

**COUNCIL OF THE GREAT CITY SCHOOLS**

**EXECUTIVE COMMITTEE MEETING**

**JULY 17-18, 2015**

**SAN FRANCISCO, CA**

# COUNCIL OF THE GREAT CITY SCHOOLS

## Executive Committee Meeting Agenda

**July 17-18, 2015  
San Francisco**

<b>July 17</b>	<b>EXECUTIVE COMMITTEE CONVENES</b>	
<b>2:00 pm</b>	<ul style="list-style-type: none"> <li>• <b>Welcome and Introductions</b></li> </ul>	Page
	Opening of Executive Committee meeting and introductions.	6
	<i>Richard Carranza, Chair of the Board</i>	
	<ul style="list-style-type: none"> <li>• <b>Minutes</b></li> </ul>	Page 14
	Consideration of minutes from the March meetings of the Executive Committee and the Board of Directors in Washington.	Vote
	<i>Richard Carranza, Chair of the Board</i>	
	<ul style="list-style-type: none"> <li>• <b>Nominations</b></li> </ul>	Page 28
	Nominations to fill vacancies on the Executive Committee, task forces, and subcommittees.	Vote
	<i>Richard Carranza, Chair of the Board</i>	
	<ul style="list-style-type: none"> <li>• <b>By-Laws Subcommittee Report</b></li> </ul>	Page 33
	Report of the By-Laws Subcommittee.	
	<i>Keith Oliveira, By-Laws Subcommittee Chair</i>	
	<ul style="list-style-type: none"> <li>• <b>Audit Subcommittee Report</b></li> </ul>	Page 44
	Status report on the 2014-15 budget and the budget for 2015-16.	Vote
	<i>Kaya Henderson, Audit Subcommittee Chair</i>	

	<ul style="list-style-type: none"> <li>• <b>Membership Subcommittee Report</b></li> </ul>	Page 78
	Report of the Membership Subcommittee.	Vote
	<i>Pam Knowles, Membership Subcommittee Chair</i>	
	<ul style="list-style-type: none"> <li>• <b>Annual Report</b></li> </ul>	Page 91
	Consideration of the annual report of the Council of the Great City Schools for 2014-15.	Vote
	<p style="text-align: center;"><i>Michael Casserly, Executive Director</i> and <i>Jumoke Hinton Hodge, Immediate Past Chair</i></p>	
	<ul style="list-style-type: none"> <li>• <b>Conferences and Meetings</b></li> </ul>	Page 120
	Executive Committee, job-alike meetings, and major conferences in 2015.	
	<i>Michael Casserly, Executive Director</i>	
	<ul style="list-style-type: none"> <li>• <b>Awards Programs</b></li> </ul>	Page 139
	Overview of Council awards programs.	
	<i>Michael Casserly, Executive Director</i>	
	<ul style="list-style-type: none"> <li>• <b>Strategic and Succession Planning</b></li> </ul>	Page 169
	Discussion of next steps in strategic and succession planning.	
	<i>Richard Carranza, Chair of the Board</i>	
<b>6:00 pm</b>	<b>EXECUTIVE COMMITTEE BREAKS FOR RECEPTION AND DINNER</b>	

<b>July 18</b>	<b>EXECUTIVE COMMITTEE RECONVENES</b>	
8:00 am	<ul style="list-style-type: none"> <li>• <b>Breakfast</b></li> </ul>	
	<ul style="list-style-type: none"> <li>• <b>Legislation</b></li> </ul>	Page 212
	Overview of the Council’s federal legislative action and discussion of upcoming issues	
	<i>Michael Casserly, Executive Director</i>	
	<ul style="list-style-type: none"> <li>• <b>Communications</b></li> </ul>	Page 308
	Overview of the Council’s communications work.	
	<i>Michael Casserly, Executive Director</i>	
	<ul style="list-style-type: none"> <li>• <b>Research</b></li> </ul>	Page 432
	Overview of the Council’s data analysis and research.	
	<i>Michael Casserly, Executive Director</i>	
	<ul style="list-style-type: none"> <li>• <b>Task Force on Achievement</b></li> </ul>	Page 489
	Overview and discussion of the Council’s work to improve student achievement and implement the Common Core State Standards.	
	<i>Eric Gordon, Achievement Task Force Co-Chair</i>	
	<ul style="list-style-type: none"> <li>• <b>Males of Color Initiative</b></li> </ul>	Page 629
	Overview and discussion of the Council’s work to improve outcomes for urban males of color.	
	<i>Michael Casserly, Executive Director</i>	
	<ul style="list-style-type: none"> <li>• <b>Task Force on Professional Development</b></li> </ul>	Page 710
	Overview and discussion of the Council’s work on teacher quality, professional development, and efforts to improve colleges of education.	

	<i>Deb Shanley, Professional Development Task Force Co-Chair</i>	
	<b>• Task Force on Bilingual Education</b>	Page 748
	Overview and discussion of the Council’s work to improve academic opportunities for English learners.	
	<i>Keith Oliveira, Bilingual Task Force Co-Chair</i>	
	<b>• Task Force on Leadership, Governance, and Management</b>	Page 787
	Overview and discussion of the Council’s work on leadership and governance.	
	<i>Bill Isler, Leadership Task Force Co-Chair</i>	
	<b>• Task Force on Finance</b>	Page 889
	Overview and discussion of the Council’s work on school finance.	
	<i>Thomas Ahart, Finance Task Force Co-chair</i>	
	<b>• Office Move</b>	Page 891
	Discussion of the selection of new office space for the Council’s Washington, D.C. headquarters.	
	<i>Michael Casserly, Executive Director</i>	
	<b>• Evaluation of Executive Director and Personnel Actions</b>	Page 946
	Evaluation of the Executive Director and consideration of recommended personnel actions.	Vote
	<i>Richard Carranza, Chair of the Board</i>	
<b>4:00 pm</b>	<b>Executive Committee Adjourns</b>	

## **ABOUT THE COUNCIL**

# **COUNCIL OF THE GREAT CITY SCHOOLS**

## **OUR VISION**

Urban public schools exist to teach students to the highest standards of educational excellence. As the primary American institution responsible for weaving the strands of our society into a cohesive fabric, we — the leaders of America’s Great City Schools — see a future where the nation cares for all children, expects their best, appreciates their diversity, invests in their futures, and welcomes their participation in the American dream.

The Great City Schools are places where this vision becomes tangible and those ideals are put to the test. We will keep our commitments, and as we do and as society supports our endeavors, cities will become the centers of a strong and equitable nation, with urban public schools successfully teaching our children and building our communities.

## **OUR MISSION**

It is the special mission of America’s urban public schools to educate the nation’s most diverse student body to the highest academic standards and prepare them to contribute to our democracy and the global community.

## **OUR GOALS**

To educate all urban school students to the highest academic standards.

To lead, govern and manage our urban public schools in ways that advance the education of our children and inspire the public’s confidence.

To build a confident, committed and supportive urban community for raising the achievement of urban public schoolchildren.

# COUNCIL OF THE GREAT CITY SCHOOLS

## Executive Committee

**2015-2016**

### OFFICERS

Chair of the Board: Richard Carranza, San Francisco Superintendent  
Chair-Elect: Felton Williams, Long Beach School Board  
Secretary/Treasurer: Kaya Henderson, District of Columbia Chancellor  
Immediate Past-Chair: Jumoke Hinton Hodge, Oakland School Board

### MEMBERS

Thomas Ahart, Des Moines Superintendent  
Jose Banda, Sacramento Superintendent  
JoAnn Brannon, Metro Nashville School Board  
Juan Cabrera, El Paso Superintendent  
Paul Cruz, Austin Superintendent  
Darienne Driver, Milwaukee Superintendent  
Doretha Edgecomb, Hillsborough County School Board  
Lawrence Feldman, Miami-Dade County School Board  
Eric Gordon, Cleveland CEO  
Terry Grier, Houston Superintendent  
Michael Hanson, Fresno Superintendent  
William Isler, Pittsburgh School Board  
Barbara Jenkins, Orange County Superintendent  
Pam Knowles, Portland School Board  
Michael O'Neill, Boston School Board  
Keith Oliveira, Providence School Board  
Ashley Paz, Fort Worth School Board  
Bolgen Vargas, Rochester Superintendent  
Airick West, Kansas City School Board  
Paula Wright, Duval County School Board

### *Ex Officio*

Deborah Shanley, Brooklyn College CUNY Dean



COUNCIL OF THE GREAT CITY SCHOOLS  
EXECUTIVE COMMITTEE  
FY 2015-16

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COUNCIL OF THE GREAT CITY SCHOOLS  
EXECUTIVE COMMITTEE  
FY 2015-16

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**COUNCIL OF THE GREAT CITY SCHOOLS**  
**Board of Directors (as of July 13, 2015)**

<b>CITY</b>	<b>SUPERINTENDENTS</b>	<b>BOARD MEMBERS</b>
Albuquerque	Luis Valentino	David Peercy
Anchorage	Ed Graff	Pat Higgins
Atlanta	Meria Carstarphen	Leslie Grant
Austin	Paul Cruz	Gina Hinojosa
Baltimore	Gregory Thornton	TBD
Birmingham	Kelley Castlin-Gacutan	Wardine Alexander
Boston	Tommy Chang	Michael O'Neill
Bridgeport	Frances Rabinowitz	Sauda Baraka
Broward Co.	Robert W. Runcie	Laurie Rich Levinson
Buffalo	Darren J. Brown	James Sampson
Charleston	Gerrita Postlewait	Todd Garrett
Charlotte-Mecklenburg	Ann Clark	Mary T. McCray
Chicago	Jesse H. Ruiz (Interim)	Jesse H. Ruiz
Cincinnati	Mary Ronan	Melanie Bates
Clark County	Pat Skorkowsky	Linda E. Young
Cleveland	Eric Gordon	Denise Link
Columbus	Daniel J. Good	Gary Baker II
Dallas	Michael Hinojosa (Interim)	Mike Morath
Dayton	Lori L. Ward	Ronald C. Lee
Denver	Tom Boasberg	Allegra Haynes
Des Moines	Thomas Ahart	Cindy Elsbernd
Detroit	Karen Ridgeway	Darnell Earley
East Baton Rouge	Warren Drake	David Tatman
El Paso	Juan Cabrera	Dori Fenenbock
Fort Worth	Patricia Linares (Interim)	Ashley Paz
Fresno	Michael Hanson	Lindsay Cal Johnson
Guilford County	Maurice Green	Rebecca M. Buffington
Hawaii Department of Education	Ronn Nozoe	Donald G. Horner
Hillsborough County	Jeff Eakins (Acting)	Doretha Edgecomb
Houston	Terry Grier	Paula Harris
Indianapolis	Lewis Ferebee	Samuel Odle
Jackson	Cedrick Gray	Monica Gilmore-Love
Jacksonville	Nikolai P. Vitti	Paula Wright
Jefferson County	Donna Hargens	Diane Porter
Kansas City	Allan Tunis (Interim)	Airick West
Long Beach	Christopher Steinhauser	Felton Williams
Los Angeles	Ramon Cortines (Acting)	Steve Zimmer
Miami-Dade County	Alberto Carvalho	Lawrence Feldman
Milwaukee	Darlene Driver	Michael Bonds
Minneapolis	Michael Goar (Interim)	Don Samuels
Nashville	Chris Henson (Interim)	JoAnn Brannon
Newark	TBD	Antoinette Baskerville-Richardson
New Orleans	Henderson Lewis Jr.	N/A
New York City	Carmen Fariña	N/A
Norfolk	Michael Thornton (Acting)	Kirk T. Houston, Sr.
Oakland	Antwan Wilson	Jumoke Hinton Hodge
Oklahoma City	Rob Neu	Phil Horning
Omaha	Mark Evans	Lacey Merica

Orlando  
Palm Beach County  
Philadelphia  
Pittsburgh  
Portland  
Providence  
Richmond  
Rochester  
Sacramento  
St. Louis  
St. Paul  
San Diego  
San Francisco  
Santa Ana  
Seattle  
Shelby County (Memphis)  
Toledo  
Washington, D.C.  
Wichita

Barbara Jenkins  
Robert Avossa  
William R. Hite, Jr.  
Linda Lane  
Carole Smith  
Christopher Maher (Interim)  
Dana Bedden  
Bolgen Vargas  
Jose L. Banda  
Kelvin Adams  
Valeria Silva  
Cindy Marten  
Richard Carranza  
Richard Miller  
Larry Nyland  
Dorsey E. Hopson, II, Esq.  
Romules L. Durant  
Kaya Henderson  
John Allison

William Sublette  
Debra L. Robinson  
Marjorie G. Neff  
William Isler  
Pam Knowles  
Keith Oliveira  
Jeffrey Bourne  
Van Henri White  
Christina Pritchett  
Rick Sullivan  
Mary Doran  
Marne Foster  
Jill Wynns  
Rob Richardson  
Harium Martin-Morris  
Kevin Woods  
TBD  
N/A  
Jeff Davis

# **COUNCIL OF THE GREAT CITY SCHOOLS**

## **Staff**

Michael Casserly, Executive Director  
Teri Trinidad, Director of Administration, Finance & Conferences  
Alisa Adams, Finance Manager  
Marilyn Banks, Administrative Assistant  
Terry Tabor, Conference Manager  
Shirley Lathern, Systems and Administrative Specialist  
Johanna Lim, Accounting and Conference Specialist  
Jeff Simering, Director of Legislation  
Julie Beth Halbert, Legislative Counsel  
Manish Naik, Legislative Manager  
Gabriela Uro, Director of ELL Policy & Research  
Debra Hopkins, ELL Project Coordinator  
Carol Aguirre, ELL Policy Specialist  
Henry Duvall, Director of Communications  
Tonya Harris, Communications Manager  
Danyell Taylor, Communications Specialist  
Raymond Hart, Director of Research  
Renata Uzzell, Research Manager  
Moses Palacios, Research Specialist  
Elizabeth Spurgeon, Research Intern  
Ricki Price-Baugh, Director of Academic Achievement  
Denise Walston, Director of Mathematics  
Robin Hall, Director of Language Arts and Literacy  
Robert Carlson, Director of Management Services  
Michell Yorkman, Special Projects Manager  
Amanda Corcoran, Special Projects Manager  
Jonathon Lachlan-Haché, Special Projects Specialist

# MINUTES

**EXECUTIVE COMMITTEE**

**COUNCIL OF THE GREAT CITY SCHOOLS  
MINUTES  
EXECUTIVE COMMITTEE MEETING  
WASHINGTON, DC  
MARCH 14, 2015**

Present:

Officers:

Jumoke Hinton Hodge, Chair, Oakland School Board  
Richard Carranza, Chair-elect, San Francisco Superintendent  
Valeria Silva, Immediate Past Chair, St. Paul Superintendent

Members:

Cecelia Adams, Toledo School Board  
Tom Ahart, Des Moines Superintendent  
Jose Banda, Sacramento Superintendent  
JoAnne Brannon, Metro Nashville School Board  
Darien Driver, Milwaukee Superintendent  
Paul Cruz, Austin Superintendent  
Eric Gordon, Cleveland CEO  
Terry Grier, Houston Superintendent  
Michael Hanson, Fresno Superintendent  
Kaya Henderson, District of Columbia Chancellor  
Barbara Jenkins, Orange County Superintendent  
Bill Isler, Pittsburgh School Board  
Pam Knowles, Portland School Board  
Keith Oliveira, Providence School Board  
Michael O'Neill, Boston School Board  
Shanaysha Sauls, Baltimore School Board  
Deborah Shanley, Brooklyn College, CUNY Dean  
Bolgen Vargas, Rochester Superintendent  
Airick West, Kansas City School Board  
Paula Wright, Duval County School Board

Absent:

Meria Carstarphen, Atlanta Superintendent  
Lawrence Feldman, Miami-Dade School Board  
Felton Williams, Long Beach School Board

Richard Carranza, Chair-elect of the Board of Directors, called the meeting to order at 12:25 pm. Present members introduced themselves and a quorum was established. The chair, Jumoke Hinton Hodge, was temporarily delayed because of her flight.



## **Minutes**

Richard Carranza presented the minutes of the January 23-24, 2015 meeting of the Executive Committee in Jacksonville, FL, and the October 25, 2014 meeting of the Board of Directors at the Annual Fall Conference in Milwaukee, WI. A motion to approve the minutes was approved by voice vote.

## **Nominations**

Nominations Committee Chair and Immediate-Past Chair of the Board Valeria Silva presented the nominations for officers and others for the 2015-16 term.

The slate of nominations included—

### **Officers**

Richard Carranza, San Francisco Superintendent as the Chair of the Board  
Felton Williams, Long Beach School Board, as the Chair-Elect  
Kaya Henderson, District of Columbia Chancellor, as the Secretary/Treasurer  
Jumoke Hinton Hodge, Oakland School Board, as Immediate Past Chair

### **Executive Committee Member for Renewed Term**

Cecelia Adams, Toledo School Board, to serve a first three-year term beginning July 1, 2015 and ending June 30, 2018.

### **Confirmation of New Members**

- 1) Darienne Driver, Milwaukee Superintendent, to serve the unexpired term of Health Morrison, whose term expires June 30, 2017
- 2) Barbara Jenkins, Orange County Superintendent, to serve the unexpired term of Winston Brooks, whose term expires June 30, 2017
- 3) Bolgen Vargas, Rochester Superintendent, to serve the unexpired term of John Deasy, whose term expires June 30, 2016
- 4) Juan Cabrera, El Paso Superintendent, to serve the unexpired term of Craig Witherspoon, whose term expires June 30, 2017.

### **Vacancies on the Executive Committee**

- 1) Thomas Ahart, Des Moines Superintendent, to serve the unexpired term of the new Secretary/Treasurer, Kaya Henderson beginning July , 2015 and ending June 30, 2016
- 2) Paul Cruz, Austin Superintendent, to serve a first three-year term beginning July 1, 2015 and ending June 30, 2018.

A motion to approve all nominations passed by voice vote.

## **Membership**

Chair Jumoke Hinton Hodge joined the committee. Pam Knowles presented the report of the Membership Subcommittee. There were two districts applying for membership—Durham, NC and Arlington, TX. The membership committee met *via* email and found that neither met the membership criteria. Although Arlington did meet the criteria on its

face, there was discussion as to whether they were truly urban enough, given the size and location of the city.

The committee materials also provided a list of recent membership requests received from a number of cities. The majority were not eligible, given population, student enrollment, or urban characteristics, and were consequently rejected for membership.

The committee then discussed specific eligibility criteria. For Arlington, the district was perceived as a large suburban district becoming more urban, but it has grown up around the center city of Dallas. The group agreed that an eligible school system needs to be the predominate district for the city—which, in this case, would be Dallas.

The decision to deny membership to both districts passed by voice vote.

Michael Casserly, the Council’s executive director, then presented to the group the possible option of having large county school districts that do not meet our membership criteria affiliate with the Council. The notion emerged from recent efforts by AASA, which currently represents these large county districts, to advocate amendments to the federal Title I program that would hurt both Council members and these large county districts. The committee discussed what this affiliation would look like—whether we truly have common cause with these systems, and what services they would be interested in or should have access to. Because of their size and emerging poverty and ELL numbers, these county school districts are beginning to see themselves as more aligned with the Council than with AASA, which has evolved over time to become almost exclusively focused on small, rural school systems.

Committee members discussed their interest in preserving the urban nature of our organization, but members thought that the participation of some large county districts could strengthen our hand in some respects.

Also, in some circumstances cities that don’t qualify for Council membership are only barely below membership requirements, and there are a number of Council districts who would no longer qualify if they were to re-apply today.

### **By-Laws Subcommittee**

No report.

### **Audit Subcommittee**

The final audit report for the period of July 2013 to June 2014 is provided in the Executive Committee materials, along with the accompanying auditor’s letter to the Board of Directors. These are the same numbers and narrative that were provided in draft form at the January Executive Committee meeting. Once again, there was no yellow book component (since the organization does not have federal funds). The audit is completely clean, with no findings or exceptions, and no material weaknesses. This has been the case for several years running, thanks to the outstanding work of Teri Trinidad.

The materials also included a general statement and documentation of the organization's financial position, including assets and liabilities and a breakdown of investments, activities, main grants and contracts receivable, etc. Materials also included revenue and expenses disaggregated by activity, and a cash flow analysis.

For new members, Casserly pointed out that the organization appears to have a fairly large cash reserve, which comes from foundation grants that are to be spent down over the balance of the calendar year. At the previous meeting in January, the committee reviewed these grants.

A copy of the organization's accounting policies were provided in the materials as well. The auditors also conducted a "tipping analysis" to make sure that funding for the organization does not rely too heavily on any one foundation source, according to IRS rules for 501 (c)(3) organizations. The Council was found to be well within acceptable limits, and not in danger of risking its tax-exempt status.

Casserly also pointed out that some investment funds were currently held in non-FDIC insured accounts. The Executive Committee has historically supported this, but this should be noted for new members. No concerns or objections were raised.

Casserly then reviewed the current status of membership dues payments. All members had paid their dues—except New Orleans, which is permanently exempt.

The materials also included budgeted expenses through December 31, 2014, and a proposed budget for 2015-16, which was approved by the committee in January. The Council is once again on schedule to have a balanced budget for the current fiscal year.

A copy of the organization's investment policies and guidelines are now included in the committee materials as well, in response to a request at the last meeting.

A motion to accept the audit report and budget passed by voice vote.

In response to a question regarding membership-dues tier adjustments, Casserly stated that according to a policy adopted by the committee, the tier classification for the dues of each member is reviewed every year ending in a "5" or "0". So in 2015 enrollment numbers will be reviewed and tier classifications will be adjusted accordingly before invoices are sent out. Casserly let the group know that they should contact Teri with enrollment information that might be different from what is provided on the district's website.

### **Conferences and Meetings**

Casserly presented the meeting lineup for 2015. The July Executive Committee meeting will be held in San Francisco, July 17-18. Hotel information is provided in the committee materials.

The 2015 annual conference will be held in Long Beach, CA. Hotel and venue information is provided in the materials. The Call for Proposals has been sent out, and we are now accepting applications for presentations.

The 2016 annual conference will be held in Miami-Dade County, the 2017 conference will be in Cleveland (October 15-22), and 2018 will be in Baltimore. We have not selected a location for the 2019 conference yet, although Louisville has a bid in.

The group then decided on locations for the 2016 Executive Committee Meetings. El Paso offered to host the January meeting, and Boston offered to host the meeting in July. A motion to approve these locations passed by a voice vote.

### **Office Move**

The Council's lease for office space at 1301 Pennsylvania Avenue expires in the summer of 2016, so Council staff have started actively looking for a new location. Materials from the real estate agent are provided in the Office Move section of the briefing book. Washington DC is an expensive real estate market, but the Bylaws require us to remain in the District of Columbia, and we want to stay in close proximity to Capitol Hill and the federal agencies.

Committee members agreed that the Council should be looking at high quality space that respects the work of Council staff. Casserly indicated that he would share more detailed information with the committee at the July meeting.

### **Strategic and Succession Planning**

The topic of strategic and succession planning will be revisited in July. Members suggested putting it first on the agenda.

In closing, Casserly informed the group that President Obama had accepted our request for a meeting with the leadership of the Council. The White House selected the group to participate from members of the executive committee. Casserly then reviewed some major points of interest for the discussion, and asked for member input.

The group agreed to meet the next day to fine-tune the list of topics and points to be discussed at the meeting.

The Chair adjourned the meeting at 2:00 pm.

Respectfully submitted:

Michael Casserly  
Executive Director

**BOARD OF DIRECTORS**

**COUNCIL OF THE GREAT CITY SCHOOLS MINUTES  
BOARD OF DIRECTORS MEETING  
WASHINGTON, DC  
MARCH 15, 2015**

Jumoke Hinton Hodge, Chair of the Board of Directors, called the meeting to order at 8:45 am. Present members introduced themselves. A quorum of the board was not immediately established, but was done so later in the meeting. All votes were ratified at that point.

Minutes

The chair presented the minutes of the October 25, 2014 meeting of the Board of Directors at the Annual Conference in Milwaukee, WI, and the January 23-24, 2015 meeting of the Executive Committee in Jacksonville, FL. A motion to approve the minutes passed by voice vote.

Nominations

Nominations Committee Chair Valeria Silva presented the nominations for officers and members of the executive committee for the 2015-16 term.

The slate of nominations included—

Officers

Richard Carranza, San Francisco Superintendent as the Chair of the Board  
Felton Williams, Long Beach School Board, as the Chair-Elect  
Kaya Henderson, District of Columbia Chancellor, as the Secretary/Treasurer  
Jumoke Hinton Hodge, Oakland School Board, as Immediate Past Chair

Executive Committee Member for Renewed Term

Cecelia Adams, Toledo School Board, to serve a first three-year term beginning July 1, 2015 and ending June 30, 2018.

Confirmation of New Members

- 1) Darienne Driver, Milwaukee Superintendent, to serve the unexpired term of Health Morrison, whose term expires June 30, 2017
- 2) Barbara Jenkins, Orange County Superintendent, to serve the unexpired term of Winston Brooks, whose term expires June 30, 2017
- 3) Bolgen Vargas, Rochester Superintendent, to serve the unexpired term of John Deasy, whose term expires June 30, 2016
- 4) Juan Cabrera, El Paso Superintendent, to serve the unexpired term of Craig Witherspoon, whose term expires June 30, 2017.

Vacancies on the Executive Committee

- 1) Thomas Ahart, Des Moines Superintendent, to serve the unexpired term of the new Secretary/Treasurer, Kaya Henderson beginning July , 2015 and ending June 30, 2016

2) Paul Cruz, Austin Superintendent, to serve a first three-year term beginning July 1, 2015 and ending June 30, 2018.

A motion to approve all the nominations passed by voice vote.

### Conferences and meetings

Michael Casserly, the Council's executive director, presented the meeting lineup for the remainder of 2015. The 2015 Annual Conference will be held in Long Beach, CA. He noted that the meeting will take place earlier than usual, October 7-11. All event venues are included in the board materials. Speakers are still being secured, and suggestions are welcome. A Call for Proposals for session presentations is now available.

The 2016 Annual Conference will be in Miami-Dade County, 2017 will be in Cleveland, and 2018 will be in Baltimore. The host city for 2019 is still being determined, although the Council has received a bid from Louisville.

### Communications

Casserly reviewed all recent statements and press releases of the organization, as well as a sample of recent articles and editorials. He invited board members to inform staff if our media outreach or editorializing were not reflecting their interests or positions or meeting their needs. No concerns were expressed.

The board materials also included communications and information tools in support of the common core. The Council's latest three-minute video was played for the board. This video is available to members to share as they like. Other common core videos and tools from the Council have gained substantial traction. Our last PSA, for example, was viewed over 240 million times in an 18-month period. Usage reports were provided in the materials, along with a list of awards the organization has received for these and other outreach tools.

Casserly also indicated that the Bernard Harris Scholarship applications were now available. The deadline for applications was April 8. The board materials also included the latest edition of *The Urban Educator*.

### Legislation

Legislative issues will be covered in greater detail at the afternoon briefing session and throughout the remainder of the legislative conference. Board materials included the Council's legislative platform on the reauthorization of ESEA. Casserly invited the group's comments and advice on these recommendations. Secretary of Education Arne Duncan will also join the group for lunch following the board meeting. Casserly then informed the group that a subset of the Executive Committee will be meeting with President Obama tomorrow morning at the White House to raise our concerns about ESEA and the proposed federal budget.

## Research

The board materials provided an overview of research activities and several new reports, including the latest edition of *Beating the Odds*. Casserly indicated that this may be the last version of this report, given the advent of new common core assessments. Also included in the materials was a new report by the Council on the impact of federal school-improvement grants (SIG); a new report based on district implementation of the common core standards; and the Council pledge on black male achievement, along with a list of districts that had developed implementation plans to accompany their pledge. There was also a letter outlining the Council's partnership with the NBA around this issue. The initiative will start with team cities to see how these local partnerships go—then potentially expand to other cities. Casserly encouraged members to continue sending in their implementation plans.

Ray Hart, the Council's research director, then reviewed early findings from the organization's assessment survey. His report presented initial findings from a survey of district assessment practices, as well as a more in-depth analysis of the assessment landscape in a handful of districts. Analysis of the data will continue until we are confident that an accurate depiction of member testing practices has been captured.

Casserly indicated that staff had not yet determined how or when to release the report—whether to release it all at once, develop recommendations, etc. Staff would like to ask the still-to-be-named testing commission to help think through the recommendations and models based on survey results. The Board materials included a list of potential members of this testing commission. The Executive Committee recommended including external partners, but not organizations or groups that might have ulterior political motives or positions. Casserly welcomed feedback on the names so that we can go ahead and contact invitees. One board member suggested charging district representatives with naming a teacher representative from their districts, while another member cautioned against trying to represent too many groups' perspectives with the task force. Other suggestions included adding parents to the group.

Casserly then asked members to share their early common core assessment experiences with the group. Washington DC reported a largely successful and incident-free test administration. Orange County indicated that the initial rollout of the Florida assessment was not as smooth, with widespread questions about the validity of the tests. Cleveland reported having had a mixed start. San Francisco reported that administration of the SBAC has been relatively issue-free so far. Richard Carranza indicated that he sat with students during testing, took the tests himself, and involved the media. Seattle reported some technical glitches, but nothing major. The group also reported that opt-out numbers had been small so far.

The Board agreed to move forward with the proposed commission.

## Achievement Task Force

Eric Gordon gave the report of the Achievement Task Force. This included updates on the assessment survey, the technology partnership with the University of Chicago, and



the draft GIMET—the grade-level instructional materials review rubrics. These grade-by-grade rubrics were designed to help operationalize the Publishers’ Criteria for alignment with the common core on a grade-by-grade basis. The rubrics were aligned with IMET, which was written by Student Achievement Partners with input from the Council, but GIMET goes deeper and is more specific.

The board of director’s materials also included an update on the academic KPI project. The Council currently has five pilot districts that are testing the indicators. The academic KPIs also incorporate indicators aligned to the black male pledge to allow us to track our progress in that area.

Casserly then updated the group on the Wallace foundation principal supervisor initiative, sharing preliminary themes from the Council’s site visits to six of the PSI districts over the last two months. The Curriculum and Research Directors’ meeting will also include these school management leaders to build additional opportunities for collaboration between curriculum staff and school-leadership units. A list of other upcoming workshops, seminars, and professional development opportunities was also provided in the board materials.

#### Professional Development Task Force

Deb Shanley gave the report of the Professional Development Task Force. The board materials included proposals from the Harvard University Graduate School of Education on joint superintendent and aspiring CAO institutes. There was also a proposal on a mentoring program for new superintendents submitted by Carol Johnson, former Boston superintendent, as well as a description of the Council’s urban school executives program.

Finally, the materials included the agenda from the recent Human Resources Directors’ meeting.

#### Bilingual Task Force

Keith Oliveira gave the report of the Bilingual Task Force. He summarized a number of ongoing Council initiatives.

To begin with, the Council released a publication last fall— a framework for raising expectations for ELLs and improving the quality of instructional materials. The Council has worked extensively with publishers to help them create higher-quality materials to meet the needs of ELLs. The organization is now entering the piloting phase of this work. Still, a number of publishers have dropped out at this point, and Casserly listed those publishers for the board.

In the area of unaccompanied minors, the Council is working with Congress and the Department of Education to make sure funds are available to support these children.

Finally, the bilingual section of the board materials included information on the upcoming BIRE meeting in Charlotte, NC.

### Leadership, Management, and Governance Task Force

Jose Banda gave the report for the Leadership, Management, and Governance Task Force. Bob Carlson conducted a review of findings from Council strategic support teams over the years and identified major themes, which were discussed at the task force meeting. A paper describing the themes was included in the board's briefing materials.

In response to a question regarding work around supporting superintendent tenure and the development of effective urban school boards, Casserly responded that the organization had not yet found a convincing way to address the issues. Board members urged the Council to play a stronger role in setting performance indicators for school boards, helping to provide professional development, and developing evaluation approaches. A group of board members and superintendents met after the session to discuss additional steps that needed to be taken.

### Finance Task Force

Board members congratulated Atlanta on earning the Council's financial management award.

### Audit

The final audit report for the period of July 2013 to June 2014 was approved by the Executive Committee yesterday. Once again, the audit was completely clean, with no findings or exceptions. The board's briefing materials included the "Independent Auditors Report for FY2013-2014", the "Financial Reports for the General Operating Budget and Categorical Programs for FY2014-2015", and the "Proposed General Operating Budget for FY2015-2016", which was approved by the Executive Committee at the January meeting in Jacksonville. Casserly pointed out that the organization appears to have a fairly large cash reserve, which comes from foundation grants that will be spent down over the course of the calendar year.

Casserly also pointed out that the organization has some cash reserves in investment accounts that are not FDIC insured, although they are stable and the auditor does not have concerns. He assured the group that the accounts were monitored closely.

The audit section also provided a breakdown of the Council's expenditures through December 31, 2014, along with the status of dues payments. Casserly reported that except for New Orleans, all dues had been collected in 2014-15. Overall, the budget was on track to be balanced once again. Casserly indicated that the organization remains in good financial standing, thanks to the commitment of its members.

The Proposed Budget for FY2015-16 was moved to the Board of Directors for consideration. A motion to accept the audit report and proposed budget for FY2015-16 passed by voice vote.

### By-Laws

No report.

### Membership

The Council received two applications for membership—Arlington, TX, and Durham, NC. The Executive Committee decided not to accept either of these applications at this time. Durham clearly did not meet membership requirements, and there were questions about whether or not Arlington was an urban or a suburban district.

A motion to deny these membership requests passed by voice vote.

### Strategic and Succession Planning

The discussion about strategic and succession planning was deferred to the next Board of Directors meeting.

In closing, Casserly thanked Jumoke Hinton Hodge for her service and leadership as Chair of the Board, and presented her with a crystal gavel.

He also thanked Valeria Silva, who will be rotating off the Executive Committee, and John McDonough, who will be leaving the Board of Directors, and presented them both with awards for their service.

The Chair adjourned the meeting at 12:05 pm.

Respectfully submitted:

Michael Casserly  
Executive Director

## **NOMINATIONS**

# COUNCIL OF THE GREAT CITY SCHOOLS

## Nominations and Appointments

The Chair of the Board forwards the following nominations to fill vacancies on the Executive Committee and makes the following appointments.

### Vacancies

- 1) Be it resolved: That Ashley Paz (Fort Worth school board) serve the unexpired term of Shana Sauls (Baltimore school board), whose term expires June 30, 2017.

ACTION BY COMMITTEE

Approved

Not Approved

AFFIRMED

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Chair of the Board

- 2) Be it resolved: That Doretha Edgecomb (Hillsborough County school board) replace Cecilia Adams (Toledo school board) and serve a full three-year term ending June 30, 2018.

ACTION BY COMMITTEE

Approved

Not Approved

AFFIRMED

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Chair of the Board

**Composition of Executive Committee  
FY2015-2016 (with New Nominations)**

<b>Region</b>	<b>Male</b>	<b>Female</b>	<b>Board</b>	<b>Supt</b>	<b>Black</b>	<b>Hispanic</b>	<b>White</b>	<b>Other</b>	<b>Totals</b>
East	4	1	3	2	1	2	2	0	5
Southeast	1	3	3	1	3	0	1	0	4
Midwest	6	3	3	6	3	3	3	0	9
West	4	2	3	3	2	2	2	0	6
Totals	15	9	12	12	9	7	8	0	24

# Appointments by the Chair, 2015-16

## Subcommittee Chairs and Members

Audit Subcommittee Chair: Kaya Henderson, District of Columbia Chancellor  
Paul Cruz, Austin Superintendent  
Michael Hanson, Fresno Superintendent  
Jumoke Hinton Hodge, Oakland School Board  
Bill Isler, Pittsburgh School Board  
Barbara Jenkins, Orange County Superintendent  
Felton Williams, Long Beach School Board

Bylaws Subcommittee Chair: Keith Oliveira, Providence school board  
Jose Banda, Seattle Superintendent  
Larry Feldman, Miami-Dade County School Board  
Eric Gordon, Cleveland CEO  
Michael O'Neill, Boston School Committee  
Bolgen Vargas, Rochester Superintendent  
Paula Wright, Duval County School Board

Membership Subcommittee Chair: Pam Knowles, Portland School Board  
Thomas Ahart, Des Moines Superintendent  
JoAnn Brannon, Nashville School Board  
Juan Cabrera, El Paso Superintendent  
Darienne Driver, Milwaukee Superintendent  
Terry Grier, Houston Superintendent  
Airick West, Kansas City School Board

## Task Force Chairs

Achievement Task Force  
Co-Chair: Eric Gordon, Cleveland CEO  
Co-Chair: Paula Wright, Duval County School Board

Professional Development Task Force  
Co-Chair: Felton Williams, Long Beach School Board  
Co-Chair: Darienne Driver, Milwaukee Superintendent  
Co-Chair: Deborah Shanley, Brooklyn College CUNY

Bilingual Task Force  
Co-Chair: Valeria Silva, St. Paul Superintendent  
Co-Chair: Keith Oliveira, Providence School Board

Leadership & Governance Task Force  
Co-Chair: Jose Banda, Sacramento Superintendent  
Co-Chair: Bill Isler, Pittsburgh School Board

Finance Task Force

Co-Chair: Thomas Ahart, Des Moines Superintendent

Co-Chair: Larry Feldman, Miami-Dade School Board



**SUBCOMMITTEE ON BY-LAWS**

# **COUNCIL OF THE GREAT CITY SCHOOLS**

## **Subcommittee on By-Laws**

**2015-2016**

### ***Subcommittee Goal***

To define the mission, responsibilities and composition of the Council's structural components within the framework of applicable laws and regulations.

### ***Chair***

Keith Oliveira, Providence School Board

### ***Members***

Jose Banda, Sacramento Superintendent  
Larry Feldman, Miami-Dade County School Board  
Eric Gordon, Cleveland CEO  
Michael O'Neill, Boston School Committee  
Bolgen Vargas, Rochester Superintendent  
Paula Wright, Duval County School Board

### ***Ex Officio***

Richard Carranza, San Francisco Superintendent

**CURRENT BY-LAWS**

**BY-LAWS  
OF THE  
COUNCIL OF THE GREAT CITY SCHOOLS**

**ARTICLE I: NAME**

**Section 1.01 Name.** The Corporation shall be organized as non-profit and be known as the Council of the Great City Schools.

**ARTICLE II: PURPOSE AND MISSION**

**Section 2.01 Purpose.** The purpose of this Corporation shall be to represent the needs, challenges, and successes of major-city public school districts and their students before the American people and their elected and appointed representatives; and to promote the improvement of public education in these districts through advocacy, research, communications, conferences, technical assistance, and other activities that may also benefit other schools, school districts and students across the country.

**Section 2.02 Mission.** The Council of the Great City Schools, being the primary advocate for public urban education in America, shall:

- Articulate the positive attributes, needs and aspirations of urban children and youth;
- Promote public policy to ensure improvement of education and equity in the delivery of comprehensive educational programs;
- Provide the forum for urban educators and board members to develop strategies, to exchange ideas and information and to conduct research; and
- Create a national focus for urban education in cooperation with other organizations and agencies.

to ensure that the members of the Great City Schools meet the needs of the diverse urban populations they serve.

**ARTICLE III: OFFICES**

**Section 3.01 Principal Office.** The principal office of the Corporation shall be at 1301 Pennsylvania Avenue, Northwest, Suite 702, Washington, D.C. The location of the registered office of the Corporation shall be in the offices of the Corporation Trust System in Chicago, Illinois at 228 South LaSalle Street, Chicago, Illinois.

The Registered Agent of the Corporation shall be the Corporation Trust System in Chicago, Illinois and Washington, D.C.

**ARTICLE IV: MEMBERSHIP**

**Section 4.01 Membership.** A Board, Committee or Commission (hereafter referred to as "Board of Education") responsible for public education in cities with a population of two hundred fifty thousand (250,000) or more, and an enrollment in public elementary and secondary schools of thirty five thousand (35,000) or more in 1980 or which is the predominant Board of Education serving the largest urban city of each state regardless of the enrollment of the school district. If the Board of Education has jurisdiction over areas outside

the central city, then the enrollment of those areas may also be included for purposes of eligibility, but the population outside the central city shall not.

Provided the above criteria are met, the Executive Committee will examine the urban characteristics of each applicant city brought to it by the membership committee prior to submitting a recommendation for membership to the Board of Directors for final approval.

Such urban characteristics may include: children eligible for Title I of the Elementary and Secondary Education Act; children in families qualifying for T.A.N.F.; children who are English language learners; and children who are African American, Hispanic, Asian American, Native American, Alaskan Native or other racial minorities as classified by federal Civil Rights statutes.

The enrollment of school districts for purposes of membership in the organization shall be based on the official district enrollment reported to the state, however calculated.

A Board of Education may retain its membership by meeting its dues-paying obligations without regard to changes in population or enrollment. To remain in good standing, dues must be paid.

A district that has not paid its dues will be notified after one year of nonpayment that it will not receive services from the organization in the subsequent year. A district will be dropped from membership after two consecutive years of non-payment of dues and will be required to reapply for membership should it wish to rejoin the organization. The Executive Committee retains the right to levy a "reinstatement fee" in an amount the committee will determine as a condition of a district's rejoining the organization after its membership has otherwise lapsed or to waive such fees depending on the circumstances of the district. The Committee will annually review the status of all district dues and make determinations for needed action.

**Section 4.02 Participation of Non-Member Cities.** Non-member districts may, on approval of the Executive Committee, be involved in studies or other projects of the Council of the Great City Schools. Conditions for such participation shall be established by the Executive Committee.

**Section 4.03 Participation of Former Board of Directors Members.** Former members of the Board of Directors may be involved as non-voting members at conferences and may receive publications of the organization under conditions established by the Executive Committee.

**Section 4.04 Colleges of Education.** Colleges of Education located in or serving cities that are members of the Council of the Great City Schools may be represented *ex officio* on the Executive Committee and Board of Directors and may meet and confer with the Council on issues of joint concern as necessary.

## **ARTICLE V: ORGANIZATION AND ELECTIONS**

**Section 5.01 Board of Directors.** The affairs of the Corporation shall be operated by the Board of Directors. Members of the Board of Directors are the officers of the corporation and the Superintendent of Schools and a member of the Board of Education officially designated by each Board of Education and the Chair of the Great City Colleges of Education. Each member of the Board of Directors shall vote as an individual. No proxies may be appointed to the Board of Directors for the purposes of constituting a quorum of the Board of Directors

or for purposes of voting on matters coming before the Board of Directors. A member of the Board of Directors who is unable to attend a board meeting may, in writing, addressed to the Chair, appoint a representative to attend such meeting for the sole purpose of reporting back to the board member on the business of the meeting.

### **Section 5.02 Officers.**

- (a) Elected Officers.** The elected officers of the Corporation shall be the Chair, Chair-Elect, and Secretary/Treasurer. No person shall be elected to the same position for more than two successive years. The officers shall be elected annually by the Board of Directors from persons who have served on the Executive Committee. Officers and shall take office on the 1st of July following their election. If an officer is unable to complete a term, the Board of Directors shall fill the vacancy at the next meeting of the Directors. The Office of the Chair shall alternate generally between superintendents and Board of Education members. Where the Chair or Chair-Elect is a Board of Education member, he or she may continue to be Chair, or Chair-Elect and then Chair, as the case may be, even though he or she is no longer the designated Board of Education member for his or her school district; provided, however, that only the designated Board of Education member from his or her district shall be entitled to vote at Board of Directors meetings.
- (b) Non-Elected Officers.** The immediate past Chair shall serve as a non-elected, but voting officer of the Corporation. The Executive Director shall serve as a non-elected and non-voting officer of the Corporation.

### **Section 5.03 Executive Committee**

- (a) Voting Members.** The voting members of the Executive Committee shall consist of the Chair, Chair-Elect, Secretary/Treasurer, Immediate Past Chair, and twenty (20) persons elected by the Board of Directors. The Executive Committee shall be elected by the Directors at the Annual Meetings of the membership on a staggered basis for terms of three years and shall take office on the 1st of July following their election. The maximum consecutive number of years that a member of the Board of Directors can serve on the Executive Committee shall be limited to the total of (i) the balance of an unexpired term to which, pursuant to subsection 5.03(e), he or she is appointed by the Executive Committee and is then elected by the Board of Directors; (ii) two three-year terms; and (iii) any additional consecutive years during which he or she serves as an officer of the Corporation.
- (b) Proxies.** No proxies may be appointed to the Executive Committee for purposes of constituting a quorum of the Executive Committee or for purposes of voting on matters to come before the Executive Committee. A member of the Executive Committee who is unable to attend a committee meeting may in writing, addressed to the Chair, appoint a representative to attend such meeting for the sole purpose of reporting back to the committee member on the business of the meeting.
- (c) Composition.** The Executive Committee and Officers of the Corporation shall have equal proportion of Superintendents and Board of Education Members; shall include geographic representation, race, gender, ethnicity, and attendance at Board of

Directors meetings as criteria for membership on the Executive Committee and for Officers of the Corporation. Attendance at Executive Committee meetings will be a criterion for renomination to the Executive Committee and for Officers of the Corporation. Failure to attend both the summer and winter meetings of the Executive Committee in any single calendar year may result in a member's replacement. No more than one person from each member district shall be nominated to the Executive Committee. In addition, the Chair of the Great City Colleges of Education shall serve as an *Ex Officio* non-voting member of the Executive Committee.

- (d) Responsibilities and Powers of the Executive Committee.** Except as to matters for which the General Not For Profit Corporation Act of 1986 of the State of Illinois, as amended from time to time, requires the approval of the members and to the extent not otherwise limited in these By-Laws and by resolution from time to time adopted by the Board of Directors, the Executive Committee shall have and may exercise all the authority of the Board of Directors, when the Board of Directors is not in session. The Executive Committee shall have power to authorize the seal of the Corporation to be affixed to all papers where required. Copies of the recorded minutes of the Executive Committee shall be transmitted to the Board of Directors. The Executive Committee shall have the power to contract with and fix compensation for such employees and agents as the Executive Committee may deem necessary for the transaction of the business of the Corporation, including but not limited to the Executive Director who shall serve as Assistant Secretary/Treasurer and disbursing agent of the Corporation. All salary rates shall be approved annually by a vote of the Executive Committee.
- (e) Vacancies.** Between meetings of the Board of Directors, the Executive Committee shall have and exercise the authority to fill vacancies on the Executive Committee on a temporary basis and to declare a vacancy on the Executive Committee if a member shall be unable to attend meetings of the Committee, or should no longer hold a Superintendency or be a member of a Board of Education in the membership. Appointments to such vacancies shall be confirmed by the Board of Directors at their next regular meeting.
- (f) Subcommittees of the Executive Committee.** There shall be three subcommittees of the Executive Committee: Audit, By-Laws, and Membership. These Committees and their chairpersons will be appointed by the Executive Committee upon the recommendations of the Chair.

**Section 5.04 Task Forces of the Board of Directors.** The Board of Directors may from time to time create Task Forces to address critical issues facing urban public education. A Chair and Co-Chair of each Task Force shall be appointed by the Chair of the Board and shall include one Superintendent and one School Board member, and may also include a representative of the Great City Colleges of Education. The mission, goals, products, and continuation of each Task Force shall be subject to annual review and concurrence by the Board of Directors. Recommendations of the Task Forces shall be posted and circulated to the Board of Directors within a reasonable time before its meetings in order to be considered.

**Section 5.05 Nominations Committee.**

**(a) Composition.** A Nominations Committee shall be chosen annually by the Chair to nominate officers and members of the Executive Committee. In order to ensure racial, ethnic and gender representation on all committees and subcommittees, the Chair shall use these criteria in establishing the Nominations Committee and all other committees and subcommittees. The Nominations Committee shall consist of the Immediate Past Chair of the Organization, who shall act as Chair of the Committee, and at least four other persons appointed by the Chair. The elected officers of the Corporation shall not serve on the Nominations Committee.

A majority of the members of the Nominations Committee shall be members of the Board of Directors who do not serve on the Executive Committee. The Nominations Committee shall have, to the extent possible, an equal number of Superintendents and Board of Education members, and in addition to being geographically representative, shall be balanced by race, ethnicity and gender.

**(b) Responsibilities and Procedures.** The Nominations Committee shall announce nominations at least 14 days before the date of the Board of Directors meeting at which such election will occur. Additional nominations may be made by written petition submitted to the Chairperson of the Nominations Committee at least 24 hours in advance of the start of the Business Meeting at which the election will take place. A written petition must have at least five written signatures from five Board of Directors members from at least five different member cities.

## **ARTICLE VI: EXECUTIVE DIRECTOR**

**Section 6.01 Duties and Responsibilities.** An Executive Director shall be employed by the Executive Committee. In general, the responsibilities of the Executive Director shall be to organize and to coordinate the activities that form the basic program of the Corporation. The Executive Director shall function as the Chief Administrative Officer of the Corporation in accordance with policies established by the Executive Committee. The Executive Director shall be responsible for executing contracts in the name of the Corporation. The Executive Director shall serve as Assistant Secretary/Treasurer and disbursing agent of the Corporation.

**Section 6.02 Fidelity Bond.** The Executive Director shall be responsible for the acquisition and maintenance of a fidelity bond for all corporate officers and employees.

## **ARTICLE VII: CONFERENCE MEETINGS**

**Section 7.01 Conferences.** The Board of Directors shall provide for at least one conference annually at which its members and staff shall meet to plan, discuss and hear reports of the organization. These meetings shall be determined and planned by the Executive Committee. The Conference may recommend to the Board of Directors problems and items for the Corporation's consideration.

**Section 7.02 Time and Place of Meetings.** Meetings of the Board of Directors and/or the Executive Committee shall be held at the call of the Chair, a majority of the Executive Committee, or one-third of the Board of Directors, and shall be held in the city of the registered office of the Corporation, or in member cities. The Board of Directors shall meet at least twice annually, once in the spring and once in the fall.



**Section 7.03 Spring Directors Meeting.** The spring meeting of the Board of Directors shall be held to elect officers, approve the annual budget, and transact such other matters of business as are necessary.

**Section 7.04 Notices of Meetings.** Written notices of the meetings of the Board of Directors and the Executive Committee shall be given at least fourteen (14) days prior to the date of the meeting.

**Section 7.05 Quorum.** The presence of one-third of the Board of Directors or a majority of elected Executive Committee members, respectively, shall constitute a quorum for the transaction of business, and unless otherwise provided in these By-Laws or by law, the act of a majority of The Board of Directors present or the act of a majority of elected Executive Committee members present at a meeting at which a quorum is present shall be an act of the Corporation.

**Section 7.06 Organization.** At every meeting of the Executive Committee, the Chair of the Board of Directors shall act as Chair. The Chair-Elect of the Board or other person designated by the Chair may chair the Executive Committee when the Chair is absent. The Executive Director or his or her designee shall serve as the Recording Secretary at all meetings of the Executive Committee and the Board of Directors.

**Section 7.07 Press Policy.** All meetings of the Corporation shall be open to the press and to the public. The Board of Directors or the Executive Committee, however, may by a majority vote declare a meeting closed.

#### **ARTICLE VIII: FISCAL YEAR**

**Section 8.01 Fiscal Year.** The fiscal year of the Corporation shall be from July 1st of each year to June 30th of the succeeding year.

**Section 8.02 Audit.** The accounts of the Corporation for each fiscal year shall be audited, and the financial reports verified annually by the Audit Committee of the Executive Committee. A written report of the Audit Committee shall be filed in the minutes of the meeting of the Corporation at which the report is submitted.

**Section 8.03 Bond.** The Officers and employees responsible for handling funds for the organization shall be bonded in an amount to be determined by the Executive Committee and premium shall be paid by the Corporation.

#### **ARTICLE IX: FINANCES**

**Section 9.01 Financial Support.** The Board of Directors shall determine the amount of the service charges and/or membership dues to be paid to the Corporation by Boards of Education in the membership. The Executive Committee shall review the membership dues structure and amounts in years ending in zero or five, and may recommend modifications to the Board of Directors.

**Section 9.02 Grants.** The Board of Directors shall be empowered to receive grants from foundations or other sources tendered to the Corporation.

**Section 9.03 Receipts.** All funds received are to be acknowledged by the Executive Director or his or her designee, and a monthly financial report is to be created internally for

management purposes and quarterly financial reports are to be submitted to the Executive Committee. Earmarked funds are to be carried in a separate account.

**Section 9.04 Checks, Drafts, and Order for Payment of Money.** Orders for payment of money shall be signed in the name of the corporation by such officers or agents as the Executive Committee shall from time to time designate for that purpose. The Executive Committee shall have the power to designate the officers and agents who shall have authority to execute any instruments on behalf of the Corporation.

**Section 9.05 Disbursements.** Checks written for amounts not exceeding \$100,000 shall be signed by the Executive Director or other persons authorized by the Executive Committee. Checks written in excess of \$100,000 shall be countersigned by the Executive Director and an officer.

