveys
- Small Group Discussions
- Large Group Discussions
- Opportunities for Public Comment
- Minority Reports
- Collaborative Whiteboards / Documents

Models & Data

Helpful to understand the potential impact and effects of decisions. In theory, data can be helpful to provide objectivity to a otherwise complex discussion.

DillingerRAD's Recommendation…a little bit of everything

Proposed Process for Decision Making

1. Review the content through pre-reads, presentations, and discussion
2. Identify, develop, and align on 2 proposals to model
3. Model & review data discussing impact, unintended effects, and potential outcomes
4. Revise and finalize a draft recommendation
5. Utilizing aspects of Robert's Rules a member of the Task Force makes a motion to accept the proposed recommendation
6. Another Task Force member must 2nd it
7. The Task Force is given the opportunity to discuss
8. Once points of discussion have been raised the facilitator will move to take a vote on whether to accept or reject the proposed recommendation
9. If a majority vote to accept the proposal, it will be incorporated into the final report, if not, the proposal must be revised and finalized again (Step 4)

5 Minute Break

Today's Agenda

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Adequacy Study - Desired Outcomes

Large Group Discussion Topic

What specific actions are you hoping to come from the published results of the 2 Adequacy Studies?

Adequacy Study Parameter Development

The charge of the task force:

- The task force is **required to set parameters** to examine and make recommendations concerning the components and costs necessary to adequately provide Colorado students with a free and uniform public education.
- The department is **required to contract with two independent entities** to conduct school finance adequacy studies.
- The department **must select entities that represent different perspectives** concerning school finance.
- The independent entities' report of findings and recommendations must be submitted to the task force and to the General Assembly by **January 3, 2025**.

Adequacy Study Parameter Development

Today	**Review Background**	What is an adequacy study, and what are the goals of an adequacy study?
	Define the "Ask"	What is the charge of the task force, and how do we define parameters for the 2 adequacy studies?
	Breakout & Discuss	Task force will split into 2 groups with each responsible for answering the "ask" and defining parameters for 1 study.
	Rejoin & Review	What did each group come up with?
Next Meeting	**Review & Vote**	Review and finalize parameters for 2 studies.

Defining the “ask” for task force members

- The task force is required to **set parameters** to examine and make recommendations concerning the **components and costs necessary to adequately provide Colorado students with a free and uniform public education.**

- Each task force breakout group should determine, for 1 adequacy study:

    - Should specific **method, or methods** be used?
    - Should studies consider specific **educational outcomes or performance levels**?
    - Are there any **key considerations** that should be included as parameters?
    - Are there any **additional analyses** that should be included in the adequacy study?

    - Across each above consideration, what are the **highest priorities** for each study given a limited budget?

Adequacy Studies

Goals & Features

An adequacy, or costing out, study aims to determine the **resources needed** for students to reach some level of **education outcomes.**

1. **Types:** There are 4 methods for resource determination, each which seek to accomplish the above goal.
   a. Typically, studies include a combination of models to provide multiple perspectives.
2. **Contents:** studies typically consider student and district characteristics, and how they relate to education outcomes.

A traditional adequacy study has not recently been conducted for the Colorado legislature.

Types of Adequacy Studies

There are **four** general methods for conducting adequacy studies:

1. **Professional Judgement**
2. **Evidence-Based**
3. **Cost Function**
4. **Successful Schools/Districts**

Each method leverages different perspectives and has strengths and limitations.

Typically, studies include a combination of models to provide multiple perspectives.

Professional Judgement

Overview

In **Professional Judgement** studies, **panels** of education professionals create **prototype schools** and determine costs of elements necessary for success.

Strengths	Weaknesses
• Easy to explain. • Includes educator perspectives. • Panels account for students with additional learning needs.	• Costs aren't directly linked to outcomes, and may be overestimated. • Method values subjective judgement over evidence-based research.

Example: Nevada Adequacy Study (pg. 38-57)

Source: *A Review of School Funding Adequacy Studies*. (2023) Kentucky Legislative Research Commission.

Professional Judgement: key considerations

Professional Judgement studies require specific school resources to be included in prototype schools.

Key considerations:

- Should any specific school levels be specified for a prototype school?
    - Elementary, middle and high
    - Specific grades (K-5, 6-8, 9-12)
    - Should school size be a consideration?
- Should any specific staffing types be required to be included in study as part of prototype school?
- Should specific staffing costs be adjusted for cost-of-living?
- Should study contain adjustments should be made for students with additional needs?
    - At-risk, economic disadvantage
    - English Language Learners
    - Special education students
    - Gifted and talented students

Evidence-based

Overview

In **evidence-based** studies, **experts use education research** to identify resources a school needs to meet state accountability standards.

Strengths	Weaknesses
• Grounded in real-world research. • Relies on expert knowledge.	• Findings may become outdated, not easily replicable. • Costs aren't directly linked to outcomes, and evidence may not be strong.

Example: Wyoming Adequacy Study (pg. 17-54)

Source: *A Review of School Funding Adequacy Studies*. (2023) Kentucky Legislative Research Commission.

Evidence-based: key considerations

Evidence-based studies require specific school resources to be included in prototype schools.

Key considerations:

- What school levels should be considered?
  - Elementary, middle and high?
  - Specific grades?
  - Should school size be a consideration?
- Should any specific staffing types be required to be included in study?
- Should specific staffing costs be adjusted for cost-of-living?
- What adjustments should be made for students with additional needs?
  - At-risk, economic disadvantage
  - English Language Learners
  - Special education students
  - Gifted and talented students
- Are there specific research-based interventions the study should be required to consider?

Cost function

In **cost function** studies, experts use statistical analysis to identify funding levels needed to achieve level of performance.

Strengths	Weaknesses
• Leverages statistical relationships between spending, need and performance. • Uses wide array of school and student data.	• May be hard to explain and interpret. • Reliant on quality education data quality. • Does not specify interventions or investments to improve outcomes.

Example: Utah Adequacy Study (pg. 35-46)

Source: *A Review of School Funding Adequacy Studies*. (2023) Kentucky Legislative Research Commission.

Cost function: key considerations

Cost function studies relies on analysis of the factors that explain differences in spending across district, controlling for performance.

Key question: what "factors held constant" that impact student performance should study researchers consider?

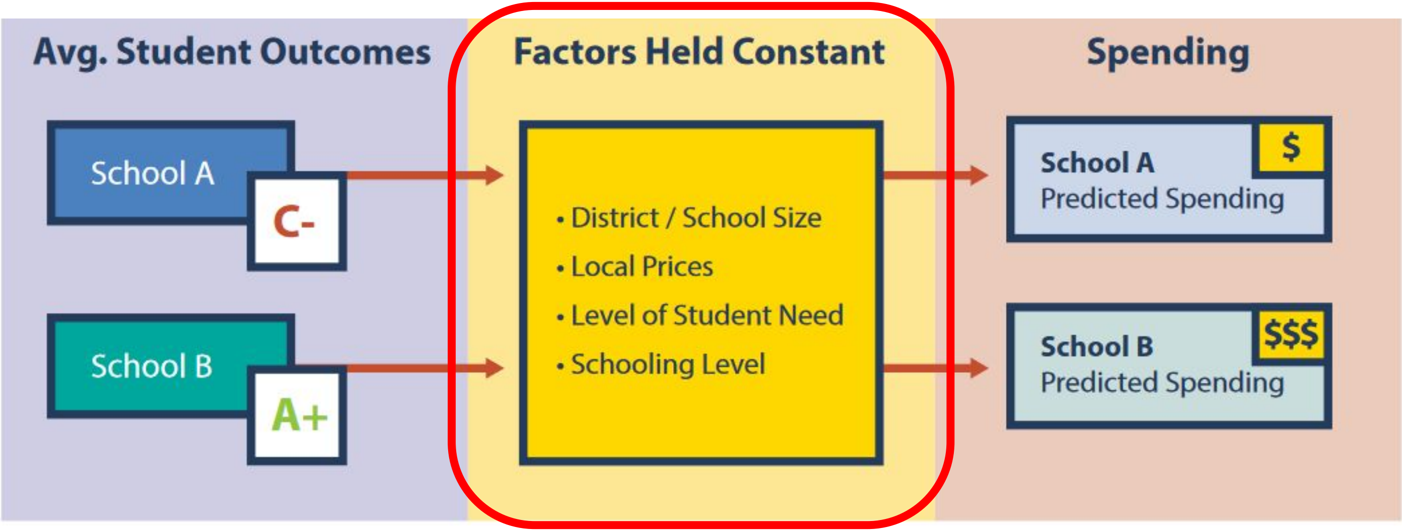

Image sourced from Jacobson, A., Silverstein, J., Willis, J., Diaz, J., Fermanich, M., Piscatelli, J., Lewis, R., McClellan, P., Durodoye, R. (2021). *Utah Funding Study: Phase 2 Report*. WestEd, Augenblick, Palaich and Associates

Successful schools/ districts

In **successful schools or districts** studies, **experts** use **spending levels of schools or districts currently meeting outcome goals** to estimate funding levels necessary statewide.

Strengths	Weaknesses
• Grounded in actual spending data. • Grounded in districts meeting state standards.	• Selected districts may not typical in state. • May not take into account high-needs student populations. • May not properly handle large city / small rural schools.

Example: Maryland Adequacy Study (pg. 64-75)
Utah Adequacy Study (pg. 63-75)

Source: *A Review of School Funding Adequacy Studies*. (2023) Kentucky Legislative Research Commission.

Successful schools/districts: key considerations

Successful schools or districts studies relies on analysis of schools or districts currently meeting desired outcomes, and extrapolating spending levels across the state.

Key considerations:

- Should the study focus on successful **schools**, or successful **districts**?
- Is spending data accurate and reliable at the school level to generate meaningful insight?
- What should the consultant consider when identifying a successful school or district?
  - Performance vs. growth?
  - District characteristics
- Should study contain adjustments for students with additional needs?
  - At-risk, economic disadvantage
  - English Language Learners
  - Special education students
  - Gifted and talented students

Source: *A Comprehensive Review of State Adequacy Studies since 2003.* (2014). Picus Odden and Associates and APA Consulting.