**Section 9.06 Contracts and Conveyances.** When the execution of any contract or conveyance has been authorized by the Executive Committee, the Executive Director shall execute the same in the name and on behalf of the Corporation and may affix the corporate seal thereto.

**Section 9.07 Borrowing.** The Executive Committee shall have the full power and authority to borrow money whenever in the discretion of the Executive Committee the exercise of said power is required in the general interest of the Corporation. In such case, the Executive Committee may authorize the proper officers of the Corporation to make, execute and deliver in the name and on behalf of the Corporation such notes, bonds, and other evidence of indebtedness as the Executive Committee shall deem proper. No pledge or mortgage of the personal or real property of the Corporation is authorized unless by a resolution of the Board of Directors.

## **ARTICLE X: MISCELLANEOUS**

**Section 10.01 Amendments.** These By-Laws may be altered, amended, or repealed, and new By-Laws may be adopted by a vote of a majority of the Board of Directors at any meeting for which there has been written notification fourteen (14) days prior to the meeting at which the By-Laws are proposed to be amended.

**Section 10.02 Rules of Order.** The parliamentary procedures governing meetings of the Board of Directors and the meetings of its committees and subcommittees shall to the extent not otherwise covered by these By-Laws, be those set out in the most current edition of *Robert's Rules of Order*.

## APPROVED

April 19, 1961 Chicago, Illinois

## REVISED

April 23, 1961 Philadelphia, Pennsylvania  
March 25, 1962 Chicago, Illinois  
November 4, 1962 Detroit, Michigan  
April 12, 1964 Chicago, Illinois  
November 20, 1964 Milwaukee, Wisconsin  
March 20, 1966 Chicago, Illinois  
April 9, 1967 Chicago, Illinois  
November 10, 1967 Cleveland, Ohio  
May 4, 1968 Boston, Massachusetts  
December 7, 1968 Philadelphia, Pennsylvania  
March 29, 1969 San Diego, California  
May 9, 1970 Buffalo, New York  
May 8, 1971 San Francisco, California  
November 16, 1972 Houston, Texas  
March 21, 1974 Washington, D.C.  
October 18, 1974 Denver, Colorado  
May 21, 1975 Washington, D.C.  
November 21, 1976 Chicago, Illinois  
May 20, 1979 Los Angeles, California  
November 4, 1979 New York City, New York  
May 21, 1983 Philadelphia, Pennsylvania  
March 18, 1984 Washington, D.C.  
March 8, 1987 Washington, D.C.  
March 11, 1989 Washington, D.C.  
November 9, 1990 Boston, Massachusetts  
Revised- March 17, 1991 Washington, D.C.  
March 15, 1992 Washington, D.C.  
October 30, 1992 Milwaukee, Wisconsin  
March 14, 1993 Washington, D.C.  
October 29, 1993 Houston, Texas  
July 8, 1995 San Francisco, California  
March 21, 1999 Washington, D.C.  
October 14, 1999 Dayton, Ohio  
March 18, 2001 Washington, D.C.  
March 12, 2005 Washington, D.C.  
July 29, 2005 Portland, Oregon  
March 16, 2008 Washington, D.C.  
October 21, 2010 Tampa, Florida  
October 26, 2011 Boston, Massachusetts  
March 19, 2012 Washington, D.C.  
March 23, 2014 Washington, D.C.

**SUBCOMMITTEE ON AUDIT**

# **COUNCIL OF THE GREAT CITY SCHOOLS**

## **Subcommittee on Audit**

**2015-2016**

### ***Subcommittee Goal***

To review and report on Council budgetary matters, and ensure the proper management of Council revenues.

### ***Chair***

Kaya Henderson, District of Columbia Chancellor

### ***Members***

Paul Cruz, Austin Superintendent

Michael Hanson, Fresno Superintendent

Jumoke Hinton Hodge, Oakland School Board

Bill Isler, Pittsburgh School Board

Barbara Jenkins, Orange County Superintendent

Felton Williams, Long Beach School Board

### ***Ex Officio***

Richard Carranza, San Francisco Superintendent

**2014-2015 BUDGET**

**COMBINED REPORT  
GENERAL OPERATIONS  
AND  
CATEGORICAL PROGRAMS**

**ESTIMATED TOTALS  
FOR  
FISCAL YEAR 2014-2015**

**ENDING JUNE 30, 2015**

THE COUNCIL OF THE GREAT CITY SCHOOLS  
PRELIMINARY REVENUE AND EXPENSE REPORT FOR FY14-15

COMBINED GENERAL OPERATIONS AND CATEGORICAL PROGRAMS

	GENERAL OPERATIONS FY14-15	CATEGORICAL PROGRAMS FY14-15	PRELIMINARY COMBINED TOTAL
<b>REVENUE</b>			
MEMBERSHIP DUES	\$2,730,360.00	\$ 9,000.00	\$ 2,739,360.00
GRANTS AND CONTRACTS	\$0.00	\$ 746,259.00	\$ 746,259.00
SPONSOR CONTRIBUTION	\$40,000.00	\$ 1,201,185.00	\$ 1,241,185.00
REGISTRATION FEES	\$0.00	\$ 421,645.00	\$ 421,645.00
INTEREST AND DIVIDENDS	\$524,148.33	\$ -	\$ 524,148.33
ROYALTIES AND OTHER INCOME	\$0.00	\$ 41,383.33	\$ 41,383.33
TOTAL REVENUE	\$ 3,294,508.33	\$ 2,419,472.33	\$ 5,713,980.66
<b>EXPENSES</b>			
SALARIES & FRINGE BENEFITS	\$1,705,723.02	\$ 1,479,987.40	\$ 3,185,710.42
OTHER INSURANCE	\$19,395.51	\$ -	\$ 19,395.51
TRAVEL & MEETINGS	\$68,695.03	\$ 1,175,691.24	\$ 1,244,386.27
GENERAL SUPPLIES	\$21,440.99	\$ 377.79	\$ 21,818.78
SUBSCRIPTION & PUBLICATIONS	\$19,002.61	\$ 4,908.16	\$ 23,910.77
COPYING & PRINTING	\$123,170.60	\$ 68,122.20	\$ 191,292.80
OUTSIDE SERVICES	\$435,116.86	\$ 1,556,046.81	\$ 1,991,163.67
TELEPHONE	\$54,227.66	\$ 4,358.28	\$ 58,585.94
POSTAGE & SHIPPING	\$7,217.54	\$ 11,647.81	\$ 18,865.35
EQUPT LEASE MAINT & DEP	\$38,310.20	\$ -	\$ 38,310.20
OFFICE RENT & UTILITIES	\$311,437.86	\$ -	\$ 311,437.86
UNCOLLECTED REVENUE	\$150,000.00	\$ -	\$ 150,000.00
EXPENSES ALLOCATED TO PROJECTS	(\$575,314.04)	\$ 575,314.04	\$ -
TOTAL OPERATING EXPENSES	\$ 2,378,423.84	\$ 4,876,453.73	\$ 7,254,877.57
REVENUE OVER EXPENSES	\$ 916,084.49	\$ (2,456,981.40)	\$ (1,540,896.91)
<b>ADJUSTMENTS:</b>			
NET ASSETS, BEGINNING OF YEAR	\$ 5,076,039.62	\$ 5,265,411.50	\$ 10,341,451.12
NET GAIN/(LOSS) ON INVESTMENT	\$ (307,805.36)	\$ -	\$ (307,805.36)
PROJECTS IN-KIND CONTRIBUTION	\$ (107,142.38)	\$ 107,142.38	\$ -
COMPLETED PROJECTS	\$ 330,094.34	\$ (330,094.34)	\$ -
NET ASSETS, END OF YEAR	\$ 5,907,270.71	\$ 2,585,478.14	\$ 8,492,748.85



**GENERAL OPERATIONS  
BUDGET REPORT**

**ESTIMATED TOTALS  
FOR  
FISCAL YEAR 2014-2015**

**ENDING JUNE 30, 2015**

COUNCIL OF THE GREAT CITY SCHOOLS  
FY 2014-15 Membership Dues

STATUS OF MEMBERSHIP DUES AS OF June 30, 2015

DISTRICT	NOT PAID	PAID	Date Rec'd FY14-15	Date Rec'd FY13-14	Date Rec'd FY12-13	Date Rec'd FY11-12	
1 Albuquerque		\$41,793	7/21/2014	7/22/2013	6/19/2012 ***	6/21/2011 ***	
2 Anchorage		\$36,571	6/3/2014 ***	7/2/2013	6/14/2012 ***	7/7/2011	
3 Atlanta		\$36,571	8/11/2014	7/16/2013	6/15/2012 ***	5/25/2011 ***	
4 Austin		\$41,793	3/2/2015	6/11/2013 ***	6/14/2012 ***	5/25/2011 ***	
5 Baltimore		\$41,793	7/23/2014	8/13/2013	7/18/2012	7/11/2011	
6 Birmingham		\$36,571	6/30/2014 ***	5/30/2013 ***	2/27/2013	6/16/2011 ***	
7 Boston		\$41,793	8/11/2014	8/7/2013	8/24/2012	8/9/2011	
8 Bridgeport		\$29,548	6/26/2014 ***	6/17/2013 ***	3/20/2012 ***		
9 Broward County		\$53,983	9/23/2014	8/2/2013	9/6/2012	9/14/2011	
10 Buffalo		\$36,571	8/18/2014	8/6/2013	10/24/2012	9/16/2011	
11 Charleston County		\$36,571	3/2/2015	8/6/2013	3/13/2013	9/9/2011	
12 Charlotte-Mecklenburg		\$47,016	6/13/2014 ***	6/7/2013 ***	6/19/2012 ***	5/25/2011 ***	
13 Chicago		\$53,983	2/17/2015	10/4/2013	11/14/2012	6/23/2012	
14 Cincinnati		\$36,571	2/10/2015	10/23/2013	7/12/2012	1/11/2012	
15 Clark County		\$53,983	7/31/2014	2/11/2014	7/24/2012	7/7/2011	
16 Cleveland		\$36,571	6/30/2014 ***	6/17/2013 ***	7/30/2012	11/15/2011	
17 Columbus		\$41,793	8/29/2014	7/22/2013	9/12/2012	3/22/2012	
18 Dallas		\$47,016	7/21/2014	7/19/2013	6/19/2012 ***	6/2/2011 ***	
19 Dayton		\$36,571	9/18/2014	4/4/2014	8/24/2012	8/9/2011	
20 Denver		\$41,793	8/4/2014	7/22/2013	7/12/2012	8/29/2011	
21 Des Moines*		\$29,548	6/17/2014 ***	7/16/2013	7/18/2012	11/30/2011	
22 Detroit		\$47,016	11/21/2014	5/23/2014	1/3/2013	10/14/2011	
23 Duval County		\$47,016	8/4/2014	9/3/2013	8/8/2012	8/29/2011	
24 East Baton Rouge		\$36,571	8/8/2014	10/7/2013	did not pay	did not pay	
25 El Paso		\$41,793	2/17/2015	4/22/2014	not a member		
26 Fort Worth		\$41,793	2/25/2015	10/7/2013	8/31/2012	3/8/2012	
27 Fresno		\$41,793	9/3/2014	8/27/2013	8/24/2012	9/14/2011	
28 Greensboro(Guilford Cty)		\$41,793	10/3/2014	10/23/2013	8/14/2012	5/15/2012	
29 Hawaii		\$47,016	11/25/2014	new	not a member		
30 Hillsborough County (Tampa)		\$47,016	7/23/2014	7/22/2013	7/24/2012	8/9/2011	
31 Houston		\$53,983	7/7/2014	7/19/2013	8/14/2012	8/2/2011	
32 Indianapolis		\$36,571	7/7/2014	11/6/2013	7/12/2012	7/11/2011	
33 Jackson, MS		\$36,571	8/11/2014	2/10/2014	did not pay	did not pay	
34 Jefferson County		\$41,793	8/4/2014	8/13/2013	8/6/2012	8/12/2011	
35 Kansas City, MO		\$36,571	9/15/2014	3/19/2014	8/31/2012	5/31/2011 ***	
36 Long Beach		\$41,793	8/11/2014	9/10/2013	8/1/2012	8/12/2011	
37 Los Angeles		\$53,983	8/8/2014	3/13/2014	3/15/2013	3/26/2012	
38 Miami-Dade County		\$53,983	8/4/2014	7/22/2013	8/24/2012	8/9/2011	
39 Milwaukee		\$47,016	6/23/2014 ***	7/31/2013	6/19/2012 ***	6/21/2011 ***	
40 Minneapolis		\$36,571	9/18/2014	11/6/2013	9/25/2012	9/7/2011	
41 Nashville		\$41,793	7/23/2014	8/1/2013	7/24/2012	7/14/2011	
42 New Orleans	\$41,793		did not pay	did not pay	did not pay	did not pay	
43 New York City		\$53,983	10/1/2014	2/24/2014	1/18/2013	12/23/2011	
44 Newark		\$36,571	2/6/2015	11/26/2013	12/16/2013	4/26/2012	
45 Norfolk		\$36,571	9/15/2014	4/4/2014	2/27/2013	9/9/2011	
46 Oakland		\$36,571	6/19/2014 ***	7/16/2013	9/17/2012	2/3/2012	
47 Oklahoma City		\$36,571	8/12/2014	did not pay	8/14/2012	8/12/2011	
48 Omaha		\$36,571	6/20/2014 ***	6/25/2013 ***	7/13/2012	6/7/2011 ***	
49 Orange County, FL		\$47,016	6/2/2014 ***	6/4/2013 ***	7/31/2012	6/7/2011 ***	
50 Palm Beach County		\$47,016	2/10/2015	2/18/2014	9/12/2012	3/13/2012	
51 Philadelphia		\$53,983	2/12/2015	10/4/2013	9/28/2012	11/18/2011	
52 Pittsburgh		\$36,571	7/11/2014	5/24/2013 ***	6/28/2012 ***	5/25/2011 ***	
53 Portland		\$36,571	6/20/2014 ***	7/11/2013	6/14/2012 ***	5/31/2011 ***	
54 Providence*		\$29,548	1/21/2015	2/18/2014	9/18/2012	7/25/2011	
55 Richmond		\$36,571	6/11/2014 ***	3/31/2014	6/15/2012 ***	5/25/2011 ***	
56 Rochester		\$36,571	6/11/2014 ***	6/11/2013 ***	6/14/2012 ***	5/25/2011 ***	
57 St. Louis		\$36,571	8/11/2014	3/27/2014	8/13/2013	did not pay	
58 St. Paul		\$36,571	7/3/2014	7/5/2013	6/15/2012 ***	5/25/2011 ***	
59 Sacramento		\$36,571	8/1/2014	10/15/2013	8/8/2012	7/25/2011	
60 San Diego		\$47,016	8/1/2014	8/1/2013	3/1/2013	8/26/2011	
61 San Francisco		\$41,793	7/31/2014	8/1/2013	8/17/2012	7/27/2011	
62 Santa Ana		\$41,793	8/11/2014	3/4/2014	8/8/2012	not a member	
63 Seattle		\$36,571	7/23/2014	6/4/2013 ***	3/1/2013	6/27/2011 ***	
64 Shelby County		\$47,016	8/11/2014	did not pay	8/24/2012	8/29/2011	
65 Toledo		\$36,571	8/11/2014	7/18/2013	8/14/2012	9/9/2011	
66 Washington, D.C.		\$41,793	7/23/2014	7/5/2013	9/27/2012	5/30/2012	
67 Wichita		\$36,571	6/17/2014 ***	6/17/2013 ***	6/19/2012 ***	6/16/2011 ***	
Total	\$41,793	\$2,730,360		14	11	14	17

\*Largest city in the state  
\*\*\* Prepaid members

THE COUNCIL OF THE GREAT CITY SCHOOLS  
 GENERAL OPERATING BUDGET  
 FOR FY 2014-15

BY FUNCTION

	AUDITED REPORT FY13-14	REVISED BUDGET FY14-15	PRELIMINARY TOTALS FY14-15
<b>GENERAL OPERATING REVENUE</b>			
MEMBERSHIP DUES	\$2,510,078.50	\$2,730,360.00	\$2,730,360.00
GRANTS AND CONTRACTS	0.00	0.00	0.00
SPONSOR CONTRIBUTION	10,000.00	40,000.00	40,000.00
REGISTRATION FEES	0.00	0.00	0.00
INTEREST AND DIVIDENDS	229,638.40	425,000.00	524,148.33
ROYALTIES AND OTHER INCOME	361.23	300.00	0.00
TOTAL REVENUE	<u>\$2,750,078.13</u>	<u>\$3,195,660.00</u>	<u>\$3,294,508.33</u>
<b>GENERAL OPERATING EXPENSES</b>			
ADMIN AND FINANCIAL MANAGEMENT	\$1,097,913.69	\$1,172,883.66	\$1,164,562.75
EXECUTIVE LEADERSHIP	\$491,994.63	570,198.35	460,559.58
FUNDRAISING ACTIVITIES	\$45,075.20	48,000.00	23,352.88
LEGISLATIVE ADVOCACY	\$482,306.96	511,062.39	520,806.60
CURRICULUM & INSTRUCTION	\$59,187.37	149,000.00	82,110.00
PUBLIC ADVOCACY	\$411,118.96	492,178.29	476,055.14
MEMBER MANAGEMENT SERVICES	\$200,521.30	231,413.49	139,493.85
POLICY RESEARCH	\$255,549.17	251,563.82	86,797.07
INDIRECT EXPENSES FROM PROJECTS	<u>(\$475,733.72)</u>	<u>(830,640.00)</u>	<u>(575,314.04)</u>
TOTAL OPERATING EXPENSES	<u>\$2,567,933.56</u>	<u>\$2,595,660.00</u>	<u>\$2,378,423.84</u>
REVENUE OVER EXPENSES	<u>\$182,144.57</u>	<u>\$600,000.00</u>	<u>\$916,084.49</u>
<b>ADJUSTMENTS:</b>			
OPERATIONS CARRYOVER BALANCE	\$7,765,234.25		\$10,341,451.12
CATEGORICAL PROG NET REVENUE	\$1,935,654.75		\$ (2,456,981.40)
NET GAIN/(LOSS) ON INVESTMENT	<u>\$458,417.55</u>		<u>\$ (307,805.36)</u>
<b>ENDING BALANCE</b>	<u><u>\$10,341,451.12</u></u>		<u><u>\$8,492,748.85</u></u>

THE COUNCIL OF THE GREAT CITY SCHOOLS  
 GENERAL OPERATING BUDGET  
 FOR FY 2014-15

BY EXPENSE LINE

	AUDITED REPORT FY13-14	REVISED BUDGET FY14-15	PRELIMINARY TOTALS FY14-15
<b>GENERAL OPERATING REVENUE</b>			
MEMBERSHIP DUES	\$2,510,078.50	\$2,730,360.00	\$2,730,360.00
GRANTS AND CONTRACTS	0.00	0.00	0.00
SPONSOR CONTRIBUTION	10,000.00	40,000.00	40,000.00
REGISTRATION FEES	0.00	0.00	0.00
INTEREST AND DIVIDENDS	229,638.40	425,000.00	524,148.33
ROYALTIES AND OTHER INCOME	361.23	300.00	0.00
TOTAL REVENUE	\$2,750,078.13	\$3,195,660.00	\$3,294,508.33
<b>GENERAL OPERATING EXPENSES</b>			
SALARIES & FRINGE BENEFITS	\$1,888,295.84	\$2,150,000.00	\$1,705,723.02
OTHER INSURANCE	17,829.86	20,000.00	19,395.51
TRAVEL & MEETINGS	62,243.69	70,000.00	68,695.03
GENERAL SUPPLIES	21,605.04	30,000.00	21,440.99
SUBSCRIPTION & PUBLICATIONS	19,054.75	20,000.00	19,002.61
COPYING & PRINTING	130,589.71	150,000.00	123,170.60
OUTSIDE SERVICES	376,311.10	498,000.00	435,116.86
TELEPHONE	37,865.69	40,000.00	54,227.66
POSTAGE & SHIPPING	5,983.40	10,000.00	7,217.54
EQPT LEASE MAINT & DEPRECIATION	14,767.82	20,000.00	38,310.20
OFFICE RENT & UTILITIES	280,620.38	318,300.00	311,437.86
ALLO FOR UNCOLLECTED REVENUE	188,500.00	100,000.00	150,000.00
INDIRECT EXPENSES FROM PROJECTS	(475,733.72)	(830,640.00)	(575,314.04)
TOTAL OPERATING EXPENSES	\$2,567,933.56	\$2,595,660.00	\$2,378,423.84
REVENUE OVER EXPENSES	\$182,144.57	\$600,000.00	\$916,084.49
<b>ADJUSTMENTS:</b>			
OPERATIONS CARRYOVER BALANCE	\$7,765,234.25		\$10,341,451.12
CATEGORICAL PROG NET REVENUE	\$1,935,654.75		(\$2,456,981.40)
NET (GAIN)/LOSS ON INVESTMENT	\$458,417.55		(\$307,805.36)
<b>ENDING BALANCE</b>	<b>\$10,341,451.12</b>		<b>\$8,492,748.85</b>

(07/01/15)  
 (4th QTR FY2014-15)

THE COUNCIL OF THE GREAT CITY SCHOOLS  
 GENERAL OPERATING BUDGET  
 FOR FY 2013-14  
 AUDITED TOTALS FOR FISCAL YEAR ENDING JUNE 30, 2014

	FINANCE & ADMIN (10)	EXECUTIVE SUPPORT (11)	FUNDRAISING ACTIVITIES (12)	LEGISLATIVE ADVOCACY (13)	CURRICULUM & INSTRUCTION (14)	PUBLIC ADVOCACY (15)	MEMBER MGT SERVICES (16)	RESEARCH ADVOCACY (17)	AUDITED TOTAL (7/1/13-06/30/14)
SALARIES & FRINGE BENEFITS	\$381,533.41	\$438,836.89	\$45,075.20	\$356,196.06	\$0.00	\$293,207.50	\$151,018.53	\$222,428.25	\$1,888,295.84
OTHER INSURANCE	17,829.86	0.00	0.00	0.00	0.00	0.00	0.00	0.00	17,829.86
TRAVEL & MEETINGS	7,323.87	33,964.69	0.00	1,814.05	0.00	3,352.98	2,526.47	13,261.63	62,243.69
GENERAL SUPPLIES	21,605.04	0.00	0.00	0.00	0.00	0.00	0.00	0.00	21,605.04
SUBSCRIPTION & PUBLICATIONS	2,223.70	1,099.00	0.00	9,517.33	0.00	4,046.84	0.00	2,167.88	19,054.75
COPYING & PRINTING	26.20	8,867.91	0.00	0.00	0.00	104,670.20	6,407.12	10,618.28	130,589.71
OUTSIDE SERVICES	166,654.27	1,128.00	0.00	110,156.38	59,089.12	1,834.35	36,855.00	593.98	376,311.10
TELEPHONE	13,995.49	6,492.97	0.00	4,370.08	24.66	3,136.14	3,645.49	6,200.86	37,865.69
POSTAGE & SHIPPING	2,833.65	1,605.17	0.00	253.06	73.59	870.95	68.69	278.29	5,983.40
EQPT LEASE MAINT & DEP	14,767.82	0.00	0.00	0.00	0.00	0.00	0.00	0.00	14,767.82
OFFICE RENT & UTILITIES	280,620.38	0.00	0.00	0.00	0.00	0.00	0.00	0.00	280,620.38
ALLO FOR UNCOLLECTED REVENUE	188,500.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	188,500.00
EXPENSES ALLOCATED TO PROJECTS	(475,733.72)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	(475,733.72)
TOTAL OPERATING EXPENSES	\$622,179.97	\$491,994.63	\$45,075.20	\$482,306.96	\$59,187.37	\$411,118.96	\$200,521.30	\$255,549.17	<b>\$2,567,933.56</b>
	\$475,733.72								
	<u>\$1,097,913.69</u>								

THE COUNCIL OF THE GREAT CITY SCHOOLS  
 GENERAL OPERATING BUDGET  
 REVISED BUDGET FOR FISCAL YEAR 2014-15

	FINANCE & ADMIN (10)	EXECUTIVE SUPPORT (11)	FUNDRAISING ACTIVITIES (12)	LEGISLATIVE ADVOCACY (13)	CURRICULUM & INSTRUCTION (14)	PUBLIC ADVOCACY (15)	MEMBER MGT SERVICES (16)	RESEARCH ADVOCACY (17)	ONE YEAR TOTAL
<b>GENERAL OPERATING EXPENSES</b>									
SALARIES & FRINGE BENEFITS	\$470,283.66	\$512,698.35	\$47,000.00	\$377,362.39	\$0.00	\$335,678.29	\$182,413.49	\$224,563.82	\$2,150,000.00
OTHER INSURANCE	20,000.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	20,000.00
TRAVEL & MEETINGS	2,500.00	42,500.00	0.00	10,000.00	0.00	6,000.00	3,000.00	6,000.00	70,000.00
GENERAL SUPPLIES	30,000.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	30,000.00
SUBSCRIPTION & PUBLICATIONS	1,200.00	0.00	0.00	10,200.00	0.00	5,000.00	100.00	3,500.00	20,000.00
COPYING & PRINTING	500.00	5,000.00	0.00	3,000.00	0.00	130,500.00	1,000.00	10,000.00	150,000.00
OUTSIDE SERVICES	205,100.00	3,000.00	0.00	100,000.00	149,000.00	\$0.00	39,900.00	1,000.00	498,000.00
TELEPHONE	4,500.00	6,500.00	500.00	10,000.00	0.00	7,500.00	5,000.00	6,000.00	40,000.00
POSTAGE & SHIPPING	500.00	500.00	500.00	500.00	0.00	7,500.00	0.00	500.00	10,000.00
EQPT LEASE MAINT & DEP	20,000.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	20,000.00
OFFICE RENT & UTILITIES	318,300.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	318,300.00
ALLO FOR UNCOLLECTED REVENUE	100,000.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	100,000.00
EXPENSES ALLOCATED TO PROJECTS	(830,640.00)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	(830,640.00)
TOTAL OPERATING EXPENSES	<u>\$342,243.66</u>	<u>\$570,198.35</u>	<u>\$48,000.00</u>	<u>\$511,062.39</u>	<u>\$149,000.00</u>	<u>\$492,178.29</u>	<u>\$231,413.49</u>	<u>\$251,563.82</u>	<u>\$2,595,660.00</u>
	\$830,640.00								
	\$1,172,883.66								

(07/01/15)  
 (4th Qtr Report.xls)

THE COUNCIL OF THE GREAT CITY SCHOOLS  
 GENERAL OPERATING BUDGET  
 FOR FY 2014-15  
 PRELIMINARY TOTALS FOR FISCAL YEAR ENDING JUNE 30, 2015

	ADMIN & FINAN MANAGEMENT (10)	EXECUTIVE SUPPORT (11)	FUNDRAISING ACTIVITIES (12)	LEGISLATIVE SERVICES (13&31)	CURRICULUM & INSTRUCT (14)	PUBLIC ADVOCACY (15)	MEMBER MGT SERVICES (16)	POLICY RESEARCH (17)	4TH QUARTER TOTAL (7/1/14-6/30/15)
<b>GENERAL OPERATING EXPENSES</b>									
SALARIES & FRINGE BENEFITS	\$406,719.24	\$388,386.48	\$23,323.39	\$383,007.67	\$0.00	\$313,775.56	\$125,107.91	\$65,402.77	\$1,705,723.02
OTHER INSURANCE	19,395.51	0.00	0.00	0.00	0.00	0.00	0.00	0.00	19,395.51
TRAVEL & MEETINGS	8,839.23	36,172.57	0.00	2,226.43	0.00	1,579.89	10,000.00	9,876.91	68,695.03
GENERAL SUPPLIES	21,440.99	0.00	0.00	0.00	0.00	0.00	0.00	0.00	21,440.99
SUBSCRIPTION & PUBLICATIONS	3,004.90	0.00	0.00	6,962.68	0.00	5,371.18	0.00	3,663.85	19,002.61
COPYING & PRINTING	205.75	126.30	0.00	198.00	0.00	114,524.09	1,448.70	6,667.76	123,170.60
OUTSIDE SERVICES	187,471.62	21,036.72	0.00	123,986.02	82,110.00	20,462.50	0.00	50.00	435,116.86
TELEPHONE	15,346.07	13,740.53	29.49	3,402.60	0.00	18,721.73	2,937.24	50.00	54,227.66
POSTAGE & SHIPPING	2,391.39	1,096.98	0.00	1,023.20	0.00	1,620.19	0.00	1,085.78	7,217.54
EQPT LEASE MAINT & DEP	38,310.20	0.00	0.00	0.00	0.00	0.00	0.00	0.00	38,310.20
OFFICE RENT & UTILITIES	311,437.86	0.00	0.00	0.00	0.00	0.00	0.00	0.00	311,437.86
ALLO FOR UNCOLLECTED REVENUE	150,000.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	150,000.00
INDIRECT EXPENSES FROM PROJECTS	(575,314.04)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	(575,314.04)
TOTAL OPERATING EXPENSES	\$589,248.71	\$460,559.58	\$23,352.88	\$520,806.60	\$82,110.00	\$476,055.14	\$139,493.85	\$86,797.07	<b>\$2,378,423.84</b>
	\$575,314.04								
	\$1,164,562.75								

07/01/15

**INVESTMENT SCHEDULE - FY14-15**  
**ENDING 6/30/15**  
Balances are from date of purchase

INVESTMENT ACCOUNTS	ENDING BALANCE 6/30/2015	PURCHASES (7/1/14 - 6/30/15)	SOLD (7/1/14 - 6/30/15)	UNREAL GAINS/(LOSS) (7/1/14 - 6/30/15)	REAL GAINS/(LOSS) (7/1/14 - 6/30/15)
Amer Cent Fds	\$386,035	\$73,602	-\$17,659	-\$39,364	\$0
Artisan FDS Inc Sm Cap	\$0	\$0	-\$169,474	-\$33,449	\$28,297
Dodge&Cox Intl Stock	\$225,688	\$10,779	-\$9,519	-\$7,737	\$1,634
Dreyfus Emerging Markets FD	\$212,575	\$14,301	-\$8,025	-\$15,589	-\$478
Eaton Vance Inc Fd	\$91,508	\$8,360	\$0	-\$2,756	\$0
Eaton Vance Large Cap Val Fd	\$469,027	\$134,833	-\$23,586	-\$113,087	\$6,711
First Eagle Fds Sogen Overseas	\$181,393	\$12,477	\$0	-\$7,679	\$0
Goldma Sachs TRUST Strat Inc Fd	\$132,493	\$15,501	\$0	-\$5,493	\$0
Goldman Sachs Treas Instr	\$44,792	\$5,700	\$0	\$0	\$0
Harbor Fund Cap Appr	\$492,595	\$28,525	-\$35,372	\$18,249	\$16,179
Harris Assoc Invt Tr Oakmk Equity	\$510,335	\$42,646	\$0	-\$21,297	\$0
JANUS Intl FD FL BD	\$351,931	\$184,131	\$0	-\$223	\$0
JPMorgan Core Bd FD Selct	\$397,347	\$106,405	\$0	\$1,942	\$0
Victory Portfolios Munder MIDCAP	\$146,766	\$13,991	-\$5,207	-\$8	\$2,260
Nuveen INVT Fds Inc RE Secs*	\$95,038	\$6,501	-\$5,766	-\$70	\$1,782
PIMCO Fds PAC Total Return	\$0	\$19,561	-\$267,675	-\$5,708	\$3,963
PIMCO Fds SER Comm Real	\$110,792	\$7,596	-\$26,451	-\$33,635	-\$9,192
Inv Mgrs Pioneer Oak Ridge Sm Cp	\$199,046	\$17,156	.	\$8,160	\$0
Ridgeworth Fds Mid-cap Val Eqty Pd	\$136,591	\$138,354	\$0	-\$1,762	\$0
Royce Value Plus FD CL	\$95,318	\$16,610	-\$584	-\$11,372	\$269
Victory Portfolios Sm Co Oppty	\$188,095	\$195,114	\$0	-\$7,019	\$0
Virtus Emerging Mkts Opportunites	\$127,378	\$47,149	\$0	-\$6,234	\$0
Crn WT Mut Fd Midcap	\$0	30,391.06	-\$142,679	-\$26,948	\$2,998
Alliance GLO Govt Tr A	\$1,344,869	\$47,824	\$0	\$5,025	\$0
Alliance Interm Bd A	\$114,098	\$1,921	\$0	-\$913	\$0
Alliance Interm Bd C	\$91,805	\$1,283	\$0	-\$736	\$0
Fidelity	\$11,377	\$185	\$0	-\$103	\$0
<b>TOTAL:</b>	<b>\$6,156,893</b>	<b>\$1,180,896</b>	<b>-\$711,997</b>	<b>-\$307,805</b>	<b>\$54,424</b>



## Components of Operational Expense Types

### Salaries and Fringe Benefits

- Basic salaries
- Life and disability insurance
- 403 (b) employer contribution
- Health benefits
- Unemployment compensation
- Employment taxes
- Paid absences

### Other Insurances

- Officers and Directors Liability
- Umbrella Liability
- Workmen's Compensation

### Travel and Meetings

- Staff Travel (unreimbursed)

### General Supplies

- Paper
- Letterhead
- Mailing labels
- Envelops
- Folders
- Binders
- Computer supplies

### Subscriptions and Publications

- New York Times
- USA Today
- Education Weekly
- Education Daily
- Committee for Education Funding membership
- AERA membership
- NABJ membership
- Bank card

### Copying and Printing

- Report printing
- Urban Educator printing

Outside Services

- Auditing Services
- Technology and internet support
- Database maintenance
- Corporate registration
- Banking services and charges
- Temporary services
- Editing services
- Legal services
- ADP payroll services
- Transact license
- Ricki Price-Baugh
- Julie Wright-Halbert
- Strategic Support Team Member expenses

Participant Support Costs

- SubGrantee Expenses

Telephone

- Monthly telephone
- Conference calls
- Cell phones

Postage and Shipping

- Mailings
- Messenger services
- Federal Express
- UPS

Equipment Lease, Maintenance and Deprecation

- Postage meter
- Copier Maintenance
- Computers
- Printers
- Fax machine

Office Rent and Utilities

- Office rent
- Off-site storage

Project In-kind Contribution

- Matching

Expenses Allocated to Projects

- Indirect costs

**CATEGORICAL PROGRAMS  
BUDGET REPORT**

**ESTIMATED TOTALS  
FOR  
FISCAL YEAR 2014-2015**

**ENDING JUNE 30, 2015**

THE COUNCIL OF THE GREAT CITY SCHOOLS  
 REVENUE AND EXPENSE REPORT  
**PRELIMINARY TOTALS FOR FISCAL YEAR ENDING JUNE 30, 2015**

**CATEGORICAL PROJECTS**  
**PAGE 1 OF 2**

	MEETINGS AND CONFERENCES (20)	STRATEGIC SUPPORT TEAMS (21)	SPECIAL PROJECTS ACCOUNT (22)	SEF GRANT (24)	HEWLETT COMMON CORE GRANT (27)	KPI BUSINESS PLAN (29)	GATES SOLUTIONS TO COMMON CORE (32)	HELMSLEY GRANT (34)	URBAN DEANS NETWK (40)
<b>OPERATING REVENUE</b>									
MEMBERSHIP DUES	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$9,000.00
GRANTS AND CONTRACTS	0.00	179,454.00	0.00	17,000.00	0.00	0.00	0.00	0.00	0.00
SPONSOR CONTRIBUTION	1,200,585.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
REGISTRATION FEES	421,645.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
INTEREST AND DIVIDENDS	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
ROYALTIES & OTHER INCOME	0.00	0.00	0.00	0.00	0.00	41,383.33	0.00	0.00	0.00
<b>TOTAL REVENUE</b>	<b>\$1,622,230.00</b>	<b>\$179,454.00</b>	<b>\$0.00</b>	<b>\$17,000.00</b>	<b>\$0.00</b>	<b>\$41,383.33</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$9,000.00</b>
<b>OPERATING EXPENSES</b>									
SALARIES & FRINGE BENEFITS	\$98,115.71	\$0.00	\$0.00	\$22,984.65	\$146,147.31	\$0.00	\$57,992.20	\$60,666.17	\$22,741.10
OTHER INSURANCE	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
TRAVEL AND MEETING EXPENSES	959,986.26	20,643.98	16,934.15	12,313.43	6,977.30	0.00	19,135.02	14,296.17	1,710.51
GENERAL SUPPLIES	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
DUES, SUBSCR & PUBLICATION	0.00	0.00	0.00	0.00	0.00	0.00	1,052.50	40.19	0.00
COPYING & PRINTING	44,488.11	0.00	0.00	0.00	5,312.00	0.00	0.00	0.00	0.00
OUTSIDE SERVICES	190,779.84	106,175.09	6,162.79	29,025.12	101,108.57	19,832.07	591,375.30	69,887.70	3,792.16
TELEPHONE	2,360.09	0.00	0.00	0.51	0.00	0.00	0.00	106.67	135.46
POSTAGE & SHIPPING	10,433.57	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
EQPT LEASE MAINT & DEP	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
OFFICE RENT & UTILITIES	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
ALLO FOR UNCOLLECTED REVENUE	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
EXPENSES ALLOCATED TO PROJECTS	100,000.00	39,313.91	0.00	2,676.29	64,886.96	0.00	100,433.25	15,003.10	\$4,256.88
<b>TOTAL PROJECT EXPENSES</b>	<b>\$1,406,163.58</b>	<b>\$166,132.98</b>	<b>\$23,096.94</b>	<b>\$67,000.00</b>	<b>\$324,432.14</b>	<b>\$19,832.07</b>	<b>\$769,988.27</b>	<b>\$160,000.00</b>	<b>\$32,636.12</b>
REVENUE OVER EXPENSES	\$216,066.42	\$13,321.02	(\$23,096.94)	(\$50,000.00)	(\$324,432.14)	\$21,551.26	(\$769,988.27)	(\$160,000.00)	(\$23,636.12)
CLOSEOUT OF COMPLETED PROJECTS	(\$300,000.00)	(\$30,094.34)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
IN-KIND CONTRIBUTION	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
CARRYOVER BALANCE 06/30/14	\$687,721.92	\$34,833.51	\$203,130.90	\$50,000.00	\$324,432.14	(\$35,637.80)	\$1,863,069.86	\$160,000.00	\$18,144.02
<b>ENDING BALANCE 06/30/15</b>	<b>\$603,788.34</b>	<b>\$18,060.19</b>	<b>\$180,033.96</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>(\$14,086.54)</b>	<b>\$1,093,081.59</b>	<b>(\$0.00)</b>	<b>(\$5,492.10)</b>

THE COUNCIL OF THE GREAT CITY SCHOOLS  
 REVENUE AND EXPENSE REPORT  
**PRELIMINARY TOTALS FOR FISCAL YEAR ENDING JUNE 30, 2015**

**CATEGORICAL PROJECTS**  
**PAGE 2 OF 2**

	S Schwartz Urban Impact Award (41)	GATES FOUNDATION COMMON CORE (45)	IN-KIND COMMON CORE (45-IK)	GATES FOUNDATION ELL GRANT (47)	GATES FOUNDATION ELL MATERIALS (47-A)	GATES FOUNDATION KPI GRANT (48)	WALLACE FOUNDATION GRANTS (51/52)	WALLACE FOUND-SURVEY GRANT (53)	4TH QUARTER TOTALS (7/1/14-6/30/15)
<b>OPERATING REVENUE</b>									
MEMBERSHIP DUES	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$ 9,000.00
GRANTS & CONTRACTS	0.00	0.00	0.00	0.00	299,805.00	0.00	0.00	250,000.00	\$ 746,259.00
SPONSOR CONTRIBUTION	600.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$ 1,201,185.00
REGISTRATION FEES	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$ 421,645.00
INTEREST AND DIVIDENDS	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$ -
ROYALTIES & OTHER INCOME	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$ 41,383.33
<b>TOTAL REVENUE</b>	<b>\$600.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$299,805.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$250,000.00</b>	<b>\$ 2,419,472.33</b>
<b>OPERATING EXPENSES</b>									
SALARIES & FRINGE BENEFITS	\$0.00	\$491,361.36	\$93,167.29	\$41,159.57	\$278,456.19	\$61,226.13	\$102,189.82	\$3,779.91	\$ 1,479,987.40
OTHER INSURANCE	0.00	0.00	0.00	0.00	0.00	\$0.00	0.00	0.00	\$ -
TRAVEL AND MEETING EXPENSES	0.00	47,187.75	0.00	38.28	33,119.33	\$0.00	42,132.85	1216.21	\$ 1,175,691.24
GENERAL SUPPLIES	0.00	0.00	0.00	0.00	113.41	\$264.38	-	0.00	\$ 377.79
DUES, SUBSCR & PUBLICATION	0.00	988.00	0.00	0.00	2,134.41	\$693.06	-	0.00	\$ 4,908.16
COPYING & PRINTING	137.00	14,692.62	0.00	297.47	3,195.00	\$0.00	-	0.00	\$ 68,122.20
OUTSIDE SERVICES	0.00	123,366.63	0.00	14,411.39	144,384.85	\$125,347.02	28,145.58	2252.70	\$ 1,556,046.81
TELEPHONE	0.00	240.77	0.00	1,374.19	41.35	\$95.24	0.00	4.00	\$ 4,358.28
POSTAGE & SHIPPING	0.00	393.64	0.00	355.46	465.14	\$0.00	0.00	0.00	\$ 11,647.81
EQPT LEASE MAINT & DEP	0.00	0.00	0.00	0.00	0.00	\$0.00	0.00	0.00	\$ -
OFFICE RENT & UTILITIES	0.00	0.00	0.00	0.00	0.00	\$0.00	0.00	0.00	\$ -
ALLO FOR UNCOLLECTED REVENUE	0.00	0.00	0.00	0.00	0.00	\$0.00	0.00	0.00	\$ -
EXPENSES ALLOCATED TO PROJECTS	0.00	101,734.62	13,975.09	8,645.45	69,286.45	28,143.88	25,870.24	1,087.92	\$ 575,314.04
<b>TOTAL PROJECT EXPENSES</b>	<b>\$137.00</b>	<b>\$779,965.38</b>	<b>\$107,142.38</b>	<b>\$66,281.81</b>	<b>\$531,196.13</b>	<b>\$215,769.71</b>	<b>\$198,338.49</b>	<b>\$8,340.74</b>	<b>\$ 4,876,453.73</b>
REVENUE OVER EXPENSES	\$463.00	(\$779,965.38)	(\$107,142.38)	(\$66,281.81)	(\$231,391.13)	(\$215,769.71)	(\$198,338.49)	\$241,659.26	\$ (2,456,981.40)
CLOSEOUT OF COMPLETED PROJECTS	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$ (330,094.34)
IN-KIND CONTRIBUTION	\$0.00	\$0.00	\$107,142.38	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$ 107,142.38
CARRYOVER BALANCE 06/30/14	\$19,926.50	\$779,965.38	\$0.00	\$66,281.81	\$492,833.01	\$300,710.27	\$300,000.00	\$0.00	\$ 5,265,411.52
<b>ENDING BALANCE 06/30/15</b>	<b>\$20,389.50</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$261,441.88</b>	<b>\$84,940.56</b>	<b>\$101,661.51</b>	<b>\$241,659.26</b>	<b>\$ 2,585,478.16</b>

**2015-2016 BUDGET**

**GENERAL OPERATING BUDGET**

**FOR**

**FISCAL YEAR 2015-2016**

(01/07/15)

COUNCIL OF THE GREAT CITY SCHOOLS  
1301 Pennsylvania Avenue, N.W., Suite 702, Washington, D.C. 20004  
Tel (202) 393-2427 Fax (202) 393-2400 Web Page: <http://www.cgcs.org>



## MEMBERSHIP DUES STRUCTURE BY TIERS

	2014-2015 DUES	WITH 1.32% INCREASE 2015-2016 DUES
Largest city in the state TIER I	\$29,548.00	\$29,938.00
Based on enrollment		
TIER II 35,000 TO 54,000	\$36,571.00	\$37,054.00
TIER III 54,001 TO 99,000	\$41,793.00	\$42,345.00
TIER IV 99,001 TO 200,000	\$47,016.00	\$47,637.00
TIER V 200,001 PLUS	\$53,983.00	\$54,696.00



COUNCIL OF THE GREAT CITY SCHOOLS

FY 2015-16 Membership Dues

STATUS OF MEMBERSHIP DUES AS OF June 30, 2015

DISTRICT	NOT PAID	PAID	Date Rec'd FY15-16	Date Rec'd FY14-15	Date Rec'd FY13-14	Date Rec'd FY12-13	Date Rec'd FY11-12	
1 Albuquerque	\$42,345			7/21/2014	7/22/2013	6/19/2012	6/21/2011	
2 Anchorage		\$37,054	6/8/2015 ***	6/3/2014 ***	7/2/2013	6/14/2012	7/7/2011	
3 Atlanta	\$37,054			8/11/2014	7/16/2013	6/15/2012	5/25/2011	
4 Austin	\$42,345			3/2/2015	6/11/2013	6/14/2012	5/25/2011	
5 Baltimore	\$42,345			7/23/2014	8/13/2013	7/18/2012	7/11/2011	
6 Birmingham		\$37,054	6/10/2015 ***	6/30/2014 ***	5/30/2013 ***	2/27/2013	6/16/2011	
7 Boston	\$42,345			8/11/2014	8/7/2013	8/24/2012	8/9/2011	
8 Bridgeport	\$29,938			6/26/2014	6/17/2013 ***	3/20/2012		
9 Broward County	\$54,696			9/23/2014	8/2/2013	9/6/2012	9/14/2011	
10 Buffalo	\$37,054			8/18/2014	8/6/2013	10/24/2012	9/16/2011	
11 Charleston County	\$483	\$36,571	5/7/2015 ***	3/2/2015	8/6/2013	3/13/2013	9/9/2011	
12 Charlotte-Mecklenburg		\$47,637	6/8/2015 ***	6/13/2014 ***	6/7/2013 ***	6/19/2012 ***	5/25/2011 ***	
13 Chicago	\$54,696			2/17/2015	10/4/2013	11/14/2012	6/23/2012	
14 Cincinnati	\$37,054			2/10/2015	10/23/2013	7/12/2012	1/11/2012	
15 Clark County	\$54,696			7/31/2014	2/11/2014	7/24/2012	7/7/2011	
16 Cleveland	\$37,054			6/30/2014	6/17/2013 ***	7/30/2012	11/15/2011	
17 Columbus	\$37,054			8/29/2014	7/22/2013	9/12/2012	3/22/2012	
18 Dallas	\$47,637			7/21/2014	7/19/2013	6/19/2012	6/2/2011	
19 Dayton	\$37,054			9/18/2014	4/4/2014	8/24/2012	8/9/2011	
20 Denver	\$42,345			8/4/2014	7/22/2013	7/12/2012	8/29/2011	
21 Des Moines*	\$29,938			6/17/2014	7/16/2013 ***	7/18/2012	11/30/2011	
22 Detroit	\$37,054			11/21/2014	5/23/2014	1/3/2013	10/14/2011	
23 Duval County	\$47,637			8/4/2014	9/3/2013	8/8/2012	8/29/2011	
24 East Baton Rouge	\$37,054			8/8/2014	10/7/2013	did not pay	did not pay	
25 El Paso	\$42,345			2/17/2015	4/22/2014	not a member		
26 Fort Worth	\$42,345			2/25/2015	10/7/2013	8/31/2012	3/8/2012	
27 Fresno	\$42,345			9/3/2014	8/27/2013	8/24/2012	9/14/2011	
28 Greensboro(Guilford Cty)	\$42,345			10/3/2014	10/23/2013	8/14/2012	5/15/2012	
29 Hawaii	\$47,637			11/25/2014	new	not a member		
30 Hillsborough County (Tampa)	\$54,696			7/23/2014	7/22/2013	7/24/2012	8/9/2011	
31 Houston		\$54,696	6/5/2015 ***	7/7/2014	7/19/2013	8/14/2012	8/2/2011	
32 Indianapolis	\$37,054			7/7/2014	11/6/2013	7/12/2012	7/11/2011	
33 Jackson. MS	\$37,054			8/11/2014	2/10/2014	did not pay	did not pay	
34 Jefferson County	\$47,637			8/4/2014	8/13/2013	8/6/2012	8/12/2011	
35 Kansas City, MO	\$37,054			9/15/2014	3/19/2014	8/31/2012	5/31/2011	
36 Long Beach	\$42,345			8/11/2014	9/10/2013	8/1/2012	8/12/2011	
37 Los Angeles	\$54,696			8/8/2014	3/13/2014	3/15/2013	3/26/2012	
38 Miami-Dade County	\$54,696			8/4/2014	7/22/2013	8/24/2012	8/9/2011	
39 Milwaukee		\$42,345	6/3/2015 ***	6/23/2014 ***	7/31/2013 ***	6/19/2012 ***	6/21/2011 ***	
40 Minneapolis	\$37,054			9/18/2014	11/6/2013	9/25/2012	9/7/2011	
41 Nashville	\$42,345			7/23/2014	8/1/2013	7/24/2012	7/14/2011	
42 New Orleans				did not pay	did not pay	did not pay	did not pay	
43 New York City	\$54,696			10/1/2014	2/24/2014	1/18/2013	12/23/2011	
44 Newark	\$37,054			2/6/2015	11/26/2013	12/16/2013	4/26/2012	
45 Norfolk	\$37,054			9/15/2014	4/4/2014	2/27/2013	9/9/2011	
46 Oakland	\$37,054			6/19/2014	7/16/2013 ***	9/17/2012	2/3/2012	
47 Oklahoma City	\$37,054			8/12/2014	did not pay	8/14/2012	8/12/2011	
48 Omaha		\$37,054	6/5/2015 ***	6/20/2014 ***	6/25/2013 ***	7/13/2012	6/7/2011 ***	
49 Orange County, FL		\$47,637	5/20/2015 ***	6/2/2014	6/4/2013 ***	7/31/2012	6/7/2011 ***	
50 Palm Beach County	\$47,637			2/10/2015	2/18/2014	9/12/2012	3/13/2012	
51 Philadelphia	\$47,637			2/12/2015	10/4/2013	9/28/2012	11/18/2011	
52 Pittsburgh		\$37,054	6/8/2015 ***	7/11/2014	5/24/2013 ***	6/28/2012 ***	5/25/2011 ***	
53 Portland	\$37,054			6/20/2014	7/11/2013	6/14/2012	5/31/2011	
54 Providence*	\$29,938			1/21/2015	2/18/2014	9/18/2012	7/25/2011	
55 Richmond	\$37,054			6/11/2014	3/31/2014	6/15/2012	5/25/2011	
56 Rochester		\$37,054	6/16/2015 ***	6/11/2014 ***	6/11/2013 ***	6/14/2012 ***	5/25/2011 ***	
57 St. Louis	\$37,054			8/11/2014	3/27/2014	8/13/2013	did not pay	
58 St. Paul		\$37,054	6/30/2015 ***	7/3/2014	7/5/2013	6/15/2012	5/25/2011 ***	
59 Sacramento		\$37,054	6/3/2015 ***	8/1/2014	10/15/2013	8/8/2012	7/25/2011	
60 San Diego	\$47,637			8/1/2014	8/1/2013	3/1/2013	8/26/2011	
61 San Francisco	\$42,345			7/31/2014	8/1/2013	8/17/2012	7/27/2011	
62 Santa Ana	\$42,345			8/11/2014	3/4/2014	8/8/2012	not a member	
63 Seattle	\$37,054			7/23/2014	6/4/2013 ***	3/1/2013	6/27/2011 ***	
64 Shelby County	\$47,637			8/11/2014	did not pay	8/24/2012	8/29/2011	
65 Toledo	\$37,054			8/11/2014	7/18/2013	8/14/2012	9/9/2011	
66 Washington, D.C.	\$37,054			7/23/2014	7/5/2013	9/27/2012	5/30/2012	
67 Wichita		\$37,054	6/16/2015 ***	6/17/2014 ***	6/17/2013 ***	6/19/2012 ***	6/16/2011 ***	
Total	\$2,219,938	\$525,318		13	14	11	14	17

\*Largest city in the state  
 \*\*\* Prepaid members

(07/01/15)  
 (4th QTR FY14-15)

THE COUNCIL OF THE GREAT CITY SCHOOLS  
 GENERAL OPERATING BUDGET

BY FUNCTION

	AUDITED REPORT FY13-14	PRELIMINARY TOTALS FY14-15	PROPOSED BUDGET FY15-16
<b>GENERAL OPERATING REVENUE</b>			
MEMBERSHIP DUES	\$2,510,078.50	\$2,730,360.00	<b>\$2,627,034.00</b>
GRANTS AND CONTRACTS	0.00	0.00	<b>0.00</b>
SPONSOR CONTRIBUTION	10,000.00	40,000.00	<b>35,000.00</b>
REGISTRATION FEES	0.00	0.00	<b>0.00</b>
INTEREST AND DIVIDENDS	229,638.40	524,148.33	<b>425,000.00</b>
ROYALTIES AND OTHER INCOME	361.23	0.00	<b>300.00</b>
<b>TOTAL REVENUE</b>	<b>\$2,750,078.13</b>	<b>\$3,294,508.33</b>	<b>\$3,087,334.00</b>
<b>GENERAL OPERATING EXPENSES</b>			
ADMIN AND FINANCIAL MANAGEMENT	\$1,097,913.69	\$1,164,562.75	<b>\$1,197,380.28</b>
EXECUTIVE LEADERSHIP	491,994.63	460,559.58	<b>686,505.46</b>
FUNDRAISING ACTIVITIES	45,075.20	23,352.88	<b>26,000.00</b>
LEGISLATIVE ADVOCACY	482,306.96	520,806.60	<b>542,383.38</b>
CURRICULUM & INSTRUCTION	59,187.37	82,110.00	<b>100,000.00</b>
PUBLIC ADVOCACY	411,118.96	476,055.14	<b>479,579.43</b>
MEMBER MANAGEMENT SERVICES	200,521.30	139,493.85	<b>224,326.16</b>
POLICY RESEARCH	255,549.17	86,797.07	<b>626,653.93</b>
ALLOWANCE FOR OFFICE MOVE	0.00	0.00	<b>315,000.00</b>
EXPENSES ALLOCATED TO PROJECTS	(475,733.72)	(575,314.04)	<b>(795,494.63)</b>
<b>TOTAL OPERATING EXPENSES</b>	<b>\$2,567,933.56</b>	<b>\$2,378,423.84</b>	<b>\$3,402,334.00</b>
<b>REVENUE OVER EXPENSES</b>	<b>\$182,144.57</b>	<b>\$916,084.49</b>	<b>(\$315,000.00)</b>
<b>ADJUSTMENTS:</b>			
OPERATIONS CARRYOVER BALANCE	\$7,765,234.25	\$10,341,451.12	\$8,492,748.85
CATEGORICAL PROG NET REVENUE	\$1,935,654.75	(\$2,456,981.40)	
NET GAIN/(LOSS) ON INVESTMENT	\$458,417.55	(\$307,805.36)	
<b>ENDING BALANCE</b>	<b>\$10,341,451.12</b>	<b>\$8,492,748.85</b>	<b>\$8,177,748.85</b>

(07/01/15)  
 (4TH QTR FY2014-15)

THE COUNCIL OF THE GREAT CITY SCHOOLS  
 GENERAL OPERATING BUDGET

BY EXPENSE LINE

	AUDITED REPORT FY13-14	PRELIMINARY TOTALS FY14-15	PROPOSED BUDGET FY15-16
<b>GENERAL OPERATING REVENUE</b>			
MEMBERSHIP DUES	\$2,510,078.50	\$2,730,360.00	<b>\$2,627,034.00</b>
GRANTS AND CONTRACTS	0.00	0.00	<b>0.00</b>
SPONSOR CONTRIBUTION	10,000.00	40,000.00	<b>35,000.00</b>
REGISTRATION FEES	0.00	0.00	<b>0.00</b>
INTEREST AND DIVIDENDS	229,638.40	524,148.33	<b>425,000.00</b>
ROYALTIES AND OTHER INCOME	361.23	0.00	<b>300.00</b>
<b>TOTAL REVENUE</b>	<b>\$2,750,078.13</b>	<b>\$3,294,508.33</b>	<b>\$3,087,334.00</b>
<b>GENERAL OPERATING EXPENSES</b>			
SALARIES & FRINGE BENEFITS	\$1,888,295.84	\$1,705,723.02	<b>\$2,643,328.63</b>
OTHER INSURANCE	17,829.86	19,395.51	<b>20,000.00</b>
TRAVEL & MEETINGS	62,243.69	68,695.03	<b>70,000.00</b>
GENERAL SUPPLIES	21,605.04	21,440.99	<b>30,000.00</b>
SUBSCRIPTION & PUBLICATIONS	19,054.75	19,002.61	<b>20,000.00</b>
COPYING & PRINTING	130,589.71	123,170.60	<b>125,000.00</b>
OUTSIDE SERVICES	376,311.10	435,116.86	<b>496,000.00</b>
TELEPHONE	37,865.69	54,227.66	<b>35,000.00</b>
POSTAGE & SHIPPING	5,983.40	7,217.54	<b>10,000.00</b>
EQPT LEASE MAINT & DEP	14,767.82	38,310.20	<b>15,000.00</b>
OFFICE RENT & UTILITIES	280,620.38	311,437.86	<b>318,500.00</b>
ALLOWANCE FOR OFFICE MOVE	0.00	0.00	<b>315,000.00</b>
ALLO FOR UNCOLLECTED REVENUE	188,500.00	150,000.00	<b>100,000.00</b>
EXPENSES ALLOCATED TO PROJECTS	(475,733.72)	(575,314.04)	<b>(795,494.63)</b>
<b>TOTAL OPERATING EXPENSES</b>	<b>\$2,567,933.56</b>	<b>\$2,378,423.84</b>	<b>\$3,402,334.00</b>
<b>REVENUE OVER EXPENSES</b>	<b>\$182,144.57</b>	<b>\$916,084.49</b>	<b>(\$315,000.00)</b>
<b>ADJUSTMENTS:</b>			
OPERATIONS CARRYOVER BALANCE	\$7,765,234.25	\$10,341,451.12	\$8,492,748.85
CATEGORICAL PROG NET REVENUE	\$1,935,654.75	(\$2,456,981.40)	
NET (GAIN)/LOSS ON INVESTMENT	\$458,417.55	(\$307,805.36)	
<b>ENDING BALANCE</b>	<b>\$10,341,451.12</b>	<b>\$8,492,748.85</b>	<b>\$8,177,748.85</b>



June 29, 2015

Ms. Kaya Henderson, Secretary/Treasurer  
Mr. Michael Casserly, Executive Director  
Council of the Great City School  
1301 Pennsylvania Avenue, NW  
Suite 702  
Washington, DC 20004

Dear Ms. Henderson and Mr. Casserly:

It is Raffa, P.C.'s (Raffa) pleasure to write this letter confirming our understanding of the terms and objectives of our engagement and the nature and limitations of the services we will perform on behalf of Council of the Great City School (the Council).

#### **Nature of Services**

It is our understanding that the services we are to provide to the Council will include the following:

1. Perform an audit of the financial statements of the Council for the year ending June 30, 2015. Any supplementary information accompanying the financial statements will be subjected to the auditing procedures applied in our audit of the financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the financial statements or to the financial statements themselves, in accordance with auditing standards generally accepted in the United States of America, and we will provide an opinion on it in relation to the financial statements as a whole, in a report combined with our auditor's report on the financial statements.
2. Prepare a report to management concerning areas where internal accounting controls can be improved or where management practices and systems can be altered to improve performance. Obtaining the information to be included in this report is largely a by-product of our audit.
3. Prepare the federal Form 990 for the year ending June 30, 2015.
4. Prepare the Council's federal 1099 Forms for the year ending December 31, 2015.
5. Be available at the conclusion of the audit to meet with the Board of Directors to discuss the results of our work.
6. Be available throughout the year to respond to any technical issues and questions that may arise.

#### **Audit Objectives**

The objective of our audit is the expression of an opinion about whether your financial statements are fairly presented, in all material respects, in conformity with U.S. Generally Accepted Accounting Principles (GAAP) and to report on the fairness of any supplementary information referred to above when considered in relation to the financial statements as a whole. Our audit will be conducted in accordance with U.S. Generally Accepted Auditing Standards (GAAS) established by the Auditing

Standards Board and will include tests of accounting records and other procedures we consider necessary to enable us to express such an opinion. We cannot provide assurance that an unmodified opinion will be expressed. Circumstances may arise in which it is necessary for us to modify our opinion or add an emphasis-of-matter or other-matter paragraph. If our opinion is other than unmodified, we will discuss the reasons with management in advance. If, for any reason, we are unable to complete the audit or are unable to form or have not formed an opinion, we may decline to express an opinion or withdraw from this engagement.

### The Council's Responsibilities

The Council's management is responsible for the basic financial statements and all accompanying information as well as all representations contained therein. As part of the audit, we will review the financial statements, notes and disclosures that management prepares for adequacy and completeness. We will discuss with the Council any adjustments or additional disclosures that we believe are necessary under GAAP. The Council is responsible for making all management decisions and performing all management functions relating to the financial statements and related notes and for accepting full responsibility for such decisions. The Council will be required to acknowledge in the management representation letter that it has reviewed and approved the financial statements and the related notes prior to their issuance and have accepted responsibility for them. Further, the Council is required to designate an individual with suitable skill, knowledge or experience to oversee the tax services and any other non-attest services we provide; and for evaluating the adequacy and results of those services and accepting responsibility for them. The Council understands and confirms that its management has the responsibility to be in a position in fact and appearance to make an informed judgment on the financial statements. If the Council is unable to prepare the financial statements and the related disclosures, we are available to assist in the preparation of such at our standard hourly rates but the final responsibility for the acceptance and approval of the financial statements and the related disclosures remains with the Council's management. The Council understands that this could result in a significant deficiency finding in the Council's internal control structure.

The Council's management is responsible for establishing and maintaining internal controls, including monitoring ongoing activities, the selection and application of accounting principles, and for the fair presentation in the financial statements of financial position, changes in net assets and cash flows in conformity with GAAP. The Council's management is also responsible for making all financial records and related information available to us and is responsible for the accuracy and completeness of information. The responsibilities of the Council's management include adjusting the financial statements to correct material misstatements and confirming to us in the management representation letter that the effects of any uncorrected misstatements aggregated by us during the current engagement and pertaining to the latest period presented are immaterial, both individually and in the aggregate, to the financial statements taken as a whole.

The Council is responsible for the design and implementation of programs and controls to prevent and detect fraud and for informing us about all known or suspected fraud or illegal acts affecting the Council involving (1) management, (2) employees who have significant roles in internal control and (3) others where the fraud or illegal acts could have a material effect on the financial statements. Your responsibilities include informing us of knowledge of any allegations of fraud or suspected fraud affecting the Council received in communications from employees, former employees, grantors, regulators or others. In addition, the Council is responsible for identifying and ensuring that the Council complies with applicable laws and regulations, and for taking timely and appropriate steps to remedy any fraud, illegal acts or violations of contracts or grant agreements that we may report.

The Council is responsible for the preparation of any supplementary information in conformity with GAAP. The Council agrees to include our report on any supplementary information in any document

that contains, and indicates that we have reported on, the supplementary information. The Council also agrees to include the audited financial statements with any presentation of any supplementary information that includes our report thereon.

Stefanie Cohn has been assigned the role of engagement partner and is responsible for directing the engagement and issuing the appropriate report on the Council's financial statements.

### **Audit Procedures – General**

An audit includes examining, on a test basis, evidence supporting the amounts and disclosures in the financial statements; therefore, our audit will involve judgment about the number of transactions to be examined and the areas to be tested. We will plan and perform the audit to obtain reasonable, rather than absolute, assurance about whether the financial statements are free of material misstatement, whether from (1) errors, (2) fraudulent financial reporting, (3) misappropriation of assets or (4) violations of laws or governmental regulations that are attributable to the Council or to acts by its management or employees acting on behalf of the Council.

Because of the inherent limitations of an audit, combined with the inherent limitations of internal control and because Raffa will not perform a detailed examination of all transactions, there is a risk that material misstatements may exist and not be detected by us even though the audit is properly planned and performed in accordance with GAAS and *Government Auditing Standards*. In addition, an audit is not designed to detect immaterial misstatements or violations of laws or governmental regulations that do not have a direct and material effect on the financial statements. However, we will inform the Council of any material errors and any fraudulent financial reporting or misappropriation of assets that come to our attention. We will also inform the Council of any violations of laws or government regulations that come to our attention, unless clearly inconsequential. Our responsibility as auditors is limited to the period covered by our audit and does not extend to any later periods for which we are not engaged as auditors.

Raffa's procedures will include tests of documentary evidence supporting the transactions recorded in the accounts, may include tests of the physical existence of investments, and may include direct confirmation of receivables and certain other assets and liabilities by correspondence with selected individuals, funding sources, creditors and financial institutions. We may also request written representations from the Council's attorneys as part of the engagement and they may bill the Council for responding to this inquiry. At the conclusion of our audit, we will require certain written representations from the Council's management about the financial statements and related matters.

### **Audit Procedures – Internal Control**

Raffa's audit will include obtaining an understanding of the entity and its environment, including internal control, sufficient to assess the risks of material misstatement of the financial statements and to design the nature, timing and extent of further audit procedures. An audit is not designed to provide assurance on internal control or to identify deficiencies in internal control. However, during the audit, we will communicate to the Council and those charged with governance internal control-related matters that are required to be communicated under professional standards.

### **Tax Services**

The Council will furnish all the information that is necessary for the preparation of the tax return and the Council represents that the information it is supplying to Raffa is accurate and complete to the best of its knowledge. The written and oral information supplied by the Council will be the only source of information for the preparation of the return and Raffa will not independently verify the information. We will not audit or otherwise verify the data the Council submits, although it may be necessary to ask

the Council to clarify some of the information. We will furnish the Council with questionnaires and/or worksheets to guide it in gathering the necessary information. In order for the draft Form 990 to be issued simultaneously with the draft audited financial statements, Raffa's tax department must receive the completed questionnaires and/or worksheets by the first day of year-end fieldwork.

The Council's management is responsible for the proper recording of transactions in the books of account, safeguarding assets and substantial accuracy of the financial records. In addition, by signing this letter, you explicitly agree that it is the responsibility of the Council's management to fully inform us of all relevant facts that affect the preparation of the return. The Council's management is also responsible for designating a management-level individual with suitable skill, knowledge or experience to oversee the tax services, for evaluating the adequacy and results of those services and accepting responsibility for them. The Council's management also has final responsibility for the tax return and, therefore, the appropriate officials of the Council should review it carefully before an authorized officer signs and files it.

The tax return is subject to examination by the taxing authorities. In the event of an audit, the Council may be requested to produce documents, records or other evidence to substantiate the items of income and deduction shown on the return. The Council should retain the tax records related to the current year's tax return for at least three (3) years after its due date since additional assessments may be made during the period. These may be necessary to prove the accuracy and completeness of the return to a taxing authority. Generally, an assessment by the taxing authorities is presumed to be correct and must be rebutted by the taxpayer.

We will use our professional judgment in resolving questions where the tax law is unclear, or where there may be conflicts between the taxing authorities' interpretations of the law and other supportable positions. Unless otherwise instructed by the Council, we will resolve such questions in your favor when possible. Any proposed adjustments by the examining agent are subject to certain rights of appeal. In the event of such government tax examination, we will be available upon request to represent the Council and will render additional invoices for the time and expenses incurred.

If, during our work, we discover information that affects the Council's prior year return, we will make the Council aware of the fact. However, we cannot be responsible for identifying all items that may affect the prior year return. If the Council becomes aware of such information during the year, please contact Raffa to discuss the best resolution.

#### **Tax Return Disclosure Requirements – Certain Tax Return Positions**

Significant penalties are applied to return positions not "more likely than not" to be sustained on their merits absent adequate disclosure. Under Section 6694, a penalty will generally be avoided where there is "substantial authority" for the position. This standard does not apply to positions on returns attributable to a tax shelter or a reportable transaction, which are subject to the more strict standard of "more likely than not." For disclosed positions, Section 6694(a) requires that there be a "reasonable basis" for the tax treatment of the position.

As a result, any tax return we prepare is required to comply with these standards. In cases where it is unclear whether the standards are satisfied, a protective disclosure may be included with the return. We will advise you of potential disclosure issues that come to our attention. The cost of additional time that may be required in connection with disclosure of return positions will result in an additional charge.

### **Electronic Filing**

Certain large entities or organizations are required to electronically file their federal tax returns. Others may do so voluntarily. In addition, certain states require tax returns to be filed electronically. Raffa will electronically file your federal and/or state returns when. In order for Raffa to file electronically, the Council must complete IRS or state signature authorization forms as appropriate. These forms will be provided to the Council upon completion of the returns. Once the signed authorization forms are returned to us, we are authorized to release your returns to the taxing authorities. Any changes requested after transmitting the return electronically will require filing an amended hard-copy return, which will be billed at our standard hourly rates. Please advise us if the Council does not wish to voluntarily file electronically.

### **Assistance by the Council Personnel and Internet Access**

The Council agrees that all records, documentation and information we request in connection with our audit and tax return preparation will be made available to us (including those pertaining to related parties), that all material information will be disclosed to us and that we will have the full cooperation of, and unrestricted access to, the Council's personnel during the course of the engagement.

Raffa also asks that the Council's personnel prepare various schedules, confirmations and analyses we request, and locate any invoices and other documents requested. In addition, we ask that the Council provide high-speed Internet access to our engagement team, if practicable, while working on the Council's premises. This assistance will serve to facilitate the progress of our work and minimize costs to the Organization.

### **E-mail Communication**

In connection with this engagement, we may communicate with you or others via e-mail transmission. As e-mails can be intercepted and read, disclosed or otherwise used or communicated by an unintended third party or may not be delivered to each of the parties to whom they are directed and only to such parties, we cannot guarantee or warrant that e-mails from us will be properly delivered and read only by the addressee. Therefore, we specifically disclaim and waive any liability or responsibility whatsoever for interception or unintentional disclosure or communication of e-mail transmission or for the unauthorized use or failed delivery of e-mails transmitted by us in connection with the performance of this engagement.

### **Documentation**

The audit and tax documentation for this engagement is the property of Raffa and constitutes confidential information. However, pursuant to authority given by law or regulation, we may be requested to make certain documentation available to a regulatory agency to carry out oversight responsibilities. We will notify the Council of any such request. If requested, access to such documentation will be provided under the supervision of Raffa personnel.

Furthermore, upon request, we may provide copies of selected documentation to the aforementioned parties. These parties may intend or decide to distribute the copies or information contained therein to others, including other governmental agencies.

The audit and tax documentation for this engagement will be retained for a minimum of seven (7) years after the report release date. Raffa does not keep any original client records, so we will return those to the Council at the completion of the services rendered under this engagement. When records are returned to you, it is your responsibility to retain and protect those records for possible future use, including potential examination by government or regulatory agencies.



By your signature below, you acknowledge and agree that upon the expiration of the seven-year period Raffa shall be free to destroy its records related to this engagement.

If the Council plans any reproduction or publication of our report or any portion of it, copies of masters' or printers' proofs of the entire document should be submitted to us in sufficient time for our review and approval before printing. The Council also agrees to provide us with a copy of the final reproduced material for our approval before it is distributed. In addition, to avoid unnecessary delay or misunderstanding, it is important that you give us timely notice of your intention to issue any such document.

### Peer Review

Our Firm, as well as all other major accounting firms, participates in a "peer review" program covering our audit and accounting practices. This program requires that once every three (3) years we subject our quality assurance practices to an examination by another accounting firm. Raffa has consistently received a pass report, the highest ranking available on the peer review report issued in accordance with the quality control standards established by the American Institute of Certified Public Accountants. As part of the process, the other firm will review a sample of our work. It is possible that the work we perform for the Council may be selected by the other firm for its review. If it is, they are bound by professional standards to keep all information confidential. If the Council objects to having the work reviewed by our peer reviewer, please notify us in writing.

### Fees for Services

Our fees for these services listed above will be based upon the time of the principal and staff assigned to the engagement, plus out-of-pocket expenses. Our Firm's established hourly rates at the date of this letter are as follows:

<b>Partner</b>	<b>\$ 285 - \$ 380</b>
<b>Manager</b>	<b>\$ 180 - \$ 255</b>
<b>Senior Accountant</b>	<b>\$ 125 - \$ 150</b>
<b>Staff Accountant</b>	<b>\$ 85 - \$ 115</b>
<b>Administration</b>	<b>\$ 65</b>

We estimate that our fees to complete the services described above will be as follows:

- To perform an audit of the financial statements for the year ending June 30, 2014 (item #1), we estimate our fees will be approximately **\$30,000**, plus out-of-pocket expenses of **\$1,500**.
- The fees related to our report to management (item #2) are included in item #1.
- To prepare the federal Form 990 for the year ending June 30, 2014 (item #3), we estimate our fees will be approximately **\$4,375**, plus out-of-pocket expenses of **\$220**.
- To prepare the Council's federal Form 1099's for the year ending December 31, 2015 (item #4), we will bill you **\$10** per federal Form 1099 and for the time incurred in filing the returns at our hourly rates, plus out-of-pocket expenses up to **\$75**.
- If the Council wishes for us to prepare a formal Board of Directors presentation (item #5) or if matters come up as noted in item #6 which will take additional time not budgeted for in the other described services, we will advise the Council of the fee estimate and obtain its approval prior to incurring any significant hours thereon.

Out-of-pocket expenses are for third-party charges incurred directly in connection with our work for the Council as well as our internal charges for certain support activities. Out of pocket third party charges incurred include costs of travel, delivery and printing of reports for the Council. Our internal charges include certain flat-rate amounts that reflect an allocation of estimated costs associated with our general office services, such as computer usage, telephone charges, facsimile transmissions, postage and photocopies, which currently represent 4% of the fees billed. We leverage our size to achieve cost savings for our clients in all areas of expense, including those covered by internal charges, and use this system of allocation to minimize total costs.

Raffa is always available to meet with you and/or other executives or members of the Board of Directors to discuss current business, operational, accounting and auditing matters affecting the Council. Whenever you feel such meetings are desirable, please let us know. We are prepared to provide services to assist the Council in any of these areas. We will also be pleased, at your request, to attend meetings held by the Council's Board of Directors, Audit Committee or Finance Committee.

The above stated fee is our best estimate based on our knowledge of the Council's operations. If the fee based on the actual hours expended comes to less than the above amount, we would, of course, charge the lower amount. If our fees, based on actual hours expended, exceed our estimated fees by up to 10% of the estimated fees due to changes in the scope of the proposed services, additional work necessary for the successful completion of the audit, the occurrence of unexpected circumstances, or the level of support anticipated from the Council's staff, including the preparation and availability of certain schedules and documents, the Council will be billed for these additional services. Should it become evident that our fee will exceed the above amount by more than 10% we will notify the Council as soon as possible and obtain your concurrence before proceeding further. In the event the Council does not agree to pay such increased amount, we may terminate our services hereunder. In all cases, the Council agrees to pay our fees based on actual hours expended. Should the Council request any additional services, we will advise you of the related fee estimate prior to incurring any significant hours thereon.

Our fee estimates are based on the time we estimate it will take us to complete the services requested. The fee estimate is also based on anticipated cooperation from the Council's personnel and the assumption that unexpected circumstances will not be encountered during the audit. This is based on the following assumptions: the Council's personnel will prepare certain schedules and analyses for us and make available to us documents for our examination as and when requested; there will be no significant changes in the internal controls, accounting systems, key personnel or structure of the Council; there will be no significant acquisitions, disposals or mergers; and there will not be any unanticipated increases in current operations requiring significant additional audit time. Should we encounter any unforeseen problems that will warrant additional time or expense, the Council will be notified of the situation and, if possible, the added cost. The estimates do not include time for performing routine bookkeeping procedures that should be completed by the Council's staff prior to the start of the engagement. Our estimates also assume that the Council's staff will assist in preparing certain schedules and analyses, gathering requested documentation, etc. Of course, if the Council's staff is unable to complete these bookkeeping and support procedures or to provide the prerequisite information, we will be glad to assist where possible. However, the Council's management must take responsibility for our work and the Council will be billed separately for this time, in addition to the fee estimates included in this letter.

As you may know, it is typical for us to assign staff and schedule their time for a client engagement well in advance of the actual performance of the services. This advanced scheduling allows us to ensure that staff is available to accommodate the technical requirements of the engagement, any preferences you may have as to the professionals assigned are considered and that all of your

deadlines can be met. From time to time we may be required to cancel and/or reschedule the on-site services due to the Council's inability to provide the documentation and schedules required prior to our beginning our work or a change in the availability of the Council's staff or simply at management's request. Without proper notification of such required rescheduling, it is typical for us to incur additional fees not originally planned within the scope of our engagement and within the related fees quoted in this letter. Therefore, the Council should anticipate an additional charge for such required rescheduling typically in the amount of 15% of our hourly rates for the time which had been scheduled and you agree to pay such charge.

Our fees for these services are due and payable under the payment schedule included on the last page of this letter. Invoices for additional amounts that may be incurred for these and other services will be rendered as such work progresses and are payable upon receipt. Interest will be assessed at the rate of 1.5% per month on all balances outstanding for longer than thirty (30) days. If not timely paid, the Council agrees to pay us the amounts outstanding plus any accrued interest and to reimburse us for all costs of collection, including reasonable attorneys' fees and costs whether or not turned over for collection or a suit is filed. In accordance with our Firm's policies, work may be suspended if your account becomes sixty (60) days or more overdue and will not be resumed until your account is paid in full. If we elect to terminate our services for nonpayment, our engagement will be deemed to have been completed upon written notification of termination, even if we have not completed our report. The Council will be obligated to compensate us for all time expended and to reimburse us for all out-of-pocket expenditures through the date of termination.

Raffa wants to know as soon as possible if the Council is unhappy with our services. The Council agrees to notify us of any problems or issues with our service within one (1) week of receiving the applicable service.

This letter of engagement shall be interpreted and construed in accordance with the laws of the State of Maryland, without regard to conflict of law principles. The Council and Raffa both agree that any action concerning the terms of this letter of engagement must be brought in the Circuit Court of Montgomery County, Maryland and hereby consent to the exclusive jurisdiction and venue of this court. THE PARTIES HEREBY EXPRESSLY WAIVE ANY RIGHT TO A TRIAL BY JURY FOR ANY DISPUTES ARISING OUT OF RAFFA'S SERVICES, REGARDLESS OF WHETHER OR NOT SUCH DISPUTES SPECIFICALLY ARISE UNDER THIS LETTER OF ENGAGEMENT.

### Employment

All of Raffa's professional staff are bonded.

During the term of our engagement and for a period of one (1) year after the expiration or termination of our services hereunder, the Council agrees not to directly or indirectly: (i) induce, or attempt to induce, any Worker (as defined below) to terminate any employment or contractual relationship with Raffa; (ii) interfere with or disrupt Raffa's relationship with any Worker; or (iii) solicit, entice, take away, employ, contract with or engage any Worker employed or engaged by Raffa or with whom Raffa has a contractual relationship. As used herein, Worker shall mean those individuals who have had an employment or independent contractor relationship with Raffa within the prior one (1) year period and have been directly involved with the provision of services under this letter of engagement.

The Council acknowledges that at the time this letter of engagement is entered into the parties are unable to determine the amount of damages that would be suffered in the event of a breach of such restriction. In the event the Council breaches such restriction, the Council shall pay Raffa an amount

equal to the gross compensation paid to the applicable Worker during the last year of such employment or engagement with Raffa. The parties agree that such amount roughly approximates the damages likely to be incurred by Raffa and that such amount is reasonable and not a penalty.

### **Electronic Transmission**

This engagement letter may be transmitted in electronic format and shall not be denied legal effect solely because it was formed or transmitted, in whole or in part, by electronic record; however, this engagement letter must then remain capable of being retained and accurately reproduced, from time to time, by electronic record by the parties to this engagement letter and all other persons or entities required by law. An electronically transmitted signature to this engagement letter will be deemed an acceptable original for purposes of consummating this engagement letter and binding the parties providing such electronic signatures.

### **Conclusion**

We appreciate the opportunity to be of service to the Council of the Great City Schools and believe this letter accurately summarizes the significant terms of our engagement. We are committed as a Firm to provide the services the Council desires, and the Council can be assured of our continuous and constructive interest in your needs. If you have any questions, please let us know. If you agree with the terms of our engagement as described in this letter, please sign this letter and return it to us. Please retain a copy for your records.

Sincerely,

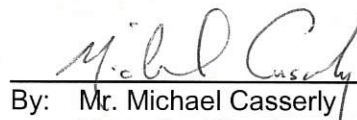
*Raffa, P.C.*

**Raffa, P.C.**

The services described in the foregoing letter are in accordance with our request. The scope of services and rates described in the letter and the terms of payment as described in this letter and as listed below are acceptable to us and are hereby agreed to. (Out-of-pocket expenses will be billed separately.)

<u>Payments will be due</u>	<u>Audit</u>	<u>Tax</u>	<u>Total</u>
Upon engagement planning	\$ 9,000	\$ -	\$ 9,000
On the day risk assessment and preliminary fieldwork commences	9,000	-	9,000
On the day year-end fieldwork commences	10,500	4,375	14,875
Upon submission of the drafts	1,500	-	1,500
Upon filing of federal Forms 1099	-	at rates	at rates
Total	<u>\$ 30,000</u>	<u>\$ 4,375</u>	<u>\$ 34,375</u>

  
By: Ms. Kaya Henderson  
Secretary/Treasurer  
Council of the Great City Schools

  
By: Mr. Michael Casserly  
Executive Director  
Council of the Great City Schools

8 July 2015  
Date

June 30, 2015  
Date

**SUBCOMMITTEE ON MEMBERSHIP**

# **COUNCIL OF THE GREAT CITY SCHOOLS**

## **Subcommittee on Membership**

**2015-2016**

### *Subcommittee Goal*

To review criteria and applications for membership, and recruit and retain members.

### *Chair*

Pam Knowles, Portland School Board

### *Members*

Thomas Ahart, Des Moines Superintendent  
JoAnn Brannon, Nashville School Board  
Juan Cabrera, El Paso Superintendent  
Darien Driver, Milwaukee Superintendent  
Terry Grier, Houston Superintendent  
Airick West, Kansas City School Board

### *Ex Officio*

Richard Carranza, San Francisco Superintendent

# COUNCIL OF THE GREAT CITY SCHOOLS

## Membership by Region

July 2, 2015

<b>East (E)</b>	<b>Midwest (MW)</b>	<b>Southeast (SE)</b>	<b>West (W)</b>
Boston	Austin	Atlanta	Albuquerque
Bridgeport	Chicago	Baltimore	Anchorage
Buffalo	Dallas	Birmingham	Fresno
Cincinnati	Denver	Broward County	Hawaii
Cleveland	Des Moines	Charleston	Las Vegas
Columbus	El Paso	Charlotte	Long Beach
Dayton	Ft. Worth	Greensboro	Los Angeles
Detroit	Houston	Jackson	Oakland
Newark	Indianapolis	Jacksonville	Portland
New York City	Kansas City	Louisville	Sacramento
Philadelphia	Milwaukee	Memphis-Shelby Cty	San Francisco
Pittsburgh	Minneapolis	Miami-Dade County	Seattle
Providence	Oklahoma City	Nashville	San Diego
Rochester	Omaha	New Orleans	Santa Ana
Toledo	St. Louis	Norfolk	
	St. Paul	Orlando	
	Wichita	Richmond	
		Palm Beach	
		Tampa	
		Washington	
15	17	20	14



**EAST BATON ROUGE MEMBERSHIP LETTER**

June 25, 2015

Robert Carlson  
Council of the Great City Schools  
1301 Pennsylvania Avenue, N.W., Suite 702  
Washington, D.C. 20004

Dear Mr. Carlson,

Re: 2015-2016 Membership

East Baton Rouge Parish School Board (EBRPSB) voted at its June 18, 2015 board meeting not to renew its membership for the 2015-2016 fiscal year due to budget constraints.

Respectfully,



Catherine Fletcher, CPA  
Chief Business Operations Officer

CAF/jcb

**LETTER OF INTEREST FROM ARLINGTON  
INDEPENDENT SCHOOL DISTRICT**



**Arlington**  
 INDEPENDENT SCHOOL DISTRICT  
*More Than a Remarkable Education*

November 24, 2014

Michael Casserly  
 Council of Great City Schools  
 1301 Pennsylvania Ave., NW, Ste. 702  
 Washington, DC 20004

Dear Michael:

We are pleased to submit this letter formally requesting membership in the Council of Great City Schools. As the 11<sup>th</sup> largest school district in Texas, we serve more than 64,000 students, prekindergarten through high school, from diverse backgrounds and have more than 8,000 employees. We have 75 campuses – six high schools, four alternative high schools, 12 junior highs, one alternative junior high, 51 elementaries one prekindergarten center, and community-based prekindergarten classes in 17 independent child-care centers. Our mission to empower and engage all students to be contributing, responsible citizens reaching their maximum potential through relevant, innovative and rigorous learning experiences matches closely with the mission of the Council of Great City Schools, and membership in this organization would help us further our academic efforts.

Arlington ISD demographics:

Total student enrollment: .....	64,046
Hispanic: .....	44%
Black: .....	24%
White: .....	22%
Asian: .....	6%
American Indian: .....	0%
Hawaiian: .....	0%
Two or more:.....	3%
Free & reduced-price eligibility: .....	67%
English-language learners:.....	26%
Special education students: .....	8%
Number of teachers: .....	4,276
Student:teacher ratio: .....	16.1:1

Academic opportunities abound for AISD students. More than 52 percent of secondary students are enrolled in the career and technical education program, which includes 16 career clusters in the health sciences, computer programming, engineering and more, certification programs, and technical dual-credit courses. One highlight in the CTE area is the AISD Fire Academy. Through a partnership with the Arlington Fire Department and Tarrant County College, students enrolled in

the two-year AISD Fire Academy receive fire and EMT certifications and can go directly into the workforce or continue their education further. The first graduating class in 2013 has four students working for the AFD. The district recently began the AISD Police Academy, which is a partnership with the Arlington Police Department and the University of Texas at Arlington. The district offers the International Baccalaureate World School Programme at Arlington, Bowie, Lamar and Sam Houston high schools. Students may earn 30 or more college credit hours through the district's Advanced Placement program. The AISD partners with Tarrant County College to offer dual-credit high school and college courses at each of its high schools.

In addition to academic programs, the AISD has award winning athletics and fine arts programs and extracurricular opportunities for our students. Athletics saw many teams advance to the playoffs, state winners in wrestling and track, and national winners in cheerleading. The district was named to the 2014 Best Communities for Music Education list by the NAMM Foundation. Martin High School was named a National GRAMMY Signature School by the GRAMMY Foundation. With an objective to have 100 percent of students actively involved in extracurricular and co-curricular activities, opportunities start as early as elementary with World Languages after-school programs and Elementary UIL A+ and go through the high school level with students winning national awards through step team, Academic Decathlon and Business Professionals of America competitions.

Thank you for your consideration. Please let us know if we can provide any further information.

Sincerely,



Dr. Marcelo Cavazos  
Superintendent



Bowie Hogg  
Board President

Key Statistics on Arlington, TX

	Council By-laws Criteria	Arlington Independent School District
Population of city	250,000	379,577
School district enrollment	35,000	64,046
Free/reduced price lunch	Urban characteristics	67%
Percent African American	Urban characteristics	24%
Percent Hispanic	Urban characteristics	44%

**DISTRICT APPLICANTS DENIED MEMBERSHIP,  
2009-2017**

**District Applicants 2009-2015**

<b>District</b>	<b>Year</b>	<b>Status</b>
Rockford (IL)	2009	Denied
Socorro (TX)	2009	Denied
Salem (OR)	2009	Denied
Clayton County (GA)	2009	Denied
Durham Public Schools (NC)	2010	Denied
Washoe County	2010	Denied
Pinellas County (FL)	2010	Denied
Michigan Education Achievement Authority	2011	Denied
Durham Public Schools (NC)	2011	Denied
Dekalb County (GA)	2011	Denied
Eugene (OR)		Denied
Knox County (TN)		Denied
Fort Wayne (IN)	2012	Denied
Portland (ME)	2012	Denied
District U-46 (Elgin, IL)	2012	Denied
Newport News (VA)	2012	Denied
Sweetwater Union High School District (CA)	2013	Denied
Grand Rapids (MI)	2014	Denied
Dallas County Intermediate	2014	Denied
Savannah Chatham County	2014	Denied
Jennings (MO)	2014	Denied
Durham Public Schools (NC)	2015	Denied
Arlington (TX)	2015	Denied



**DISTRICTS ELIGIBLE FOR MEMBERSHIP**

**Districts Eligible for Full Membership  
2010/2011 School Year**

AGENCY NAME- BY SURVEY YEAR (DISTRICT)	STATE NAME	URBAN- CENTRIC LOCALE (DISTRICT)	TOTAL STUDENTS (UG, PK-12) (DISTRICT)	% White	% FRL
ARLINGTON ISD	Texas	11-City: Large	64,484	26.2%	63.0%
CORPUS CHRISTI ISD	Texas	11-City: Large	38,409	13.9%	68.7%
EL PASO ISD	Texas	11-City: Large	64,330	10.7%	69.9%
FAYETTE COUNTY (Lexington)	Kentucky	11-City: Large	37,819	57.8%	48.2%
LINCOLN PUBLIC SCHOOLS	Nebraska	11-City: Large	35,896	70.7%	43.5%
MESA UNIFIED DISTRICT	Arizona	11-City: Large	65,123	51.0%	54.3%
RIVERSIDE UNIFIED	California	11-City: Large	42,532	27.0%	54.4%
SAN ANTONIO ISD	Texas	11-City: Large	55,116	2.2%	40.8%
STOCKTON UNIFIED	California	11-City: Large	38,252	8.9%	81.7%
TUCSON UNIFIED DISTRICT	Arizona	11-City: Large	53,275	25.2%	56.2%
TULSA	Oklahoma	11-City: Large	41,501	30.0%	82.1%
VIRGINIA BEACH CITY PBLC SCHS	Virginia	11-City: Large	71,185	52.9%	29.8%
WAKE COUNTY SCHOOLS	North	11-City: Large	144,173	49.4%	33.0%

# **ANNUAL REPORT**

# ANNUAL REPORT 2014-2015



# Executive Committee 2014-2015

## OFFICERS

### Chair of the Board

Jumoke Hinton Hodge, Oakland School Board

### Chair-Elect

Richard Carranza, San Francisco Superintendent

### Secretary/Treasurer

Felton Williams, Long Beach School Board

### Immediate Past Chair

Valeria Silva, St. Paul Superintendent

## MEMBERS

Cecelia Adams, Toledo School Board

José Banda, Seattle Superintendent

JoAnn Brannon, Nashville School Board

Juan Cabrera, El Paso Superintendent

Meria Carstarphen, Atlanta Superintendent

Darienne Driver, Milwaukee Superintendent

Lawrence Feldman, Miami-Dade County School Board

Eric Gordon, Cleveland CEO

Terry Grier, Houston Superintendent

Michael Hanson, Fresno Superintendent

Kaya Henderson, District of Columbia Chancellor

William Isler, Pittsburgh School Board

Barbara Jenkins, Orange County Superintendent

Pam Knowles, Portland School Board

Keith Oliveira, Providence School Board

Michael O'Neill, Boston School Committee

Shanaysha Sauls, Baltimore City School Board

Bolgen Vargas, Rochester Superintendent

Airick West, Kansas City School Board

Paula Wright, Duval County School Board

### Ex Officio

Deborah Shanley, Brooklyn College CUNY Dean

Cover Photo: Top Row, left: Student from Fresno Unified School District; Right: Students from Dallas Independent School District;

Bottom row: Students from Dallas Independent School District

Contents Page Photo: Students from Metro Nashville Public Schools

Page 3 Photo: Student from Des Moines Public Schools

Page 4 Photo: Students from Metro Nashville Public Schools

Page 6 Photo: Students from Columbus City Schools; Page 9 Photo: Student from Dallas Independent School District

Page 10 Photo: Students from Clark County School District

Page 23 Photo: Students from Des Moines Independent School District

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## Report Prepared by:

Tonya Harris, Communications Manager  
Ashley Chandler, Graphic Design Consultant  
Danyell Taylor, Communications Specialist  
Henry Duvall, Director of Communications

Photography by: Alex Jones and Clarence Tabb Jr.



# Message from the Chair

June 30, 2015

The Council of the Great City Schools continues to demonstrate what it is to be the premier national educational institution. This year's retrospective on the work, the students, the dedicated educators, and the change makers in urban education will inspire and challenge you to do what is necessary to ensure *All* students are thriving. *Lean In*.

This was a year that brought fresh thinking, fresh approaches, and new resolve to stand up for urban schools, students, and families. The Council staff again produced a stellar body of work to help districts advance equity, inclusion, and higher expectations for urban youth and educators.

This year's Annual Report will remind you of the public advocacy, research, networking, and cutting edge tools Council staff provided to equip us to make a difference in our districts. In particular, we were relentless and honest about the needs of our growing urban ELL populations. The ELD 2.0 criteria and publishers project demanded excellence for some of our most vulnerable urban youth. Council staff and member districts also "leaned in" to ensure harmful changes to the Elementary and Secondary Education Act did not jeopardize the promise of federal resources for our youth.

We stood as a united force to promote better public understanding of the Common Core State Standards and meaningful assessments of student progress, while also celebrating student excellence in each of our districts. And we invited needed discussion about shifting the nature and work of local Boards of Education and Superintendents, recognizing our collective leadership is what will inspire greater success for urban youth and our districts.

Over the past year we maintained our commitment to boosting racial equity within our school districts. In every corner of the nation, school districts had to continue the vital work of education despite losing students to gun violence and impassioned uprisings in our member cities. Our students and families found themselves at the center of our nation's extraordinarily tragic and somber moments of hatred, ignorance, and violence. If we were ever going to stand by our students, demand justice, and educate *All Children*, this was the year to be counted. And together as a Council we stood to be counted.

This was also the year we answered a call by President Barak Obama and Secretary of Education Arne Duncan in pledging to improve the social and educational outcomes of boys of color. Council leadership had the privilege of sitting with our President to share our best practices and reaffirm our commitment to quality education. We were all humbled. Our voice as urban educators must continue to be amplified as we agitate, collaborate, and relentlessly fight for urban youth. I am grateful for the opportunity to have served with such great educators and board members.

Finally, rest in peace and power, Beverly Hall. We will honor your dedication with our continued work. And rest in peace all of the students we lost this past year to violence and hatred. In your memory, we will strive collectively to ensure all students are safe and thriving!

Jumoke Hinton Hodge, Chair of the Board  
Council of the Great City Schools, 2014-2015



# Message from the Director

June 30, 2015

I am most pleased and proud to present this annual report to the membership on the activities of the Council of the Great City Schools during the 2014-15 program year.

The Council had another amazing and productive year, but it was a year filled with challenges. The public debate about the nation's college and career standards has become noisier and more controversial; budget cuts continue to erode financial support for our districts; and the turnover of our superintendents saw a decided uptick. Still, the organization and its member urban school districts persist in their efforts to boost student achievement, improve leadership and management, and strengthen public confidence—the three pillars of our joint work.

One of the singular achievements of the year was the public pledge that the membership made with President Obama last July to improve educational and social outcomes for our males of color. It was an extraordinary moment, and since then the organization has redoubled its efforts on behalf of these students. More recently the organization reaffirmed our commitments in a meeting with the president in the White House in March.



Photo by Pete Souza

The organization also launched a new round of public service announcements and videos in support of the common core standards that are now being seen and heard on television and radio stations nationwide in numbers that may surpass even our previous PSAs. In addition, the Council published a set of new tools to help school districts select high-quality instructional materials aligned with the new standards at each grade level. And the organization developed a unique set of criteria to help districts identify badly-needed materials for English learners, and is encouraging publishers to improve the quality and rigor of materials they develop moving forward.

These resources and the numerous other tools the Council has developed are now being used in school districts all over the country.

Our research team also issued the nation's most comprehensive look to date of the effects of the federal government's school-improvement grants on the academic performance of our turn-around schools. And we are finalizing the nation's most comprehensive inventory of testing practices in our big city school systems.

On top of those accomplishments, the Council published its annual *Managing for Results* report with nearly 500 key performance indicators, and piloted a new set of academic indicators that together form a unique and comprehensive performance management system for the nation's urban schools.

Finally, the Council continued to provide its top-flight strategic support teams to the membership, and held a phenomenal annual conference in Milwaukee.

I thank Jumoke Hinton Hodge for her terrific leadership this year in chairing the board of directors and executive committee.

And I thank the Council's exceptional staff, who continue to perform at the top of their games and astonish everyone with their productivity. Thank you for a great year.

Michael Casserly  
Executive Director





# About the Council

The Council of the Great City Schools brings together the nation's largest urban public school systems in a coalition dedicated to the improvement of education for children in the inner cities. The Council and its member school districts work to help our schoolchildren meet the highest standards and become successful and productive members of society.

The Council keeps the nation's lawmakers, the media, and the public informed about the progress and problems in big-city schools. The organization does this through legislation, communications, research, and technical assistance.

The organization also helps to build capacity in urban education with programs to boost academic performance and narrow achievement gaps; improve professional development; and strengthen leadership, governance, and management.

The Council of the Great City Schools accomplishes its mission by connecting urban school district personnel from coast to coast who work under similar conditions. Staff with responsibilities for curricula, research and testing, finance, operations, personnel, technology, legislation, communications, and other areas confer regularly under the Council's auspices to share concerns and solutions and discuss what works in boosting achievement and managing operations.



In addition, joint efforts with other national organizations, corporations, and government policymakers extend the Council's influence and effectiveness outside member school districts to the larger, interdependent world that will ultimately benefit from the contributions of today's urban students.

Since the organization's founding in 1956, geographic, ethnic, language, and cultural diversity has typified the Council's membership. That diversity propels the coalition forward to see that all citizens receive an education that will equip them with the skills and knowledge to compete successfully in the world marketplace and to enhance the quality of their lives in a society changing with phenomenal speed. The wellspring of accomplishments and innovations rising from our inner cities testifies to the resounding benefits of investment in the nation's urban centers and in their public schools.



Urban school leaders pose with President Barack Obama in the Oval Office after their meeting. Official White House Photo by Pete Souza



President Obama announces pledge by urban school districts to support his *My Brother's Keeper* initiative as district leaders and students look on. Photo credit: Candace Simon

# Vision

## OUR VISION

Urban public schools exist to teach students to the highest standards of educational excellence. As the primary American institution responsible for weaving the strands of our society into a cohesive fabric, we — the leaders of America’s Great City Schools — see a future where the nation cares for all children, expects their best, appreciates their diversity, invests in their futures, and welcomes their participation in the American dream.

The Great City Schools are places where this vision becomes tangible and those ideals are put to the test. We will keep our commitments. And as society supports our endeavors, cities will become the centers of a strong and equitable nation, with urban public schools successfully teaching our children and building our communities.

## OUR MISSION

It is the special mission of America’s urban public schools to educate the nation’s most diverse student body to the highest academic standards and prepare them to contribute to our democracy and the global community.

## OUR GOALS

- To educate all urban school students to the highest academic standards.
- To lead, govern and manage our urban public schools in ways that advance the education of our children and inspire the public’s confidence.
- To build a confident, committed and supportive urban community for raising the achievement of urban public schoolchildren.





**Rochester Schools Superintendent Bolgen Vargas participates in a session at the Annual Fall Conference.**



**Albuquerque school board member David Percy asks a question at the Legislative Conference as Florida's Duval County school board member Paula Wright looks on.**



**Minneapolis Schools Superintendent Bernadeia Johnson presents information at a session at the Annual Fall Conference.**

# Organizational Structure

School districts located in cities with populations over 250,000 and student enrollments over 35,000 are eligible for membership in the Council of the Great City Schools. Membership is also open to those districts serving a state's largest city, depending on its urban characteristics.

The **Board of Directors** is composed of the superintendent and one board of education member from each member district, making the Council the only national educational organization so constituted and the only one whose purpose and membership is solely urban. The board meets twice a year to determine and adopt policies. It elects a 24-member executive committee, which exercises governing authority when the board is not in session.

The board of directors established five special task forces in 1998 and 1999 to address major issues facing the membership. These included a **School Finance Task Force** to explore ways to challenge urban school funding inequities around the nation and an **English Language Learners and Bilingual Education Task Force** to focus on issues around the education of English language learners.

A **Task Force on Achievement** was established to eliminate gaps in the academic achievement of students by race. A **Task Force on Leadership and Governance** addresses the increasing concern about issues surrounding urban school leadership and management, and a **Task Force on Professional Development** explores ways to give teachers and administrators the latest tools and techniques to improve student achievement.

Three subcommittees of the executive committee provide support in financial and organizational areas:

**By-Laws:** Defines the Council's mission, responsibilities, and composition within the framework of applicable laws and regulations.

**Audit:** Reviews and studies budgetary matters and ensures that revenues are properly managed.

**Membership:** Determines eligible cities for membership and recruits, screens, and recommends new members.

In addition to these governing bodies, a network of deans of the **Great City Colleges of Education** and staff liaisons from various school district departments encourage information exchange with counterparts in other cities. Common concerns in areas such as student achievement, public relations, technology, human resources, finance, research, legislation, special education, and curriculum connect urban education personnel from member cities to share the ideas and experiences of the larger group.



# Characteristics of the Great City Schools

- ❑ **Total Student Enrollment.....7.1 million**
  - Hispanic .....39%
  - African American.....31%
  - White.....19%
  - Asian/Pacific Islander.....8%
  - Alaskan/Native American.....1%
- ❑ **Free/Reduced Price Lunch Eligibility.....68%**
- ❑ **English Language Learners.....16%**
- ❑ **Students With Individualized Education Plan (IEP's).....14%**
- ❑ **Total Number of Teachers.....414,976**
- ❑ **Student-Teacher Ratio.....17:1**
- ❑ **Number of Schools.....12,095**



Source: National Center for Education Statistics

## Conferences

### Public Relations Executives Meeting

July 11-13, 2014  
Baltimore, MD

### Curriculum & Research Directors Meeting

July 23-26, 2014  
Los Angeles, CA

### Annual Fall Conference

October 22-26, 2014  
Milwaukee, WI

### Chief Financial Officers Conference

November 11-14, 2014  
New Orleans, LA

### HRD/Personnel Directors Meeting

February 4-6, 2015  
Fort Lauderdale, FL

### Legislative/Policy Conference

March 14-17, 2015  
Washington, DC

### Chief Operating Officers Conference

April 21-24, 2015  
Las Vegas, NV

### Bilingual, Immigrant & Refugee Education Directors Meeting

May 13-16, 2015  
Charlotte, NC

### Chief Information Officers Meeting

June 2-5, 2015  
Philadelphia, PA





# Annual Fall Conference

More than 1,000 urban school superintendents, senior administrators, board members and deans of colleges of education assembled in Milwaukee for the Council of the Great City Schools' 58th Annual Fall Conference, October 22-26, hosted by Milwaukee Public Schools.

Under the theme "Fresh Water. Fresh Thinking in Urban Education," the conference featured an insightful keynote speech by astrophysicist Neil deGrasse Tyson. He challenged educators' preconceived notions about good student behavior and urged teachers to allow students the freedom to think in new ways.

The issue of testing was the focus of a 90-minute town hall meeting moderated by Claudio Sanchez, the education correspondent for National Public Radio. The panel featured several big-city school superintendents, board members, officials from education organizations and a 12th grade student from Milwaukee Public Schools discussing the benefits and the burdens of testing as well as the need to make tests more relevant.

Urban educators heard from David Coleman, president of the College Board, who discussed efforts his organization is making to recruit more minorities into Advanced Placement classes as



College Board President David Coleman discusses the need to increase minority participation in Advanced Placement courses.



Astrophysicist Neil deGrasse Tyson shares ways educators can inspire students.

well as provide students with access to higher quality instruction.

Also addressing the conference was Anna Maria Chávez, CEO of the Girl Scouts USA. Chávez, who is the first woman of color to lead the 102-year-old organization, told urban educators that their leadership was critical to the Girl Scouts mission because the only way the organization serves girls is through local school districts.

The conference also featured numerous breakout sessions focused on issues such as preparing students to become college and career ready and exploring ways big-city school districts can recruit and retain teachers of color.



Girls Scouts USA CEO Anna Maria Chávez stresses the need to build partnerships with urban school districts.

# Legislative/Policy Conference

Urban school leaders assembled in the nation's capital March 14-17 to consider ways to reauthorize the *No Child Left Behind Act* (NCLB), as well as discuss the education priorities of the Obama administration.

Conferees heard from U.S. Secretary of Education Arne Duncan, who has served six years as the nation's top education official.

The former chief executive of Chicago Public Schools emphasized the importance of increasing access to early childhood education programs and said that the Department of Education has put a billion dollars behind states that are providing children with early learning opportunities.

Duncan also addressed the issue of NCLB, which was passed in a bipartisan fashion in 2001. He believes that the law is outdated and needs to be fixed, but fixed in the right way to ensure equity, excellence and innovation.

"At its heart, NCLB is not just an education law," stressed Duncan, "but a civil rights law."

The nation's ninth secretary of education praised urban school districts for taking the lead in improving graduation rates for students of color



U.S. Secretary of Education praises the progress urban schools are making.



Congressman Bobby Scott discusses the achievement gap between minority students and their white counterparts.

as well as raising standards, and said they must continue to accelerate the pace of change.

Also addressing the conference was Rep. Robert "Bobby" Scott (D-Va.), who is the ranking Democrat of the U.S. House Education and the Workforce Committee.