Common features of adequacy studies

Outcomes

Education Outcomes

Adequacy studies often contain **specific educational outcomes** or **levels of performance** for state students.

1. **Maryland** aligned their study to the Maryland College and Career-Readiness Standards.
2. **Wyoming** used a “basket of educational goods” largely aligned to curriculum and graduation requirements.
3. **Utah** used the “minimum school program” concept and primary principles for education as defined in statute (reasonably equal opportunity for all, local participation and determination).

Source: Maryland, Wyoming, Utah adequacy studies.

Educational Outcomes: key considerations

Defining educational outcomes is key in ensuring adequacy studies accurately reflect state goals and necessary spending.

Key considerations:

- The task force is required to **set parameters** to examine and make recommendations concerning the components and costs necessary to adequately provide Colorado students with a **free and uniform public education.**

- Colorado's accountability framework centers the belief that **every student should receive an excellent education and graduate ready to succeed.**

- Colorado's performance frameworks use academic growth, achievement and postsecondary and workforce readiness data to **accredit districts** and **assign school plan types, or ratings.**

Source: CDE.

Common features of adequacy studies

Other Features

Other Features

Adequacy studies often contain additional analyses of state funding systems to guide policymakers:

1. **Current System Analysis:** reviewing the current funding formula or mechanism, including goals and definitions of what is adequate (outcomes, performance, state definitions).
2. **Alignment:** on a common understanding of the goals of the system (what outcomes do education stakeholders want to see?)
3. **Comparisons:** how are other states funding education and tackling these challenges?
4. **Equity:** what are the distributional impacts of the current and future system?

Best practices for adequacy study design

Best Practices

In a review of 39 adequacy studies for Maryland, researchers identified the following best practices:

1. Clear focus on improvement of student performance
2. The potential value of case studies in future work
3. Importance of state policy makers and local stakeholders in the process
4. Combining multiple methods in each state study
5. Selection of professional judgment panels
6. Number of professional judgment panels
7. Accurately representing compensation in the analysis

Source: *A Comprehensive Review of State Adequacy Studies since 2003.* (2014). Picus Odden and Associates and APA Consulting.

Defining the "ask" for task force members: Maryland example

"Chapter 288 requires that a follow-up study of the adequacy of education funding in the State be undertaken approximately 10 years after the enactment of the Bridge to Excellence in Public Schools Act. The study must include, at a minimum **(1) adequacy cost studies that identify (a) a base funding level for students without special needs and (b) per pupil weights for students with special needs, where weights can be applied to the base funding level, and (2) an analysis of the effects of concentrations of poverty on adequacy targets. The adequacy cost study will be based on Maryland's College and Career-Ready Standards (MCCRS) adopted by the State Board of Education.** The adequacy cost study will include two years of results from new state assessments aligned with the standards. These assessments are scheduled to be administered beginning in the 2014-2015 school year.

There are several additional components mandated to be included in the study. These components include evaluations of (**1) the impact of school size, (2) the Supplemental Grants program, (3) the use of Free and Reduced-Price Meals eligibility as the proxy for identifying economic disadvantage, (4) the federal Community Eligibility Provision in Maryland, (5) prekindergarten services and the funding of such services, (6) equity and the current wealth calculation, and (7) the impact of increasing and decreasing enrollments on local school systems.** The study must also include an update of the Maryland Geographic Cost of Education Index."

Maryland Adequacy Study (pg. 2)

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  - Are there any **additional analyses** that should be included in the adequacy study?

  - Across each above consideration, what are the **highest priorities** for each study given a limited budget?

Breakout groups for discussion

- **Details:** the facilitation and technical teams will create **2** groups and associated breakout rooms for task force members to discuss and generate adequacy study parameters for **1 study per team.**

- **Timing:** The teams will participate in breakout rooms and follow the timeline below for this discussion.

  - **Breakout for Question 1:** Should specific **method, or methods** be used? (10 mins)

    Return *to task force as a whole for discussion and review. (5 mins)*

  - **Breakout for Question 2:** Should studies consider specific **educational outcomes or performance levels**? (10 mins)

    Return *to task force as a whole for discussion and review. (5 mins)*

  - **Breakout for Question 3:** Are there any **key considerations** that should be included as parameters? (10 mins)

    Return *to task force as a whole for discussion and review. (5 mins)*

  - **Breakout for Question 4:** Are there any **additional analyses** that should be included in the adequacy study? (10 mins)

    Return *to task force as a whole for discussion and review. (5 mins)*

- **Finalizing Parameters:** next meeting, task force members will review the generated parameters, and vote on the approval of the study parameters using previously discussed voting procedures.

Next Steps

1. Finalize Project Plan
2. Develop preread for next meeting

Closing

Recap of today's discussions

Our next *Tentative* meeting is September 29, 2023, 11 am- 3 pm

(in our 3 hour meetings we WILL take a mid meeting break)