The congressman believes that significant progress has been made in education with the passage of the Elementary Secondary Education Act and the U.S. Supreme Court decision in *Brown vs. Board of Education*, which ended legal segregation in schools.

Yet he lamented the fact that there is a persistent achievement gap between minority students and their white counterparts and believes this disparity is one of the most pressing civil rights issues facing the nation.

Conferees also heard from Catherine Lhamon, assistant secretary in the Office of Civil Rights (OCR) for the U.S. Department of Education. She said that recent data collected by OCR revealed disparities in school discipline, with African Americans students three times more likely to be suspended or expelled from high school than their white peers.



National Public Radio education correspondent Claudio Sanchez, left, moderates the Council's town hall meeting on testing, featuring, left to right, Oakland school board member Jumoke Hinton Hodge, Milwaukee student Jaxs Goldsmith, St. Paul Schools Superintendent Valeria Silva, Executive Director of the Council of Chief State School Officers Chris Minnich, Chancellor of D.C. Schools Kaya Henderson and President and CEO of the National Center on Education and the Economy Marc Tucker.



President Obama briefs the news media on his discussion with big-city school leaders. (Photo credit: Win McNamee/Getty Images)

# Highlights of Council Activities

## COMMUNICATIONS

The Council of the Great City Schools works to give the public and the press a balanced and accurate view of the challenges, developments, and successes of urban public schools. In 2014-15, the Council—

- ❑ Initiated the Council's Pledge on Males of Color that was signed by 62 districts, and garnered major national and regional press coverage from President Obama's announcement of the pledge.
- ❑ Arranged a meeting between member district leaders and President Obama at the White House to discuss urban school progress, the federal budget, and the reauthorization of ESEA.
- ❑ Conducted a press event with the Council of Chief State School Officers to improve student testing.
- ❑ Launched new Common Core videos and public service announcements.
- ❑ Won three prestigious Telly Awards for public awareness videos explaining how the common core standard helps students succeed.
- ❑ Aired the Council's Common Core public service announcements at the Daytona 500 and Indianapolis 500.
- ❑ Published and disseminated a booklet titled *How We Help America's Urban Public Schools*.
- ❑ Published and disseminated a booklet titled *Good News About Urban Public Schools*.
- ❑ Coordinated a PBS-produced National Town Hall Meeting on issues of student testing, moderated by National Public Radio Education Correspondent Claudio Sanchez.
- ❑ Issued some 15 press releases on newsworthy activities and developments.
- ❑ Fielded scores of inquiries from national and regional media outlets, such as the *New York Times*, *Washington Post*, *Wall Street Journal*, *Boston Globe*, *Fox News*, National Public Radio and the Associated Press.
- ❑ Managed CGCS' ExxonMobil Bernard Harris Math and Science Scholarships.
- ❑ Published eight issues of the *Urban Educator*.
- ❑ Published the organization's *Annual Report*.
- ❑ Hosted the 14th Annual Public Relations Executives Meeting.

## LEGISLATION

In voicing its proposals and ideas to Congress and other federal policymakers, the Council helps shape legislation to strengthen the quality of schooling for the nation's urban children. In 2014-15, the Council—

- ❑ Successfully prevented a major Title I funding formula change from being offered as a House floor amendment that would have cut over a half billion dollars from Council member districts.
- ❑ Submitted formal ESEA recommendations to the Senate and House education committees.
- ❑ Testified before a House minority forum on the Education and Workforce Committee bill.
- ❑ Participated in a Senate education staff briefing on the Senate Committee ESEA Discussion Draft.
- ❑ Provided comments to the Senate and House education committees during various stages of the ESEA reauthorization, school meals reauthorization, and development of education research legislation.
- ❑ Assisted in securing a new federal appropriation of \$14 million to help schools facing an influx of unaccompanied minor and immigrant students.
- ❑ Submitted comments to the U.S. Department of Education on upcoming funding priorities, new Preschool Development Grants, and School Improvement Grants.
- ❑ Promoted No Child Left Behind waivers for school districts in states without waivers, resulting in two Council districts gaining additional SES flexibility.
- ❑ Advocated successfully for more flexibility from the Education and Agriculture Departments in implementing the poverty-focused Community Eligibility Program for free school breakfasts and lunches.

# Highlights of Council Activities

- ❑ Supported local flexibility waivers of school meal regulations in the FY 2015 appropriations bills.
- ❑ Provided comments, recommendations, data, examples, and other input to the Federal Communications Commission (FCC) throughout the rulemaking process on E-Rate.
- ❑ Supported the \$1.5 billion increase in annual E-Rate funds approved by the Federal Communications Commission.
- ❑ Advocated successfully for a multi-week extension of the E-Rate filing deadline in 2015.
- ❑ Convened the Annual Legislative/Policy Conference with four days of briefings on federal policy. Also convened meetings of the Council’s Special Education Directors, Food Service Directors, and E-Rate Directors.
- ❑ Continued work to expand school-based Medicaid reimbursements, which resulted in additional flexibility guidance on third party liability and modifications to the Medicaid “free care rule”.
- ❑ Served as an intermediary for Council districts in resolving problems with the U.S. Department of Education; provided multiple legislative updates on critical issues; and responded to scores of questions on federal legislation.
- ❑ Fielded multiple requests from Congress for information on a wide variety of issues.

## **RESEARCH**

Timely data collection and analysis allow the Council to prepare comprehensive reports, predict trends, and assess the effects of various policies, reforms, and practices on student performance. In 2014-15, the Council—

- ❑ Conducted research that demonstrated 10 years of urban school improvement based on the Trial Urban District Assessment of NAEP that received extensive positive national media coverage.
- ❑ Published *School Improvement Grants: Progress Report from America’s Great City Schools*, a major analysis of the impact of federal SIG funding on turnaround schools in member districts.
- ❑ Analyzed student responses to NAEP items that were similar to PARCC and SBAC-released questions, published a major report on the results, and presented them at various meetings of district curriculum, research, and ELL staff.
- ❑ Conducted Strategic Support Team reviews on research and accountability functions in a number of member districts.
- ❑ Published *Implementing the Common Core Standards: Year Three Progress Report From the Great City Schools*.
- ❑ Published *Implementing Common Core Assessments: Challenges and Recommendations*.
- ❑ Represented urban school district interests at meetings of the American Educational Research Association, the Partnership for Readiness for College and Careers (PARCC), the Smarter Balanced Assessment Consortium (SBAC), the National Assessment Governing Board (NAGB), the National Center for Education Statistics (NCES), the Coalition of Schools Educating Boys of Color, The White House Domestic Policy Council, The White House Initiative on Educational Excellence for African Americans, the Harvard Strategic Data Project Institute for Leadership in Analytics, and the Educational Testing Service.
- ❑ Responded to numerous member requests for statistical information and research assistance.
- ❑ Conducted special analysis for member districts of student achievement levels, changing demographics, and improvement.
- ❑ Conducted and facilitated a webinar for member districts and other stakeholders on Black male achievement.
- ❑ Published *Beating the Odds: Analysis of Student Performance on State Assessments, Results from the 2012-2013 School Year*.
- ❑ Convened the 2014 annual Research and Curriculum Directors Meeting in Los Angeles, CA.

## **ACHIEVEMENT AND PROFESSIONAL DEVELOPMENT**

Improving the performance of all students and closing achievement gaps is one of the Council’s most important priorities. In 2014-15, the Council—

- ❑ Developed and disseminated the *Grade-Level Instructional Materials Evaluation Tool—Quality Review* for English language arts and mathematics to assist districts in the selection of common core-aligned instructional materials.
- ❑ Convened numerous meetings with the organization’s common core advisory committees.

# Highlights of Council Activities

- ❑ Convened the Males of Color Preconference session at the Annual Fall Meeting.
- ❑ Convened a number of workshops and institutes for member districts on implementation of the common core.
- ❑ Developed a groundbreaking set of academic Key Performance Indicators and piloted them with member districts.
- ❑ Collaborated with the Vermont Writing Project to offer member districts professional development on enhancing expository and narrative writing.
- ❑ Participated in Student Achievement Partners and Achieve's initiative to help teachers develop mathematics units.
- ❑ Partnered with the University of Chicago's Center for Elementary Mathematics and Science Education to review a computer science toolbox for K-12 teachers, administrators, and district leaders.
- ❑ Made multiple presentations to organizations on the common core and college- and career-ready standards while representing urban districts and their work.
- ❑ Partnered with the Southern Education Foundation to host a two-day meeting on college- and career- readiness standards.
- ❑ Provided feedback to Achieve on the Educators Evaluating Quality Instructional Products Rubric (EQuIP) tool and to Student Achievement Partners on the Instructional Materials Evaluation Tool (IMET).
- ❑ Expanded the Basal Alignment Project, Anthology Alignment Read-Aloud Project, and Text Set Project.
- ❑ Updated [www.commoncoreworks.org](http://www.commoncoreworks.org) to provide greater access to materials for implementing the common core.
- ❑ Conducted Strategic Support Team reviews of the special education and general education programs in member districts.
- ❑ Provided Wallace Foundation Principal Supervisor Initiative (PSI) awardees with early feedback on progress and next steps for enhancing the instructional leadership role of principal supervisors.
- ❑ Facilitated two meetings of the Achievement and Professional Development Task Forces.

## **LEADERSHIP, GOVERNANCE, AND MANAGEMENT AND SCHOOL FINANCE**

The Task Forces on Leadership, Governance, and Management, and School Finance address the quality and tenure of leadership and management in and the funding of urban schools. In 2014-15, the Council—

- ❑ Conducted Strategic Support Team reviews of the human resources, facilities, and finance functions of member districts.
- ❑ Convened meetings of Chief Financial Officers, Human Resources Directors, Chief Operating Officers, Chief Information Officers, Chiefs of Safety & Security, Food Services Directors, Facilities Directors, Transportation Directors, Internal Auditors, Risk Managers, and Procurement Directors.
- ❑ Published the final report of the Deferred Maintenance Working Group, *Reversing the Cycle of Deterioration in the Nation's Public School Buildings*.
- ❑ Published the tenth edition of *Managing for Results in America's Great City Schools, 2014* with an expanded set of indicators.
- ❑ Conducted the Council's Urban School Executive Program (C'USE) for aspiring Chief Financial Officers and Chief Information Officers.
- ❑ Published the eighth edition of the survey and report *Urban School Superintendents: Characteristics, Tenure, and Salary*.
- ❑ Fielded numerous member requests for management information and services.
- ❑ Facilitated two meetings of the School Finance and Leadership, Governance, and Management Task Forces.

## **BILINGUAL, IMMIGRANT AND REFUGEE EDUCATION**

America's urban schools serve more than 26 percent of the nation's English language learners. In 2014-15, the Council—

- ❑ Worked with the U.S. Departments of Education, Health and Human Services, and Homeland Security and the White House to release county-by-county figures of unaccompanied minors.
- ❑ Conducted multiple surveys of enrollments of unaccompanied minors in member districts and shared the results with Congressional staff to help secure \$14 million in new appropriations. Assisted member districts in working with their SEAs to ensure they receive their share of new funding.

# Highlights of Council Activities

- ❑ Worked to analyze and provide feedback to Congressional staff on the effect of ELL-related provisions in the ESEA reauthorization bills.
- ❑ Worked with Department of Education staff on ELL accountability provisions in state-waiver extensions.
- ❑ Provided Strategic Support Team reviews of ELL programming in Chicago and Nashville, and provided technical assistance to Clark County in their self-assessment.
- ❑ Made numerous presentations on the organization's new English Language Development framework (ELD 2.0) to the Office of Civil Rights, the White House Initiative on Educational Excellence for Hispanic Americans, Student Achievement Partners, the Southern Education Foundation, the Association of Latino Administrators and Superintendents, State Title III Directors, and the Hunt Institute.
- ❑ Worked with Student Achievement Partners to ensure an ELL component in their IMET tool.
- ❑ Translated the Council's public service announcements, PowerPoints, and other products into Spanish.
- ❑ Maintained strong relations with other organizations working to implement common core standards with ELLs, including TESOL, the National Association of Latino Elected Officials (NALEO), the Understanding Language Initiative, and Univision.
- ❑ Piloted an initiative funded by The Bill & Melinda Gates Foundation and Televisa Foundation to produce and revise ELL instructional materials from four publishers.
- ❑ Conducted a planning project with support from the Helmsley Charitable Trust to design professional development for teachers working with high-need students who are below grade level.
- ❑ Developed a series of ELL performance indicators as part of the Council's academic KPI project.
- ❑ Answered numerous specific requests for ELL-related information from member districts.
- ❑ Convened the annual meeting of the Bilingual Immigrant, and Refugee Education Directors in Charlotte, NC with the highest participation rate in the history of the meeting.
- ❑ Convened two meetings of the Task Force on English Language Learners and Bilingual Education.
- ❑ Represented the Council at the ELL Roundtable meetings held by the U.S. Department of Education.
- ❑ Participated in national meetings of CCSSO on the common definition and reclassification of ELLs.
- ❑ Served on the Advisory Board to the National Council of State Title III Directors.
- ❑ Collaborated with the University of Wisconsin on an IES-funded project on cognitive assessments of ELLs at beginning levels of proficiency.

## **ORGANIZATION AND ADMINISTRATION**

The Council works to manage its resources and ensure the integrity of its programs. In 2014-15, the Council—

- ❑ Conducted an internal audit of the organization's 2014-15 spending and received unqualified external audit results for FY2013-14.
- ❑ Hosted the Annual Fall Conference in Milwaukee, WI as well as multiple meetings and forums throughout the year.
- ❑ Continued cleanup of the organization's database system.
- ❑ Upgraded the online conference registration and hotel reservation system for all meetings.
- ❑ Managed financials for 10 Strategic Support Team trips, nine grant projects, 10 programs, and 16 conferences and specialty meetings.
- ❑ Organized and coordinated the travel arrangements of 54 participants in the Males of Color White House event on July 21, 2014. Organized a special meeting of ten members with President Obama at the White House on March 16, 2015.
- ❑ Managed the Dr. Shirley Schwartz Urban Impact Scholarship Program, and the ExxonMobil Bernard Harris Math and Science Scholarships.
- ❑ Started the process for moving the Council's headquarters, selecting a real estate broker and conducting site visits.

# Award Programs

## GREEN-GARNER AWARD



Richard R. Green

During the annual fall conference, the Council bestows the Green-Garner Award upon a past or present member district superintendent or board of education member in recognition of exceptional contributions to urban schools and students. As the nation's highest urban education honor, the award pays tribute to the memory of Richard R. Green, former Minneapolis superintendent and New York City Public Schools chancellor, and Edward Garner, a businessman and former school board president of the Denver Public Schools.

The award, sponsored by ARAMARK Education and Voyager Sopris Learning, includes a \$10,000 college scholarship to be presented to a senior in the winner's school system or system from which the winner graduated.



Edward Garner

**Terry Grier, superintendent of the Houston Independent School District, received the award at the 2014 Fall Conference in Milwaukee. He has served as superintendent since 2009, and under his leadership the nation's seventh largest school district has experienced higher graduation rates, especially among African American and Hispanic students. He also has focused on improving student access to Advanced Placement (AP) coursework, resulting in a rising number of students participating in AP exams and earning high marks.**



Houston Schools Superintendent Terry Grier gives a hug to student Alisa Hamilton, after presenting her with a \$10,000 Green-Garner college scholarship. Hamilton will use the money to attend East Texas Baptist University, where she plans to study math. Photo Credit: David Einsel/Houston ISD



# Green-Garner Award Winners

1990 James Griffin, Retired Member Timothy Dyer, Former Superintendent	St. Paul School Board Phoenix Union High School District
1991 Paul Houston, Former Superintendent	Tucson Public Schools
1992 Richard Wallace Jr., Superintendent Emeritus	Pittsburgh Public Schools
1993 Constance Clayton, Superintendent	School District of Philadelphia
1994 Holmes Braddock, Board Member	Miami-Dade County Public Schools
1995 Curman Gaines, Superintendent	St. Paul Public Schools
1996 James Williams, Superintendent	Dayton Public Schools
1997 Maxine Smith, Retired Member	Memphis City School Board
1998 Gerry House, Superintendent	Memphis City Public Schools
1999 Rod Paige, Superintendent Judy Farmer, Board Member	Houston Independent School District Minneapolis Public Schools
2000 Eric Smith, Superintendent	Charlotte-Mecklenburg Schools
2001 Barbara Byrd-Bennett, Superintendent	Cleveland Municipal School District
2002 John Simpson, Superintendent	Norfolk Public Schools
2003 Arthur Griffin, Board Member Franklin Till, Superintendent	Charlotte-Mecklenburg Schools Broward County Public Schools
2004 Tom Payzant, Superintendent	Boston Public Schools
2005 Anna Dodson, Board Member	Norfolk Public Schools
2006 Beverly Hall, Superintendent	Atlanta Public Schools
2007 Elizabeth Reilinger, Board Member	Boston Public Schools
2008 Pascal Forgione, Superintendent	Austin Independent School District
2009 Emmett Johnson, Board Member	Atlanta Public Schools
2010 Arlene Ackerman, Superintendent	The School District of Philadelphia
2011 Candy Olson, Board Member	Hillsborough County Public Schools
2012 Carol Johnson, Superintendent	Boston Public Schools
2013 Denise Link, Board Member	Cleveland Metropolitan School District
2014 Terry Grier, Superintendent	Houston Independent School District

## Queen Smith Award For Commitment to Urban Education

William Daniel, a financial literacy teacher at Boone High School in Orlando, Fla., was the recipient of the Queen Smith Award for Commitment to Urban Education. Sponsored by the Macmillan/McGraw-Hill Publishing Co., the award is named in honor of the company's late vice president of urban programs.

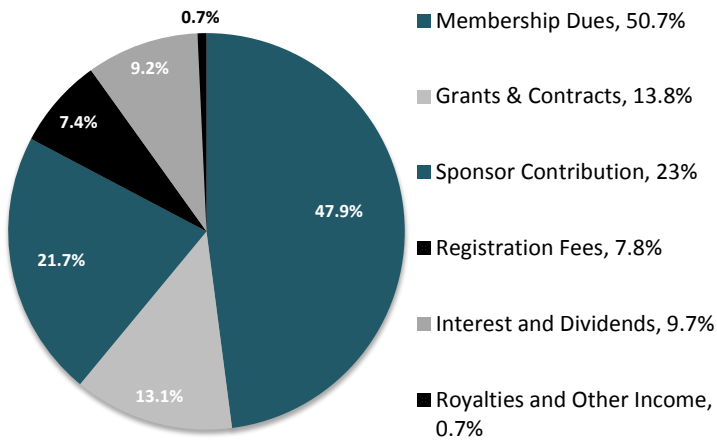
## Shirley S. Schwartz Urban Education Impact Award

The Council of the Great City Colleges of Education, an affiliate group of deans working with big-city school leaders, presented the sixth annual Dr. Shirley S. Schwartz Urban Education Impact Award to Charlotte-Mecklenburg Schools and Winthrop University for their Leaders for Tomorrow program, which is designed to prepare school principals and assistant principals for the Charlotte-Mecklenburg school system. The award honors an outstanding partnership between a university and urban school system and is named in honor of the Council's director of special projects who died in March 2009.

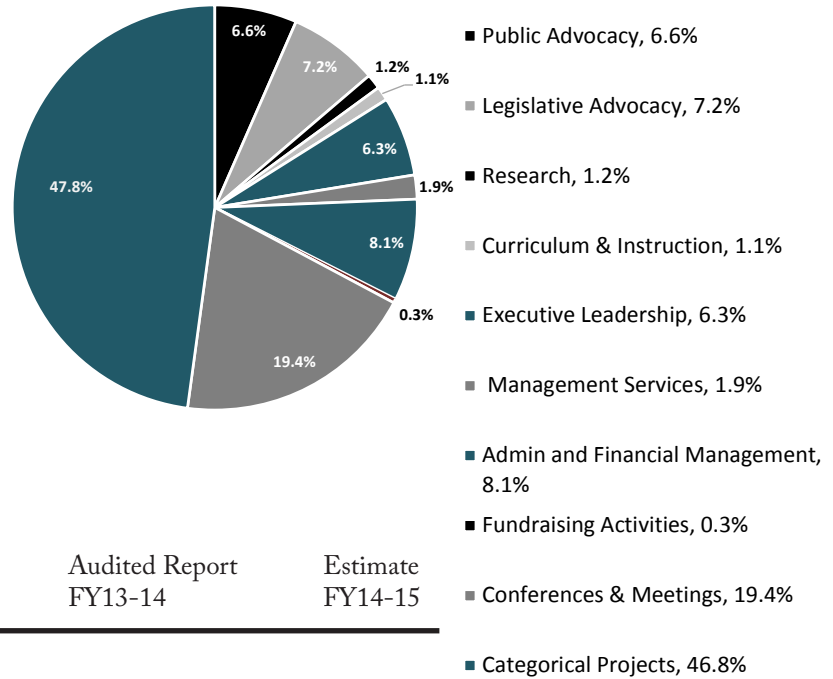
# Financial Report

Financial Statement for the year ending June 30, 2015

## Revenue



## Expenses



	Audited Report FY13-14	Estimate FY14-15
<b>Revenue</b>		
Membership Dues	\$2,524,579	\$2,739,360
Grants & Contracts	4,125,125*	746,259
Sponsor Contributions	1,057,000	1,241,185
Registration Fees	444,171	421,645
Interest and Dividends	229,638	524,148
Royalties and Other Income	46,958	41,383
Unrealized Gain/Loss on Investments	458,418	-307,805
<b>Total Revenue</b>	<b>\$8,885,888</b>	<b>\$5,406,175</b>

*Grants received in FY13-14 for subsequent years*

	Audited Report FY13-14	Estimate FY14-15
<b>Expenses</b>		
Public Advocacy	\$411,119	\$476,055
Legislative Advocacy	482,307	520,807
Research	255,549	86,797
Curriculum & Instruction	59,187	82,110
Executive Leadership	491,995	460,560
Management Services	200,521	139,494
Admin & Financial Management	622,180	589,249
Fundraising Activities	45,075	23,353
Conferences & Meetings	1,208,686	1,406,164
Categorical Projects	2,533,052	3,470,290
<b>Total Expenses</b>	<b>\$6,309,672</b>	<b>\$7,254,878</b>

<b>Change in Net Assets</b>	<b>\$2,576,217</b>	<b>(\$1,848,702)</b>
<b>Net Assets, Beginning</b>	<b>\$7,765,234</b>	<b>\$10,341,451</b>
<b>Net Assets, Ending</b>	<b>\$10,341,451</b>	<b>\$8,492,749</b>

# Sponsors

The Council thanks the following contributors for their support in 2014-2015.

## Blue Ribbon Corporate Advisory Group

American Reading Company  
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Curriculum Associates  
Gaggle  
Houghton Mifflin Harcourt  
IBM  
Knowledge Delivery Systems  
Lexia Learning Systems  
McGraw Hill Education  
Microsoft  
Pearson Education  
Safari Montage  
Scholastic, Inc.  
SchoolMessenger  
Schoolwires  
Waterford Institute  
Wilson Language Training



Chartwells  
Compass Learning  
Curriculum Associates  
Discovery Education  
Edupoint  
GCA Services Group  
Hobsons  
Houghton Mifflin Harcourt  
IBM  
Imagine Learning  
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Safari Montage  
Scholastic, Inc.  
SchoolWires  
Sodexo  
TCG Advisors  
TeachScape  
Texas Instruments  
Truenorthlogic  
Waterford Institute  
Wilson Language Training  
Zaner-Bloser  
95% Group

## 2014 Curriculum & Research Directors Meeting

Amplify  
Curriculum Associates  
dgedu  
Discovery Education  
Fluid Math  
GCA Services Group  
Houghton Mifflin Harcourt  
Imagine Learning  
Knowledge Delivery Systems  
McGraw Hill Education  
Pearson  
Safari Montage  
Scholastic, Inc.

## 2014 Executive Committee Meetings

Houghton Mifflin Harcourt  
McGraw Hill Education

## 2014 Public Relations Executives Meeting

Peachjar  
SchoolMessenger  
Schoolwires

## 2015 HRD/Personnel Directors Meeting

Convectus Solutions LLC  
Cornerstone OnDemand Inc.  
Kelly Educational Staffing  
Knowledge Delivery Systems  
Truenorthlogic  
Workday

## 2015 Legislative/Policy Conference

American Reading Company  
Curriculum Associates  
Houghton Mifflin Harcourt  
Knowledge Delivery Systems  
National Geographic Museum/  
Cengage Learning  
PCG  
Renaissance Learning  
Waterford  
Wilson Language Learning

## 2015 Bilingual, Immigrant & Refugee Education Directors Meeting

Achieve 3000  
American Reading Company  
Benchmark Education  
Curriculum Associates  
Ellevation  
Houghton Mifflin Harcourt  
Imagine Learning Inc.  
Knowledge Delivery Systems  
Mawi Learning  
McGraw Hill Education  
Middlebury Interactive Languages  
MM Publications  
Pearson  
Safari Montage  
Santillana USA  
Vantage Learning

## 2015 Chief Operating Officers Conference

247 Security  
AECOM  
ALC  
Allegion  
ARAMARK Education  
Arthur J. Gallagher & Co.  
BlueBird  
Chartwells School Dining  
Cree  
CPI  
DeJong-Richter  
DMS  
Durham School Services  
EDI  
Education Facilities Clearinghouse  
E & I Cooperative Services  
First Student  
Gafcon  
Gatlin Enterprises  
GCA Services Group

Heery  
Jacobs Engineering Group  
Oracle  
Preferred Meal Systems, Inc.  
Raptor  
Reta Security  
Roush Cleantech  
Safari Montage  
SchoolDude.com  
School Improvement Network  
School Planning & Management  
Seon  
Sodexo  
SSC  
The Cooperative Purchasing  
Network  
Thompson Hospitality  
Transfinder  
Transportation Sector  
Consultants  
U.S. Communities Government  
Purchasing Alliance  
Wesco Distribution  
Zonar

## 2015 Chief Information Officers Meeting

Amplify  
Aruba Networks  
Cisco Systems  
Clever  
Dell  
Education Networks of America  
Fuel Education  
Gaggle  
Google for Education  
Houghton Mifflin Harcourt  
iboss Network Security  
Infor Public Sector  
Intel  
its Learning  
Jamf Software  
Kajeet  
Knowledge Delivery Systems  
Lightspeed Systems  
Microsoft  
Pearson  
Safari Montage  
SchoolMessenger  
Schoolology  
Schoolwires

## Shirley Schwartz Urban Education Impact Award

Barbara Reed  
Joseph Schwartz  
Teri Trinidad

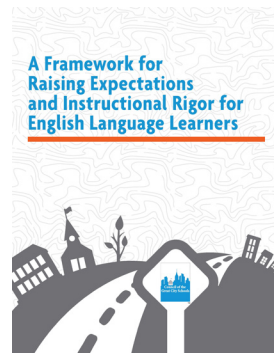
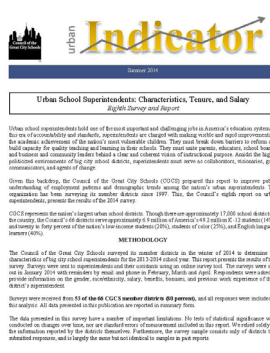
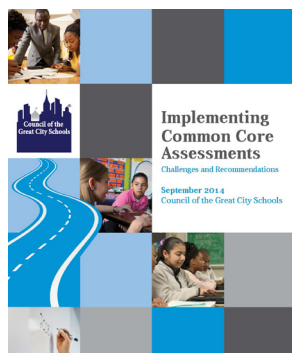
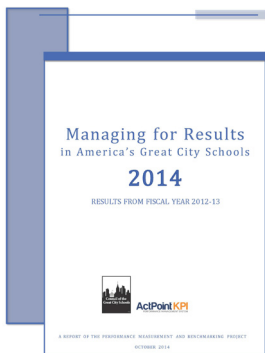
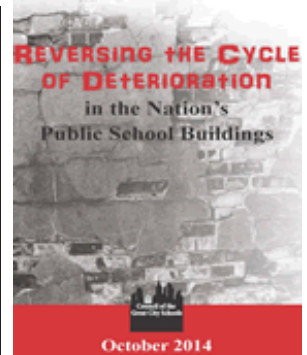
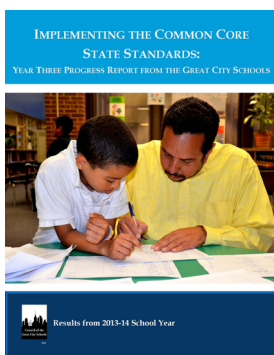
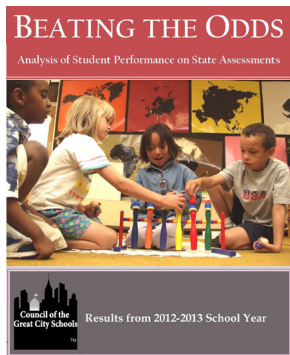
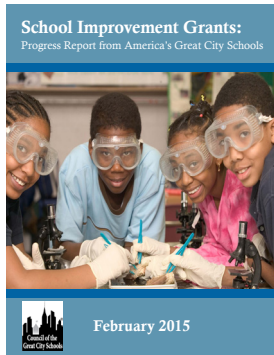
## 2014 Chief Financial Officers Meeting

Aon Hewitt  
ARAMARK Education  
Arthur J. Gallagher & Co.  
Chartwells School Dining  
Clifton Larson Allen  
Crowe Horwath  
E & I Cooperative Services  
GCA Services Group  
HireRight  
Houghton Mifflin Harcourt  
Jacobs Engineering Group  
Keenan & Associates  
Kelly Educational Staffing  
McGladrey  
Procurex  
SSC  
The Cooperative Purchasing Network  
Transportation Sector Consultants  
U.S. Communities Government Purchasing Alliance  
SAP

## 2014 Annual Fall Conference

Achieve 3000  
American Reading Company  
Amplify  
ARAMARK Education  
Benchmark Education  
Cambium Learning Group/Voyager Sopris Learning  
Catapult Learning

# Publications



- ❑ **School Improvement Grants: Progress Report from America's Great City Schools - February 2015**  
This report measures trends in performance among urban schools receiving federal School Improvement Grant awards as part of the American Recovery and Reinvestment Act of 2009.
- ❑ **Beating the Odds: Analysis of Student Performance on State Assessments, Results from the 2012-2013 School Year - December 2014**  
This thirteenth edition of Beating the Odds gives the nation an in-depth look at how big-city schools are performing on the academic goals and standards set by the states.
- ❑ **Implementing the Common Core State Standards: Year Three Progress Report from the Great City Schools - December 2014**  
The Council of the Great City Schools surveyed the progress urban public school districts are making in implementing the CCSS. This report presents the results from this third-year survey.
- ❑ **Good News About Urban Public Schools - October 2014**  
This publication documents the progress and good work that is going on in the nation's urban schools.
- ❑ **Reversing the Cycle of Deterioration in the Nation's Public School Buildings - October 2014**  
This report describes how school districts, financially squeezed over long periods of time, made economic decisions that reduced the most cost-effective types of maintenance work: preventive and predictive maintenance.
- ❑ **Managing for Results in America's Great City Schools, 2014 - October 2014**  
The Council's annual report on some 500 Key Performance Indicators of operational performance in the nation's urban schools.
- ❑ **Implementing Common Core Assessments: Challenges and Recommendations - September 2014**  
The purpose of this booklet is to help urban school districts across the country get ready for new Partnership for Assessment of Readiness for College and Careers (PARCC) and Smarter Balanced Assessment Consortia (SBAC) assessments.
- ❑ **Urban Indicator: Urban School Superintendents: Characteristics, Tenure, and Salary - Fall 2014**  
The Council of the Great City Schools prepared this report to improve public understanding of employment patterns and demographic trends among the nation's urban superintendents.
- ❑ **A Framework for Raising Expectations and Instructional Rigor for English Language Learner Students - August 2014**  
This report presents a framework for teaching ELLs consistent with the CCSS and lays out criteria for assessing ELL materials.
- ❑ **Beyond Test Scores: What NAEP Results Tell Us About Implementing the Common Core in Our Classrooms- July 2013**  
This report analyzes NAEP items that resemble PARCC and SBAC questions and discusses what the results mean for instruction.

# Council Staff

## ADMINISTRATION

Michael Casserly, Executive Director  
Teri Trinidad, Director of Administration, Finance & Conferences  
Alisa Adams, Finance Manager  
Terry Tabor, Conference Manager  
Shirley Lathern, Systems & Administration Specialist  
Johanna Lim, Accounting & Conference Specialist  
Marilyn Banks, Administrative Assistant

## COMMUNICATIONS

Henry Duvall, Director of Communications  
Tonya Harris, Communications Manager  
Danyell Taylor, Communications Specialist

## CURRICULUM AND INSTRUCTION

Ricki Price-Baugh, Director of Academic Achievement  
Robin Hall, Director of Language Arts and Literacy  
Denise Walston, Director of Mathematics

## LEGISLATION AND POLICY

Jeff Simering, Director of Legislation  
Manish Naik, Manager of Legislative Services  
Gabriela Uro, Director of ELL Policy and Research  
Debra Hopkins, ELL Project Coordinator  
Carol Aguirre, ELL Policy Specialist  
Julie Wright Halbert, Legislative Counsel

## MANAGEMENT AND TECHNOLOGY

Robert Carlson, Director of Management Services  
Jonathon Lachlan-Haché, Special Projects Specialist

## RESEARCH

Ray Hart, Director of Research  
Renata Uzzell, Research Manager  
Moses Palacios, Research Specialist  
Jeannette Fernandez, Research Intern

## SPECIAL PROJECTS

Amanda Rose Corcoran, Special Projects Manager  
Michell Yorkman, Special Projects Manager



**Council Board of Directors and Member Districts 2014-2015 (As of March 2015)**

<u>School District</u>	<u>Superintendent</u>	<u>Board Member</u>
Albuquerque	Brad Winter	David Peercy
Anchorage	Ed Graff	Natasha Von Imhof
Atlanta	Meria Carstarphen	Leslie Grant
Austin	Paul Cruz	Gina Hinojosa
Baltimore	Gregory Thornton	Shanaysha Sauls
Birmingham	Spencer Horn	Wardine Alexander
Boston	John McDonough	Michael O'Neill
Bridgeport	Frances Rabinowitz	Sauda Baraka
Broward County	Robert Runcie	Laurie Rich Levinson
Buffalo	Donald Ogilvie	James Sampson
Charleston	Michael Bobby	Todd Garrett
Charlotte-Mecklenberg	Ann Clark	Mary McCray
Chicago	Barbara Byrd Bennett	Jesse Ruiz
Cincinnati	Mary Ronan	Melanie Bates
Clark County	Pat Skorkowsky	Linda Young
Cleveland	Eric Gordon	Denise Link
Columbus	Daniel Good	Gary Baker II
Dallas	Mike Miles	Mike Morath
Dayton	Lori Ward	Ronald Lee
Denver	Tom Boasberg	Allegra Haynes
Des Moines	Thomas Ahart	Cindy Elsbernd
Detroit	Karen Ridgeway	Darnell Earley
District of Columbia	Kaya Henderson	N/A
Duval County	Nikolai Vitti	Paula Wright
East Baton Rouge	Bernard Taylor, Jr.	David Tatman
El Paso	Juan Cabrera	Dee Margo
Fort Worth	Patricia Linares	Ashley Paz
Fresno	Michael Hanson	Lindsay Cal Johnson
Guilford County	Maurice Green	Rebecca Buffington
Hillsborough County	MaryEllen Elia	Doretha Edgcomb
Honolulu	Ronn Nozoe	Donald G. Horner
Houston	Terry Grier	Paula Harris
Indianapolis	Lewis Ferebee	Samuel Odle
Jackson	Cedrick Gray	Monica Gilmore-Love
Jefferson County	Donna Hargens	Diane Porter
Kansas City (MO)	Stephen Green	Airick West
Long Beach	Christopher Steinhauser	Felton Williams
Los Angeles	Ramon Cortines	Steve Zimmer
Miami-Dade County	Alberto Carvalho	Lawrence Feldman
Milwaukee	Darienne Driver	Michael Bonds
Minneapolis	Michael Goar	Don Samuels
Nashville	Jesse Register	JoAnn Brannon
Newark	Cami Anderson	Antoinette Baskerville-Richardson
New Orleans	Stan Smith	N/A
New York City	Carmen Fariña	N/A
Norfolk	Samuel King	Kirk Houston Sr.
Oakland	Antwan Wilson	Jumoke Hinton Hodge
Oklahoma City	Rob Neu	Phil Horning
Omaha	Mark Evans	Lacey Merica
Orange County	Barbara Jenkins	William Sublette
Palm Beach County	E. Wayne Gent	Debra Robinson
Philadelphia	William Hite	Bill Green
Pittsburgh	Linda Lane	William Isler
Portland	Carole Smith	Pam Knowles
Providence	Susan Lusi	Keith Oliveira
Richmond	Dana Bedden	Jeffrey Bourne
Rochester	Bolgen Vargas	Van Henri White
Sacramento	José L. Banda	Christina Prichett
Santa Ana	Rick Miller	Rob Richardson
St. Louis	Kelvin Adams	Rick Sullivan
St. Paul	Valeria Silva	Mary Doran
San Diego	Cindy Marten	Marne Foster
San Francisco	Richard Carranza	Hydra Mendoza
Seattle	Larry Nyland	Harium Martin-Morris
Shelby County	Dorsey Hopson II	Kevin Woods
Toledo	Romules Durant	Cecelia Adams
Wichita	John Allison	Jeff Davis

Albuquerque, Anchorage, Atlanta, Austin, Baltimore, Birmingham, Boston, Bridgeport, Broward County, Buffalo, Charleston County, Charlotte-Mecklenburg, Chicago, Cincinnati, Clark County, Cleveland, Columbus, Dallas, Dayton, Denver, Des Moines, Detroit, Duval County, East Baton Rouge, El Paso, Fort Worth, Fresno, Guilford County, Honolulu, Hillsborough County, Houston, Indianapolis, Jackson, Jefferson County, Kansas City, Long Beach, Los Angeles, Miami-Dade County, Milwaukee, Minneapolis, Nashville, New Orleans, New York City, Newark, Norfolk, Oakland, Oklahoma City, Omaha, Orange County, Palm Beach County, Philadelphia, Pittsburgh, Portland, Providence, Richmond, Rochester, Sacramento, San Diego, San Francisco, Santa Ana, Seattle, Shelby County, St. Louis, St. Paul, Toledo, Washington, D.C., Wichita



## **CONFERENCES AND MEETINGS**



**COUNCIL OF THE GREAT CITY SCHOOLS  
2015 Conference Schedule**

**Executive Committee Meeting**

January 23-24, 2015  
Omni Hotel, Jacksonville, FL

**HRD/Personnel Directors Meeting**

February 4-6, 2015  
Sonesta Hotel, Ft. Lauderdale, FL

**Legislative/Policy Conference**

March 14-17, 2015  
Renaissance Mayflower Hotel, Washington, DC

**Chief Operating Officers Conference**

April 21-24, 2015  
Renaissance Hotel, Las Vegas, NV

**Bilingual Directors Meeting**

May 13-16, 2015  
Westin Hotel, Charlotte, NC

**Chief Information Officers Meeting**

June 2-5, 2015  
Loews Philadelphia Hotel, Philadelphia, PA

**Public Relations Executives Meeting**

July 10-12, 2015  
Renaissance Nashville Hotel, Nashville, TN

**Curriculum & Research Directors' Meeting**

July 15-18 2015  
Hotel Allegro, Chicago, IL

**Executive Committee Meeting**

July 17-18, 2015  
Parc 55 Wyndham Hilton Hotel, San Francisco, CA

**Annual Fall Conference**

October 7-11, 2015  
Hyatt Regency, Long Beach, CA

**Chief Financial Officers Conference**

November 3-6, 2015  
Hotel Sorella, Houston, TX

**FALL CONFERENCE  
2015**

**COUNCIL OF THE GREAT CITY SCHOOLS**

**59th ANNUAL FALL CONFERENCE**

**Hosted by the  
LONG BEACH UNIFIED SCHOOL DISTRICT  
Long Beach, CA**

**OCTOBER 7 - 11, 2015**

**CONFERENCE HOTEL:**

Hyatt Regency Long Beach  
200 South Pine Avenue  
Long Beach, CA 90802  
(562) 491-1234

**OVERFLOW HOTEL:**

Hyatt The Pike Long Beach  
255 Bay Street  
Long Beach, CA 90802  
(562) 432-1234

**GROUP RATE: \$215/night for Single and Double Occupancy  
Plus 15.1% tax**

Long Beach is California's 5<sup>th</sup> largest city and Southern California's newest coastal destination. Attractions include: the Queen Mary, the Aquarium of the Pacific, Long Beach Museum of Art and the Museum of Latin American Art.

A fun and fast way to get around Long Beach is by AquaBus and AquaLink. These water taxis offer visitors enjoyable transportation to some of the prime spots within the city. AquaBus is a bright red ferry with capacity to 49 passengers, while AquaLink is a bright yellow catamaran for as many as 79 passengers.

Downtown Long Beach's Passport Shuttle is designed to provide a direct connection between Pine Avenue retail and restaurant district and Long Beach Convention Center, Aquarium of the Pacific, Queensway Bay and Shoreline Village waterfront destinations. Shuttles run between these locations as often as every ten minutes, every day.

Surrounding airports include: Long Beach airport; LAX airport; Orange County/John Wayne Airport; and, Ontario Airport.

The Hyatt Regency Long Beach is right next door to the Convention and Entertainment Center where some of the meetings will be held during the conference. The hotel has 528 stylish guestrooms all with water views. It also has 22,000 square feet of function space. From the hotel you can take a stroll along the harbor or play on the beach. It is only steps from major attractions, shops, restaurants and entertainment.

COUNCIL OF THE GREAT CITY SCHOOLS  
2015 ANNUAL FALL CONFERENCE  
LONG BEACH, CA

WEDNESDAY, OCTOBER 7, 2015 WELCOME RECEPTION AT [THE AQUARIUM OF THE PACIFIC](#)



FRIDAY, OCTOBER 9, 2015 RECEPTION AT **THE QUEEN MARY**



SATURDAY, OCTOBER 10, 2015 FAREWELL DINNER AT **THE CAFÉ SEVILLA**





# **CALL FOR PRESENTATIONS**

An Invitation to Present at the 59<sup>th</sup> Annual  
Fall Conference of the Council of the Great City Schools in  
Long Beach, CA

Urban schools have shown remarkable progress in the past few years; test scores are up, attendance rates are improving, and more students are taking college entrance exams. We invite you to submit a proposal for a 10 minute presentation on what's working for you to improve academic achievement for all students through efforts in one of the following areas:

- Improving Achievement and Closing Gaps in Urban Schools
- Urban School Professional Development
- Urban School Finance
- Urban School Leadership and Governance
- Bilingual Education Programs in Urban Schools
- Special Education Programs in Urban Schools
- Other Initiatives

## SUBMITTING A PROPOSAL FOR PRESENTATION

It is our intent that the Annual Conference serves the membership by providing a forum for the presentation, consideration, and discussion of the needs of urban education. This year discussion groups and concurrent breakout sessions will be arranged to facilitate the exchange of information around increasing academic achievement in urban schools.

We invite you to submit a proposal for presentation that addresses how programs, initiatives and/or practices in the areas of closing achievement gaps, professional development, finance, leadership, and bilingual and special education programming are aligned and related to making a difference in improving academic achievement for all students. We are especially interested in receiving proposals that provide clear, convincing data that the program/initiative is effective in raising achievement and closing gaps between students in core academic subjects, such as reading, mathematics, science, and social studies. You may submit more than one program for presentation.

The title and the 75-100 word description should summarize and accurately reflect the content of what you are proposing for the session. As you develop your proposal, think about real and concrete results, what your urban colleagues most want to know, and how your session can be interactive and involve conference attendees in the session.

### PRESENTER ELIGIBILITY

**The Council asks that all proposals be approved by the appropriate district superintendent and/or college dean in order to be considered for presentation.** Please be sure to check the appropriated box on the application form to confirm that the submitted proposal has been approved.

**Additionally, we do not allow for-profit consultants, businesses, or organizations to make presentations at the conference.** If one of our member districts would like to submit a proposal that speaks to a vendor's product, we will consider the proposal. If such a proposal is accepted, the presentation must be done by a staff member from the district and representatives from the company may not be on the panel.

### PRESENTATION FORMAT

The format for presentations is one of concurrent sessions. Each session will include a panel comprised of one or more presenters from different districts or colleges of education or partner organizations presenting on similar topics. Each session will run for approximately one hour and fifteen minutes. **Presenters are to limit formal presentations to approximately 10 minutes.** This will encourage discussion between the panelists and participants and maximize sharing of important ideas and information. All rooms will be arranged in conference-style to facilitate discussion.

### ACCEPTANCE NOTIFICATION

The deadline for submitting a proposal is **April 10, 2015**. The receipt of all proposals will be acknowledged by e-mail within a week of submission. All correspondence will be sent to the presenter(s) acknowledged in the submitted proposals. Accepted and declined proposals will be acknowledged via e-mail by June 19, 2015.

## STRAND DESCRIPTIONS

Presentations should be designed to help participants:

- Become more knowledgeable about quality programs and practices that promote student achievement
- Develop a deeper understanding of the principles for effective teaching and learning for all students

Priority in selection will be given to proposals that provide clear and convincing data demonstrating that the program/initiative is effective in raising student achievement.

### 1. **Improving Achievement and Closing Gaps**

This strand seeks proposals about research-based practices and interventions that are having an impact on learning in the core content areas, systemic levers that accelerate academic performance, effectiveness of accountability systems, and practices that can close the significant achievement gaps existing along racial, ethnic, gender, and economic lines.

### 2. **Urban School Professional Development**

Proposals submitted under this strand might address how different approaches to the recruitment, preparation, induction, and retention of qualified teachers, principals, and school site leaders have impacted student achievement. Of particular interest are proposals addressing methods for evaluating the effectiveness of professional development and individual teachers on student achievement.

### 3. **Urban School Finance**

Among the key issues that might be addressed in this strand are managing finances to deal with federal, state and local budget cuts, equitable distribution of funding, cost beneficial ways to allocate district resources to boost student achievement, and meeting special education costs.

### 4. **Urban School Leadership and Governance**

Critical topics that proposals in this strand might address are the recruitment and preparation of personnel for leadership roles, expanding the capacity of building leadership, role of board members, community relationships, and models of effective urban governance and management systems.

### 5. **Bilingual Education Programming**

Proposals in this strand might include programs that successfully improve student achievement, especially for recent immigrants, older students and long-term ELLs, comprehensive assessment strategies, and the development of curriculum that impact ELL student achievement.

### 3. **Special Education Programming**

Proposals in this strand might include programs that successfully improve student achievement, especially for students with mental, emotional and physical disabilities, comprehensive assessment strategies, and the development of curriculum that impact special education student achievement.

**Please submit your proposal online at [www.cgcs.org](http://www.cgcs.org)  
Or complete the attached form and submit by fax, email, or mail by April 10, 2015**



**2015 PRESENTATION PROPOSAL FORM**

Our urban district, college of education, or non-profit organization would like to make a presentation on ways in which we are improving student achievement through:

- Improving Achievement and Closing Gaps in Urban Schools**
- Urban School Professional Development**
- Urban School Finance**
- Urban School Leadership and Governance**
- Bilingual Programs in Urban Schools**
- Special Education Programs In Urban Schools**
- Other** \_\_\_\_\_

Title of presentation:

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Name and title of person(s) submitting this presentation:

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Name of urban school district, college of education, or organization:

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Mailing Address:

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Phone Number:

Fax Number:

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Email Address:

**Brief description of presentation (75-100 words):**

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- By checking this box you have acknowledged that your proposal has been approved by your superintendent or dean.**

**Please submit your proposal online at: [www.cgcs.org](http://www.cgcs.org) by April 10, 2015  
or return via fax at (202) 393-2400 or  
email to: [myorkman@cgcs.org](mailto:myorkman@cgcs.org)  
Attention: Michell Yorkman**

**FALL CONFERENCE  
2016**

## **COUNCIL OF THE GREAT CITY SCHOOLS**

### **60th ANNUAL FALL CONFERENCE**

**Hosted by the  
MIAMI DADE COUNTY PUBLIC SCHOOLS  
Miami, FL**

**OCTOBER 19 - 23, 2016**

#### **CONFERENCE HOTEL:**

InterContinental Miami Hotel  
100 Chopin Plaza  
Miami, FL 33131  
(305) 577-1000

**GROUP RATE: \$235/night for Single and Double Occupancy  
Plus 13% tax**

InterContinental Miami Hotel is a 4-star hotel with 641 elegant guestrooms and suites, all of which are equipped with the latest technological features including flat panel TVs and hi-speed internet access. A dramatic marble exterior leads into a newly restyled lobby showcasing an eighteen foot Sir Henri Moore Sculpture that soars towards the sky.

The InterContinental Miami is a waterfront property situated on Biscayne Bay. The 103 Club InterContinental rooms with private club lounge on the 29<sup>th</sup> floor boasts of a breathtaking panoramic views of the city. The hotel's multiple food and beverage options include two outlets: acclaimed Chef Richard Sandoval's Toro Toro Restaurant and Bar which offers Pan Latin steakhouse featuring small sharing plates and Latin spirits in the hotel's interactive lobby lounge, and Olé Restaurant offering a la carte and gourmet breakfast. By the pool is Blue Water and exclusive dining outside Toro Toro kitchen is the Chef's Table 40. Starbucks is also located in the lobby.

The hotel is just 7.5 miles from Miami International Airport, and just minutes away from Port of Miami. It is 1 mile to the Shops of Mary Brickell Village, 1.5 miles to Adrienne Arsht Center for the Performing Arts, 10 minutes to South Beach, and 5 miles to the Art and Design Districts. It is also walking distance from Miami's most exclusive restaurants, Bayside Marketplace and the American Airlines Arena, home to the Miami Heat.

**FALL CONFERENCE 2017**

## **COUNCIL OF THE GREAT CITY SCHOOLS**

### **61st ANNUAL FALL CONFERENCE**

**Hosted by the  
CLEVELAND PUBLIC SCHOOLS  
Cleveland, Ohio**

**OCTOBER 18 - 22, 2017**

#### **CONFERENCE HOTEL:**

Hilton Cleveland Downtown  
100 Lakeside Avenue East  
Cleveland, Ohio 44114  
Phone: (216) 413-5000

**GROUP RATE: \$179/night for Single and Double Occupancy  
Plus 16.5% tax**

The Convention Center Hotel, Hilton Cleveland Downtown, will connect the new Cleveland Convention Center, the Global Center for Health Innovation, and the downtown mall in a way that has never been done before. With this hotel, the Northeast Ohio region will be in a stronger position than ever to compete on a national and international stage. With the new Hilton Cleveland Downtown in place, the Cleveland Convention Center attendee experience will be world-class.

Hilton Hotels & Resorts, owned by Hilton Worldwide, will operate the hotel. The hotel will feature a 28-story tower filled with 600 guest rooms positioned atop a four-story podium of ballrooms, meeting space, retail space, and lobby. The hotel will feature a rooftop bar as well as underground connections to the Cleveland Convention Center and the Global Center for Health Innovation.

Situated on the site of the former Cuyahoga County Administration Building, the new Hilton Cleveland Downtown is scheduled to open by 2016.



**FALL CONFERENCE 2018**

# BALTIMORE CITY PUBLIC SCHOOLS

**Stephanie Rawlings-Blake**  
*Mayor, City of Baltimore*

**Shanaysha M. Sauls, Ph.D.**  
*Chair, Baltimore City Board of  
School Commissioners*

**Gregory E. Thornton, Ed.D.**  
*Chief Executive Officer*

September 15, 2014

Council of the Great City Schools  
1301 Pennsylvania Avenue  
Suite 702  
Washington, DC 20004

Members of the Host City Selection Committee:

We welcome the opportunity to submit the enclosed proposal for Baltimore to host the 2017 Annual Fall Conference of the Great City Schools. As a longstanding member of the Council of the Great City Schools, and the winner of the 2010 CUBE Award for Excellence in School Board Governance, Baltimore City Public Schools is uniquely suited to host this annual gathering. Of equal importance, Baltimore is nationally recognized as one of the premier tourist destinations on the East Coast, hosting more than 30 million visitors each year to the city's world famous Inner Harbor.

The Baltimore Convention and Visitors Bureau, in collaboration with Visit Baltimore staff and every level of city government, has the experience and resources to support every aspect of the Council's needs and the commitment to ensure that the Annual Fall Conference is a success. The Baltimore Convention Center boasts 300,000 square feet of contiguous exhibition space and 85,000 square feet of meeting space in 50 meeting rooms, all directly connected to the 750-room Hilton Baltimore. Most important, the Convention Center sits squarely in the middle of Baltimore's Inner Harbor, surrounded by unmatched educational, cultural and entertainment attractions, a wide range of restaurants, and 8,500 additional hotel rooms within easy walking distance.

Baltimore City Public Schools has been recognized for the district's ongoing, progressive commitment to urban education reform, partnership with unions, and our historic program to transform schools and neighborhoods across the city through our \$1.1 billion 21<sup>st</sup> Century Buildings Plan. At the same time, City Schools has the capacity to assist in the organization of meeting events and provide educational programs of national interest to conference attendees. In summary, Baltimore City Public Schools and the City of Baltimore will collaborate to make the 2017 Annual Fall Conference a memorable, enjoyable, productive gathering for the nation's top urban educators.

Thank you for your serious consideration of our proposal. Please don't hesitate to contact the office of the Baltimore City Board of School Commissioners if you need any additional information.

Sincerely,



**Shanaysha Sauls, Chair**  
Baltimore City Board of School Commissioners



**Gregory E. Thornton, Ed.D.**  
Chief Executive Officer

**PROSPECTIVE CITIES FOR 2019 ANNUAL  
CONFERENCE**



**Administrative Offices**

VanHoose Education Center  
P.O. Box 34020  
Louisville, Kentucky 40232-4020  
(502) 485-3011

September 4, 2014

Mr. Michael Casserly  
Executive Director  
Council of the Great City Schools  
1301 Pennsylvania Avenue, NW Suite 702  
Washington, DC 20004

Dear Mr. Casserly:

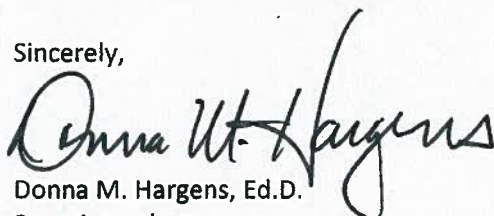
On behalf of the Jefferson County Public School (JCPS) District, I am very excited to submit this proposal to the Council of the Great City Schools to host the 2017, 2018, or 2019 Annual Fall Conference. The attendees will experience our city's unique brand of southern hospitality, spirit, and excitement that has made it one of the top visitor and meeting destinations in the world. From our thriving independent arts and restaurant scene to our world-famous museums and attractions, Louisville is sure to surprise and delight. Partnered with us, we can assure you the Annual Fall Conference will be a huge success!

With JCPS, we fully support the mission of the Council of Great City Schools which states, "It is the special mission of America's urban public schools to educate the nation's most diverse student body to the highest academic standards and prepare them to contribute to our democracy and the global community." With more than 14,000 full-time employees including more than 6,400 teachers, we have the capacity to successfully host a national conference. With more than 4,900 business partnerships, and a very engaged, active public education foundation, we are confident that we can garner extensive community support for this event.

Hosting a conference in Louisville provides a great opportunity to share JCPS' journey to becoming the best urban district in the nation, as well as sharing learning and best practices with other large, urban districts around the country. The city of Louisville has many cultural attractions including Churchill Downs, Slugger Museum and Factory, Muhammad Ali Center, Kentucky Center for the Arts, Kentucky Science Center, Waterfront Park, and many more that would be of great interest to conference attendees, as well as their families.

We appreciate the opportunity to share the many great things that make Louisville such a wonderful community and JCPS such a great, urban school district. We look forward to your response to our proposal, and do not hesitate to contact us if you have any questions or need additional information.

Sincerely,



Donna M. Hargens, Ed.D.  
Superintendent

DMH:scf

**Diane Porter**

Jefferson County Board of Education—District 1  
VanHoose Education Center  
3332 Newburg Road  
P.O. Box 34020  
Louisville, Kentucky 40232-4020  
(502) 485-3566  
porterschoolboard@gmail.com

September 5, 2014

Michael Casserly  
Executive Director  
Council of the Great City Schools  
1301 Pennsylvania Avenue, N.W., Suite 702  
Washington, DC 20004

Dear Mr. Casserly:

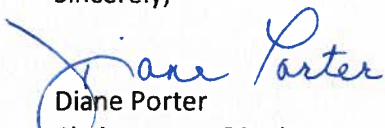
It is my pleasure to write a letter in support of the proposal being submitted to the Council of Great City Schools (CGCS) by the Louisville Convention & Visitors Bureau (LCVB) in collaboration with the Jefferson County Public School (JCPS) District to host the Great City Schools Fall Conference in 2017, 2018, or 2019.

As Chairwoman of the Jefferson County Board of Education, I am excited for the potential opportunity to partner with the Council of Great City Schools to host a conference which focuses on educating the nation's most diverse student body to the highest academic standards and prepare them to contribute to our democracy and the global community. As a large, diverse, urban district, our Board is committed to this same goal as evidenced in our vision, "All JCPS students graduate prepared to reach their full potential and contribute to our society throughout life."

Hosting a conference in Louisville provides a great opportunity to share JCPS' journey to becoming the best urban district in the nation, as well as sharing best practices with other large, urban districts around the country. The city of Louisville has many cultural attractions including Churchill Downs, Ed Hamilton (sculptor) Public Works, Muhammad Ali Center, Kentucky Center for the Arts, Kentucky Museum of Art and Craft, Kentucky Science Center, Louisville Slugger Museum and Factory, and many more that would be of great interest to conference attendees, as well as their families. With more than 14,000 full-time employees, JCPS has the staff capable of assisting with this conference.

We fully support the CGCS continuing to lead the effort to meet the challenge of educating all children to prepare them for work and life. We look forward to sharing all the wonderful things in our community and the great things happening at Jefferson County Public Schools.

Sincerely,

  
Diane Porter  
Chairwoman, District 1

DP:scf

## **AWARDS PROGRAMS**

**GREEN GARNER AWARD**

2015 BOARD MEMBER APPLICATION PACKET



THE 26<sup>TH</sup> ANNUAL  
**GREEN★GARNER**  
AWARD PROGRAM

Recognizing outstanding contributions to urban education and honoring the memories of Richard R. Green, leading urban chancellor, and Edward J. Garner, urban school board leader.

Sponsored by: Council of the Great City Schools, Aramark K-12 Education and Voyager Sopris Learning

Too late to  
mail your  
application?  
No problem!

# APPLY ONLINE

with our convenient PDF application!

The Council of the Great City Schools is not only committed to recognizing and supporting outstanding leadership in urban education but also to preserving our precious resources. We are offering a convenient and earth-friendly PDF version of our application on our website.

Quickly and easily apply online:  
<http://www.cgcs.org/Page/50>

The screenshot shows a web browser window displaying the Council of the Great City Schools website. The page title is "Awards and Scholarships / Green-Garner Award". The website header includes the Council's logo and tagline "The Nation's Voice for Urban Education", along with navigation links for Contact Us, Jobs Board, EduPortal, and Calendar. A main navigation bar lists Home, About the Council, Member Services, Newsroom, Publications, Research, Academics, Legislative, and Conferences. The left sidebar lists various awards, with "Green-Garner Award" selected. The main content area features the "Green-Garner Award" section, which includes a description of the award, a photo of Terry Grier, and a photo of Terry Grier being congratulated by his wife Nancy Grier. The text states that Terry Grier was the 2014 winner and received a \$10,000 college scholarship.

**Note:** When filling out the PDF version, place your cursor on the blank line and type your answer. Once the forms are completed, be sure to save it on your computer for your records, and then press the "submit" button on the bottom of page 12. Alternatively, you can email the completed forms as an attachment to: [ttabor@cgcs.org](mailto:ttabor@cgcs.org).

THE TWENTY-SIXTH ANNUAL  
**GREEN-GARNER AWARD PROGRAM**

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The Council of the Great City Schools is committed to recognizing and supporting outstanding leadership in urban education in honor of Richard R. Green and Edward Garner.



Michael Casserly

*The Council of the Great City Schools is pleased to join with Aramark K-12 Education and Voyager Sopris Learning in sponsoring the annual Green-Garner Award in Urban Education. This year's award is dedicated to honoring one of our school board members. Next year's award will spotlight one of our superintendents. The honor has been named for our outstanding colleagues and friends—Richard Green, the former Chancellor of the New York City Public Schools and former Superintendent of the Minneapolis Public Schools, and Edward Garner, the former School Board President of Denver Public Schools. This award will be presented at the Annual Conference of the Council of the Great City Schools in Long Beach, CA.*

*Urban education has been blessed with many dedicated and talented individuals. School board members who will be nominated will have helped spearhead the comeback and progress of the nation's urban schools. These remarkable individuals have worked tirelessly on behalf of our very special children.*



Jumoke Hinton Hodge

**Michael Casserly**  
Executive Director  
Council of the Great City Schools

**Jumoke Hinton Hodge**  
Chair of the Board (FY14-15)  
Council of the Great City Schools



Jeff Gilliam

*We are fortunate to have so many dedicated and talented leaders in the K-12 urban education community. Aramark K-12 Education is honored to be part of a very special tradition. Each year, we join the Council of the Great City Schools and Voyager Sopris Learning in sponsoring the Green-Garner Award in Urban Education. As we recognize an individual for their leadership and commitment to excellence this year, let's also remember what drives all of us every day—the wellbeing and future of our students. Help us celebrate the legacies of Richard R. Green and Edward Garner by nominating one of your district school board leaders.*

**Jeff Gilliam**  
President  
Aramark K-12 Education



Carolyn W. Gettridge

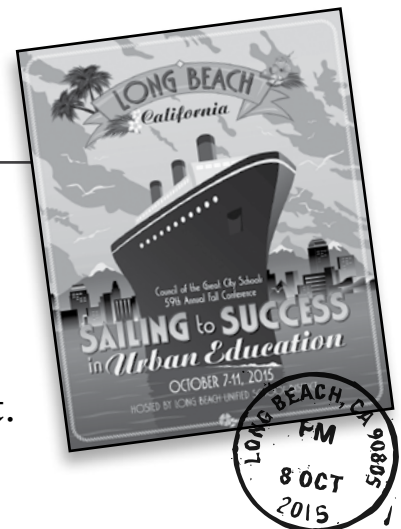
*It is an honor for Voyager Sopris Learning to join the Council of the Great City Schools and Aramark in sponsoring the Green-Garner Award in Urban Education. This award acknowledges leaders in America's urban schools who exemplify the highest standards of leadership, achievement, professionalism and involvement—ideals that define our esteemed colleagues in whose honor the award is given. Voyager Sopris Learning appreciates your unwavering commitment to our children, and we welcome your nominations for this distinguished award.*

**Carolyn W. Gettridge**  
Senior Vice President  
Voyager Sopris Learning



THE TWENTY-SIXTH ANNUAL  
**GREEN-GARNER AWARD PROGRAM**

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"If you believe it, you can achieve it.  
If it is to be, it's up to me."



Richard R. Green (1936–1989)

- Earned doctorate in Educational Administration from Harvard Graduate School of Education
- Led the nation's largest school system as chancellor of New York City Public Schools
- Mentored urban school superintendents nationwide



Edward J. Garner (1942–2012)

- Outstanding businessman and former school board president, Denver Public Schools
- Played key role in establishing and funding the CGCS Urban Educator of the Year Award
- Represented school board members on the CGCS Executive Committee





# THE TWENTY-SIXTH ANNUAL GREEN-GARNER AWARD PROGRAM

## Program Overview

*In tribute to the memories of Richard R. Green and Edward Garner, the Council of the Great City Schools, Aramark, and Voyager Sopris Learning will annually present an award in their names to a past or present council member superintendent or board of education member. The award rotates annually between superintendents and board members, and winners will be awarded for representing one or more of the ideals and commitments expressed by Richard Green and Edward Garner (see Selection Criteria, page 4).*

*The 2015 Green-Garner Award winner will be honored at the Annual Conference of the Council of the Great City Schools in Long Beach, CA and will receive a \$10,000 college scholarship to present to a senior in a high school from the winner's school system or from the high school from which the winner graduated, at the winner's discretion.*

### All nominees will:

- ★ *Have their brief video shown during the conference.*
- ★ *Receive recognition on stage during the banquet.*
- ★ *Be guests of honor at a special dinner reception.*

### The winner will:

- ★ *Receive a special Green-Garner Award expressing the history of Dr. Green, Mr. Garner, and the ideals they cherished.*
- ★ *Be the guest of honor at a reception and banquet where the award will be presented.*
- ★ *Receive nationwide recognition in the news and various trade media, as well as a special profile in the Council of the Great City Schools newsletter, the Urban Educator.*



*Austin Superintendent Pat Forgione, left, congratulates Angga Pratama for winning the Richard R. Green Scholarship. Forgione was the 2008 Green Award winner.*



*Abraham Tejada, a student from Tampa's Middleton High School, holds his \$10,000 Richard Green college scholarship he received from Hillsborough School Board Member Candy Olson, left. He is also congratulated by principal Owen Young and Hillsborough School Board Member Doretha W. Edgecomb. Olson was the 2014 Green Award winner.*

## CRITICAL DATES

- ★ **Monday, August 10, 2015**  
*Last day application packets may be postmarked and mailed or emailed to the Council of the Great City Schools.*
- ★ **August/September 2015**  
*Distinguished panel selects Green-Garner Award Winner.*
- ★ **Thursday, October 8, 2015**  
*The Green-Garner Award Winner will be announced and honored at the Annual Fall Conference banquet hosted by Aramark K-12 Education and Voyager Sopris Learning at the Hyatt Regency Hotel in Long Beach, CA.*



# THE TWENTY-SIXTH ANNUAL GREEN-GARNER AWARD PROGRAM

## Selection Process

*This application must be completed in its entirety and postmarked or emailed by August 10, 2015, to the following address:*

Terry Tabor, Conference Manager  
Green-Garner Award Program  
Council of the Great City Schools  
1301 Pennsylvania Avenue, N.W., Suite 702  
Washington, D.C. 20004  
(202) 393-2427 / FAX (202) 393-2400  
ttabor@cgcs.org



*The program in 2015 is open to all past and present school board members of the Council of the Great City Schools. All current school board members and Board of Education members of the Council of the Great City Schools may make nominations for a past or present school board member for the Green-Garner Award Program. Those nominating a candidate should complete page 12.*

*The Council of the Great City Schools will review all applications for completeness. A distinguished panel of superintendents and school board members will select the recipient of the annual Green-Garner Award.*

## Selection Criteria for School Board Members

*Applicants for the Green-Garner Award should be able to demonstrate one or more of the following ideals cherished by Dr. Green and Mr. Garner:*

### LEADERSHIP

- ★ *The applicant has shown excellence in leadership and sustained that leadership over a number of years.*
- ★ *The applicant has improved the quality and stability of the district through his or her leadership and governance.*

### ACHIEVEMENT

- ★ *The applicant has demonstrated that his or her leadership has been instrumental in improving student achievement districtwide for a number of years.*
- ★ *The applicant has demonstrated that his or her leadership has been instrumental in narrowing achievement gaps in his or her district over a number of years.*

### PUBLIC CONFIDENCE

- ★ *The applicant has helped improve the public's confidence in his or her school district.*

### PROFESSIONALISM

- ★ *The applicant embodies the personal characteristics and professional accomplishments that reflect well on urban education and the progress it is striving to make.*

### INVOLVEMENT

- ★ *The applicant has shown active and sustained participation in and support of the Council of the Great City Schools.*



*Charlotte-Mecklenburg School graduates Shanika Moser, left, and Devina Flores, right receive congratulations from Gwen High. They were each selected by Superintendent Eric Smith to receive \$5,000 Richard R. Green scholarships.*



THE TWENTY-SIXTH ANNUAL  
**GREEN-GARNER AWARD PROGRAM**

**APPLICATION SPECIFICATIONS**

**INCOMPLETE APPLICATIONS WILL NOT BE CONSIDERED.**

**BY MAIL:**

Please complete and return five copies of this application, \* one color photograph, and a 2-minute DVD to be used during the event, postmarked by August 10, 2015, to:

Terry Tabor, Conference Manager  
Council of the Great City Schools  
1301 Pennsylvania Avenue, N.W., Suite 702  
Washington, D.C. 20004

(202) 393-2427

FAX (202) 393-2400

ttabor@cgcs.org

**ONLINE:**

You may also use the automated application system, but please provide all requested information, photo (JPEG), and video (MOV) by August 10, 2015.

You may attach supporting documents (each on one 8-1/2 x 11 sheet) to this packet. Please also include a color photo with name, title and address on the back of the color photo and a 2-minute DVD on the nominee to be used during the event. The DVD should focus on the applicant's qualifications and accomplishments based on the selection criteria. You may email your photo to [ttabor@cgcs.org](mailto:ttabor@cgcs.org) along with your PDF application.

Additional materials (please provide five sets\* if mailed) can include copies of letters, testimonials, news clippings, pamphlets, etc. **DO NOT SUBMIT** display materials, films or scrapbooks, as they will not be considered in judging the nomination. All submitted materials become the property of the Council of the Great City Schools and will not be returned.

The nominator and/or nominee for the Green-Garner Award should fill out the entire application. Page 12 is to be filled out by the nominator only and included with the nominee's application.

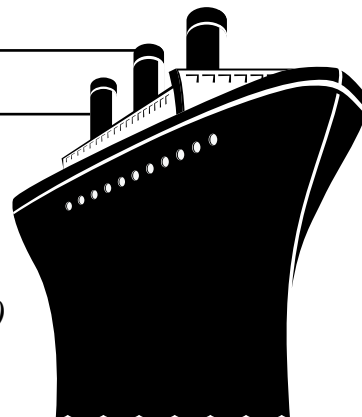
**NOTE:** Please detach and type (or print clearly) directly on each page when completing this application. You may also retrieve the application from: [www.cgcs.org/Awards](http://www.cgcs.org/Awards).

**ONLINE SUBMISSION ONLY:** If using the PDF version, place your cursor on the blank line and type your answer. Once the forms are completed, be sure to save it on your computer for your records, and then press the "submit" button on the bottom of page 12. Alternatively, you can email the completed forms as an attachment to: [ttabor@cgcs.org](mailto:ttabor@cgcs.org).

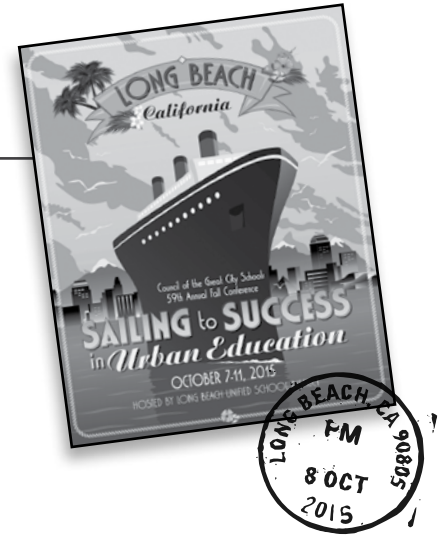
**APPLICATION CHECKLIST**

- Completed Application
- Five Copies of Application\*
- A 2-minute DVD on Applicant
- One Color Photograph (5" x 7" preferred)

\* Applies to mailed applications ONLY.  
The PDF application need only be sent once.



# THE TWENTY-SIXTH ANNUAL GREEN-GARNER AWARD PROGRAM



## APPLICATION

Kindly complete the information below and submit to the address on page 5 following all specified criteria.

### TOO LATE TO MAIL?

You also have the option to use our new PDF application, which can be found on our site at: <http://www.cgcs.org/awards>.

Note: All PDF applications should be saved to your computer prior to submission to CGCS for your protection.

## PERSONAL INFORMATION (Please write your information above the lines below.)

NAME \_\_\_\_\_

SCHOOL SYSTEM \_\_\_\_\_ TITLE \_\_\_\_\_

OFFICE ADDRESS \_\_\_\_\_

CITY \_\_\_\_\_ STATE \_\_\_\_\_ ZIP \_\_\_\_\_ PHONE \_\_\_\_\_

## SCHOOL SYSTEM INFORMATION

SYSTEM ENROLLMENT \_\_\_\_\_

PLEASE GIVE A BRIEF DESCRIPTION OF THE SCHOOL SYSTEM WITH WHICH YOU ARE AFFILIATED.

\_\_\_\_\_  
\_\_\_\_\_

## EDUCATION

SCHOOL ATTENDED \_\_\_\_\_ DEGREE \_\_\_\_\_ DATES \_\_\_\_\_

SCHOOL ATTENDED \_\_\_\_\_ DEGREE \_\_\_\_\_ DATES \_\_\_\_\_

SCHOOL ATTENDED \_\_\_\_\_ DEGREE \_\_\_\_\_ DATES \_\_\_\_\_

## TEACHING/ADMINISTRATIVE EXPERIENCE OR OTHER PRIVATE SECTOR/COMMUNITY EXPERIENCE

POSITION HELD \_\_\_\_\_ ORGANIZATION \_\_\_\_\_ DATES \_\_\_\_\_

POSITION HELD \_\_\_\_\_ ORGANIZATION \_\_\_\_\_ DATES \_\_\_\_\_

POSITION HELD \_\_\_\_\_ ORGANIZATION \_\_\_\_\_ DATES \_\_\_\_\_



THE TWENTY-SIXTH ANNUAL  
**GREEN-GARNER AWARD PROGRAM**

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*Please answer the following five questions. When answering each question, please make reference to the selection criteria.  
(See page 4 under Selection Criteria.)*

- 1.** *How has your tenure as a school board member improved the quality and stability of your district's leadership and governance? (Please type your response and confine it to this page.)*

---

*Print Name of Nominator or Nominee*

---

*Email of Nominator*

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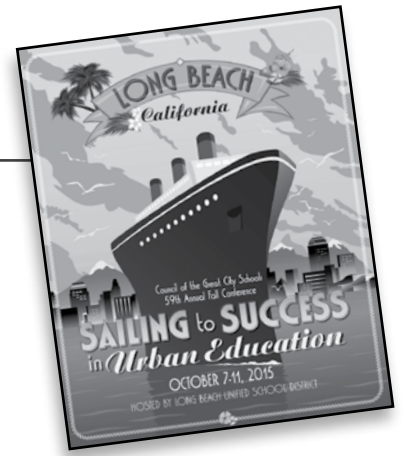
*Telephone Number of Nominator*



THE TWENTY-SIXTH ANNUAL  
**GREEN-GARNER AWARD PROGRAM**

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2. *How has your leadership as a school board member helped to improve student achievement districtwide and narrow the district's achievement gaps? Include specific data. (Please type your response and confine it to this page.)*



Print Name of Nominator or Nominee

Email of Nominator

THE TWENTY-SIXTH ANNUAL  
**GREEN-GARNER AWARD PROGRAM**

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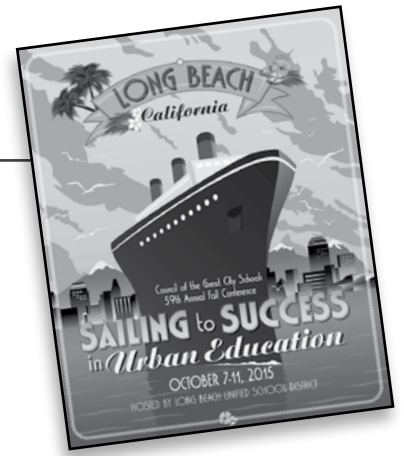
**3.** *How has your leadership as a school board member helped improve the public's confidence in your district?  
(Please type your response and confine it to this page.)*



THE TWENTY-SIXTH ANNUAL  
**GREEN-GARNER AWARD PROGRAM**

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- 4.** *How has your leadership as a school board member exemplified the progress that urban schools nationwide are determined to make? (Please type your response and confine it to this page.)*



*Print Name of Nominator or Nominee*

*Email of Nominator*



THE TWENTY-SIXTH ANNUAL  
**GREEN-GARNER AWARD PROGRAM**

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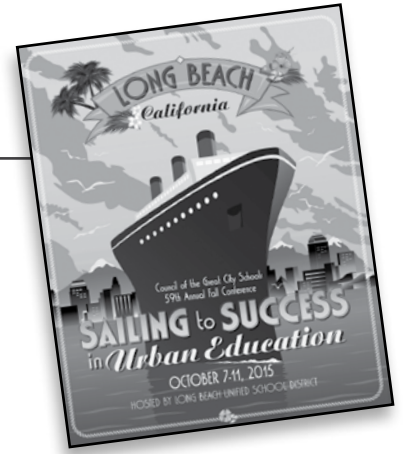
**5.** *How have you or your district participated over the years in the Council of the Great City Schools?  
(Please type your response and confine it to this page.)*



THE TWENTY-SIXTH ANNUAL  
**GREEN-GARNER AWARD PROGRAM**

**For Nominators Only!**

*Please describe why you believe your candidate will be the best recipient of  
The Green-Garner Award. (Please submit this page with nominee's application.)*



\_\_\_\_\_  
*Print Name of Nominator or Nominee*

\_\_\_\_\_  
*Concurred by:  
School Board President or Superintendent*

\_\_\_\_\_  
*Email of Nominator*



\_\_\_\_\_  
*Telephone Number of Nominator*



### **Council of the Great City Schools**

*The Council of the Great City Schools is the primary advocate for urban public education in America. The organization is dedicated to improving student achievement in the nation's major cities; strengthening the quality of urban school leadership, governance, and management; creating greater educational opportunities for historically underserved students; and boosting public confidence in city schools. The organization works to achieve its mission by serving as a forum for urban school leaders.*



### **Aramark K-12 Education**

*Aramark delivers experiences that enrich and nourish people's lives through innovative food, facility, and uniform services. United by a passion to serve, our more than 250,000 employees make a meaningful difference each day for millions of people around the world. Aramark is recognized among the Most Admired Companies by FORTUNE and World's Most Ethical Companies by the Ethisphere Institute. Aramark K-12 Education partners with more than 500 school districts across the country – offering breakfast and lunch meal programs, after-school snacks, summer meals, catering, nutrition education; and facilities services, including custodial service, grounds and landscaping, operations and maintenance, and energy management. Aramark programs are designed to encourage healthy eating habits, increase meal participation, and create safe, clean, comfortable learning environments for students and district communities. For more information, please visit [www.aramark.com](http://www.aramark.com).*



### **Voyager Sopris Learning**

*Voyager Sopris Learning™ is committed to partnering with school districts to build the capacity of educators to ensure the success of every child – no matter where their journey begins. Our research and evidence-based instructional solutions and services are proven to enhance the effectiveness of educators and increase student achievement. Our solutions are innovative, both in overall instructional approach and in the strategic use of technology, whether blended or 100% online. With a comprehensive suite of instructional resources, we ensure sustained success through literacy and mathematics intervention and supplemental resources, assessments, professional development and school-improvement services.*



*Cleveland student Yu Zhang, second from left, holds his \$10,000 Green-Garner college scholarship he received from Cleveland School Board Chair Denise Link. Link was the 2013 winner of the Green-Garner Award.*



*Boston Schools Committee Chairperson Elizabeth Reilinger, right, congratulates John Casper for winning the \$10,000 Richard R. Green college scholarship as Boston Schools Superintendent Carol Johnson looks on. Reilinger was the 2007 Green Award winner.*

THE 26<sup>TH</sup> ANNUAL  
**GREEN★GARNER**  
AWARD PROGRAM



**Council of the Great City Schools**  
1301 Pennsylvania Ave NW, Ste 702  
Washington, D.C. 20004  
(202) 393-2427  
[www.cgcs.org](http://www.cgcs.org)

**Aramark K-12 Education**  
1101 Market St  
Philadelphia, PA 19107  
(800) 926-9700  
[www.aramark.com](http://www.aramark.com)

**Voyager Sopris Learning**  
17855 Dallas Parkway, Ste #400  
Dallas, TX 75287  
(888) 399-1995  
[www.voyagerlearning.com](http://www.voyagerlearning.com)



**QUEEN SMITH AWARD**



COUNCIL of the GREAT CITY SCHOOLS  
59th Annual Fall Conference

# SAILING to SUCCESS in *Urban Education*

## 2015 Queen Smith Award *for Commitment to Urban Education*





**Education**

The Council of the Great City Schools &  
McGraw-Hill Education  
Announce

# The Queen Smith Award for Commitment to Urban Education 2015



Queen was a much loved and admired colleague who always said it like it was. She worked with many of us in key accounts, at national exhibits, and participated in all new product development discussions. She was well-known nationally in urban accounts and elsewhere. In the early 1990s, she established the Educator's Collaborative, a leadership group of national educational leaders, brought together to focus on the needs of urban schools and children. During the last several years of her life, she was a major presence in the Council of the Great City Schools and was Chair of the Urban Education Technology Form (UETF) section of the Council. She was also active in the National Alliance of Black School Educators. In 1996, Queen represented

Macmillan/McGraw-Hill on a trip to South Africa with a number of other educators to learn about their educational system and to share ideas about our system. This was a very proud moment for her.



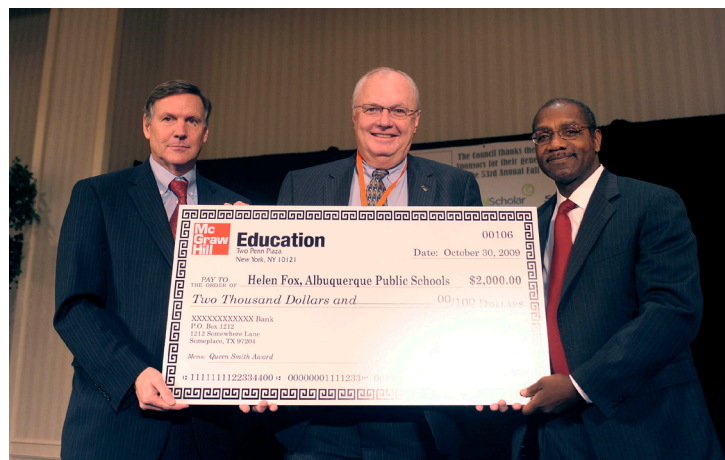
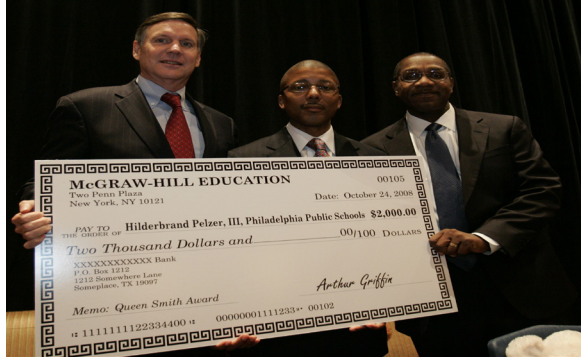
Queen joined Macmillan/McGraw-Hill School Publishing Company in June 1989. She had been a junior high school teacher and was involved in school publishing as a sales representative, consultant, consultant manager, and a software curriculum specialist. In 1991, she served as Urban Specialist and then promoted to Vice President, Urban Sales.



The Queen Smith Award for Commitment to Urban Education was established in October 1998 in celebration of the unwavering commitment Queen gave to children, her community, and her church. During the Council's Annual Fall Conference (October 7-11) in Long Beach, CA, \$5,000 will be awarded to a teacher who has made significant contributions to education and to the community. The \$5,000 award will be held Friday, October 9. Additionally, \$1,000 will be awarded to the Council of Great City Schools whose programs serve as models for educating future generations.



# Queen Smith Recipients





# A

ll children are to be endeared and nurtured with careful guidance. With this in mind, each generation is bequeathed a legacy of unwavering commitment by the torch we all must carry.”

– Queen Smith

At the 59th Annual Fall Conference in Long Beach, CA Friday, October 9th, the Council will present the Queen Smith Award for Commitment to Urban Education to an urban school educator who has made significant contributions to education and to the community. Sponsored by McGraw-Hill Education, the award is named in memory of the company’s late vice president of urban programs.



**Education**

COUNCIL OF THE GREAT CITY SCHOOLS  
1301 PENNSYLVANIA AVENUE, N.W.  
SUITE 702  
WASHINGTON, D.C. 20004

**DR. SHIRLEY S. SCHWARTZ URBAN IMPACT AWARD**

**COUNCIL OF THE GREAT CITY COLLEGES OF EDUCATION**

**DR. SHIRLEY S. SCHWARTZ URBAN EDUCATION IMPACT AWARD**

**APPLICATION**



**July, 2015**

Please return to the Council of the Great City Schools by **August 28, 2015**  
1301 Pennsylvania Avenue, NW, Suite 702  
Washington, DC 20004

*In recognition of an outstanding school-based project, conducted by faculty from the member institutions of the Council of the Great City Colleges of Education in the Great City Schools.*

College/District Submitting: \_\_\_\_\_

Partnering College/District: \_\_\_\_\_

Faculty Name & Title: \_\_\_\_\_

Telephone Number & Email: \_\_\_\_\_



## II. Evaluation: Evidence of Impact

1. Has this project been evaluated and when?

No

Yes

If yes, when?

2. Who conducted the evaluation? Was it in-house or an outside evaluation?

3. In specific terms, describe **evidence** that this program/project increased P-12 student learning. Please indicate the variables assessed, with what instrument or method, and the time frame of the data. *Attach* a one-two page (double-spaced, 12 point font) explanation of the evidence that reveals if/how much student learning was impacted.

4. In specific terms, describe **evidence** that this program/project increased teacher/educator/leader effectiveness and/or had an impact on other significant issues that the profession faces (e.g., teacher retention, teacher retention in high need schools, principal turnover). Please indicate the variables assessed, with what instrument, method or set of metrics, and the time frame of the data. *Attach* one-two page (double-spaced, 12 point font) explanation of evidence that reveals if/how teacher/educator/leader effectiveness or other issues were impacted.

5. What are the key or salient features of the project/program that have resulted in the positive impact cited in #3 and #4? Please describe each.

6. How has the evaluation data been used to improve, sustain, or extend the program/project?

7. Provide any additional information that you would like for the reviewers to consider in the area of **Evaluation: Evidence of Impact**.

## **Sustainability and Scale**

1. Indicate all sources of funding and approximate amounts for this project.

University

School district

State grants

Foundation(s) (please include name of Foundation)

Local businesses

Federal grants (please include name of grant funding)

Other (please specify)

2. Provide an annual cost estimate of the project/program.

\$

3. If this project/program has been funded by external resources (e.g., grants, businesses), what is the plan to sustain it at the end of the external funding period?

4. In what ways, other than the financial aspects, have you sustained/internalized this project/program or how do you plan to do so?

5. How have you scaled up the program/project or how do you plan to do so?

6. Provide any additional information that you would like for the reviewers to consider in the area of **Sustainability and Scale**.

**Please attach two letters of support that address the award criteria,  
one from each of the following:**

**Dean of the College/School of Education (or designee)**

**Superintendent of Schools (or designee)**

**Please return this application packet by August 28, 2015 to:**

**Michell Yorkman, Special Projects Manager  
Council of the Great City Schools  
1301 Pennsylvania Avenue, NW  
Suite 702  
Washington, DC 20004**

**Fax Number: 202-393-2400**

**[myorkman@cgcs.org](mailto:myorkman@cgcs.org)**

## COUNCIL OF THE GREAT CITY COLLEGES OF EDUCATION

### SHIRLEY S. SCHWARTZ URBAN EDUCATION IMPACT AWARD APPLICATION GUIDELINES

The Council of the Great City Colleges of Education, in keeping with its mission to develop and maintain a system of mutually beneficial support for colleges of education and urban schools to improve student learning, annually honors an outstanding educational partnership program with the Shirley S. Schwartz Urban Education Impact Award.

#### **Application Eligibility**

Each member institution may submit one college/school partnership school-based project for consideration for the award. Eligibility for the award is limited to projects that are being implemented in partnership with a member district of the Council of the Great City Schools. **All participating Colleges of Education must be paid members of the Council of the Great City Colleges of Education and all partnering Schools Districts must be paid members of the Council of the Great City Schools.** Additionally, the project needs to be currently operating and have been in existence for at least two academic years. Applications require a letter of support from the Dean of the college of education and a letter of support from the Superintendent or superintendent's designee of the partner Great City School district. Consideration for this award will only be given to college of education and school district applicants who are current paid members of the Council. The deadline for submission of the application is **August 28, 2015**.

#### **Review Process and Selection Criteria**

A committee composed of members of the Council of the Great City Colleges of Education and the Council of the Great City Schools will make the final selection for the award. The Committee will use the following criteria to determine quality and select the winning project:

##### **1. Project/Program Design (10 points)**

- Nature of the program/project: significance of the program/project in urban education
- Scope of the program/project: number and extent to which program/project impacts groups of Pre-kindergarten through 12<sup>th</sup> grade students and groups of IHE students, district teachers, IHE faculty and leaders

##### **2. Evidence of Impact (50 points)**

- Evidence of an increase in educator/leader effectiveness and K-12 learning: documented evidence of the impact of the project/program on increasing educator effectiveness or reducing professional issues on Pre-Kindergarten – 12<sup>th</sup> grade student learning

##### **3. Scale and Sustainability (40 points)**

- Evidence of a link to system reform: documented evidence of how the project is impacting the broader policy projects across the partnership districts.



## **STRATEGIC AND SUCCESSION PLANNING**

**FINAL PARTHENON REPORT**



# **Council of the Great City Schools**

## **Succession Planning in the Context of the Council's Mission and Strategic Direction: Final Report**

July 20, 2012



**THE PARTHENON GROUP**  
Boston • London • Mumbai • San Francisco

## Agenda, Objectives and Proposed Discussion Format

TOPIC	OBJECTIVE	TIMING
<b>1</b> Project Background	Provide an <b>overview of the succession planning project</b> conducted for the Executive Committee and the Council	8:20 – 8:30
<b>2</b> Mission, Goals and Strategies	Review <b>summary findings from field research</b> and potential implications of the research on the Council’s mission, goals, key activities and impact measures	8:30 – 9:15
<b>3</b> Organization and Budget	Discuss <b>organizational and budget recommendations</b> related to succession planning	9:15 – 10:00
<b>4</b> Succession Planning Process	Discuss <b>recommendations around succession planning processes</b> to put in place (starting as soon as possible)	10:00 - 11:00
<b>5</b> Criteria / Characteristics (Key Positions)	Review and gather <b>additional feedback on key skill sets and capabilities</b> to seek in the Council’s senior leadership team, and on <b>proposed pipelines of candidates</b> by type of position	11:00 – 12:00
<b>Short Break (12:00 – 12:15)</b>		
<b>6</b> Working Lunch / Discussion	<b>In-depth discussion of issues and implications for the Council:</b> Clarify any questions, respond to concerns, and reach preliminary consensus where possible	12:15 – 2:00



# High-Level Project Overview

The strategic planning and succession planning project spanned 9 weeks

	W1	W2	W3	W4	W5	W6	W7	W8	W9
	2/27	3/5	3/12	3/19	3/26	4/2	4/9	4/16	4/23
<b>(1) Strategic Context and Organizational Mission (Weeks 1-3)</b>									
• Conduct internal (CGCS staff) and external (member district) interviews									
• Hold working sessions to clarify mission and strategic goals									
<b>(2) Programmatic and Policy Strategy (Weeks 2-7)</b>									
• Evaluate current services and offerings relative to CGCS's mission									
• Evaluate offerings relative to member district needs (survey)									
• Determine optimal balance of activities through Core Team sessions									
• Agree on optimal impact measures for the Council									
<b>(3) Organizational and Financial Requirements (Weeks 5-8)</b>									
• Conduct a detailed review of organizational capacity and finances									
• Determine role of partnerships in the Council's overall strategy									
• Estimate incremental organizational / budget needs required to execute against the mission in a sustainable way									
<b>(4) Succession Planning Recommendation Development (Weeks 6-9)</b>									
• Define skill sets and capabilities needed across senior leadership team									
• Benchmark senior leadership compensation against comparable orgs									
• Identify pipelines of candidates by position and sample orgs by pipeline									
• Establish a succession planning framework (process) for the future									
<b>Project Kick-Off, Interim and Final Presentations</b>									



## High-Level Project Overview

The project's Core Team was instrumental in providing overall guidance to the project, and reviewing and reacting to initial findings and recommendations

- **Winston Brooks**, Superintendent, Albuquerque Public Schools, CGCS Executive Committee Chair
- **Michael Casserly**, Executive Director, CGCS
- **Amanda Corcoran**, Manager of Special Projects, CGCS
- **William Isler**, Board Member, Pittsburgh Public Schools, CGCS Executive Committee Member
- **Carol Johnson**, Superintendent, Boston Public Schools, CGCS Executive Committee Immediate Past Chair
- **Sharon Lewis**, Director of Research, CGCS
- **Candy Olson**, School Board Chair, Hillsborough County Schools
- **Ricki Price-Baugh**, Director of Academic Achievement, CGCS
- **Eileen Cooper Reid**, Board Member, Cincinnati Public schools, CGCS Executive Committee Member
- **Teri ValeCruz**, Director of Administration, Finance and Conferences, CGCS
- **Eugene White**, Superintendent, Indianapolis Public Schools, CGCS Executive Committee Secretary-Treasurer



# High-Level Project Overview

Over 40 qualitative interviews with staff, current members (superintendents and school board members) and former members informed the work along the way

## CGCS Internal Staff

1. **Bob Carlson**, Director of Management Services
2. **Michael Casserly**, Executive Director
3. **Amanda Corcoran**, Special Projects Manager
4. **Henry Duvall**, Director of Communications
5. **Robin Hall**, Director of Language Arts and Literacy
6. **Sharon Lewis**, Director of Research
7. **Manish Naik**, Legislative and Research Manager
8. **Ricki Price-Baugh**, Director of Academic Achievement
9. **Jeff Simering**, Director of Legislative Services
10. **Gabriela Uro**, ELL Policy & Research Manager
11. **Teri ValeCruz**, Director of Administration, Finance & Conferences
12. **Denise Walston**, Director of Mathematics

### Follow-up / Working Sessions:

1. **Academic Achievement / Research:** Ricki Price-Baugh & Sharon Lewis
2. **Advocacy:** Manish Naik
3. **Communications:** Henry Duvall
4. **Operations:** Bob Carlson

## Districts: Current Members

District Senior Leadership	District Line Management
1. <b>Alberto Carvalho</b> , Superintendent, Miami-Dade	1. <b>Jennifer Bell-Ellwanger</b> , Chief Accountability Officer, Baltimore Public Schools
2. <b>Carol Comeau</b> , Superintendent, Anchorage	2. <b>Russell Brown</b> , Deputy Chief, Organizational Accountability, Cleveland Metropolitan School District
3. <b>Lawrence Feldman</b> , School Board Vice-Chair, Miami-Dade	3. <b>Nora Carr</b> , Chief of Staff, Guilford County School District
4. <b>Jerrelle Francois</b> , Board Member, Baltimore City School District	4. <b>Linda Chen</b> , Deputy Chief Academic Officer, Boston Public Schools
5. <b>Carlos Garcia</b> , Superintendent, San Francisco Unified School District	5. <b>Maria Crenshaw</b> , Director of Instruction, Richmond Public Schools
6. <b>Eric Gordon</b> , CEO, Cleveland Metropolitan School District	6. <b>Jeffrey Eakins</b> , Director of Federal Programs, Hillsborough Public Schools
7. <b>Cecily Harsch-Kinnane</b> , Board Member, Atlanta Public School District	7. <b>Michael Eugene</b> , COO, Orange County
8. <b>Carol Johnson</b> , Superintendent, Boston Public Schools	8. <b>Richard Hinds</b> , CFO, Miami-Dade
9. <b>Dwight Jones</b> , Superintendent, Clark County	9. <b>Brian Pick</b> , Deputy Chief Academic Officer, District of Columbia Public Schools
10. <b>Candy Olson</b> , School Board Chair, Hillsborough County Schools	10. <b>Robert Rodosky</b> , Executive Director of Accountability, Research, and Planning; Jefferson County Public Schools
11. <b>Nancy Sebring</b> , Superintendent, Des Moines	11. <b>Teresa Walter</b> , Director, Office of Language Acquisition, San Diego Unified School District
12. <b>Felton Williams</b> , Board Member, Long Beach Unified School District	

## Districts: Past Members

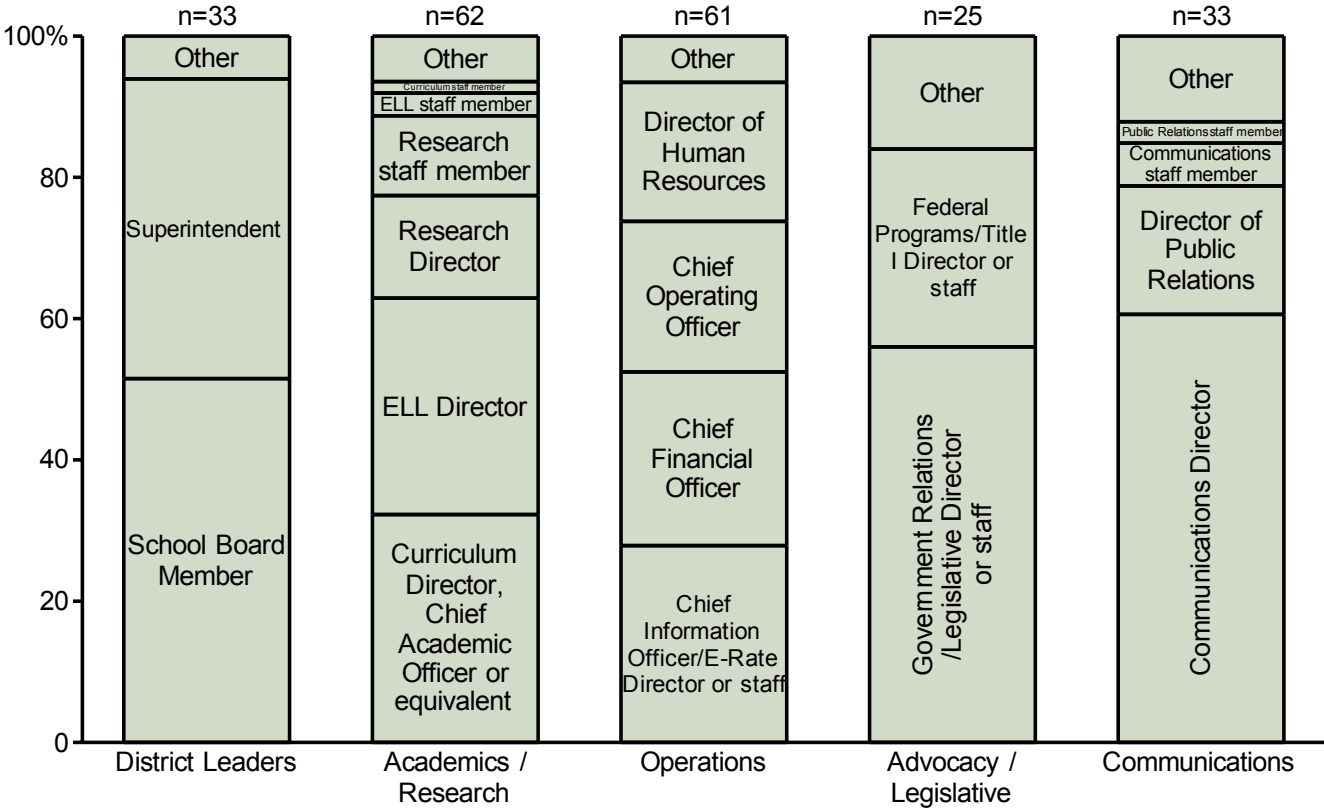
1. **Marcia Lyles**, Superintendent, Christina School District, DE
2. **John Pedicone**, Superintendent, Tucson Unified School District
3. **McKell Withers**, Superintendent, Salt Lake City School District



# High-Level Project Overview

Five separate surveys (district leadership and four line management groups) yielded 214 responses and were a critical complement to the interviews

Q: What is your role in your school district?





# Key Strategic Plan / Succession Plan Components

## Mission, Goals and Strategies

1

### Mission, Goals and Strategies

- What is the Council's mission and goals?
- What set of strategic levers will the Council utilize to make progress against these goals?
- What activities should the Council focus on within these strategic levers?
- How far should the Council's role extend in terms of helping districts implement change?
- Are there partnerships that can help the Council remove barriers for member districts to implement educational reforms?
- How should the Council measure its impact?

2

### Organization and Budget

- What organizational capabilities and structure need to be in place to enable the Council to execute agreed upon strategies and activities?
- What do field interviews and surveys tell us about member district needs relative to the Council's current offerings and capacity?
- What additional capacity, if any, might be needed for the Council to best serve member districts?
- What are the financial implications of any potential changes to current organizational capacity?

3

### Succession Planning Process

- How much succession planning can be done ahead of time and what must occur over time, given the succession planning horizon?
- What succession scenarios should we plan for?
- What processes need to be in place to ensure that succession planning (each of the scenarios above) is being addressed systematically over the next 3-6 years?
- What level of internal "institutionalizing" of knowledge and processed needs to happen over the next few years to make any transitions smoother?

4

### Criteria, Characteristics and Pipelines

- What beliefs, attributes and skills are important across the entire leadership team?
- What skills and capabilities are important for a future Executive Director to bring to the position?
- What skills and capabilities are important at the Director(s) level?
- What potential pipelines exist, by position type?

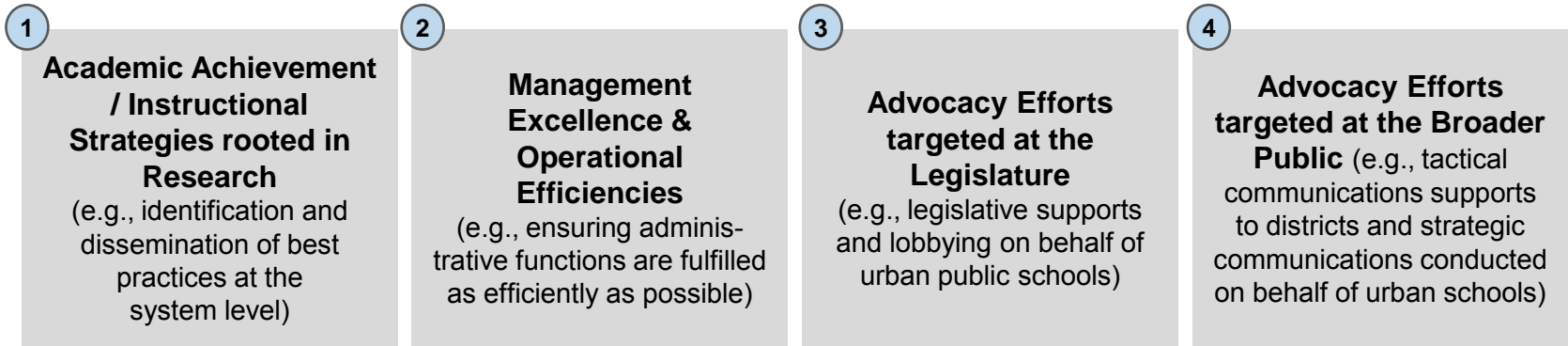
# Mission, Goals and Strategies

## The Council focuses on four key areas to advance three long-term goals

### MISSION

It is the special mission of America’s urban public schools to educate the nation’s most diverse student body to the highest academic standards and prepare them to contribute to our democracy and the global community

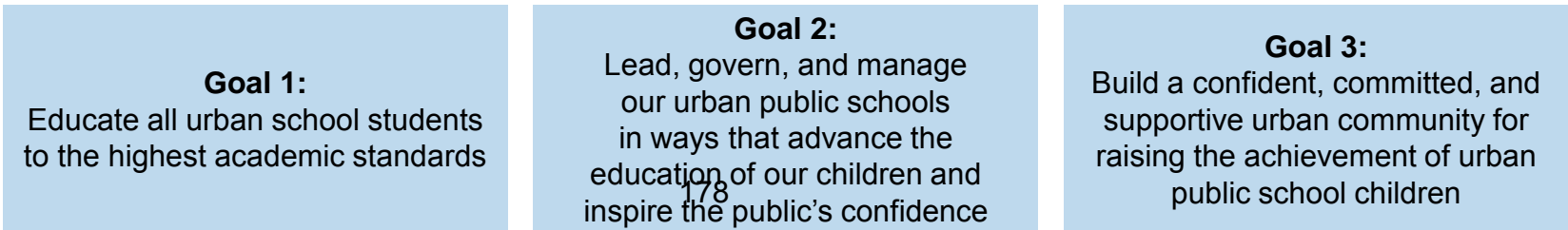
### CORE AREAS OF FOCUS



### BALANCE ACROSS AREAS

While each of the four areas listed above is an important piece of the overall “puzzle,” the Council’s stated **primary** focus area will continue to be **Academic Achievement & Research**.

### GOALS

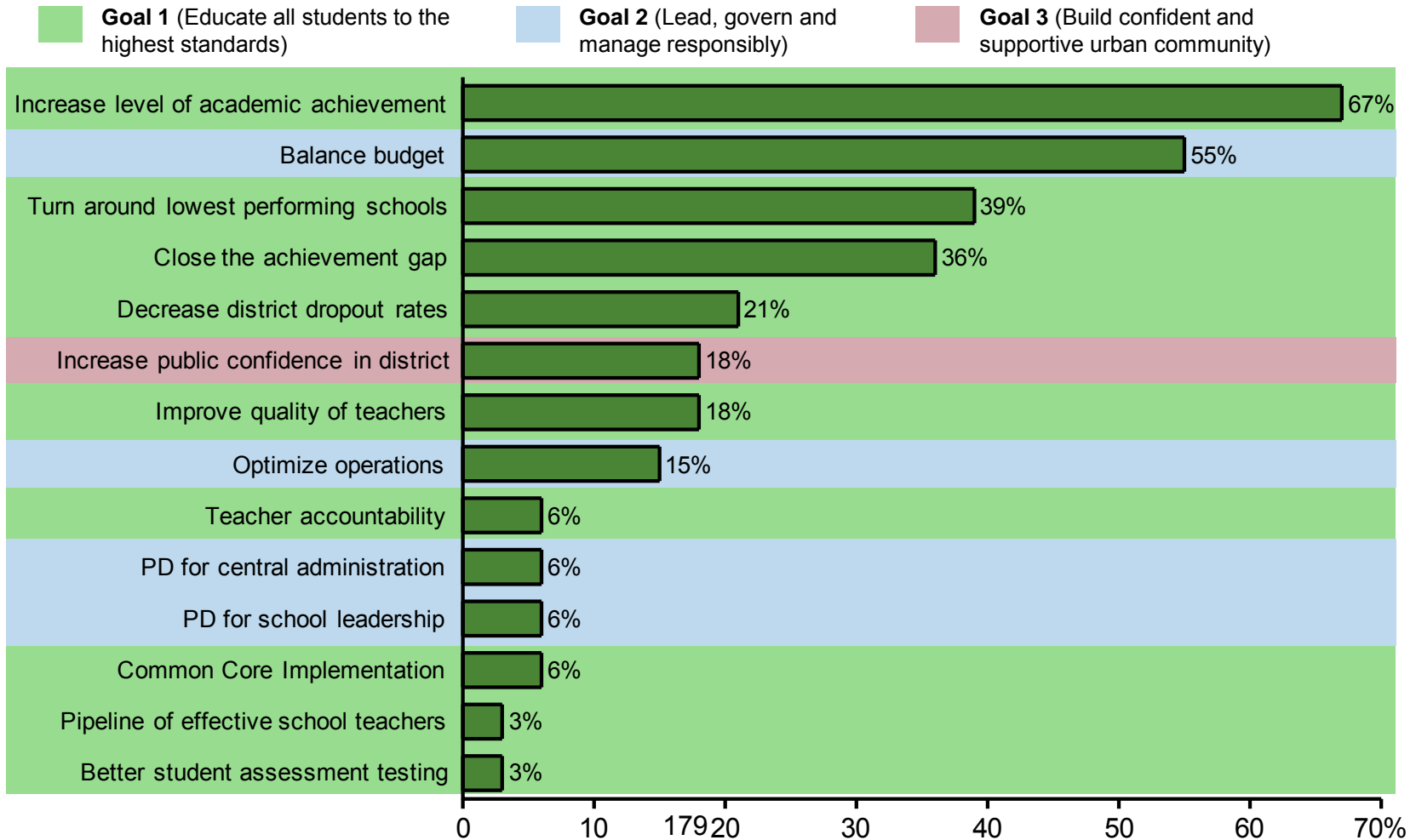


# Mission, Goals and Strategies

## The Council's goals align with what districts leaders have identified as the most pressing needs within their districts

### District Leaders (Superintendents and School Board Members)

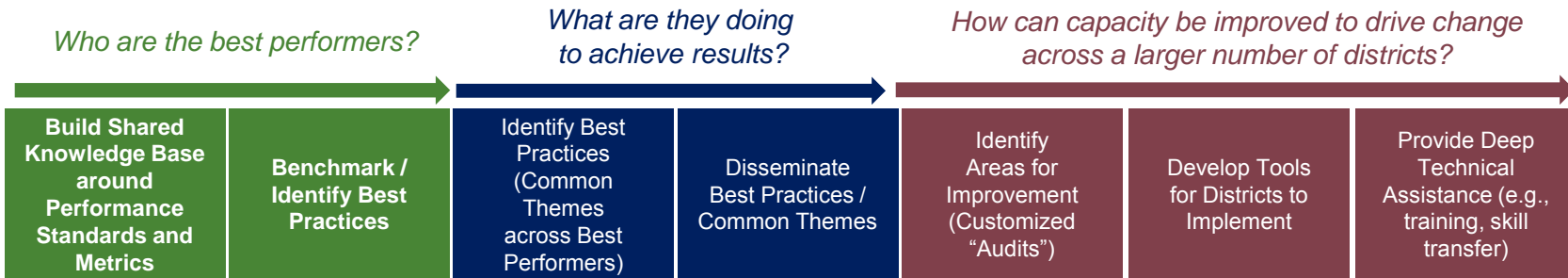
Q: Please select the three most pressing needs your district is facing (% of respondents)



Source: Council's district leadership survey launched week of 3/28/12

# Mission, Goals and Strategies

The Council sees its role as helping inform change within districts and removing barriers to improvement rather than driving actual implementation



- 1 Academic Achievement / Instructional Strategies rooted in Research
- 2 Management Excellence & Operational Efficiencies
- 3 Advocacy Efforts targeted at the Legislature
- 4 Advocacy Efforts targeted at the Broader Public

**Inform change and remove barriers to implementation**

The Council **brings member districts together in a variety of settings** (conferences, job-alike meetings, listserv exchanges) to create shared knowledge re: what is happening nationally in the area of education.

The Council **contributes to the development of standards** (e.g., Common Core State Standards) and **develops and tracks performance metrics** (e.g. KPIs) to identify best performers and to enable districts to compare their performance to a group of peers.

The Council **conducts research studies** to determine what distinguishes best performers and **synthesizes findings into common themes and lessons** that can be applied by districts (with appropriate degree of customization to account for differences in local contexts).

The Council **conducts "audits" or strategic support teams** to evaluate specific functions within districts or to answer specific questions raised by member districts. The recommendations of each strategic support team are customized to the needs and context of each district, and are practical and action-oriented.

The Council **supports its members in a variety of other ways**, including ad hoc requests for information.

**Drive Implementation / Implement**

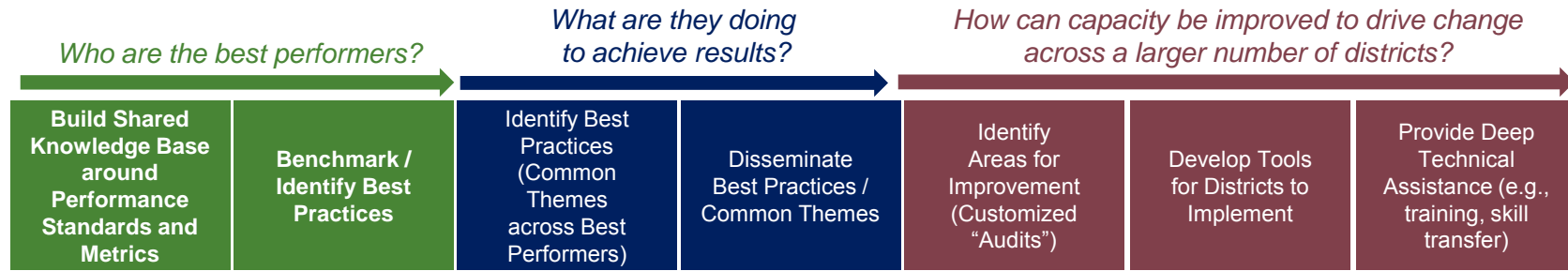
While the Council and its members **do NOT view this area as services that should be incorporated into the Council's mission**, given the Council's lean staffing model, the Council does – on occasion – go as far as developing tools for districts to use (to build capacity and facilitate implementation). Examples include:

- **Academic:** NAEP TUDA (district-level NAEP assessment) and Common Core tools (Math progression PD modules and text-dependent questions)
- **Operations:** KPIs have become a tool widely used by operational department heads



# Mission, Goals and Strategies

## Certain types of partnerships can help the Council remove barriers to implementation of reforms within members districts



*The partnerships listed below are meant to be illustrative only and not comprehensive of all partnerships*

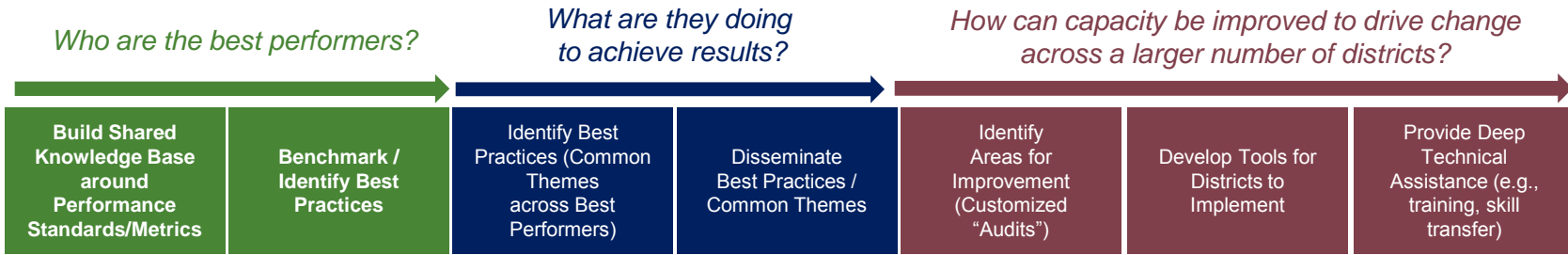
<p>1 Academic Achievement / Instructional Strategies rooted in Research</p>	<p>Examples of current partnerships around the implementation of Common Core State Standards:</p> <ul style="list-style-type: none"> <li>• <b>ACHIEVE</b></li> <li>• <b>Student Achievement Partners</b></li> <li>• <b>Houghton Mifflin Harcourt Foundation</b> (Black Male Initiative)</li> <li>• <b>CCSSO</b> – <i>In light of states taking on new (increased) responsibilities, the Council's leadership and Executive Committee may wish to pursue / discuss a deeper relationship with CCSSO .</i></li> </ul>
<p>2 Management Excellence &amp; Operational Efficiencies</p>	<p>Examples of current partnerships:</p> <ul style="list-style-type: none"> <li>• <b>ERS</b> (implementation of budget-related recommendations)</li> <li>• <b>TransACT</b> (Council's IT provider; large potential role in productizing KPIs to broader set of non-member districts)</li> </ul>
<p>3 Advocacy Efforts targeted at Legislature</p>	<p>Examples of current partnerships:</p> <ul style="list-style-type: none"> <li>• <b>The Committee for Education Funding</b> (ongoing)</li> <li>• All other "partnerships" in this space are issue-based</li> </ul>
<p>4 Advocacy Efforts targeted at the Broader Public</p>	<p>Examples of current partnerships:</p> <ul style="list-style-type: none"> <li>• <b>USA TODAY Education Forum</b></li> <li>• <b>Exxon Mobil</b> (scholarships)</li> </ul>

- The Council pursues ad hoc and tactical partnerships based on the issues at hand.
- The Executive Committee may want to discuss the Council's partnerships and relationships on an ongoing basis – review and propose with which organizations the Council could partner and why.



# Mission, Goals and Strategies

The Council pursues a variety of activities along the implementation spectrum, incl. data collection & benchmarking, facilitation of meetings, and strategic audits



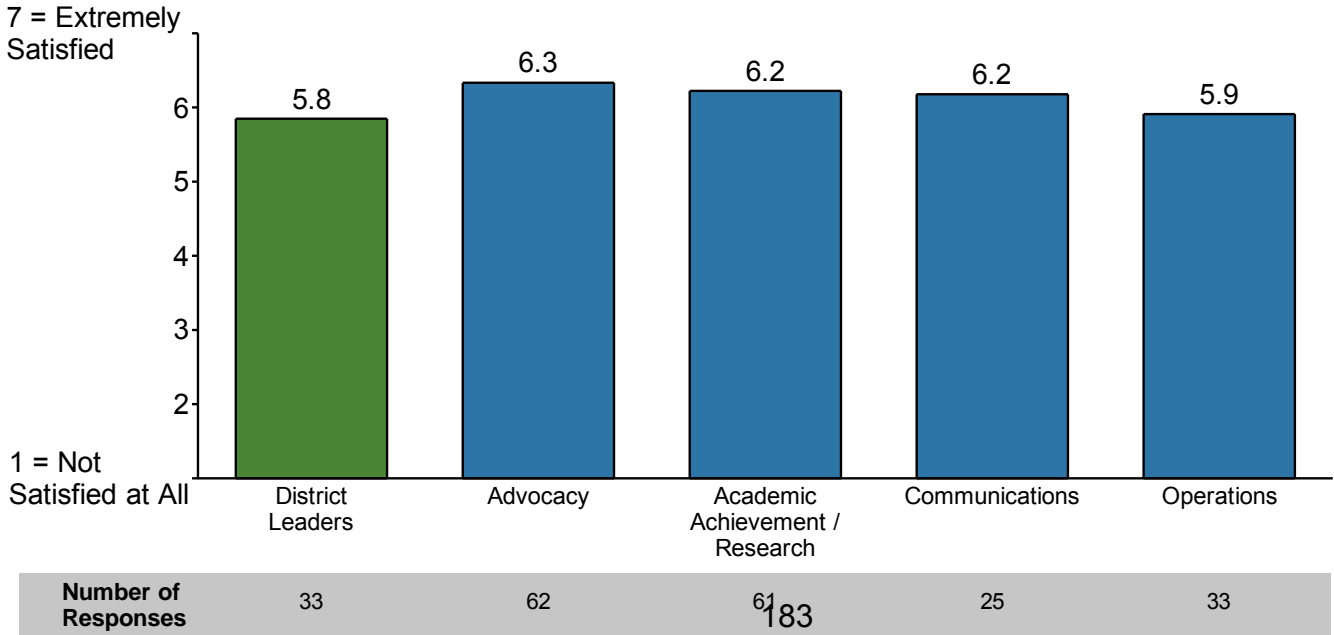
<p>1 Academic Achievement / Instructional Strategies rooted in Research</p>	<ul style="list-style-type: none"> <li>Regular <b>research reports</b> &amp; special research reports</li> <li><b>Common Core implementation meetings</b> (e.g. developing math progression PD modules and text dependent reading questions)</li> <li><b>Job-alike meetings</b> (Bilingual Directors, Curriculum and Research Directors)</li> <li><b>SSTs</b> in curriculum and instruction, special education and ELL</li> <li>Utilizing <b>job-alike listserves</b> to collect and synthesize information in response to ad hoc district requests</li> <li><b>Dissemination of information/findings/recommendations</b> via website, email, newsletter, etc.</li> </ul>	
<p>2 Management Excellence &amp; Operational Efficiencies</p>	<ul style="list-style-type: none"> <li>Development of <b>shared definitions</b> (underlying the KPI work) through advisory groups in various functional areas</li> <li>Utilizing <b>operational KPIs</b> to identify best performers and to identify areas for improvement within a particular district</li> <li><b>Job-alike meetings</b> (e.g., COOs, CFOs, CIOs, HR and Personnel Directors)</li> <li><b>SSTs</b> in a variety of areas including Finance, Facilities, Food Services, Procurement, Transportation</li> <li><b>Pilot professional development program</b> targeted at succession planning (developing next generation of leaders in Finance)</li> <li>Electronic library of resources on the <b>EduPortal</b></li> </ul>	
<p>3 Advocacy Efforts targeted at the Legislature</p>	<ul style="list-style-type: none"> <li><b>Direct legislative and regulatory advocacy</b></li> <li><b>Assistance with interpreting</b> new and proposed legislation</li> <li><b>Advice</b> to districts on how to implement legislation or comply with specific federal guidance/regulations</li> <li><b>SSTs</b> in the area of federal programs</li> <li>Getting information from or connecting with other urban districts</li> <li><b>Conference calls</b> on federal legislation, guidance, regulations, and/or proposed rules</li> <li><b>Annual fall conference and annual legislative conference</b></li> </ul>	
<p>4 Advocacy Efforts targeted at the Broader Public</p>	<ul style="list-style-type: none"> <li><b>Assistance with press releases</b> or opinion pieces on district developments</li> <li><b>Media assistance</b> around release of NAEP scores</li> <li><b>Monthly newsletter</b> – the Urban Educator</li> <li><b>SSTs</b> in the area of communications</li> <li>Exchanging information via the <b>public relations executives listserv</b></li> <li><b>Annual fall conference and Public Relations Executives meeting</b></li> </ul>	

# Mission, Goals and Strategies

## District Leaders and Line Managers are very satisfied with services provided by the Council

- Overall satisfactions levels with the Council’s services are high across the board (with District Leaders at 5.8 on average and line managers ranging from 5.9 for Operations to 6.3 for Advocacy).
  - **District Leaders:** 15 out of 18 services scored 6.0 or higher.
  - **Advocacy:** 10 out of 12 specific Advocacy services scored 6.0 or higher.
  - **Academic / Research:** 7 out of 8 specific Academic / Research areas scored 6.0 or higher.
  - **Communications:** 7 out of 11 specific Communications services scored 6.0 or higher.
  - **Operations:** Respondents in this area were tougher graders overall. 3 out of 10 services scored 6.0 or higher.

**Overall Satisfaction with the Council’s Services**



N = 214



Source: Council's leadership and line management surveys launched week of 3/28/12

## Mission, Goals and Strategies

### District Leaders and Line Managers suggested a few potential service improvement opportunities for the Council to consider in the future

#### “What Works”

- District leaders and line managers alike are interested in **more best practice identification** and in **proactive sharing of these practices** on the part of the Council
- Given current information overload, they are looking for “bite size” pieces – crisp summaries of “what works” (what accounts for superior performance in some districts)

#### Shorter Turnaround Time on Reports

- Districts are looking for **faster turnaround on reports**
- This can be accomplished either through adding more resources to focus on report writing or through shortening reports (e.g., make short reports the norm and long / comprehensive reports the exception)

#### Institutionalizing Operational Activities

- Institutionalizing the operational work may require adding more staff to the Council in the short term. The arrangement with TransACT to “productize” the KPIs and distribute them to non-member districts has potential, but revenue is uncertain and will likely require some time (e.g., several years) to grow to the point where it can cover the costs of additional FTEs

#### Establishing Academic KPIs

- District leaders and Academic/Research staff expressed high levels of interest in the Council developing a set of academic KPIs (e.g., key leading indicators)
- This will require some additional effort on the part of the Council (facilitating meetings with advisory groups, reaching agreement on shared definitions, etc.). However, the volume of academic KPIs will be much lower than the volume of operational KPIs (e.g., 15-30 vs. 300-400)

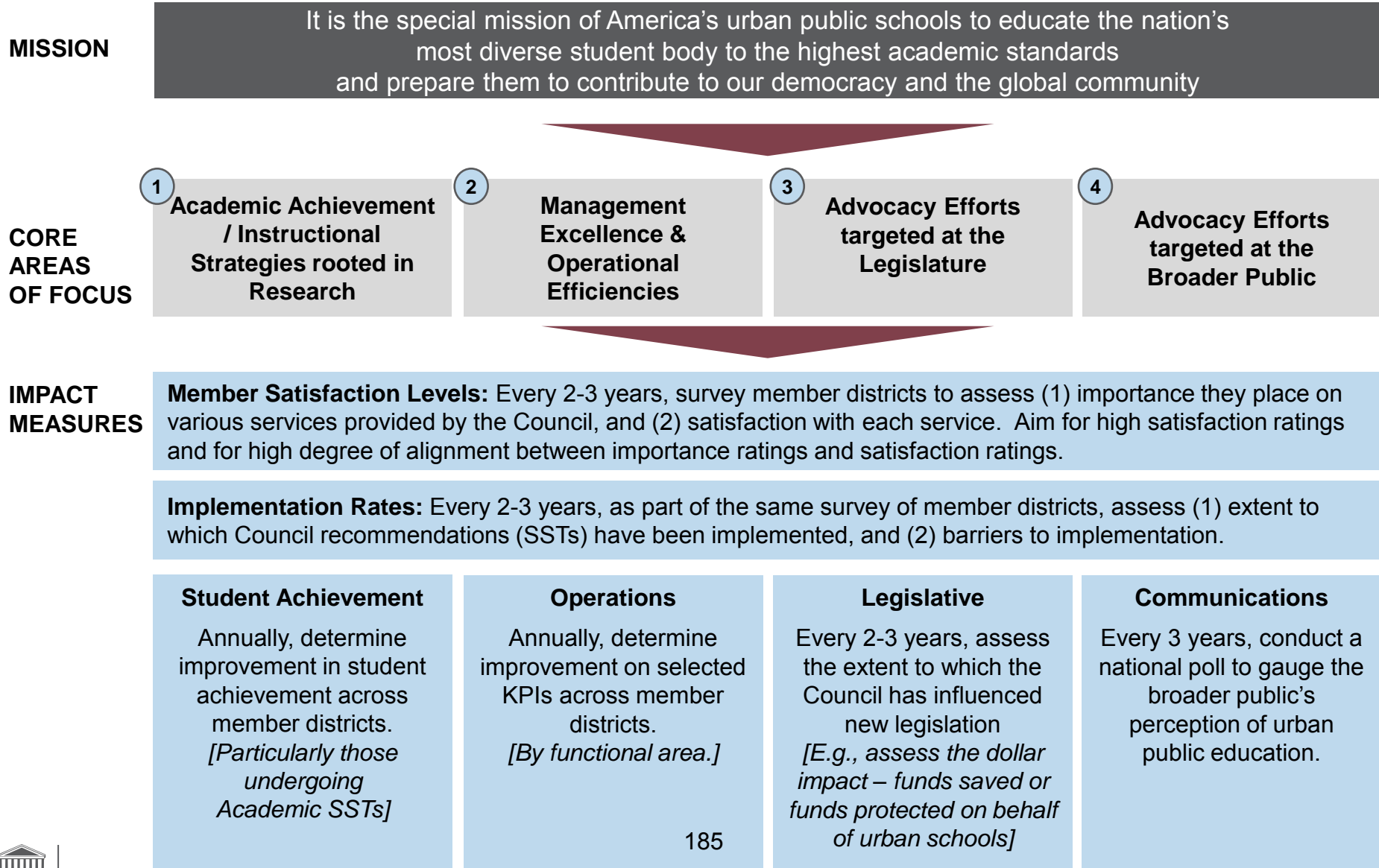
#### Strategic Communications Targeted at Broader Public

- Respondents also expressed an interest in the Council pursuing more strategic communications on behalf of urban public schools (e.g., writing more op-ed pieces, utilizing mass media more effectively, etc.).



# Mission, Goals and Strategies

Going forward, the Council can measure its impact on the field in several ways



# Key Strategic Plan / Succession Plan Components

## Organization and Budget

1

### Mission, Goals and Strategies

- What is the Council's mission and goals?
- What set of strategic *levers* will the Council utilize to make progress against these goals?
- What *activities* should the Council focus on within these strategic levers?
- How far should the Council's role extend in terms of helping districts implement change?
- Are there partnerships that can help the Council remove barriers for member districts to implement educational reforms?
- How should the Council measure its impact?

2

### Organization and Budget

- What organizational capabilities and structure need to be in place to enable the Council to execute agreed upon strategies and activities?
- What do field interviews and surveys tell us about member district needs relative to the Council's current offerings and capacity?
- What additional capacity, if any, might be needed for the Council to best serve member districts?
- What are the financial implications of any potential changes to current organizational capacity?

186

3

### Succession Planning Process

- How much succession planning can be done ahead of time and what must occur over time, given the succession planning horizon?
- What succession scenarios should we plan for?
- What processes need to be in place to ensure that succession planning (each of the scenarios above) is being addressed systematically over the next 3-6 years?
- What level of internal "institutionalizing" of knowledge and processed needs to happen over the next few years to make any transitions smoother?

4

### Criteria, Characteristics and Pipelines

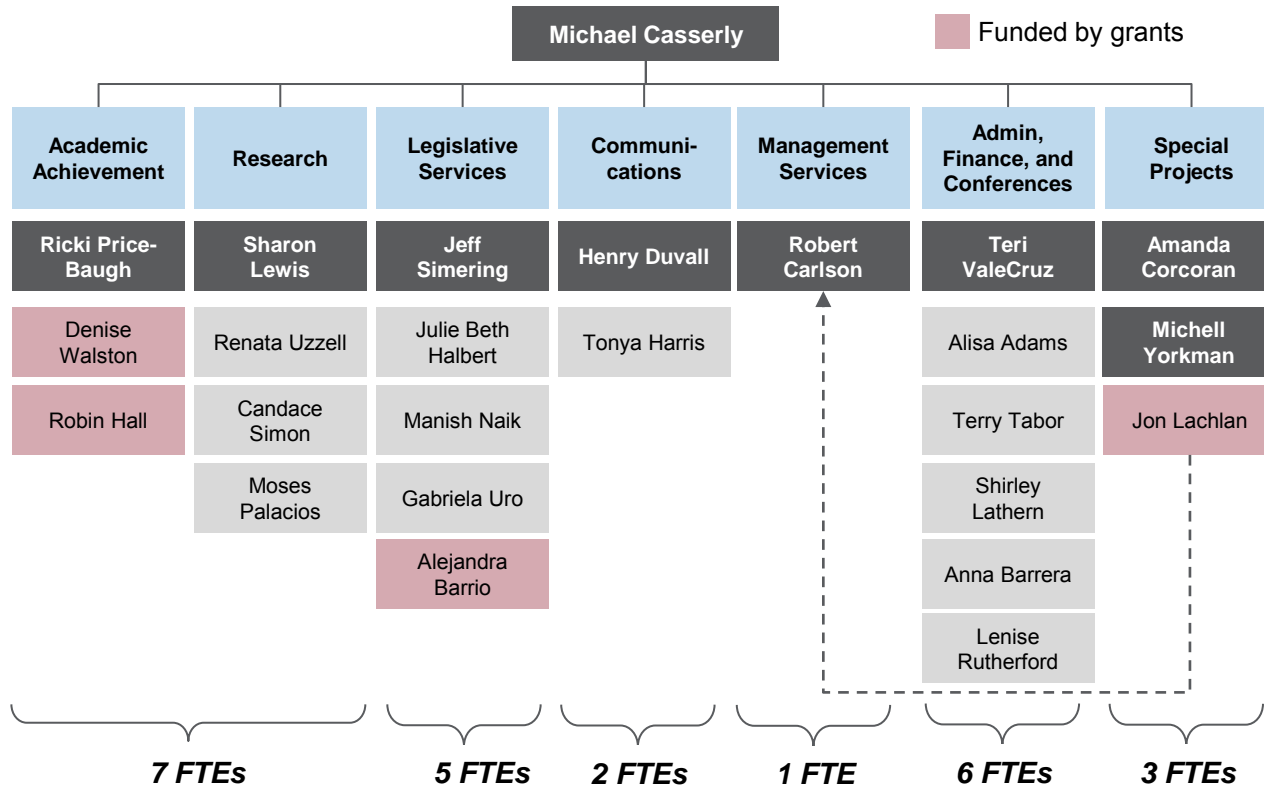
- What beliefs, attributes and skills are important across the entire leadership team?
- What skills and capabilities are important for a future Executive Director to bring to the position?
- What skills and capabilities are important at the Director(s) level?
- What potential pipelines exist, by position type?



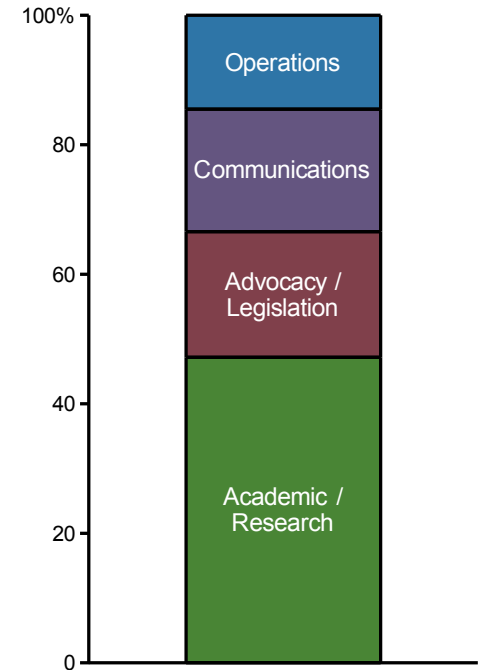
# Organization and Budget

The Council counts 25 FTEs overall, with Academics/Research as the largest area of focus (in terms of time and staff resources)

The Council's Organizational Structure (25 FTEs)



Share of Staff Time by Core Strategic Area as indicated by Staff Survey\*



- The Academic/Research area is the largest “consumer” of staff resources, which aligns with the Council’s core mission and the desire to treat the academic goal “Educate all urban school students to the highest academic standards” as the first among equals.
- One potential vulnerability to note is that 2 out of the 7 FTEs dedicated to Academic/Research are grant-funded.
- The grant-funded position within Special Projects has been supporting primarily the Management Services area, which has no permanent staff besides the Director.



## Organization and Budget

### The “opportunities for improvement” highlighted earlier (suggested by District Leaders and Line Management) have some resource implications

Description	Likely Impact on Staff / Budget
<p><b>1</b> Academics / Research - “What Works”</p>	<p><b>+</b> Will likely require more staff time (unless something else can be removed from staff responsibilities)</p>
<p><b>2</b> Shorter Turnaround Time on Reports</p>	<p><b>—</b> Will free up some staff time (primarily in the Academics / Research function where reports are the longest and most time consuming)</p>
<p><b>3</b> Institutionalizing Operational Activities</p>	<p><b>+</b> Will likely require adding 2 FTEs to the Council’s current operational staff in the short to medium term</p>
<p><b>4</b> Establishing Academic KPIs</p>	<p><b>+</b> Depending on timeframe, may require an additional resource in Academic / Research or re-alignment of priorities within Academic / Research</p>
<p><b>5</b> Strategic Communications Targeted at Broader Public*</p>	<p><b>+</b> Would likely require an additional full-time staff person and a budget for mass media communications</p>



Note: \*A more detailed description of proposed Communications activities is included in Appendix – Slide 39

# Organization and Budget

## Adoption of all suggested changes would require ~4 additional employees and additional resources for the Communications function

	Likely Impact on Staff / Budget (Annual)	Key Assumptions
<p>1 Academics/Research - "What Works"</p>	<p>+ 1.0 FTE</p>	<ul style="list-style-type: none"> <li>Identifying and disseminating "what works" best practices will require staff time to collect data from districts, synthesize findings and write reports</li> </ul>
<p>2 Shorter Turnaround Time on Reports</p>	<p>- 0.5 FTE</p>	<ul style="list-style-type: none"> <li>Staff time spent on SST activities is approx. equal to 2 FTEs</li> <li>~50% of staff time spent on SST activities is related to report writing (workload survey)</li> <li>~50% of staff time spent on SST report generation will be reduced by writing "short-version" reports</li> </ul>
<p>3 Institutionalizing Operational Activities</p>	<p>+ 2.0 FTE</p>	<ul style="list-style-type: none"> <li>Estimated 3 full-time staff needed to conduct core operations work (including the current Director of Operations)</li> </ul>
<p>4 Establishing Academic KPIs</p>	<p>+ 0.5 FTE</p>	<ul style="list-style-type: none"> <li>Establishing academic KPIs will require Council staff time to facilitate advisory group meetings, get agreement around definitions and methodology, and work with districts to overcome any data collection / reporting challenges</li> </ul>
<p>5 Strategic Communications Targeted at Broader Public*</p>	<p>+ 1.0 FTE + \$50K</p>	<ul style="list-style-type: none"> <li>1 additional FTE will be required for communications activities related to: Common Core implementation, op-ed pieces, Council website etc.</li> <li>A national perception poll will be administered every three years at a cost of \$150K for each poll</li> </ul>



## Organization and Budget

Implementing all proposed changes would require \$386K in additional Council funds annually

	Base Cost	Fringe Benefits	Total Cost
Operations Specialist (1 FTE)	\$60K	41%	\$85K
Operations Manager (1 FTE)	\$90K	41%	\$127K
Communications Specialist (1 FTE)	\$60K	41%	\$85K
Academics Specialist (1 FTE)	\$60K	41%	\$85K
National Perception Poll (Allocation)	\$50K	N/A	\$50K
<b>Total</b>			<b>\$432K</b>

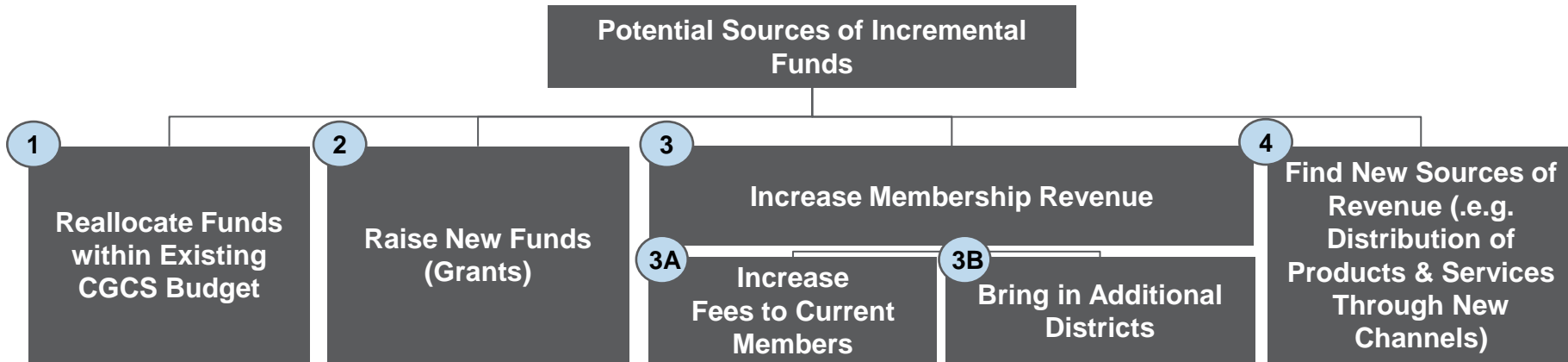


- Should all changes be adopted simultaneously or phased-in over time?
- If phased in, what order should they be prioritized?



# Organization and Budget

## How might we cover the incremental costs associated with these proposals?



- PROS**
- 1** • Budget neutral – No need to raise additional funds
  - 1** • Membership fees remain the same
  - 2** • No impact to existing services
  - 2** • Membership fees remain the same
  - 3A** • No impact to existing services
  - 3A** • Continuous funding stream
  - 3B** • No increase in cost to current member districts
  - 3B** • Larger network of member districts to include in best practice identification and SST staff sourcing
  - 4** • No increase in cost to current member districts
  - 4** • Improve products and services to existing members

- CONS**
- 1** • Some existing services must be scaled-back or eliminated (but surveys indicate that member districts do not want to eliminate / scale back existing services)
  - 2** • Funding stream may not be sustainable over the long-term
  - 3A** • Creates additional financial burden on member districts at a time of significant financial constraints
  - 3B** • Risk that new members will utilize disproportionate share of Council resources/ services (at least over some transition period)
  - 4** • Risk of reduced focus on core mission
  - 4** • Paying districts may require disproportionately more assistance initially, “distracting” from member districts



## Organization and Budget

### New member districts could contribute ~\$420K in incremental revenue by Year 5

#### 3B Incremental Revenue from Potential New Member Districts

District	Enrollment	Estimated Dues
Wake County	140,558	\$45,637
Mesa	67,471	\$40,567
El Paso	63,378	\$40,567
Tucson	55,369	\$40,567
San Antonio	55,327	\$40,567
Riverside	42,696	\$35,498
Tulsa	41,493	\$35,498
Corpus Christi	38,196	\$35,498
Stockton	38,141	\$35,498
Bakersfield	37,928	\$35,498
Lexington	36,988	\$35,498
<b>Total</b>		<b>\$420,893</b>



Year	Fiscal Year	Revenue from New Districts
1	FY13	\$84K
2	FY14	\$168K
3	FY15	\$253K
4	FY16	\$337K
5	FY17	\$421K

**Note:** The revenue forecast assumes that it will take the Council up to 5 years to recruit the 11 eligible districts. Annual revenue estimates above are based on “straight-lining” revenue from Year 1 to Year 5 based on steady state (Year 5) amount of \$421K. Actual revenue will vary based on when a particular district joins the Council (district dues will vary based on their enrollment levels).

**Note:** New member district revenue is based on 2012-2013 dues by tier and NCES district enrollment.





## Organization and Budget

**Productizing KPIs (at a subscription fee to non-member districts) could generate between \$186K and \$745K of additional annual revenue for the Council**

### 4 New Sources of Revenue: KPI Product / Service Offering Implemented Beyond Members Districts

Potential Market Segments	Scenario 1 (Conservative)	Scenario 2 (Moderate)	Scenario 3 (Aggressive)	
<p>The “Act Point KPI Standard” service <b>primarily targets large school districts (&gt;10K students)</b>.</p> <p>Secondary markets include:</p> <ul style="list-style-type: none"> <li>• Small to medium school districts (&lt;10K students)</li> <li>• State Departments of Education</li> <li>• Education Service Agencies</li> </ul>	Primary Market Size	1,079 Districts	1,079 Districts	1,079 Districts
	Market Penetration	5%	10%	20%
	# of Customer Districts	54	108	216
	Average Purchase Order (Annual)	\$6,275	\$6,275	\$6,275
	Total Revenue	\$338,850	\$677,700	\$1,355,400
	<b>CGCS (55%) Revenue</b>	<b>\$186K</b>	<b>\$373K</b>	<b>\$745K</b>



**Given the current economic environment for school districts, Scenario 1 seems the most plausible**



## Organization and Budget

**Additional sources of revenue potentially exist, but would require more in-depth market analysis to quantify / evaluate**

### 4 New Sources of Revenue: Other Ideas

1. **Productizing Strategic Support Teams** for implementation in non-member districts
2. **Academic KPIs** as an enhancement to the operational KPIs offering that is being productized through TransACT
3. **Leadership development training** to member and non-member districts, targeted at growing the next generation of leaders within districts, by functional area (service provided at a fee)
4. **Productizing Common Core tools** (e.g., professional development modules, complex text-dependent questions, etc.) for distribution to non-member districts



**Sizing of market opportunity and quantification of potential revenue streams from the above concepts would require further research/analysis of market needs**



# Key Strategic Plan / Succession Plan Components

## Succession Planning Process

1

### Mission, Goals and Strategies

- What is the Council's mission and goals?
- What set of strategic *levers* will the Council utilize to make progress against these goals?
- What *activities* should the Council focus on within these strategic levers?
- How far should the Council's role extend in terms of helping districts implement change?
- Are there partnerships that can help the Council remove barriers for member districts to implement educational reforms?
- How should the Council measure its impact?

2

### Organization and Budget

- What organizational capabilities and structure need to be in place to enable the Council to execute agreed upon strategies and activities?
- What do field interviews and surveys tell us about member district needs relative to the Council's current offerings and capacity?
- What additional capacity, if any, might be needed for the Council to best serve member districts?
- What are the financial implications of any potential changes to current organizational capacity?

3

### Succession Planning Process

- How much succession planning can be done ahead of time and what must occur over time, given the succession planning horizon?
- What succession scenarios should we plan for?
- What processes need to be in place to ensure that succession planning (each of the scenarios above) is being addressed systematically over the next 3-6 years?
- What level of internal "institutionalizing" of knowledge and processed needs to happen over the next few years to make any transitions smoother?

4

### Criteria, Characteristics and Pipelines

- What beliefs, attributes and skills are important across the entire leadership team?
- What skills and capabilities are important for a future Executive Director to bring to the position?
- What skills and capabilities are important at the Director(s) level?
- What potential pipelines exist, by position type?



# Succession Planning Process

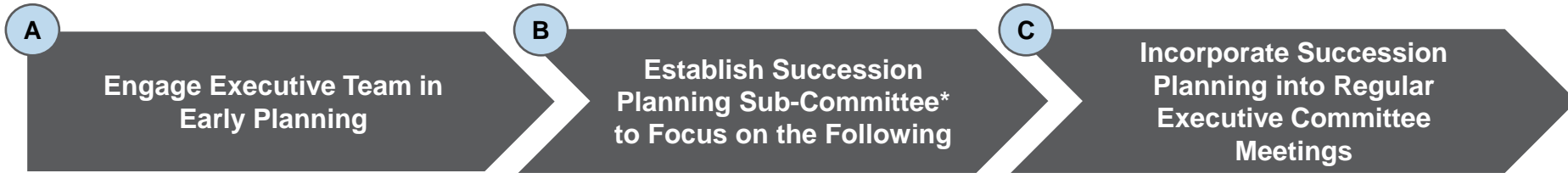
## Guiding Principles

1. **Be holistic with respect to succession planning:** Consider the entire senior leadership team, not just the Executive Director position. Prioritize those positions that do not have strong internal candidates and where external pools are limited.
2. **Make succession planning a core priority** for the organization, by incorporating specific activities, updates and decisions into regular Executive Committee meetings.
3. **Plan for multiple Executive Director scenarios** (e.g., emergency situation, short-to-medium term, medium-to-long term). The ideal transition time would be 3-6 years to allow for early identification, mentoring, grooming and transition of candidates. The Council could identify some likely candidates (internal or external) and place them in meaningful “interim” positions to test skills/capabilities and to build Council capacity.
4. **Be transparent with staff** re: overall succession planning process and selection criteria.
5. **Establish appropriate internal processes (documentation, databases of contacts, etc.)** to ensure that transitions are as smooth as possible when they start occurring.
6. **When determining skill sets and capabilities, do not think about the Executive Director vs. Directors as isolated hires and job descriptions.** Start by determining what complementary set of skills needs to exist across the entire leadership team to sustain the organization. Then, determine which skills/capabilities are most needed within an Executive Director vs. other members of the leadership team.
7. **Establish as “deep” a pool as possible** for each type of position by being open to considering a variety of possible sources of candidates.



## 2 Succession Planning Process: Core Priority for the Executive Team

There are several meaningful and important ways for the Executive Committee to be engaged in the succession planning process



*\*Note: The Executive Committee may choose to forgo the formation of a sub-committee and participate fully in all Succession Planning activities*




● Agreement on succession planning scenarios (emergency, medium-term, 6 year)	● Refine criteria / characteristics by position	● The sub-committee and the Executive Director prepare updates and discussion topics for regularly scheduled Executive Committee meetings
● Agreement on initial criteria / characteristics that the future Executive Director should bring to the organization in each succession planning scenario	● Evaluate internal candidates for Director-level positions, as needed	
● Identification of possible pipelines of candidates	● Review/update pools of candidates	
● Identification of quality search firms with solid track records in education		
● Creation of preliminary job descriptions for senior leadership roles (including the Executive Director role)	● Refine / update recruitment, hiring and training timeline (by key position)	
		● Executive Committee solicits input on characteristics, potential candidates, etc, <b>from broader membership</b> (either directly through Succession Planning Subcommittee or through search firm). Will <b>need to balance engagement / transparency with efficiency / confidentiality</b>

● Will be completed by the end of the Parthenon project	● Will have made substantial progress by the end of the Parthenon project	● Will start after the Parthenon project is over
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### 3 Succession Planning Process: Multiple Scenarios

The Executive Committee should consider the scenarios outlined below

	<b>A</b> Emergency Situation [0-1 year]	<b>B</b> Short-Term Situation [1-3 years]	<b>C</b> Medium-Term Situation [3-6 years]
<b>Example Description</b>	<ul style="list-style-type: none"> <li>Something happens to current Executive Director; the Executive Committee has not had time to groom any internal or external candidates</li> </ul>	<ul style="list-style-type: none"> <li>Executive Director decides to leave within a few years</li> </ul>	<ul style="list-style-type: none"> <li>Executive Director stays for 2 more terms, giving the Executive Committee ample time to plan for succession at multiple levels of the organization</li> </ul>
<b>Other "Side Effects"</b>	<ul style="list-style-type: none"> <li>All or large portion of senior leadership staff will likely stay for a transition period (e.g., up to a year)</li> </ul>	<ul style="list-style-type: none"> <li>Some portion of senior leadership will likely exit the organization</li> </ul>	<ul style="list-style-type: none"> <li>Large portion of senior leadership will likely exit the organization</li> <li>Roles become available / can be filled with potential ED candidates</li> </ul>
<b>Type of ED Needed</b>	<ul style="list-style-type: none"> <li>"Ready to go" candidate</li> <li>Has most of the desired skills and capabilities already</li> </ul>	<ul style="list-style-type: none"> <li>"Front-runners" (ready in 2-3 years)</li> <li>Have many of the desired skills and capabilities</li> </ul>	<ul style="list-style-type: none"> <li>"Rising contenders" (need to be developed and monitored)</li> <li>Have the raw potential and some of the desired skills and capabilities</li> </ul>
	 <b>MOST LIMITED POOL</b> (likely not someone on staff but ideally someone who knows the organization well)	 <b>WIDER POOL</b> (but may be the trickiest to "get right" – may not have sufficient time to hire internally into an interim position, in which case revert to Scenario A)	 <b>WIDEST POOL</b> (may be able to hire candidate into meaningful Director-level role and then groom for several years)



### 3 Succession Planning Process: Multiple Scenarios

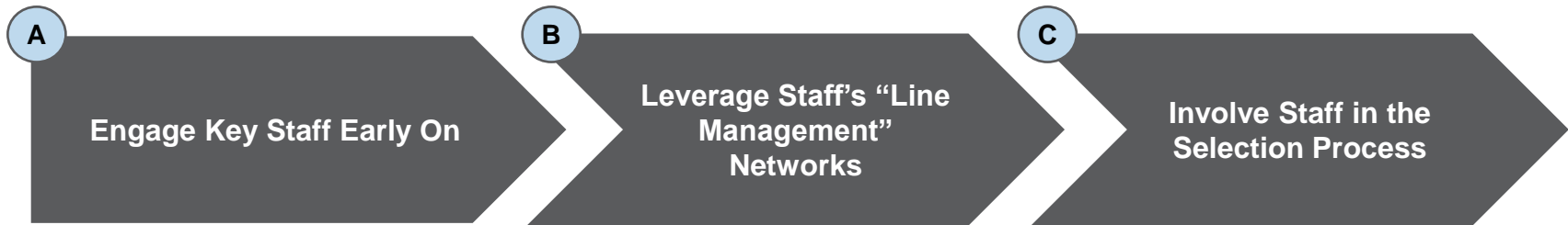
There are three potential paths to hire an ED candidate into the Council

Potential Paths to Executive Director	A Emergency Situation [0-1 year]	B Short-Term Situation [1-3 years]	C Medium-Term Situation [3-5 years]	
	← Considerations →		← Considerations →	
<p>1 Hire Directly into Executive Director Position</p>	<ul style="list-style-type: none"> <li>Likely an interim role while the search for a longer-term successor continues through the use of a search firm</li> <li>Someone who knows the organization well and has the full “tool-kit” (e.g., current /former members)</li> <li>Candidates would likely be sourced / hired directly by the Executive Comm.</li> </ul>	<ul style="list-style-type: none"> <li>Hiring an external candidate directly into the Executive Director position presents a higher risk than first hiring into a lower-level position and then grooming</li> </ul>		
<p>2 Hire into a Director Position, if one Becomes Available, and Groom for Executive Director Position</p>	N/A	<ul style="list-style-type: none"> <li>Qualifications / skill sets required for a Director of Management Services may not be the right match for an Executive Director</li> <li>The Director of Legislative Services role might be a good training ground for the ED role</li> <li>The Director of Academic Achievement or Research pathway may be ideal since these are core priorities for the Council and it takes time/experience to understand how education works</li> <li>Candidates can be sourced through the Council’s network and a search firm</li> </ul>		
<p>3 Create a New Position, Deputy Director, as a Training Position for Executive Director</p>	N/A	<ul style="list-style-type: none"> <li>This option offers the most flexibility since it does not depend on any of the Directors retiring in the short term, but increases costs since it is an incremental position</li> <li>Creation of such a position would need a careful yet meaningful split of responsibilities with the Executive Director and is contingent on current ED being interested in pursuing this particular solution</li> </ul>		



## 4 Succession Planning Process: Involve Staff

Being transparent with staff and involving them in succession planning will strengthen the overall process and increase likelihood of staff staying on



- Key staff members can provide an important perspective on the most important skills and capabilities that a future Executive Director and anyone in a particular Director-level position should have

- Staff have wide-reaching networks developed over years of working with member districts' line management (in their respective functional areas)
- Staff also have networks that reach beyond member districts and include contacts in academia, research organizations, government, consulting firms, and other non-profit organizations

- Staff can be part of succession planning by participating in formal interviews and providing their input to the Executive Committee
- Staff can also serve as a "sounding board" for contacts in the field interested in learning more about the Council and the particular roles

• **This is already underway. We have interviewed a number of the Directors and other staff members to get their perspectives**

• **The strength of relationships developed by staff in education over the last 20-30 years will be a strong asset in the search process**

• **Senior staff may be more likely to stay if they have gotten to know leading candidates through the selection process**

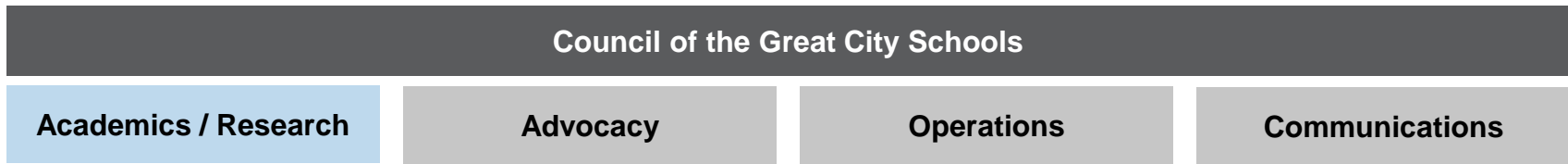
• **Need to establish a mechanism through which staff perspectives are regularly fed back to the Executive Committee – staff need to feel like they have a voice / are being heard**





5 Succession Planning Process: Internal Processes

Documentation of existing processes at the “enterprise” and “functional” levels will enable a smoother transition and help institutionalize practices



*The following examples are meant to be illustrative only*

Example Documentation for SSTs in Curriculum and Instruction	Example Documentation for Research Studies
<ol style="list-style-type: none"> <li>1. How are member district requests for SSTs processed and scheduled?</li> <li>2. What is the selection process for SST team members?</li> <li>3. What pre-work needs to be completed prior to the SST event?</li> <li>4. What logistical items need to be handled by the Council vs. the member district?</li> <li>5. What is the standard on-site agenda for an SST in Curriculum?</li> <li>6. What are the steps involved in creating a report summarizing the SST findings?</li> <li>7. What is the standard report format?</li> </ol>	<ol style="list-style-type: none"> <li>1. How are topics for research studies identified and prioritized?</li> <li>2. What are the steps involved in reaching out to member districts for data collection purposes?</li> <li>3. What is the network of vendors (research organizations) with whom the Council works?</li> <li>4. What is the protocol for reviewing initial analysis results with participating districts and for incorporating feedback?</li> <li>5. What is the protocol for reviewing and finalizing the report? Who reviews internally? Are external stakeholders involved?</li> <li>6. How are results of a research study published and communicated?</li> </ol>

**Need a directional “roadmap,” not a detailed book covering all minute details. Key processes should be identified and prioritized for documentation to ensure the most efficient use of scarce staff resources / time**



# Key Strategic Plan / Succession Plan Components

## Criteria, Characteristics and Pipelines

1

### Mission, Goals and Strategies

- What is the Council's mission and goals?
- What set of strategic *levers* will the Council utilize to make progress against these goals?
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### Organization and Budget

- What organizational capabilities and structure need to be in place to enable the Council to execute agreed upon strategies and activities?
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- How much succession planning can be done ahead of time and what must occur over time, given the succession planning horizon?
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### Criteria, Characteristics and Pipelines

- What beliefs, attributes and skills are important across the entire leadership team?
- What skills and capabilities are important for a future Executive Director to bring to the position?
- What skills and capabilities are important at the Director(s) level?
- What potential pipelines exist, by position type?



## Criteria / Characteristics: Overall

### Core personal beliefs and attributes

#### (Entire Senior Leadership Team, including the Executive Director)

##### Beliefs

- **Deep commitment** to public education and to urban children
- **Strong commitment to the mission of the organization**
- **Deep belief that the public education system can improve**, with appropriate supports
- **Deep belief that a proactive stance is more conducive to achieving results than a defensive stance:** People and organizations should take issues head on and be “part of the solution” rather than see themselves them as victims / targets of criticism

##### Personal Attributes

- **Sound judgment** to understand when to take policy positions (in any functional area), with the goal of helping member districts get better and better over time, and **courage to take those positions**
- **Strong customer service orientation** (accessible, responsive, proactive)
- **Ability to combine a sense of urgency** (need for reform) **with pragmatic approach** (to enable reform)
- **Strong orientation towards implementing reforms that work** (e.g., based on research) rather than pursuing change for the sake of change
- **Ability to put member districts and the organization first** (primary affirmation of value comes from member district actions and improvement over time rather than from being “in the spotlight” or getting credit for ideas)
- **Ability to build consensus among senior level executives** with strong (and sometimes differing) points of view
- **Ability to create a healthy dialog among members** (diverse membership comprised of superintendents and school board members) and **enable decision-making based on “what works” rather than emotions**
- **Strong work ethic, flexibility, willingness to “roll up one’s sleeves”** (given size of organization and relatively flat structure)
- **Strong personal skills** to work with functional staff in member school districts
- **Strong team player, respectful** of other Council (and member district) staff, values diversity of the organization, recognizes and leverages strengths that others bring to the table



6

## Criteria / Characteristics: Executive Director

### “Must-have” vs. “nice-to-have” skills and attributes

	Must-Have	Nice-to-Have
<b>Political</b>	<ul style="list-style-type: none"> <li>• Strong political instincts</li> <li>• Knowledge of DC politics (on a national level)</li> <li>• Credibility with both political parties</li> <li>• Existing network on Capitol Hill (or proven ability to build it)</li> </ul>	<ul style="list-style-type: none"> <li>• Previously involved in urban school districts</li> <li>• Policy contacts outside of education</li> <li>• Familiarity with urban social issues</li> <li>• Knowledge of DC politics (at a local level)</li> </ul>
<b>Education / Academic</b>	<ul style="list-style-type: none"> <li>• Strong knowledge of education and key issues facing urban public schools</li> <li>• Sound knowledge of district instructional systems (how to move school districts forward in improving overall student achievement and closing the student achievement gap)</li> <li>• Extensive knowledge of federal education policy</li> </ul>	<ul style="list-style-type: none"> <li>• Familiarity with education research (e.g. best practices for English Language Learners)</li> <li>• Familiarity with translational research (ability to translate directly into action)</li> </ul>
<b>Leadership / Management</b>	<ul style="list-style-type: none"> <li>• Ability to manage (and work with) large Executive body</li> <li>• Ability to craft a vision and build consensus around that vision among senior level executives</li> <li>• Ability to balance needs of various groups (e.g., race, gender)</li> <li>• Ability to create a culture of trust and support, both among member districts and within the organization</li> <li>• Strong sense of what is right for the organization and ability to protect it from other “agendas”</li> </ul>	<ul style="list-style-type: none"> <li>• Ability to lead and manage a range of styles</li> <li>• Willingness to empower senior leadership team</li> <li>• Ability to generate ideas for initiatives that will keep the agenda moving forward</li> <li>• Ability to identify and attract talent</li> </ul>
<b>Communications</b>	<ul style="list-style-type: none"> <li>• Very strong communication skills, written and spoken</li> <li>• Track record of representing his/her previous organization in public forums, including with the media</li> </ul>	<ul style="list-style-type: none"> <li>• Effective public speaker</li> <li>• Good fundraising skills</li> <li>• Deep knowledge of how to handle the media</li> </ul>
<b>Personal Attributes *</b>	<ul style="list-style-type: none"> <li>• Strong sense of personal accountability for the success of the Council and member districts</li> <li>• Ability to listen and tease out what is really important</li> </ul>	<ul style="list-style-type: none"> <li>• Even temperament</li> <li>• Sense of humility</li> </ul>



\* In addition to what is listed on prior slide

## 6 Criteria / Characteristics: Senior Leadership Team

### Expertise and core skills required

Academic	Research	Operations	Advocacy	Communications
<b>Knowledge / Expertise of the Following Areas</b>				
<ul style="list-style-type: none"> <li>• Effective instructional practice, with a focus on ELL, Special Ed, Reading and Math instruction</li> <li>• Common Core State Standards</li> <li>• Instructional intervention systems</li> <li>• Effective professional development strategies in districts</li> <li>• Major commercial instructional programs and packages</li> </ul>	<ul style="list-style-type: none"> <li>• Research design, methodology and statistical techniques</li> <li>• NAEP</li> <li>• Educational testing and assessment</li> <li>• Conducting survey research and writing reports</li> <li>• Creating and maintaining educational databases</li> <li>• Knowledge of federal research agencies, people, and procedures (e.g., IES, NCES, NAS)</li> </ul>	<ul style="list-style-type: none"> <li>• Urban school governance systems</li> <li>• Urban school budget and finance systems and procedures</li> <li>• Personnel operations and IT systems</li> <li>• District business services (e.g., transportation, food services, maintenance and operations)</li> <li>• Council's Performance Management System (KPIs)</li> </ul>	<ul style="list-style-type: none"> <li>• Federal education legislation and programs, especially Title I, Title II, Title III, IDEA, Medicaid, E-Rate, Vocational Education, School Nutrition</li> <li>• Federal education regulations, guidance, and policy letters</li> <li>• House and Senate committee and floor parliamentary procedures</li> <li>• Federal court procedures</li> </ul>	<ul style="list-style-type: none"> <li>• Conceptualizing, writing and placing opinion pieces in major media outlets</li> <li>• Handling of emergency communications and media problems</li> <li>• Publishing a regular (monthly) communications publication for the membership</li> <li>• Website management / utilizing web presence to tell the organization's story</li> <li>• Using public service announcements, ads and ideas to promote issue</li> </ul>
<b>Function-Specific Skills / Capabilities</b>				
<ul style="list-style-type: none"> <li>• Strong analytics</li> <li>• Ability to analyze a district's instructional programs, materials, and procedures, and determine ways to improve student achievement</li> <li>• Ability to develop or coordinate the development of tools for use in the field</li> </ul>	<ul style="list-style-type: none"> <li>• Ability to recognize where research is needed and initiate it</li> <li>• Ability to translate complex research findings for school practitioners</li> <li>• Ability to develop or coordinate the development of tools for use in the field</li> </ul>	<ul style="list-style-type: none"> <li>• Strong data analysis skills</li> <li>• Ability to analyze a district's operational / functional areas and determine ways to make operations more efficient</li> <li>• Ability to develop or coordinate the development of tools for use in the field</li> </ul>	<ul style="list-style-type: none"> <li>• Strong political skills</li> <li>• Ability to analyze effect of proposed legislation on school districts</li> <li>• Ability to form legislative and political coalitions as needed</li> <li>• Ability to write and advocate legislation, regulations, and policy</li> </ul>	<ul style="list-style-type: none"> <li>• Outstanding writing skills</li> <li>• Ability to identify topics of relevance / interest to member districts and to broader public</li> <li>• Ability to "message" urban schools before the national media and the public</li> <li>• Ability to develop or coordinate the development of tools for use in the field</li> </ul>

### Skills / Capabilities Common Across Functions

- Strong communication skills (written and verbal); ability to effectively communicate with member districts (information sharing, response to requests, recommendations, etc.)
- Ability to identify patterns, synthesize common themes, and help districts translate those themes into customized applications within a district
- Ability to organize and manage technical assistance teams for member school districts
- Ability to manage a small internal team of staff (and potentially external vendors)

6 Criteria / Characteristics: Senior Leadership Team

Ideal background: Experience and education by functional area

Academic	Research	Operations	Advocacy	Communications
<p><b><u>Experience</u></b></p> <ul style="list-style-type: none"> <li>• Proven track record of having improved student achievement in a major urban school district</li> </ul>	<ul style="list-style-type: none"> <li>• Senior level experience in a research setting (district, academic, research organization, non-profit, government)</li> <li>• Proven track record of utilizing research for improvement purposes</li> </ul>	<ul style="list-style-type: none"> <li>• Urban school experience in running major operating systems</li> <li>• Track record of operational improvement while in role</li> </ul>	<ul style="list-style-type: none"> <li>• Extensive experience with House and Senate committee and floor parliamentary procedures</li> <li>• Experience with the federal legislative process</li> <li>• Hill experience not necessary</li> <li>• Litigation skills not necessary</li> </ul>	<ul style="list-style-type: none"> <li>• Extensive experience with national and big-city media outlets</li> <li>• Experience working with polling companies, ad agencies and other communications companies</li> <li>• Experience managing websites</li> <li>• Not necessary to have been a reporter</li> </ul>
<p><b><u>Education</u></b></p> <ul style="list-style-type: none"> <li>• Doctoral-level degree in curriculum and instruction or education psychology helpful</li> </ul>	<ul style="list-style-type: none"> <li>• Doctoral-level degree in psychology, sociology, economics, or educational research and statistics helpful</li> </ul>	<ul style="list-style-type: none"> <li>• Master’s degree in management, business administration or related field helpful</li> </ul>	<ul style="list-style-type: none"> <li>• Law degree or graduate degree in public policy helpful</li> </ul>	<ul style="list-style-type: none"> <li>• Graduate degree in journalism or communications helpful</li> </ul>
<p><b><u>Network</u></b></p> <ul style="list-style-type: none"> <li>• Extensive network of contacts (e.g., senior curriculum and instruction staff across school districts)</li> </ul>	<ul style="list-style-type: none"> <li>• Extensive network of contacts (e.g., senior researchers across the country in a variety of areas)</li> </ul>	<ul style="list-style-type: none"> <li>• Extensive network of contacts (senior operations staff across school districts – finance, budget, IT, HR, transportation, food services, facilities, etc.)</li> </ul>	<ul style="list-style-type: none"> <li>• DC contacts (e.g., Departments of Education, agriculture, Labor, FCC, HHS and others; House and senate committees), various non-profit and advocacy organizations</li> </ul>	<ul style="list-style-type: none"> <li>• Extensive network of contacts in national and big-city media outlets</li> </ul>



# 7 Potential Pipelines of Candidates

Preliminary assessment of pipelines for those positions that do not have strong internal candidates

Council Positions	Executive Director	Director, Academics / Research	Director, Management Services	Director, Administration & Finance
Overall Availability of Candidates	Limited	Somewhat Limited (Academics) / Strong (Research)	Strong	Moderate / Strong
Potential Pipelines	Member Districts (including former members)	Member Districts (including former members)	Member Districts (including former members)	Member Districts (including former members)
	Non-Member Districts	Non-Member Districts	Non-Member Districts	Non-Member Districts
	Academia / Academic Centers	Academia / Academic Centers	Academia / Operational Roles	Academia / Finance Roles
	Government Agencies	Government Agencies	Government Agencies	Government Agencies
	OTHER: Non-Profit Organizations, ideally in Education	OTHER: Research Organizations	OTHER: Non-Profit Organizations	OTHER: Non-Profit Organizations
	Private Sector (with past K12 experience)	Private Sector (with past K12 experience) <sup>207</sup>	Private Sector (with past K12 experience)	Private Sector (with past K12 experience)



## 7 Potential Pipelines of Candidates

### Sample organizations (list will continue to be refined over time)

Districts	Academia	Government	Other
<p><b>Executive Director</b></p> <ul style="list-style-type: none"> <li>• Superintendents</li> <li>• Board Members</li> </ul> <p><b>Dir, Academics/Research</b></p> <ul style="list-style-type: none"> <li>• Chief Academic Officer</li> <li>• Director of Research</li> <li>• Director of Curriculum</li> </ul> <p><b>Dir, Management Services</b></p> <ul style="list-style-type: none"> <li>• Chief Operating Officer</li> <li>• Chief Financial Officer</li> <li>• Assistant Superintendent for Human Resources</li> </ul> <p><b>Dir, Communications</b></p> <ul style="list-style-type: none"> <li>• Director of Public Relations</li> <li>• Communications Director</li> </ul> <p><b>Dir, Legislative Services</b></p> <ul style="list-style-type: none"> <li>• Government Relations / Legislative Director</li> </ul>	<p><b>K12-related Centers</b></p> <ul style="list-style-type: none"> <li>• <b>Consortium for Policy Research in Education</b> (Penn, Teacher’s College, Harvard, Stanford, Univ. of Michigan, Northwestern, Wisconsin-Madison)</li> <li>• <b>Harvard’s</b> Public Education Leadership Project</li> <li>• <b>University of Wisconsin’s</b> Wisconsin Center for Education Research</li> <li>• <b>University of Chicago’s</b> Consortium on Chicago School Research</li> </ul> <p><b>Colleges / Universities</b></p> <ul style="list-style-type: none"> <li>• Former/Retired University Presidents</li> <li>• Former/Retired University Deans</li> </ul> <p><b>Council of the Great City Colleges of Education (~85)</b></p>	<p><b>Members of Congress</b></p> <ul style="list-style-type: none"> <li>• As a source of information for finding potential candidates</li> </ul> <p><b>U.S. Department of Education</b></p> <ul style="list-style-type: none"> <li>• <b>Office of Elementary and Secondary Education</b> (political leadership)</li> <li>• <b>Office of the Secretary of Education</b> (political leadership)</li> <li>• <b>Institute of Education Sciences</b></li> </ul> <p><b>State Education Agencies</b></p> <ul style="list-style-type: none"> <li>• Chiefs or staff members of SEAs with urban experience</li> </ul> <p><b>Municipal leaders</b></p>	<p><b>Research Organizations</b></p> <ul style="list-style-type: none"> <li>• AIR</li> <li>• McREL</li> <li>• RAND Corporation</li> <li>• WestEd</li> </ul> <p><b>Philanthropy</b></p> <ul style="list-style-type: none"> <li>• Carnegie</li> <li>• Gates</li> <li>• Hewlett</li> <li>• Wallace</li> </ul> <p><b>Non-Profits</b></p> <ul style="list-style-type: none"> <li>• ACHIEVE</li> <li>• Center for Reform of School Systems (operations?)</li> <li>• Education Trust</li> <li>• NAACP</li> <li>• National Council of La Raza</li> </ul> <p><b>Associations</b></p> <p><b>For-Profits</b></p> <ul style="list-style-type: none"> <li>• Publishing (has recruited former superintendents)</li> <li>• Ed Tech</li> <li>• K12 Consulting</li> </ul>





## 7 Potential Pipelines of Candidates

As part of overall succession planning, we also benchmarked compensation of key Council positions against similar non-profit positions in the market

Salary Benchmarking							
Large Urban Districts		Associations		Foundations		COUNCIL	
<i>Examples:</i> Los Angeles, New York, Houston		<i>Examples:</i> NGA, ACHIEVE, NSBA, CCSSO, AASA		<i>Examples:</i> HP, Wallace, Joyce, Gates, Broad			
<b>Superintendent</b>	\$200K - \$300K	<b>Executive Director</b>	\$300K - \$400K	<b>CEO / Managing Director</b>	\$300K - \$500K	<b>Executive Director</b>	\$280K
<b>COO</b>	\$150K - \$250K	<b>Associate Executive Director</b>	\$200K - \$250K	<b>CFO</b>	\$200K - \$250K	<b>Directors</b>	\$120K - \$160K
<b>CAO</b>	\$150K - \$200K	<b>Director (COO / CFO)</b>	\$150K - \$200K	<b>Corporate Secretary*</b>	\$200K - \$250K		
<b>Research / Curriculum Director</b>	\$100K - \$150K	<b>Director (other)</b>	\$150K - \$200K	<b>Director (other)</b>	\$150K - \$250K		

- The Council’s compensation structure is generally at the lower end of comparable positions in Large Urban Districts and other Associations.
- Should the Council’s senior leadership team’s compensation be adjusted upward when the time comes to hire into these positions?



Note: The corporate secretary position is a C-level executive position responsible for board governance and communication  
 Source: District websites; Non-profit 990-PF forms

# IN SUMMARY: REVENUE & COST PROJECTIONS

If all the proposed changes were implemented, the Council would need to find incremental sources of revenue (or deprioritize some of the identified needs)

	YR1	YR2	YR3	YR4	YR5
<b>Revenue</b>					
New Member Districts	\$84K	\$168K	\$253K	\$337K	\$421K
KPIs	\$37K	\$75K	\$112K	\$149K	\$186K
<b>Total Revenue</b>	<b>\$121K</b>	<b>\$243K</b>	<b>\$365K</b>	<b>\$486K</b>	<b>\$607K</b>

<b>Cost</b>					
Academics Specialist (1 FTE)	\$85K	\$85K	\$85K	\$85K	\$85K
Operations Specialist (1 FTE)	\$85K	\$85K	\$85K	\$85K	\$85K
Operations Manager (1 FTE)	\$127K	\$127K	\$127K	\$127K	\$127K
Communications Specialist (1 FTE)	\$85K	\$85K	\$85K	\$85K	\$85K
National Perception Poll (Allocation)	\$50K	\$50K	\$50K	\$50K	\$50K
Compensation Adjustments (ED and Directors)				\$148K	\$148
Incremental Positions at time of transition *					\$197K
<b>Total Cost (excl. comp adjustments)</b>	<b>\$432K</b>	<b>\$432K</b>	<b>\$432K</b>	<b>\$580K</b>	<b>\$777K</b>

<b>NET</b>	<b>(\$311K)</b>	<b>(\$189K)</b>	<b>(\$67K)</b>	<b>(\$94K)</b>	<b>(\$170K)</b>
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**Potential Impact on Membership Fees** (if considered increasing to meet gap)

Average per Member District	\$4,622	\$2,801	\$981	\$1,384	\$2,525
<b>Implied Percentage Increase (on average)</b>	<b>13%</b>	<b>8%</b>	<b>3%</b>	<b>4%</b>	<b>7%</b>



\* Equivalent to 1 Deputy / Chief of Staff or 2 other FTE positions – Manager / Specialist, in response to feedback (from interviews) that may need these positions at time of transition. Current positions are not necessarily 1:1 replacements, given staff's workload and increasing needs / demands of member districts)  
 Source: Internal Data. All compensation costs include a 41% benefit load factor

## Appendix: Communications

### The Communications Team offered ideas for additional programs and activities to advance the Council’s communications efforts

	Activity	Description
Expanding Existing Activities	Expanding Communications Department	<ul style="list-style-type: none"> <li>Expand Communications personnel capacity to match increased workload – publications production, media and public relations, news reporting and editing, graphic arts, advertising, public service announcements, press conferences, etc.</li> </ul>
	Establishing and Cultivating Closer Relations with the News Media	<ul style="list-style-type: none"> <li>Heightening contact with working journalists, columnists, news managers, bloggers, etc. to sensitize them to the challenges in urban education as well as to inform them of measurable improvements</li> </ul>
	Increasing Contact with Council Public Relations Executives	<ul style="list-style-type: none"> <li>Create a unified force to develop universal messages for urban education nationally and locally and to provide proactive assistance to their external and internal communications operations</li> </ul>
	Increasing the Frequency of the National Perception Poll	<ul style="list-style-type: none"> <li>Every 3 years (currently every 6 years), conduct a national poll to gauge the broader public’s perception of urban public education. Evaluate extent to which public perception has improved / worsened.</li> </ul>
	Coordinating Council Web Site Content	<ul style="list-style-type: none"> <li>Keep the Council website current and organized</li> </ul>
New Activities	Spearheading the Creation of an Urban School Television Network	<ul style="list-style-type: none"> <li>Help capable member districts to produce urban school TV programming for distribution to member districts with public or education access channels, which have a huge appetite for quality urban school programming – especially if they have 24 hours of airtime</li> </ul>
	Exploring New Avenues of Communications	<ul style="list-style-type: none"> <li>Explore new avenues of communications through Internet sites and programs, New Media, new publications and cable and commercial television programming in addition to radio broadcast opportunities, webinars and video streaming</li> </ul>
	Exploring the Possibility of Launching Other New Ventures	<ul style="list-style-type: none"> <li>Explore possibility of producing a communications vehicle that features advertisements, sponsoring an awards program for responsible urban education reporting, or staging an annual State of Urban Education address at the National Press Club</li> </ul>
	Considering Avenues of Communications Research	<ul style="list-style-type: none"> <li>Gauge the success of Council communications products, services and campaigns</li> </ul>



## **LEGISLATION**

**APPROPRIATIONS**

## Legislative Update on FY 2016 Appropriations and ESEA Reauthorization

**From:** Manish Naik  
**Sent:** Wednesday, June 24, 2015  
**To:** Legislation  
**Subject:** Update on FY 2016 Appropriations and ESEA Reauthorization

Legislative Liaisons of the Great City Schools –

**FY 2016 APPROPRIATIONS:** This week, both the House and the Senate appropriations subcommittees reported the education spending bill for federal Fiscal Year 2016 (school year 2016-17). Both bills reduced or eliminated funding for a number of key education programs, and both bills cut funding for the U.S. Department of Education overall. The severity of the cuts to some programs, as well as the overall number of programs seeing reduced funding, are a direct result of the budget caps that congressional appropriators were given and the limited allocation of funds available to programs for Labor, Health and Human Services, and Education. An overall deal to raise the budget cap set by Congress in previous years will be necessary to increase or restore funding for education programs.

The full Appropriations Committees in both the House and Senate are expected to approve the subcommittee bills by the end of this week. Specific funding changes reported by the subcommittees include:

- **Title I, Part A:** Senate increased by \$125 million; House froze funding
- **School Improvement Grants:** Senate decreased by \$56 million; House decreased by \$506 million
- **Title II-A, Teacher Quality:** Senate decreased by \$103 million; House decreased by \$668 million
- **Title III, English Language Learners:** Senate decreases by \$25 million; House froze funding
- **21<sup>st</sup> Century Schools:** Senate decreased by \$117 million; House froze funding
- **Charter Schools:** Senate increased by \$20 million; House increased by \$22 million
- **Magnet Schools:** Senate decreased by \$7 million; House eliminated funding
- **IDEA, Part B:** Senate increased by \$100 million; House increased by \$500 million

**ESEA REAUTHORIZATION:** The Every Child Achieves Act, the ESEA bill approved by the Senate education committee in April, is expected to be considered on the Senate floor after the July 4<sup>th</sup> recess. We will provide more information on the legislation, timing, and amendments, as well as any calls or action we need from your districts, as floor consideration gets closer.

Thank you.

--Manish Naik  
Council of the Great City Schools

**ESEA**

# Council of the Great City Schools®

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(202) 393-2427 (202) 393-2400 (fax) www.cgcs.org



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Great City Schools®

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Seattle  
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St. Louis  
St. Paul  
Toledo  
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Wichita

February 26, 2015

U.S. House of Representatives  
Washington D.C. 20515

Dear Representative:

The Council of the Great City Schools, the coalition of the nation's largest central city school districts, opposes the pending Elementary and Secondary Education Act (ESEA) reauthorization bill, H.R. 5.

Although the Committee made an effort to streamline and simplify this overly prescriptive federal statute, H.R. 5 contains numerous financial provisions that adversely impact the Great City Schools and the disadvantaged students nationwide who rely on these critical programs.

The Council would prefer to be supporting recommendations for improving ESEA rather than opposing the bill outright. We would much rather be suggesting ways to establish minimum federal parameters around state accountability systems or strengthening program planning and management of the Title I program instead of standing against this measure. In fact, we believe there are areas in ESEA that could be pared back beyond what is in the pending bill.

Yet, there is an essential set of ESEA fiscal requirements that separately and together help ensure the integrity and "value-added" benefits of funds generated by specific groups of high-need students that the current bill undermines. For instance, eliminating maintenance of effort requirements would allow states to cut their own state education expenditures without creating a federal compliance violation. In effect, ESEA funds could become merely an offset against reductions in state school aid without providing the additional benefits that federal education aid is designed to provide. There is ample historic precedent to support this concern and the retention of supplement not supplant provisions will not cure the damage from eliminating maintenance of effort.

In addition, the essential targeting of funds to concentrations of high-need students under ESEA is fundamentally eroded in H.R. 5. The Title I portability provision could aggregate poverty-weighted Title I allocations allotted to individual school districts, and then redistribute those funds through a uniform, unweighted per-pupil allocation across each state. Districts with high concentrations of poverty would have their funds redistributed to lower-poverty communities. In fact, there would no longer be Title I schools as we know them, since any school with one or more low-income students would receive the same Title I per-pupil allocation as schools with the greatest concentration of poor students. The result would be a dilution of scarce federal funds and the inability of schools to provide programs of sufficient size and scope to produce results. Ironically, this is the antithesis of local control of Title I funds.



Other provisions in H.R. 5 also skew the benefits of ESEA funds away from students who generated the federal allocations in the first place. For example, programs for migrant students, neglected and delinquent students and English learners would no longer have separate funding authorizations, and would become set-asides under a quasi-consolidated Title I program. Of even greater concern, the “alternative use” authority in section 1002 would allow funds generated by one group of students to be spent on another. For example, funds generated by English learners (currently ESEA Title III) could be used for activities unrelated to meeting their educational needs. In the same manner, H.R. 5 would allow Title I funds generated by disadvantaged students to be spent on general schoolwide activities for all students by eliminating the 40 percent poverty threshold for Title I schoolwide activities, a proposal that exacerbates the problems with the portability provision.

H.R. 5 also reduces local school district formula aid by over three-quarters of a billion dollars annually by increasing the state Title I set-aside for school improvement/direct services grants by 150 percent. And, the Council cannot support a \$2 billion block grant controlled by state departments of education in Title III-B, providing nearly unfettered discretion to states over how these funds will be used and which schools and districts will receive more than a token amount of funds.

Further, H.R. 5 establishes a virtual freeze on ESEA program funding for the remainder of the decade and beyond. Service levels for high-needs students would deteriorate over time and risk the widening of an already cavernous achievement gap. ESEA program funding has virtually no impact on the nation’s long-term structural budget problems, but could provide a real opportunity to solve it.

Additionally, H.R. 5 creates the unusual procedural hurdle of requiring each State legislature to affirmatively accept ESEA grant awards and the conditions accompanying those funds awarded to state and local educational agencies. This provision invites controversy and establishes an unnecessary barrier to the timely receipt and use of critical ESEA funds by the nation’s schools.

Finally, the Council opposes any amendment that would replace the annual grade-by-grade testing in current law. Annual statewide assessments of students are critical to our ability to monitor student progress and close achievement gaps. The Council, therefore, opposes the Goodlatte amendment to supersede state assessments with a variety of local assessments, which would inhibit important district-to-district comparisons of student and subgroup achievement, and contribute to the redundant and poorly aligned local testing that has been highlighted in virtually every review of the over-testing problem nationwide.

The effect of these financial and other proposals justifies the Council’s opposition to passage of H.R. 5 in its current form.

Sincerely,



Michael Casserly  
Executive Director

**Council of the Great City Schools®**

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- St. Paul
- Toledo
- Washington, D.C.
- Wichita

April 13, 2015

The Honorable Lamar Alexander  
Chairman, Senate HELP Committee  
U.S. Senate  
Washington, DC 20510

The Honorable Patty Murray  
Ranking Member, Senate HELP Committee  
U.S. Senate  
Washington, DC 20510

Dear Chairman Alexander and Senator Murray:

The Council of the Great City Schools, the coalition of the nation’s largest central city school districts, writes to express preliminary support for the “Every Child Achieves Act of 2015” pending before the HELP Committee. After unsuccessful ESEA reauthorization efforts during the past four Congresses, the Council is encouraged by the bipartisan approach reflected in the Committee bill. The Council appreciates that many of our extensive comments on January’s discussion draft have been addressed, and the willingness of the Committee to continue to work on additional issues of concern.

The pending bipartisan bill is a significant improvement over the early draft, and is in many ways an improvement over No Child Left Behind (NCLB). Most of the NCLB-mandated spending provisions or set-asides - amounting to some forty percent of Title I program funding - would be repealed. The poorly designed adequate yearly progress (AYP) accountability and intervention systems of NCLB would be replaced with a state-defined accountability and intervention system. And although the new accountability system can be commended for its differentiation and flexibility, it needs additional language clearly linking under-performance of at-risk groups to appropriate corrective measures.

The Committee bill also makes major revisions to a number of the troubling fiscal provisions in the initial discussion draft, including removal of the portability provision and the six-year authorization freeze. It also modifies disconcerting proposals to change maintenance of effort, supplement not supplant, private school services, and schoolwide program provisions, though not enough in the opinion of the Council to prevent some funding and benefits from being diverted away from disadvantaged students who either generated the funds or deserve continuing services. Further, the Committee bill now includes new provisions and multiple requirements -- some that exceed current NCLB language and others that are hard to distinguish as either mandatory or permissive.

On balance, the significant progress made by the Committee on this ESEA reauthorization warrants the Council’s support for reporting the current bipartisan bill. Still, the open amendment process in Committee and on the Senate floor could result in damaging amendments, including formula changes, major funding shifts, and private school provisions that could undercut the growing consensus of support. The Council encourages the Committee to continue its pragmatic, problem-solving approach to this legislation, which continues to hold more potential for success than any other ESEA reauthorization effort since the 107th Congress.

Respectfully,

Michael Casserly  
Executive Director

## **Recommendations for Potential Managers' Amendment to Senate ESEA Committee Bill**

**Council of the Great City Schools  
April 20, 2015**

### **In General**

The Council of the Great City Schools appreciates the many revisions made by the Committee during the legislative process on the Every Child Achieves Act of 2015 to date. As the Committee prepares for Senate floor consideration of the Committee bill, the Council proposes five areas of revision for inclusion in a potential Managers' Amendment, which - in our opinion - will improve the school-level implementation of this ESEA reauthorization. We would be happy to discuss further.

### **Title I**

#### **Reinstate Current "Full Academic Year" Provision for School-level Title I Performance Determinations**

Current law includes only students who have attended a school for the full academic year in school-level performance/accountability determinations, in recognition that some communities have high levels of student mobility (transfers in and out), and that individual schools should not be responsible for students who may have attended for only a few months of the academic year. The performance of students who have attended multiple schools within the LEA during an academic year, however, are included annually in LEA progress determinations. [See current ESEA sec. 1111(b)(3)(C) "*(ix) include students who have attended school in the LEA for a full academic year, but have not attended a single school for a full academic year, except that the performance of students who have attended more than 1 school in the LEA in any academic year shall be used on in determining the progress of the LEA;*"] The rationale for this provision of current law is that schools (including their teachers and principals) should not be held accountable for students who have not received a full year of instruction in that school. Yet, accountability for the performance of highly mobile students is a reasonable and current expectation for the LEA serving those students in multiple schools during the academic year. Of particular concern are the high-poverty communities that experience significantly greater student mobility than other more economically-stable neighborhoods often with one-third or more of their students transferring in or out during a single school year. This provision helps to "level the playing field" and provide for more consistent data on the performance of Title I schools.

Council Recommendation: Reinstate the "full academic year" provision in the same place in section 1111 as in current law by inserting a new clause (x) on page 30 of the Committee Substitute between lines 21 and 22 as follows: "(x) include students who have attended school in the LEA for a full academic year, but have not attended a single school for a full academic year, except that the performance of students who have attended more than 1 school in the LEA in any

academic year shall be used on in determining the progress of the LEA;” and renumbering clauses (x) through (xiii) as clauses (xi) through (xiv).

**Add New Title I School Allocation Discretion for Two-Year Transition when Changing Poverty Measures from FRPL to Community Eligibility, or Other Authorized Measures**

Please consider adding a provision to help the many school districts transitioning from the use of the free and reduced price lunch (FRPL) poverty measure to the community eligibility poverty measure for school-level Title I allocations (within the school district). The 2010 Child Nutrition Amendments allow school districts the option of using “community eligibility” for determining qualification for free school meals. For schools using the community eligibility provision (CEP), students now qualify for free meals based on the percentage of students whose families receive SNAP or TANF benefits (directly certified by the state social services data base) plus a multiplier adjustment. These schools are no longer required to collect the FRPL household income survey forms. Most districts opting for community eligibility, however, will still have a numerous traditional FRPL schools (non-CEP schools) as well as a number of CEP schools. As a result for Title I school-level allocation purposes, many LEAs will be using two entirely different data bases (the FRPL household income survey data, and the CEP direct certification data) which often will result in significant shifts in student poverty counts among schools, and therefore also shift Title I school-level allocations that are based on those different poverty counts.

Some schools will gain poverty counts and some school will lose poverty numbers in this change of poverty data, which will also result in changes in their Title I school-level allocations. Some schools would lose “hundreds of thousands of dollars” in this poverty data shift to CEP, often resulting in the loss of two or three teaching positions. Moreover for the LEAs that have both CEP and non-CEP schools, they are facing an apples-to-oranges situation among their schools due to these differing poverty indicators used to establish Title I school eligibility and Title I allocations. School year 2014-2015 is the first year that this community eligibility option has been available to all LEAs in the nation. More school districts will be making the decision about shifting to community eligibility in the upcoming years.

The Council is proposing to help LEAs adjust to this change in school-level poverty data as they transition to the CEP, or even for districts that decide to transition back to the traditional FRPL poverty surveys. The Council recommends providing LEAs with the ability to implement a two-year transition period where they could adjust school-level Title I allocations at their discretion following a poverty data change. This does not appear to be controversial, and would help to mitigate this clearly unintended consequence of adding the community eligibility provision in 2010 to the National School Lunch Act.

**Council Recommendation:** On page 102 line 14 of the Committee Substitute strike “and” [at the end of sec. 1113(a)(2)(A)(iii)] and also strike “(iv)” on line 15, and insert the following on line 14: “ (iv) elect to adjust allocations under paragraph (3) for a period of up to two consecutive years for any eligible attendance area or school in which allocations have changed following a transition to or from the use of community eligibility under the Richard B. Russell National School Lunch Act or another measure of poverty under subparagraph (1)(E); and (v)”.

### **Reconsider the New 50% High School Title I Rank Order Requirement**

The new Title I rank order service requirement for high schools with 50% poverty is likely to cause significant school-level funding problems for many higher-poverty elementary and middle schools throughout much of the reauthorization period. Even with the special rule for holding harmless current Title I elementary and middle schools, what little additional Title I funding is appropriated in upcoming years could be redirected in many districts solely to these high schools with 50% to 75% poverty. Current Title I elementary and middle schools would have their funding basically frozen under this new federal mandate until the 50% poverty high schools receive a full rank-order Title I allocation. This is expected to occur even where other Title I elementary and middle schools have greater poverty than the high schools at the 50% level. It is also worth noting that 50% FRPL poverty is about the national average among public schools, and many of our urban districts currently use a Title I eligibility cut-off at a higher poverty percentage. The result, therefore, may undercut the traditional concentration of Title I funds to an LEA's highest poverty schools.

The Council is very appreciative that the Committee decided to remove other provisions from the Discussion Draft that would have federally-required Title I funds to be redirected to lower-poverty schools under the portability provision, or would have diverted Title I funds to federally-required intervention activities under the 5% school choice expenditure provision. The Council is requesting that all the current LEA discretion and flexibility in determining the poverty "cut-off" level and allocations for eligible school participation in Title I under current sec. 1113 be retained. It should be noted that LEAs often appropriately decide that investing Title I funds at the elementary and middle schools levels – generally schools with smaller student populations than high schools – produce better results with available per-pupil allocations, and provide critical preschool, primary, intermediate, and middle grade instruction that will benefit students as they move into high schools. Starving Title I elementary and middle school programs of additional federal funds under this provision in order to benefit often lower-poverty high schools is a questionable federal policy change. These are decisions best left to LEAs, not to the federal legislative or executive branch. The Council, therefore, recommends deleting this new high school requirement. [The Council also provides, in the alternative, a less-preferable revision that would mitigate some of the redirection of future funding within LEAs with Title I elementary and middle schools having concentrations of poverty in excess of 50 percent.]

Council Recommendation: On page 97 lines 16 through 18 of the Committee Substitute strike "percent, and exceeds 50 percent in the case of the high schools served by such agency," and on page 97 strike everything from line 23 to line 10 on page 98, and renumber accordingly.

Alternative Recommendation: On page 98 of the Committee Substitute between lines 10 and 11 insert a new clause (iii) as follows: "(iii) Exception. --- A local educational agency may serve eligible elementary and middle school attendance areas with concentrations of children from low-income families in excess of 50 percent under subsection (a), notwithstanding subclause (1)(C)(i)(I) with regard to high schools with concentrations of children from low-income families that exceed 50 percent."

## English Learners

### **Roll-back the Unnecessarily Restrictive and Burdensome Standardized, Statewide English Learner Requirements for SEAs and LEAs in Title I and Title III**

In contrast to the general flexibility allowed for state-determined accountability systems, the Committee bill adds multiple new standardized statewide requirements for English Learners (ELs) that are not required for any other category of students. By imposing federally-established statewide requirements – regardless of the options available for the State – State plans as well as LEA plans and programs will have to be revised to address these new federally-mandated statewide requirements. Moreover, setting “standardized” “statewide” requirements for ELs in programs to develop English language proficiency ignores the wide variation of language proficiencies and prior educational background of ELs, including the refugee population. The new federal requirement to set standardized statewide entrance and exit procedures in Title III will likely be interpreted as requiring standardized criteria which could become narrowly focused on English proficiency, and diminish attention to the equivalent need for progress in content area subjects. The additional federal requirement for the State to set a statewide finite “term of years” for EL students to move from the lowest levels of English language skills to proficiency again ignores the diverse education backgrounds which ELs bring to the classroom and the variety of program approaches used by local educators to meet these students’ language acquisition needs. Each of these new requirements in the Committee bill result in unnecessarily expansive state and local plans in Title I and III programs, and overlook the fact that the Committee bill already requires reporting on “long-term ELs” in language programs for five years or more, requires reporting the number and percentage of EL exiting each year under Title III, and requires setting specific “goals” for progress in language proficiency. While the Discussion Draft properly removed the poorly crafted Title III AMAOs, the Committee bill now establishes a more burdensome and less flexible federal accountability regiment to replace it in Titles I and III. Moreover, some provisions could be interpreted as conflicting or inconsistent when referring to the mandatory establishment of timelines, while concurrently referring to permissibly “taking into account” the time in programs. In fact, current law and the Committee bill seem to acknowledge that program exit requirements at the local level have already been set and reported to parents in a required LEA Title I notification. Additionally in many States, there will a heightened potential for significant disagreements on statewide EL procedures and criteria among LEAs and other interest groups stemming from these new standardized federal requirements in ESEA. Reasonable adjustments to these new EL statewide requirements in ESEA seem warranted, in order to allow both State and local plans and programs to better address the widely diverse needs and backgrounds of ELs. A limited number of revisions are proposed by the Council below.

#### Council Recommendations:

In Title I on page 53 lines 7 and 8 of the Committee Substitute strike “in a State-determined number of years”. And on page 53 line 4 in Title I strike “timelines and”, and in Title III on page 313 line 3, on page 318 line 23, on page 319 lines 16 and 17 and page 329 line 16 strike “timelines and” respectively – thereby deferring to the State to determine how or whether to take into account the time in language programs or to allow the local educators to address that issue on an individual student basis (see permissive language on “time in program” on page 53 lines 11 to 14).

In Title III on page 313 lines 5 through 7 of the Committee Substitute strike “Establishing and implementing standardized statewide entrance and exit procedures, including” and insert “Including”. On page 316 lines 13 through 16 strike “Describe how the agency will establish and implement standardized, statewide entrance and exit procedures, including” and insert “Include”.

### **Restrictive Definition of “Evidence-based” Strategies or Methods Could Result in Major Nationwide ESEA Violations and Non-Compliance**

The use of “evidence-based” terminology across the entire bill, and the narrowness and strictness of the definition in the Title IX, General Provisions raises significant concerns about how federal and state auditors/monitors will apply these provisions.

Realistically, there are a very limited number of local instructional programs, methods, strategies, approaches or activities that meet the strict evidenced-based standards of the Title IX definition. In short, not many of the instructional practices in Title I, II, III or otherwise – including those approaches with promising results or positive evaluations at the local level – can meet the strong or moderate evidence criteria, are backed by a well-designed experimental, quasi-experimental, or tight correlational and controlled study, or necessarily have a basis in high-quality research findings. And for Title I activities, the evidence-based standards in Title IX are even more stringent than other ESEA programs, requiring strong or moderate evidence.

Under the Committee bill, if LEAs are implementing instructional practices that they believe are appropriate, but nonetheless fail to meet the new federal Title IX evidenced-based definition, the LEA could readily be in non-compliance and all expenditures for such activities could be subject to repayment. Since school districts do not typically conduct experimental, quasi-experimental, or tight correlational and controlled studies on their varied instructional practices, but generally implement impact evaluations controlling for some but not all variables, any local-level evidence of positive outcomes is unlikely to meet the new Title IX definitional requirements. Moreover, the Administration’s Investing in Innovation (I3) program underscores that school districts have very few programs that can successfully meet the strong or moderate evidence tiers for I3 grant funding, and rarely even meet the less stringent criteria for the I3 Development Grants. Research entities and universities may conduct studies meeting the new Title IX requirements, but school districts typically do not.

By comparison, NCLB loosely used the terminology of “scientifically-based” or “research-based” programs, but the definition or its interpretation appeared to have sufficient practical flexibility that the new Title IX evidence-based definition does not. Unless revised, fairly widespread problems can be expected in the implementation of all ESEA programs, particularly Title I but also Title II professional development and class size reduction activities, and Title III language and content acquisition programs as well.

**Council Recommendation:** On page 525 of the Committee Substitute strike line 20 through 25, and on line 14 strike “high-quality research findings” and insert “high-quality research or positive program evaluation findings”.

## DRAFT Talking Points – Title I Formula Amendment in the U.S. Senate

- **The purpose of Title I funding is to provide supplemental assistance to help school districts with the cost of educating each poor student**
  - The two major factors in the Title I formula are the number of children living in poverty in each district and each State’s Average Per Pupil Expenditure (APPE, or Expenditure)
- **The amendment eliminates the use of State APPE or any “cost of education” factor in the distribution of federal Title I funds, reducing funding in States with higher per-pupil costs**
  - Eliminating State APPE ignores the fact that wages, goods and services, operations, facilities, and cost of living in some areas of the country result in a higher cost for educating students
- **The amendment eliminates the “Effort” factor and increases scarce federal funding for States making low financial investment in education, thereby rewarding those with a track record of underinvestment in education**
  - The Effort factor is a ratio comparing an individual State’s spending on education with the State’s average per capita income
  - The Effort factor was included to benefit States that had relatively high levels of spending for public K-12 education *relative to* their income levels
  - By eliminating the Effort factor, the amendment ignores the availability of sufficient State financial resources or income and each State’s relative “ability to pay” for education
- **States that have low spending on education, that have low incomes, or are in low-cost areas are assisted by factors in the existing formula under current law:**
  - PER-PUPIL EXPENDITURE: The Expenditure factor lifts low-spending states up to 80% - 85% of the national average per pupil amount (depending on the formula used), even when the State is spending less
  - EFFORT: The Effort factor doesn’t simply look at how much a State is spending on education, it looks at how much the state is spending on education *in relation to* a three-year average of income levels in the State
  - EFFORT: The Effort factor lifts low-effort states up to 95% of the national average when the ratio of per-pupil spending to per capita income is too low.
  - POVERTY: There is no geographic cost of living adjustment (other than for Hawaii and Alaska) for the income thresholds determining which children are from poor families, benefitting States with lower costs and disadvantaging States in higher cost areas.
- **The amendment narrows the distribution of all funding for Title I into a single, modified EFIG formula that emphasizes one funding factor – and eliminates others – in order to disproportionately benefit a specific group of States**



- This approach eliminates the balance that currently exists when the Title I appropriation is distributed through the four formulas that include multiple factors
  - Each of the four current formulas has a distinct pattern of allocations among regions, states, and local educational agencies (LEAs)
  - The current mix of formulas balances aid for the education of disadvantaged children among different parts of the nation
  - This proposal would severely upset that balance, favoring only that part of the nation that benefits most from a modified version of the EFIG formula
- **The amendment’s removal of the “Effort” factor disrupts the balance that exists between “Effort” and “Equity” within the current EFIG formula**
    - The “Effort” factor was always intended to be a companion to the “Equity” factor, to avoid the possibility of simply rewarding states where spending is "equalized" at a very low level
    - The amendment’s removal of both the “Effort” and “Expenditure” factors while preserving the “Equity” factor will reward states that fund all school districts with a low but “equitable” amount of K-12 education funds
- **The amendment distributes the entire national appropriation for Title I through a modified EFIG formula, amplifying the importance of the “Equity” factor despite the factor’s limitations**
    - A number of the nation's highest poverty LEAs are located in States that do not fare well under the EFIG definition of “equity” and will be harmed financially by their State’s lack of an "equitable" state school finance program, through no fault of their own
    - The standard of equity embodied in the EFIG's formula's “Equity” factor is only one of several alternative measures used in school finance studies, and different equity measures lead to substantial differences in the categorization of states as "equitable" or "inequitable."
    - The “Equity” factor takes into account only one (i.e. children in poor families) of the many groups of high-need and high-cost students (e.g., students with disabilities, English language learners, etc.)
    - The “Equity” factor also fails to take into account the large differences in the costs of providing public K-12 education among different LEAs in each state
- **The amendment eliminates ESEA’s original objective of targeting Title I funds to individual school districts based on their share of nationwide poverty concentrations**
    - The EFIG formula first calculates funding to States based on their overall poverty counts relative to other States, ignoring large and growing poverty concentrations in certain school districts within the State
    - This approach differs from the other three Title I formulas, which fund school districts first based on their share of the national poverty levels, and calculates a State total once all of the individual district totals have been determined

- **The amendment could result in sizable shifts in district funding levels from year-to-year as a result of hold-harmless requirements**
  - Under the EFIG formula, the funds needed to provide “hold harmless” amounts for LEAs can only be taken from within each State’s allocation, rather than the larger national pool of funds
  - The result may be significant changes in funding levels for school districts from one year to the next, even when Title I funding is flat
  - Each year, schools districts within each State will be diverting funds from or donating funds to their neighboring districts
  
- **When a State needs more Title I funds:**
  - State legislatures and governors should increase state funding for education, which under current law, would increase a State’s Title I allocation because of the benefits of the “Expenditure” and “Effort” factors
  - Senators should work to increase the appropriations for Title I, which are currently below their FY 2009 funding levels

**Elementary and Secondary Education Act (ESEA) Reauthorization**  
**Major Provisions of Senate Committee Bill and House Bill**

[Major New Requirements and Revisions highlighted in Bold]

<b>Senate Committee Bill Every Child Achieves Act</b> (as reported by Committee)	<b>H.R. 5 Student Success Act</b> (includes amendments adopted on House floor to date)
<u>Overall Purpose</u> To enable States and local communities to improve and support the Nation’s public schools and ensure that every child has an opportunity to achieve.	
	<u>Transition</u> Grants awards prior to enactment continue, but not for more than one year after enactment
	<u>Effective Dates</u> On enactment, except: <ul style="list-style-type: none"> <li>• for noncompetitive programs, 10/1/15</li> <li>• for competitive programs and Impact Act, FY2016 appropriations</li> </ul>
<u>Authorization of Appropriations</u>  Sec. 1002: <ul style="list-style-type: none"> <li>• Such sums as necessary for Title I, Part A annually through FY21</li> <li>• Such sums as necessary for Part B – State Assessments annually through FY21</li> <li>• Such sums as necessary for Part C – Migrant Programs annually through FY21</li> <li>• Such sums as necessary for Part D – Neglected and Delinquent Programs annually through FY21</li> <li>• Such sums as necessary for Title I evaluation activities annually through FY21 under ESEA section 9601</li> <li>• Such sums as necessary for Sec. 1114 School Intervention and Support</li> </ul>	<u>Authorization of Appropriations</u>  Basically freezes authorization levels annually through FY21 <ul style="list-style-type: none"> <li>• \$16.245 billion for Title I, Part A which includes percentage reservations of funds for: <ul style="list-style-type: none"> <li>• Migrant Education at 2.45%,</li> <li>• Neglected and Delinquent Education at 0.31%,</li> <li>• English Language Acquisition at 4.6%, and</li> <li>• Rural Schools Program at 0.6%</li> </ul> </li> <li>• \$710,000 for Part B for various evaluations and studies of Title I</li> </ul>

<p style="text-align: center;"><b>Senate Committee Bill Every Child Achieves Act</b> (as reported by Committee)</p>	<p style="text-align: center;"><b>H.R. 5 Student Success Act</b> (includes amendments adopted on House floor to date)</p>
<ul style="list-style-type: none"> <li>• Repeals Part E – Evaluations under Title I, and Demonstrations, Part F - Comprehensive Reform Demonstrations, and Part H – Dropout Prevention authorities</li> <li>• Moves Part G – Advanced Placement to Title IV Part E – Advanced Learning</li> </ul> <p><b><u>Other Authorizations</u></b></p> <p>Title II Preparing, Training, and Recruiting High-Quality Teachers and Principals (Sec. 2103)</p> <ul style="list-style-type: none"> <li>• Such sums as necessary through FY21 for Part A – Fund for Improvement of Teaching and Learning</li> <li>• Such sums as necessary for National Activities through FY21 with 20% for technical assistance and evaluation, 40% for Programs of National Significance, and 40% School Leader Recruitment and Support Programs</li> <li>• Such sums as necessary for Part B – Teacher and School Leader Incentive Fund through FY21</li> <li>• Such sums as necessary for Part C – American History and Civics Education through FY21</li> <li>• Such sums as necessary for Part D – Literacy Education for All through FY21</li> <li>• Such sums as necessary for Part E – STEM Instruction and Student Achievement through FY21</li> </ul> <p>Title III -- English Learners</p> <ul style="list-style-type: none"> <li>• Such sums as necessary through FY21</li> </ul>	<p>Title II – Teacher Preparation and Effectiveness:</p> <ul style="list-style-type: none"> <li>• \$2.788 billion through FY21 (75% for Part A and 25% for Part B – Teacher and Leader Flexible Grant)</li> </ul> <p>(see Title I set-aside for English Language Acquisition)</p>

<p style="text-align: center;"><b>Senate Committee Bill Every Child Achieves Act</b> (as reported by Committee)</p>	<p style="text-align: center;"><b>H.R. 5 Student Success Act</b> (includes amendments adopted on House floor to date)</p>
<p>Title IV – Safe and Healthy Students</p> <ul style="list-style-type: none"> <li>• Such sums as necessary for Part A – Grants to States and LEAs through FY21</li> <li>• Such sums as necessary for Part B – 21<sup>st</sup> Century Learning Centers through FY21</li> <li>• Such sums as necessary for Part C – Elementary and Secondary School Counseling Program through FY21</li> <li>• Such sums as necessary for Part D – Physical Education Program through FY21</li> </ul> <p>Title V -- Empowering Parents and Expanding Opportunity Through Quality Charter Schools and Magnet Schools</p> <ul style="list-style-type: none"> <li>• Such sums as necessary for Part A -- Charter Schools annually through FY21</li> <li>• Such sums as necessary for Part B -- Magnet Schools annually through FY21</li> <li>• Such sums as necessary for Part C – Javits Gifted and Talented Program annually through FY21</li> <li>• Such sums as necessary for Part D – Education Innovation annually through FY21</li> <li>• Such sums as necessary for Part E – Advanced Learning annually through FY21</li> <li>• Such sums as necessary for Part F – Ready to Learn TV annually through FY21</li> <li>• Such sums as necessary for Part G – Innovative Technology annually through FY21</li> <li>• Such sums as necessary for Part H – Literacy and Arts Program annually through FY21</li> </ul>	<p>Title III Parental Engagement and Local Flexibility annually through FY21</p> <ul style="list-style-type: none"> <li>• Part A-1 - Charter Schools -- \$300 million</li> <li>• Part A-2 - Magnet Schools -- \$91.6 million</li> <li>• Part A-3 - Parent Engagement -- \$25 million</li> <li>• Part B -- Local Academic Flexible Grant -- \$2.3 billion</li> </ul>

<p align="center"><b>Senate Committee Bill Every Child Achieves Act</b> (as reported by Committee)</p>	<p align="center"><b>H.R. 5 Student Success Act</b> (includes amendments adopted on House floor to date)</p>
<ul style="list-style-type: none"> <li>• Such sums as necessary for Part I – Early Learning Alignment and Implementation annually through FY21</li> </ul> <p>Title VI -- State Innovation and Flexibility</p> <ul style="list-style-type: none"> <li>• Part A -- Transferability and Other Flexibility</li> <li>• Such sums as necessary for Part B -- Rural Schools Program annually through FY21</li> </ul> <p>Title VII – Indian and Native Education</p> <ul style="list-style-type: none"> <li>• Such sums as necessary through FY 21 for Part A-1 -- Indian Education LEA Formula Grants</li> <li>• Such sums as necessary through FY 21 for Part A-2 &amp; 3 -- Special Projects and Professional Development</li> <li>• Such sums as necessary through FY 21 for Part B -- Native Hawaiian Education</li> <li>• Such sums as necessary through FY 21 for Part C -- Alaska Native Education</li> </ul> <p>Title VIII -- Impact Aid such sums as necessary annually through FY21</p> <ul style="list-style-type: none"> <li>• Section 2</li> <li>• Basic Payments</li> <li>• Children with Disabilities</li> <li>• Construction</li> <li>• Facilities Maintenance</li> </ul>	<p>(Rural Schools Program authorized as 0.6% set-aside under Title I)</p> <p>Title V – Indian and Native Education</p> <ul style="list-style-type: none"> <li>• \$105.9 million for Indian Education LEA Formula Grants</li> <li>• \$ 24.9 million for Special Projects and Professional Development</li> <li>• \$ 33.2 million for Alaska Native Education</li> <li>• \$ 34.2 million for Native Hawaiian Education</li> </ul> <p>Title IV -- Impact Aid annually through FY21</p> <ul style="list-style-type: none"> <li>• \$66.8 million for previous Section 2</li> <li>• \$1.15 billion for Basic Payments</li> <li>• \$48.3 million for children with disabilities</li> <li>• \$17. million for construction</li> <li>• \$4.84 million for facilities maintenance</li> </ul>

<p style="text-align: center;"><b>Senate Committee Bill Every Child Achieves Act</b> (as reported by Committee)</p>	<p style="text-align: center;"><b>H.R. 5 Student Success Act</b> (includes amendments adopted on House floor to date)</p>
<p style="text-align: center;"><b>Title I Improving Basic Programs Operated by State and Local Educational Agencies</b></p>	<p style="text-align: center;"><b>Title I Aid to Local Educational Agencies</b></p>
<p>No applicable provision</p> <p><u>Purpose</u> To ensure that all children have a fair, equal, and significant opportunity to receive a high-quality education that prepares them of postsecondary education or the workforce, without the need for remediation, and to close achievement gaps.</p>	<p><u>Findings, Sense of Congress and Purpose</u> ESEA prohibits Federal control and mandates on curriculum, national test, or influencing common national standards and assessments through grants or waivers. States and LEAs retain rights and responsibilities for determining curriculum, instructional programs and assessments in el/sec education.</p> <p><u>Purpose</u> To provide all children with the opportunity to graduate prepared for postsecondary education or the workforce by meeting the educational needs of low-achieving children in highest poverty schools, English learners, migratory children, children with disabilities, Indian children, and neglected and delinquent children; closing achievement gaps; providing parent participation opportunities; and encouraging state and local evidence-based reform and innovation</p>
<p><u>No Directly Applicable Provisions</u> (Transferability and other flexibility provisions provided in Title IV below)</p>	<p><u>Flexibility to use Federal Funds</u> <u>Alternate Uses for SEAs</u> May use applicable funds [sections 1003 and 1004, and Title I Part A Subparts 2, 3, and 4] to carry out any State activity authorized or required, unless funds are reserved or spend for required activities, awarded to LEAs or</p>

<p align="center"><b>Senate Committee Bill Every Child Achieves Act</b> (as reported by Committee)</p>	<p align="center"><b>H.R. 5 Student Success Act</b> (includes amendments adopted on House floor to date)</p>
	<p>other entities, or used for technical assistance or monitoring, under:</p> <ul style="list-style-type: none"> <li>• Sec. 1003 – school improvement</li> <li>• Sec. 1004 – state administration</li> <li>• Title I Part A - Subpart 2 – Migrant</li> <li>• Title I Part A – Subpart 3 – N&amp;D</li> <li>• Title I Part A – Subpart 4 – English Language Acquisition</li> </ul> <p><u>Alternative Uses for LEAs</u> May use applicable funds [Title I Part A Subparts 2, 3, and 4] to carry out any local activity authorized or required, unless funds are reserved or spend for required activities, awarded to LEAs or other entities, or used for technical assistance or monitoring, under:</p> <p>Sec. 1003 – school improvement</p> <ul style="list-style-type: none"> <li>• Title I Part A – Subpart 1 – Basic Grants</li> <li>• Title I Part A - Subpart 2 – Migrants</li> <li>• Title I Part A – Subpart 3 – N&amp;D</li> <li>• Title I Part A – Subpart 4 – English Language Acquisition</li> </ul> <p>Administrative cost limitations are retained. Supplement not supplant, comparability, private school participation, civil rights requirements and standards/assessments (sec. 1111) and eligible attendance areas (sec. 1113) are retained.</p>
<p><u>Section 1003 – School Improvement and State Administration</u></p> <ul style="list-style-type: none"> <li>• Up to 4% may be reserved for SEA technical assistance and support for LEAs (not less than 95% directly</li> </ul>	<p><u>Section 1003 and 1004 -- School Improvement and State Administration</u></p> <p><u>Sec. 1003 -- School Improvement Set-Aside</u></p> <ul style="list-style-type: none"> <li>• <b>Increases State school improvement set-aside to 7% of</b></li> </ul>



<p align="center"><b>Senate Committee Bill Every Child Achieves Act</b> (as reported by Committee)</p>	<p align="center"><b>H.R. 5 Student Success Act</b> (includes amendments adopted on House floor to date)</p>
<p>allocated to LEAs for activities required under sec. 1114</p> <ul style="list-style-type: none"> <li>• Maintains the current option for the State, with LEA approval, to provide activities directly through other entities including for-profit organizations</li> <li>• Priority given to LEAs that serve the lowest performing elementary and secondary schools identified under sec. 1114; demonstrate the greatest need for funds as determined by the State; and demonstrate the strongest commitment to using evidence-based interventions in the lowest performing schools</li> <li>• Maintains the current rule that the set-aside not decrease the amount of any LEAs Title I allocation below the prior year</li> <li>• State Administration unchanged 1% with cap</li> </ul>	<p><b>local allocation (previously 4%). Allows states and educational service agencies, as well as non-profit and for-profit external providers to directly provide school improvement services to LEAs with LEA approval of direct service approach. Criteria for “greatest need for funds” is repealed as is the commitment to use funds for the lowest-achieving schools. Repeals SEA reporting of the poverty level of schools receiving subgrant funds.</b></p> <ul style="list-style-type: none"> <li>• <b>Adds new 3% State set aside for LEA grants to support “Direct Students Services” with up to 1% for outreach to parents, not more than 2% for related administration costs, and the remainder for the hourly rate of tutoring determined by a state-approved provider and transportation required for public school choice, if insufficient funds, priority provided to LEAs with the greatest number of low-performing schools</b></li> <li>• Maintains the current rule that the set-aside not decrease the amount of any LEAs Title I allocation below the prior year</li> </ul> <p><u>Section 1004 -- State Administration</u></p> <ul style="list-style-type: none"> <li>• State Administration unchanged 1% with cap</li> </ul>

<p style="text-align: center;"><b>Senate Committee Bill Every Child Achieves Act</b> (as reported by Committee)</p>	<p style="text-align: center;"><b>H.R. 5 Student Success Act</b> (includes amendments adopted on House floor to date)</p>
<p style="text-align: center;"><i>Part A</i></p>	<p style="text-align: center;"><i>Part A – Improving the Academic Achievement of the Disadvantaged</i></p>
<p style="text-align: center;">SUBPART 1 – BASIC PROGRAM REQUIREMENTS</p>	<p style="text-align: center;">SUBPART 1 – IMPROVING BASIC PROGRAMS OPERATED BY LEAS CHAPTER A --BASIC PROGRAM REQUIREMENTS</p>
<p><u>Section 1111 – State Plans</u></p> <ul style="list-style-type: none"> <li>• State Plan developed with broad consultation including with the Governor, and subject to federally-established peer review with respect to State and local judgments, and deemed approved within 90 days unless Secretary presents a body of substantial evidence that the plan does not meet requirements.</li> <li>• Limitations established on federal requirements on standards, assessment instruments or items, state goals and timelines, weights, measures or indicators, criterion, accountability systems, teacher and principal evaluation systems or indicators of effectiveness, or require data collection beyond data derived from existing Federal, State and local reporting requirements and data sources (with rule of requiring explicit authority under Federal law)</li> <li>• Duration up to 7 years and periodically reviewed and revised by SEA to reflect State changes in strategies and programs</li> </ul>	<p style="text-align: center;"><b>Chapter B – Allocations</b></p> <p><u>Section 1111 – State Plans</u> Filing and Consolidated Plans:</p> <ul style="list-style-type: none"> <li>• Minimal revisions</li> </ul>

<p style="text-align: center;"><b>Senate Committee Bill Every Child Achieves Act</b> (as reported by Committee)</p>	<p style="text-align: center;"><b>H.R. 5 Student Success Act</b> (includes amendments adopted on House floor to date)</p>
<p><u>Standards:</u></p> <ul style="list-style-type: none"> <li>• States must assure that they have adopted challenging academic content standards and academic achievement standards for use in its LEAs and schools to carry out Title I Part A</li> <li>• Standards required in math, reading or language arts, and science, and any other subjects determined by the State, which include the same knowledge, skills, and achievement levels</li> <li>• Achievement standards include not less than three levels of achievement</li> <li>• Standards are the same standards that apply to all public schools and public school children</li> <li>• States must assure that the content standards are aligned with higher education entrance requirements (without remediation); relevant state career and technical education standards; and relevant state early learning guidelines (under the CCDBG)</li> <li>• Allows alternate academic achievement standards for students with the most significant cognitive disabilities, but other alternate or modified standards for use in Title I is prohibited</li> <li>• States must demonstrate that they have adopted English language proficiency standards aligned with State academic standards to ensure proficiency in four domains, address different proficiency levels, and are aligned with the State academic standards so that achieving English language proficiency indicated sufficient knowledge of English to validly measure achievement on the</li> </ul>	<p><u>Standards:</u></p> <ul style="list-style-type: none"> <li>• States demonstrate that they have adopted academic content standards and aligned achievement standards for mathematics, reading or language arts and science, and may adopt standards for other subjects</li> <li>• Eliminates the federal requirement of at least three performance levels</li> <li>• Standards apply to all public schools and the same knowledge, skills, and achievement levels expected for all public students</li> <li>• State retain right to adopt alternate academic achievement standards for students with disabilities with the most significant cognitive disabilities</li> <li>• SEA describe how it will establish English language proficiency standards derived from the four domains, and aligned to academic content standards</li> </ul>

<p style="text-align: center;"><b>Senate Committee Bill Every Child Achieves Act</b> (as reported by Committee)</p>	<p style="text-align: center;"><b>H.R. 5 Student Success Act</b> (includes amendments adopted on House floor to date)</p>
<p>State's reading or language arts standards</p> <p><u>Assessments</u></p> <ul style="list-style-type: none"> <li>• States must demonstrate the implementation of a set of high-quality statewide academic assessments that: includes at minimum mathematics, and reading or language arts, are the same assessments for all public school students, are administered to all public school students, are aligned with State standards, and are valid and reliable and of adequate technical quality for each purpose under the Act, and measure the annual academic achievement against state standards.</li> <li>• Administered in grades 3-8, and at least once in grades 9-12 for math and reading or language arts.</li> <li>• Administered at least once in grades 3-5, 6-8, and 9-12 in science, and silent on other subjects</li> <li>• Administered at State discretion through a single summative assessment or multiple state assessments which in totality provide a valid summative score</li> </ul> <ul style="list-style-type: none"> <li>• Provide for participation of all students with reasonable accommodations and includes English learners and to extent</li> </ul>	<p><u>Assessments</u></p> <ul style="list-style-type: none"> <li>• Implement student academic assessments in mathematics and reading or language arts, or other subjects at State discretion</li> <li>• Aligned with State standards</li> <li>• Used to determine performance of each LEA and public school</li> <li>• Used to measure the academic achievement of all public students</li> <li>• Used to measure individual student achievement proficiency and growth</li> <li>• Administered in grades 3-8 and at least once in grades 9-12 for math, and reading or language arts, and at least once in grades 3-5, 6-9, and 10-12 for science, and for other subjects to be administered at State discretion</li> <li>• Administered in a single summative assessment or multiple assessments that result in a single summative score</li> <li>• <b>Adds two new subgroups to the required capacity to disaggregate state assessment results for students of active duty military families, and foster care students to the current racial and ethnic groups, ELs, students with disabilities, economically disadvantaged, and by migrant and gender status.</b></li> <li>• Maintains current language on participation and accommodations, and the language and form most</li> </ul>

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<p>practicable in the language yielding accurate data</p> <ul style="list-style-type: none"> <li>• Maintains 3 year newcomer authority for tests not in English and the 2 year case by case exception, and other provisions of current law</li> </ul> <p>(See similar 95% provision in accountability requirements)</p> <ul style="list-style-type: none"> <li>• Does not include any of the current provision for reporting students in the LEA for a full year but not in any one school for a full year</li> <li>• Adds Rule of Construction that nothing prohibits an LEA from administering its own assessments in lieu of the State assessment system with State approval and meeting the requirements of this section</li> <li>• Enable results to be disaggregated by State, LEA and school by traditional subgroups, including migrant and gender disaggregation (maintains exceptions for statistically insufficient information or personally identifiable information)</li> <li>• Developed to extent practicable using universal design principles</li> <li>• <b>Allows for alternate assessments aligned with grade-level standards and alternative assessments the State develops alternate assessments aligned with alternate standards with <u>a 1% cap on total number of students in State who are assessed in a subject and other requirements</u></b></li> <li>• Maintains provision for a state lacking authority on standards and assessments</li> </ul>	<p>likely to yield accurate and reliable information to the extent practicable</p> <ul style="list-style-type: none"> <li>• Testing in English after three consecutive school years of U.S. school attendance with another 2 years in another language on a case by case basis</li> <li>• Maintains the current 95% assessment participation rate for all students and each subgroup</li> <li>• Does not include any of the current provision for reporting students in the LEA for a full year but not in any one school for a full year</li> <li>• Allows LEAs to use local assessment in lieu of state assessments with state approval, comparable data, and meeting requirements of the ESEA assessment provisions</li> <li>• Allows alternate assessments for students with the most significant cognitive disabilities</li> </ul>

<p align="center"><b>Senate Committee Bill Every Child Achieves Act</b> (as reported by Committee)</p>	<p align="center"><b>H.R. 5 Student Success Act</b> (includes amendments adopted on House floor to date)</p>
<ul style="list-style-type: none"> <li>• Demonstrates that LEAs will provide for an annual assessment of English proficiency measuring the four domains for all English learners in schools served by the SEA</li> <li>• Includes rule allowing for computer adaptive assessments meeting assessment requirements and measuring performance above or below grade level, and for use with students with significant cognitive disabilities for determining whether the student is performing at grade level</li> <li>• Includes Rule of Construction allowing parent opt-out of assessment participation if allowed under state or local law</li> </ul>	<ul style="list-style-type: none"> <li>• Provide annual English Language Proficiency Assessments of all English learners in all schools aligned to the English language proficiency standards</li> <li>• Allows for computer adaptive assessments and the use of off-level items for assessment and accountability purposes</li> </ul>
<p><u>State Accountability System</u> State must describe in the state plan a single, statewide accountability system based on state academic standards to ensure all students graduate prepared for postsecondary education or the workforce without remediation</p> <ul style="list-style-type: none"> <li>• Annually establishes State-designed goals for all students and each category of students that take into account the progress necessary to graduate from high school prepared for postsecondary education or the workforce including at a minimum: 1) academic achievement which may include growth, and 2) high school graduation rates under the 4-year adjusted cohort or at State discretion the extended-year adjusted cohort</li> </ul>	<p><u>State Accountability Systems</u> States must demonstrate that they have developed and are implementing a single statewide accountability system within two years of enactment (silent on interim years accountability)</p> <p>Elements of the Single, Statewide Accountability System:</p> <ul style="list-style-type: none"> <li>• Annually measure the academic achievement of all public schools students in math and reading or language arts, and may include growth measures using state assessments and other academic indicators</li> </ul>

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<ul style="list-style-type: none"> <li>• Annually measures and reports on the following indicators for all public schools and LEAs:               <ol style="list-style-type: none"> <li>1) academic achievement in public schools toward meeting the above goals, which may include measures of growth;</li> <li>2) academic success on another statewide indicator for non-high schools;</li> <li>3) graduate rates for high schools toward meeting the above goals;</li> <li>4) <b>English language proficiency for all ELs which may include measures of growth;</b> and</li> <li>5) <b>not less than one other indicator of school quality, success, or student supports as determined by the State (which may include postsecondary or workforce readiness, student engagement, educator engagement [such as satisfaction including working conditions with the school), teacher quality and effectiveness, and absenteeism, student/parent/educator surveys, school climate and safety, access to advanced programs, or other state-determined measure.</b></li> </ol> </li> <li>• Disaggregate data for economically disadvantaged, major racial and ethnic groups, children with disabilities, and EL categories of students</li> <li>• Annually identify and meaningfully differentiate among all public schools based on all indicators for all students and each category of students, and use academic achievement and the other required indicator as substantial factors</li> <li>• Meet the requirements for School Intervention and Support for Title I schools under sec. 1114</li> </ul>	<ul style="list-style-type: none"> <li>• Annually evaluate and identify the academic performance of each public schools (not just Title I), based on academic achievement, and overall performance, and achievement gaps compared to all students in the school with economically disadvantaged, major racial and ethnic groups, students with disabilities, and English learners unless insufficient statistically or personally identifiable</li> <li>• Includes a school improvement system for low-performing schools receiving Title I funds that implements interventions addressing the schools' weaknesses by the LEA, but repeals current sec. 1116</li> </ul>

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<ul style="list-style-type: none"> <li>• Measures the annual progress of not less than 95% of all students and each category of students required to take the assessments and how this requirement is factored into the state accountability system</li> <li>• Exception allows exclusion of recently arrived ELs who have attended US schools for less than 12 months from one administration of the reading or language arts assessment, except for the results of the English language proficiency assessments for the first year of enrollment in the state-determined accountability system</li> <li>• Include state academic assessment results (but not ELPA results) for former ELs for not more than 2 years after no longer identified</li>   <li>• Charter school accountability to be overseen in accordance with State law</li>   <li>• Includes multiple express limitations on the Education Department authority to establish accountability or personnel evaluation requirements or interfere with state and local decisions</li> </ul>	<p>(95% participation provision in assessment requirements)</p> <ul style="list-style-type: none"> <li>• States may delay inclusion of English learner for purposes of the evaluation and identification of schools above, if the students have attended schools in the U.S. for less than two years in the case of math, and less than three years in the case of reading or language arts, except in States using growth calculations in evaluation and identification systems these students in those growth calculations</li> <li>• Implementation of standards, assessments, and accountability system required within 2 years of enactment</li> <li>• Charter school accountability to be overseen in accordance with state law</li> <li>• Prohibits the Secretary from establishing any criteria on any aspect of the State accountability system, or to influence in any way the peer review process</li> <li>• Nothing construed to alter any state law or regulations granting parents authority over repeatedly failing schools</li> <li>• Failure to meet requirements will result in withholding of State administration funds</li> </ul>
<p><u>Other State Plan Provisions and Assurances</u></p>	<p><u>Other State Plan Requirements</u></p>



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<ul style="list-style-type: none"> <li>• Requires States to address their determination of minimum N sizes in the accountability system</li> <li>• Requires a description of the monitoring and evaluation intervention and support strategies implemented by LEAs for schools identified as in need of intervention and support, including the lowest-performing schools, schools identified for other reasons including subgroups not meeting state goals, and steps to further assist LEAs if intervention strategies are not working</li> <li>• Assurance that the SEA will support the collection and dissemination of effective parental and family engagement strategies</li> <li>• <b>In the case of a State using Title I funds to offer early childhood education, how the State provides assistance and support to LEAs and individual schools</b></li> <li>• <b>In the case of a State using Title I funds to support multi-tiered systems of supports, positive behavioral interventions, or early intervening services, how the State will assist LEAs</b></li> <li>• <b>How low-income and minority children assisted under Title I are not service at disproportionate rated by ineffective, out-of-field, and inexperienced teachers, principals or other school leaders, and the measures the SEA will use to evaluate and publicly report the progress of the SEA</b></li> <li>• How the State will make public the methods or criteria the State or its LEAs are using to measure teacher, principal and other school leaders effectiveness</li> </ul>	<ul style="list-style-type: none"> <li>• Collects and disseminates information on effective parental involvement practices</li> </ul>

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<p>above – but not to be construed as requiring a State to develop or implement an evaluation system</p> <ul style="list-style-type: none"> <li>• <b>How the SEA will protect each student from physical or mental abuse, aversive behavioral interventions that compromise student health and safety, or any physical restraint or seclusion imposed solely for discipline or convenience, which may include how the SEA will identify and support LEAs and schools with high levels of seclusion and restraint or disproportionality</b></li> <li>• <b>How the SEA will address school discipline issues which may include how the SEA will identify and support LEAs and schools with high levels of exclusionary discipline or disproportionality</b></li> <li>• <b>How the SEA will address school climate issues which may include technical assistance on strategies to reduce school violence, bullying, harassment, drug and alcohol use, and chronic absenteeism</b></li> <li>• <b>How the State determines with timely and meaningful consultation with LEAs the timelines and annual goals for progress necessary to move ELs from the lowest levels of English proficiency to the State-defined proficient level in a State-determined number of years (and may take into account the amount of time enrolled in a language program and grade level)</b></li> <li>• <b>Provide other information on how the State proposes to use Title I funds to meet Title I purposes as the State deems appropriate, which may</b></li> </ul>	

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<p><b>include how the SEA will assist LEAs in identifying and serving gifted and talented students, and encouraging a variety of well-rounded education experiences</b></p> <ul style="list-style-type: none"> <li>• <b>Steps taken by the SEA to collaborate with the State agency administering parts B and E of the Social Security Act to improve the educational stability of children in foster care including an assurance</b></li> <li>• Assurance that the SEA will assist each LEA and schools affected by the State plan meet Title I requirements</li> <li>• SEA support the collection and dissemination of effective family engagement strategies</li> <li>• Assurance that all teachers and paraprofessionals working in a Title I program meet applicable State certification and licensure requirements, including alternative certification</li> <li>• <b>Assurance that the State has professional standards for paraprofessionals including qualifications under NCLB</b></li> <li>• Retains required participation in NAEP and other provisions of current law</li> <li>• Maintains the Committee of Practitioners</li> </ul>	<p>(Committee of Practitioners included in State Administration requirements)</p>
<p><u>State and Local Report Cards</u> Requires concise and understandable annual State report card and continues to require aggregated and disaggregated achievement information for subgroups of students, including other indicators used by the state to determine student achievement</p> <ul style="list-style-type: none"> <li>• Requires description of the State accountability system including goals for all students and subgroups, and the</li> </ul>	<p><u>State and Local Report Cards</u> Reports required to be concise and understandable</p>



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<p><b>rates of effective and ineffective teachers, principals and other school leaders in the aggregate and disaggregated by high-poverty versus low-poverty schools (top and bottom quartile) and high-minority and low-minority schools in the State</b></p> <ul style="list-style-type: none"> <li>• Requires information on LEA and school performance, including schools identified for intervention and support under sec. 1114</li> <li>• <b>For States with teacher, principal and other school leader evaluation systems, includes results of the evaluations without personally identifiable information</b></li> <li>• <b>Requires per-pupil expenditures of Federal, State and local funds, including actual personnel expenditures and non-personnel expenditures disaggregated by source for each LEA and school in the State for the preceding year</b></li> <li>• <b>Requires the number and percentage of students with significant cognitive disabilities taking an alternate assessment by grade and subject</b></li> <li>• <b>Requires information on the acquisition of English proficiency by ELs</b></li> <li>• <b>Requires reporting by SEAs and LEAs of information provided to OCR on: 1) the number and percentage of: (a) students enrolled in gifted and talented programs, (b) students enrolled in coursework to earn postsecondary credit, and children enrolled in preschool programs; 2) average class size by grade; and 3) other state-determined indicators</b></li> </ul>	<ul style="list-style-type: none"> <li>• Requires information on LEA and school performance</li> </ul>

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<ul style="list-style-type: none"> <li>• <b>Requires reporting the number and percentage of students attaining career and technical proficiencies as defined in the Perkins Act</b></li> <li>• Requires reporting of NAEP results for reading and math for the State compared to the national average</li> <li>• Requires reporting on the percentage of students not meeting State goals by traditional subgroups</li> <li>• <b>Requires reporting the number of military-connected students and their academic achievement (not to be used for school or LEA accountability purposes)</b></li> <li>• Requires additional information at State discretion</li> </ul> <p><b><u>Rule of Construction:</u> OCR-related data in State Report Cards will continue to be reported even if OCR no requires that information</b></p> <p><u>Annual LEA Report Card</u> At minimum, provide concise, understandable and accessible information on an annual LEA Report Card and <b>for each school on a School Report Card</b> including:</p> <ul style="list-style-type: none"> <li>• All information required on the State Report Card including for the LEA the achievement on the statewide assessments for the LEA compared with the State, and for schools the achievement on the statewide assessments for each schools compared with the LEA and the State as a whole</li> <li>• Other information required by the State or information included at LEA discretion</li> </ul> <p>Cost Reduction: SEAs and LEAs shall take steps as possible to reduce data costs including using existing data</p>	<p style="text-align: center;">(Required in assessment provisions)</p>

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<p><u>Annual State Report to Secretary</u> Continues to require additional information such as the percentage of students making at least one year of academic growth, schools in need of required interventions, and information of school choice participation under Title I.</p> <p><u>Secretary’s Report Card:</u> Continues the Secretary’s report to the congressional Education Committees</p>	
<p><u>Parents Right to Know (included in LEA Plans)</u> At the beginning of each school year, the LEA must notify the parents of each student in a Title I participating school that they may request information on the professional qualifications of their student’s classroom teachers, including at minimum whether the teacher has met state qualifications, is teaching under an emergency or provisional status, the field of discipline of the certification, and whether the child is served by paraprofessionals and their qualifications. In addition, the parent may request information on the level of student achievement and growth, if applicable and available, on state assessments and timely notice of their child been taught for 4 consecutive weeks or more by a teacher not meeting applicable state certification and licensure requirements.</p> <p><u>Voluntary State Partnerships:</u></p> <ul style="list-style-type: none"> <li>• Voluntary state partnerships permitted while any requirement, coercion, priority or incentive to enter into partnerships by the Department is prohibited</li> </ul>	<p><u>Parents Right To Know</u> At the beginning of each school year, a school receiving funding must provide individual parent information on the achievement level of the parent’s child on state assessments and other adopted academic indicators, in an understandable format and language to the extent practicable (additional provisions under Title II B regarding qualifications)</p> <p><u>Voluntary State Partnerships for Standards and Assessment</u></p> <ul style="list-style-type: none"> <li>• Prohibits the Secretary to require or incentivize States to adopt the Common Core standards, other common standards, or assessments</li> </ul>

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	<p>or participate in any state partnership</p> <p><u>Construction</u> – Nothing to be construed to prescribe the use of academic assessments</p>
<p><u>Sec. 1112 – LEA Plans</u></p> <ul style="list-style-type: none"> <li>• Revises LEA plan requirements which must be approved by the SEA if it meets requirements and enables children served to meet State standards</li> <li>• Includes most of the existing LEA plan requirements and assurances, and revises and adds other requirements as well</li> <li>• Submitted for the first year of the reauthorization and remains in effect for the duration of LEA participation, but must be periodically reviewed, and as necessary revised to reflect changes in strategies and programs. A renewed plan required on a periodic basis as determined by the SEA.</li> <li>• <b>Requires description of how the LEA will work with each of the schools served by the agency so that students meet State academic standards by developing and implementing a comprehensive program to meet the academic needs of all students” (with no clarification regarding SWP or TAS or non-Title I schools), quickly identifying students at risk of academic failure, providing additional assistance to individual students needing help, and identifying significant gaps in achievement and grad rates between categories of students and developing strategies, and identifying and implementing evidence-based methods and strategies intended to</b></li> </ul>	<p><u>Sec. 1112 – LEA Plans</u></p> <ul style="list-style-type: none"> <li>• Reduces a number of the LEA plan requirements and assurances from current law</li> <li>• Requires an LEA plan for the first year after enactment but no revisions are required thereafter, although periodic review is required</li> </ul>



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<p><b>strengthen the academic program and improve school climate.</b> [Does not include “general description of the nature of programs to be conducted” raising questions about whether SWP and TAS plans might have to be included in the LEA Plan.]</p> <ul style="list-style-type: none"> <li>• <b>Identify and address any disparities in rates of low-income and minority students being taught by ineffective, inexperienced and out-of-field teachers</b></li> <li>• Describe how the LEA will coordinate and integrate Title I services with other preschool services within the LEA including transition plans, and if appropriate use funds to support preschool programs</li> <li>• Describes actions to assist identified schools under sec. 1114, including the lowest-performing schools, and clarifies actions can be taken which apparently would include the use of local funds for targeted school improvement initiatives by the LEA in schools identified for other reasons</li> <li>• <b>If an LEA proposes to use funds to support a multi-tiered system of supports, positive behavioral interventions or early intervening services, how the services will be provided and coordinated with similar activities under IDEA</b></li> <li>• <b>How the LEA will implement strategies to facilitate effective transitions from middle to high schools and to postsecondary education</b></li> <li>• <b>How the LEA will address school discipline issues which may include supporting school with significant</b></li> </ul>	<ul style="list-style-type: none"> <li>• Includes “general description of the nature of programs to be conducted” raising questions about whether SWP and TAS plans might have to be included in the LEA Plan</li> <li>• <b>Describes how the LEA will address disparities in the rates of low-income and minority students being taught by ineffective teachers</b></li> <li>• Provides no clarification regarding the use of Title I funds for targeted school improvement initiatives by the LEA</li> </ul>

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<p><b>disparities or high rates of subgroup discipline actions</b></p> <ul style="list-style-type: none"> <li>• <b>How the LEA will address school climate issues which may include improving performance on school climate indicators</b></li> <li>• <b>Other information on how the LEA proposes to use funds to meet the purposes of Title I, as determined to be appropriate by the LEA, which may include assisting schools in identifying and serving gifted and talented students and encouraging the offering of well-rounded education experiences</b></li> <li>• Continues to require all the parent notification and opt-out requirements for students placed in language instructional programs</li> </ul>	<ul style="list-style-type: none"> <li>• Continues to require all the parent notification and opt-out requirements for students placed in language instructional programs</li> </ul>
<p><u>Section 1113 – Eligible School Attendance Areas, Schoolwide Programs, and Targeted Assistance Schools</u></p> <ul style="list-style-type: none"> <li>• Retains current requirements and options in selection Title I school attendance areas</li> <li>• Retains current schoolwide program authority, but reduces the number of requirements</li> <li>• Retains current targeted assistance school authority, but reduces the number of requirements</li> </ul>	<p><u>Sec. 1113 – Eligible School Attendance Areas</u></p> <ul style="list-style-type: none"> <li>• Retains current requirements and options in selecting Title I school attendance areas</li> </ul>
<ul style="list-style-type: none"> <li>• <b>Creates a major exception to the current 40% poverty threshold for operating a Title I Schoolwide Program based on LEA discretion to also allow the consolidation and use</b></li> </ul>	<p><u>Sec. 1114 – Schoolwide Programs</u></p> <ul style="list-style-type: none"> <li>• Eliminates the 40% poverty level currently required to use Title I funds in a schoolwide approach, thereby allowing all Title I schools</li> </ul>

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<p><b>with other Federal, State and local funds to upgrade the entire educational program of the school serving an eligible attendance area below the 40% poverty threshold</b></p> <ul style="list-style-type: none"> <li>• <b>Adds new requirement to the current 7% poverty “rank and serve” rule for Title I schools by also requiring rank order and serving any high schools with 50% or more poverty. Title I elementary and middle schools that would otherwise lose funding under the new requirement to serve high school with 50+% poverty could be held-harmless at their current funding level but would not necessarily benefit from any increased Title I appropriations until these high schools are fully funded under the new rank order.</b></li> <li>• For secondary schools, allows the LEA to use the same measure of poverty for all schools or an accurate estimate of the number of low-income students calculated by applying the average percentage from elementary attendance areas that feed into the secondary school to the enrollment</li> <li>• Adds provision for homeless children that funds may be determined based on a needs assessment and may be used for services not ordinarily provided to other Title I students including funding a liaison and transportation pursuant to the McKinney Act</li> <li>• Clarifies that the LEA may reserve funds for early childhood education programs</li> <li>• <b>Revises the supplement not supplant requirement for Schoolwide Programs by a new compliance provision in which the LEA</b></li> </ul>	<p>to be schoolwide programs regardless of poverty level</p> <ul style="list-style-type: none"> <li>• Allows non-profit and for-profit providers to deliver SWP services</li> </ul>

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<p><b>demonstrates that the methodology for allocating State and local funds ensures that each Title I school receives all the state and local funds it would otherwise receive if it were not a Title I school. (Likely to change the local compliance procedures but may not significantly affect SWP uses of funds.)</b></p> <ul style="list-style-type: none"> <li>• <b>Eliminates the current law provision allowing Targeted Assistance Schools to be accountable for the performance of the students served [section 1116(b)(1)(D)].</b></li> </ul>	
<p><i>Consolidates Provisions of Schoolwide Programs, Targeted Assistance Schools, and Eligible Attendance Areas provisions under LEA Plans (sec. 1112)</i></p>	<p><u>Sec. 1115 – Targeted Assistance Schools</u></p> <ul style="list-style-type: none"> <li>• Makes minimal revisions to current law</li> <li>• Allows non-profit and for-profit providers to deliver TAS services</li> </ul>
<p><u>New Sec. 1114 – School Identification, Interventions, and Supports</u> States will review use the state accountability system under sec. 1111 to annually:</p> <ul style="list-style-type: none"> <li>• identify public schools receiving Title I funds that are in need of intervention and support</li> <li>• ensure that identified Title I schools implement an evidence-based intervention and support strategy designed by the SEA or LEA</li> <li>• prioritize school most in need as determined by the state using the results of the accountability system</li> <li>• monitor and evaluate implementation of intervention and support strategies and use results to take appropriate steps to</li> </ul>	<p><u>Sec. 1116 and 1117 (School Improvement and School Support)</u> Repealed</p>

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<p>change or improve strategies as necessary</p> <ul style="list-style-type: none"> <li>• State must make technical assistance available for LEAs with identified schools</li> <li>• State takes such actions as appropriate and that comply with state law</li> </ul> <p>LEA with an identified schools with broad consultation will:</p> <ul style="list-style-type: none"> <li>• Conduct a review of the school including indicators and measures from the state accountability system</li> <li>• <b>Conduct a review of policies, procedures, personnel decisions, and budgetary decisions of the LEA including measures on the LEA and school report cards that could contribute to identification</b></li> <li>• Develop intervention and support strategies (as described below) proportional to the needs of the school</li> <li>• Develop a rigorous comprehensive plan which <u>may</u> include: technical assistance, improved services from the LEA, increased curriculum, instructional support or wrap-around services or other resources for students, personnel changes, redesigning learning time and teacher collaboration time, use of data, increased coaching and support, improving school climate, family and community engagement, establishing partnerships (including private entities)</li> <li>• Monitoring progress and adjusting strategies</li> <li>• LEA will notify parents of school identification as in current law</li> <li>• <b>LEA will develop and implement evidence-based intervention and support strategies for identified</b></li> </ul>	

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<p><b>schools</b> designed to address the reasons for identification; be proportional to the reasons of identification; and distinguish between the lowest performing schools and other schools identified for other reasons such as subgroup performance</p> <p><b><u>State-Determined Strategies -- Consistent with State law, the SEA may establish alternative State determined strategies that can be used by LEAs to assist identified schools, in addition to LEA-developed assistance strategies</u></b></p> <p><u>Public School Transfer Option</u> The LEA may provide to all students in identified schools the option to transfer to another public school in the LEA unless the option is prohibited by State law. Priority provided to the lowest-achieving children from low-income families. The LEA may spend not more than 5 percent of its Title I allocation on transportation under this provision.</p> <p>Prohibition against Department criterion on school assistance strategies</p> <p><u>Funds for Local School Interventions and Supports</u> States will be allocated funds for School Intervention and Support Grants based on their Title I allocations</p> <ul style="list-style-type: none"> <li>• SEA must describe the process and criteria for subgrants, including how the lowest-performing schools will be served</li> <li>• SEA must describe the process and criteria used to determine if an LEA application meets the requirements of this subsection</li> </ul>	

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<ul style="list-style-type: none"> <li>• SEA must ensure that a comprehensive LEA review of each identified schools is implemented and evidence-based strategies that are likely to be successful will be sued</li> <li>• SEA must ensure subgrant geographic diversity</li> <li>• SEA will set priorities for subgrant awards including for LEAs serving schools identified as lowest-performing schools</li> <li>• SEA will reduce barriers to implementation including providing operational flexibility</li> <li>• SEAs may reserve not more than 5 percent of their allocation, <b>and may reserve more if an LEA fails to carry out its responsibilities</b></li> </ul> <p><u>LEA Subgrants</u> 95% of the State allocation will be used for competitive subgrants to LEAs of a duration of not more than 5 years, which may include a planning year</p> <ul style="list-style-type: none"> <li>• Statewide school districts, consortia of LEAs, or educational service agencies (if these entities are constituted as LEAs) serving identified schools may receive subgrants</li> <li>• LEAs must describe the process for selecting appropriate evidence-based school intervention and support strategies for each school to be served</li> <li>• LEAs must describe the specific evidence-based interventions and supports to be used in each school, implementation timelines and budgets including school level expenditures</li> <li>• LEAs must provide technical assistance</li> </ul>	

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<ul style="list-style-type: none"> <li>• LEAs must assure that each school served will receive all the State and local funds it would have received in the absence of the subgrant</li> <li>• The traditional federal supplement not supplant requirement is applicable</li> <li>• <b>LEAs must use funds to implement evidence-based strategies in identified schools</b>, and may use funds at the LEA level to directly support implementation</li> </ul> <p><u>Sections 1119 is repealed</u> (Current NCLB paraprofessional requirement includes as a new requirement under Title I State Plan provisions)</p>	<p><u>Sec. 1119 – Qualifications of Teachers and Paraprofessionals (including Highly Qualified Teacher requirements)</u> Repealed (Floor amendment pending to reinstate current qualifications requirements for new paraprofessionals in Title I programs.)</p>
<p><u>Section 1115 – Parental Involvement</u></p> <ul style="list-style-type: none"> <li>• Requires the addition of objectives for the LEA written parent and family engagement policy</li> <li>• <b>Requires designing evidence-based strategies for more effective parental involvement</b></li> <li>• Distributes 85% rather than 95% of the parent set-aside to the school level and requires one of five enumerated activities</li> </ul>	<p><u>Sec. 1118 – Parental Involvement</u></p> <ul style="list-style-type: none"> <li>• Makes minimal revisions to current law</li> </ul>
<p><u>Sec. 1116 – Participation of Private School Children</u></p> <ul style="list-style-type: none"> <li>• <b>Expenditure requirement to be equal to the proportion of funds allocated to participating attendance areas</b></li> <li>• <b>Allocation proportion determined based on the total Title I allocation to the LEA prior to other allowable expenditures and transfers</b> (includes</li> </ul>	<p><u>Sec. 1120 – Participation of Private School Children</u></p> <ul style="list-style-type: none"> <li>• Adds new language and requirements</li> <li>• Ambiguity could portend implementation and interpretation problems (i.e. “service, on an equitable basis and individually or in combination, as requested by the</li> </ul>



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<p>reservations for public school improvement activities that are prohibited for private school institutions)</p>	<p>officials or representatives to best meet the needs of such children...”</p> <ul style="list-style-type: none"> <li>• Adds a State ombudsman</li> <li>• Makes unclear revisions to the current expenditure provision regarding the proportion of funds for participating school attendance areas</li> <li>• <b>Determines private school allocation for services based on total LEA allocation prior to allowable expenditures (i.e. school improvement expenditures which are excluded under current law due to focus of improving the public “school” as an institution)</b></li> <li>• Requires obligation of funds and carry-over of unused funds</li> <li>• Adds “pooling of funds” to the consultation requirements</li> <li>• Adds ambiguous language regarding reaching agreement with private school officials</li> <li>• <b>Authorizes the SEA to provide services directly or through contract including if an LEA has more than 10,000 low-income children in private schools in a participating school attendance area that are not being served or 90% of the eligible private school students in a participating attendance area are not being served</b></li> </ul>
<p><u>Sec. 1117 – Supplement Not Supplant</u></p> <ul style="list-style-type: none"> <li>• <b>Revises the Title I Maintenance of Effort requirement to allow a one-time in five years failure to meet the current 90% provision</b></li> </ul>	<p><u>Sec. 1120A – Fiscal Requirements</u></p> <ul style="list-style-type: none"> <li>• <b>Strikes Maintenance of Effort requirements</b></li> </ul>

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<ul style="list-style-type: none"> <li>• <b>Revises the supplement not supplant requirement by a new compliance provision in which the LEA demonstrates that the methodology for allocating State and local funds ensures that each Title I school receives all the state and local funds it would otherwise receive if it were not a Title I school.</b> LEAs are not required to identify that an individual cost or service is supplemental or that services are provided through a particular method or in a particular setting. The Secretary is prohibited from prescribing any criterion or method for LEAs to demonstrate compliance. (Likely to significantly affect traditional supplement not supplant compliance for TAS and central district expenditures.)</li> <li>• LEAs must meet the new compliance requirement not later than 2 years after enactment and may demonstrate compliance before the end of the 2-year period</li> <li>• Retains the current comparability requirements and exclusion of funds provision</li> </ul>	<ul style="list-style-type: none"> <li>• Continues current supplement not supplant</li> <li>• Retains current comparability requirements</li> </ul>
<p><u>Sec. 1118 – Coordination</u></p> <ul style="list-style-type: none"> <li>• Makes conforming revisions</li> </ul>	<p><u>Sec. 1120B – Coordination Requirements</u></p> <ul style="list-style-type: none"> <li>• Makes conforming revisions and adds a requirement for agreements with Head Start and other entities on coordination of activities including records and transition</li> </ul>
<p><u>Sec. 1122, 1124 and 1124A</u></p> <ul style="list-style-type: none"> <li>• Updates fiscal years</li> </ul>	<p><u>Section 1122 – Allocation to States</u></p> <ul style="list-style-type: none"> <li>• 91.44% reserved for the Title I Program</li> <li>• Amounts equal to the FY 2001 appropriation for the Basic and Concentration Grant formulas are</li> </ul>

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	<p>reserved, and any additional amounts are divided equally between the Targeted and Education Finance Incentive Grant formulas</p>
<p><u>Sec. 1125, 1125AA, 1125A, and 1126</u></p> <ul style="list-style-type: none"> <li>• Revises the state maintenance of effort provision in sec. 1125A to allow the state to fall below the 90% MOE level without reduction of federal funds for one fiscal year if the state has not failed to meet the requirement for another fiscal year with the five immediately preceding fiscal years</li> <li>• Retains current law regarding return to the previous MOE level for subsequent year compliance</li> <li>• Adds another example to exceptional circumstances justification for a State MOE waiver request to the Secretary</li> </ul>	<p><u>Sec. 1125 and 1125A – Targeted and EFIG Formula Grants</u> Adds a single digit change to the poverty ranges for percentages and numbers of students in the quintile steps of the Targeted and EFIG formulas in order to maintain House options later in the legislative process</p> <p><u>Sec. 1125AA</u> – Adds findings regarding the Title I formula</p> <p><u>Sec. 1125A</u> – Continues current law for EFIG through FY 2021 and establishes a hold-harmless thereafter</p> <p><u>Sec. 1126</u> – Unamended</p>
<p><u>Sec. 1127 Carryover</u> Unamended</p>	<p><u>Sec. 1127 – Carryover</u> Unchanged except for conforming amendments</p>
	<p><u><b>Sec. 1128 – Title I Portability – State Option</b></u> <b>A state <u>may</u> allocate Title I Part A funds to LEAs, notwithstanding any formula distribution provisions of Title I, based on the number of Title I eligible children enrolled in public schools of the LEA</b></p> <ul style="list-style-type: none"> <li>• <b>Eligible children mean low-income children based on the Census poverty level</b></li> <li>• <b>LEAs must provide the state with a count of the census-based eligible children enrolled in the public schools served by the LEA</b></li> </ul>

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	<ul style="list-style-type: none"> <li>• <b>SEAs would allocate Title I-A funds on per eligible-child (enrolled) basis to each LEA</b></li> <li>• <b>LEAs would allocate funds to their public schools on a per eligible-child (enrolled) basis, which must supplement and not supplant other non-Federal funds available for the education of participating students</b></li> </ul>
<p style="text-align: center;"><i>Part B – Academic Assessments</i></p> <p><u>Grants for State Assessments and Related Activities</u> (formerly Title VI – Part A – Subpart 1)</p> <ul style="list-style-type: none"> <li>• Such sums as necessary through FY21</li> <li>• Provides for competitive to SEAs for Grants for Enhanced Assessment Instruments and for Grants for Assessment System Audits (with 20% reserved for subgrants to LEAs)</li> <li>• Consolidates grants for state assessments and related activities with enhanced assessment grants, and authorizes Innovative Assessment System Demonstrations</li> <li>• States are allocated \$3 million and the remainder of amounts appropriated based on school-age population</li> <li>• Authorized such sums as necessary for NAEP through FY21</li> </ul>	<p>(Academic Assessments Authorized in ESEA Title III, Part B, sec. 3202(c)(3)(a) as part of the 17% State set-aside for the Local Academic Flexible Grants)</p> <p style="text-align: center;"><i>Part B – National Assessment of Title I</i></p> <ul style="list-style-type: none"> <li>• Repeals the Title I demonstration authority and Close Up program</li> <li>• Reauthorizes the National Assessment of Title I and other Title I studies under sec. 1201 and 1302</li> </ul>
<p style="text-align: center;"><i>Part C – Migrant Programs</i></p> <ul style="list-style-type: none"> <li>• Such sums as necessary through FY21</li> </ul>	<p style="text-align: center;">SUBPART 2 – EDUCATION OF MIGRATORY CHILDREN</p> <ul style="list-style-type: none"> <li>• Authorized at a 2.45% reservation from the Title I appropriation</li> </ul>
<p style="text-align: center;"><i>Part D – Neglected and Delinquent Programs</i></p>	<p style="text-align: center;">SUBPART 3 – PROGRAMS FOR NEGLECTED AND DELINQUENT CHILDREN AND YOUTH</p>

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<ul style="list-style-type: none"> <li>• Such sums as necessary through FY21</li> </ul>	<ul style="list-style-type: none"> <li>• Authorized at a 0.31% reservation from the Title I appropriation</li> </ul>
<p align="center"><i>Part E -- General Provisions</i></p>	<p align="center"><i>Part C – General Provisions</i></p>
<p><u>Federal Regulations</u></p> <ul style="list-style-type: none"> <li>• Makes some modifications in Negotiated Rulemaking process</li> </ul>	<p><u>Federal Regulations</u></p> <ul style="list-style-type: none"> <li>• Negotiated Rulemaking and general input similar to current law</li> <li>• Rulemaking process and timeframes specified, including new parameters on regulatory burdens</li> </ul>
<p><u>State Administration</u></p> <ul style="list-style-type: none"> <li>• No significant changes</li> <li>• Committee of Practitioners maintained in Part A</li> </ul>	<p><u>State Administration</u></p> <ul style="list-style-type: none"> <li>• State rulemaking parameters and notifications similar to current law with additional regulatory hurdles included to discourage burdensome requirements</li> <li>• State Committee of Practitioners maintained to advise the State on implementation issues and state regulations.</li> </ul> <p><u>Rule of Construction</u> – Nothing to be construed in Title I to mandate equalized spending per pupil for a State, LEA or school.</p>
<p align="center"><b>Title II – Preparing, Training and Recruiting High-Quality Teacher and Principals</b></p>	<p align="center"><b>Title II – Teacher Preparation and Effectiveness</b></p>
<p>Relocates Teacher Liability Protection from Title II, Part C, Subpart 5 and Sec. 2441 Internet Safety to the ESEA General Provisions.</p>	
<p><u>Sec. 2103 – Authorization of Appropriations</u></p>	<p><u>Authorization of Appropriations</u> \$2.79 billion through FY21</p>

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<ul style="list-style-type: none"> <li>• Such sums as necessary through FY21 for Part A – Fund for Improvement of Teaching and Learning</li> <li>• Such sums as necessary for National Activities through FY21 with 20% for technical assistance and evaluation, 40% for Programs of National Significance, and 40% School Leader Recruitment and Support Programs</li> <li>• Such sums as necessary for Part B – Teacher and School Leader Incentive Fund through FY21</li> <li>• Such sums as necessary for Part C – American History and Civics Education through FY21</li> <li>• Such sums as necessary for Part D – Literacy Education for All through FY21</li> <li>• Such sums as necessary for Part E – STEM Instruction and Student Achievement through FY21</li> </ul>	<ul style="list-style-type: none"> <li>• 75% for Part A</li> <li>• 25% for Part B – Teacher and Leader Flexible Grant</li> <li>• 1% for national activities</li> <li>• ½% for outlying areas, ½% for BIA</li> </ul>
<p style="text-align: center;"><i>Part A – Fund for the Improvement of Teaching and Learning</i></p>	<p style="text-align: center;"><i>Part A – Supporting Effective Instruction</i></p>
<p><u>Purpose</u> To improve student achievement by increasing capacity to provide a well-rounded and complete education, improving teacher and principal/school leaders quality and effectiveness, and ensuring low-income and minority students are served by effective teachers and principals and have access to high-quality instructional programs in core subjects. (Current Title II definitions deleted including high-need LEA.)</p>	<p><u>Purpose</u> To increase student achievement, improve teacher and leader effectiveness, provide evidence-based professional development, and, if the state or LEA chooses, develop and implement teacher evaluation systems using in part student achievement data to determine teacher effectiveness. (Current Title II definitions deleted including high-need LEA)</p>
<p><u>State Allocations</u></p> <ul style="list-style-type: none"> <li>• ½% for outlying areas and ½% for BIA</li> </ul>	<p><u>State Allocations</u></p> <ul style="list-style-type: none"> <li>• 75% to SEAs – 50% based on school age population, and 50% based on school age poverty (½% small state minimum)</li> </ul>

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<ul style="list-style-type: none"> <li>• <b>Retains hold-harmless provisions from current law but reduced each of the next six years by 14.29%</b></li> <li>• Remainder allotted to States based 20% of school age population and 80% based on school age poverty</li> <li>• For FY22 and beyond allocations are based only on the 20/80 percentage</li> <li>• ½% small state minimum</li> </ul>	<ul style="list-style-type: none"> <li>• Former state hold-harmless provision eliminated in favor an LEA high poverty percentage certification of no funding loss and the pre-HR 5 formula</li> </ul>
<p><u>Within State Allocation</u></p> <ul style="list-style-type: none"> <li>• 95% to LEAs – 20% based on school age population, and 80% based on school age poverty</li> <li>• 5% for State activities of which up to 1% may be for administrative costs</li> <li>• <b>Up to 3% may be reserved for State activities to make subgrants for Principals and Other School Leaders out of the 95% for LEAs, provided that this reservation would not result in a lower allocation to LEAs compared to the preceding fiscal year</b></li> <li>• <b>Removes the local hold-harmless</b></li> </ul>	<p><u>Within State Allocation</u></p> <ul style="list-style-type: none"> <li>• 95% to LEAs – <b>50% based on school age population, and 50% based on school age poverty</b></li> <li>• 5% for State activities of which 1% may be for planning and administration</li> <li>• Removes hold-harmless subject to state hold-harmless above</li> </ul>
<p><u>Local Use of Funds</u></p> <ul style="list-style-type: none"> <li>• Revises needs assessment to determine schools with the most acute staffing needs related to increasing the number of effective teachers and principals, ensuring low-income and minority students are served by effective teachers and principals, ensuring low-income and minority students have access to a high-quality instructional program, using data, improving student behavior, and teaching English learners and students with disabilities, and other evidence-based factors determined by the LEA through broad consultation</li> </ul>	<p><u>Use of Funds</u></p> <ul style="list-style-type: none"> <li>• If applicable, how the state will work with LEAs to develop and implement a teacher or leader evaluation system</li> <li>• The local teacher evaluation system may: use student achievement data from a variety of sources as a significant factor with the weight defined by the LEA, use multiple measures, have more than two categories of teacher rating, be used to make personnel decisions, and based on broad input</li> </ul>

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<ul style="list-style-type: none"> <li>● <b>Prioritize funding for schools identified under the accountability system and schools with the highest percentage or numbers of Title I eligible children</b></li> <li>● Not more than 2 percent for “direct” administrative costs</li> <li>● Funds to be used generally to develop, implement, and evaluate comprehensive, evidence-based program and activities</li> <li>● Retains Title II supplement not supplant requirements</li> </ul> <p><u>New Allowable Activities may include:</u></p> <ul style="list-style-type: none"> <li>● Developing or improving an evaluation systems based in part on evidence of student achievement which may include student growth and other measures as determined by the SEA or LEA</li> <li>● Developing and implementing initiatives to assist in recruiting, hiring, and retention of highly effective teachers and principals in high-poverty schools with high percentages of ineffective teachers and high percentages of students not meeting state standards</li> <li>● Providing performance or incentive pay systems and multiple career paths</li> <li>● Providing Induction and mentoring</li> <li>● Recruiting qualified individuals from other fields</li> <li>● Providing high quality professional development</li> <li>● <b>Reducing class size to an evidence-based level to improve achievement through recruiting and hiring additional effective teachers</b></li> <li>● Developing activities to increase the ability of teachers to effectively teach</li> </ul>	<ul style="list-style-type: none"> <li>● provide training and technical assistance to LEA on implementation of the teacher evaluation system in states with a statewide teacher evaluation system, and in states without teacher on development and implementation of teacher evaluation systems as appropriate</li> <li>● training and professional development</li> <li>● partnering with other organizations</li> <li>● recruitment and retention, incentives, performance pay, induction, mentoring and other preparation programs</li> <li>● reporting teacher and leader evaluation results in applicable LEAs in a non-personally identifiable form</li> </ul> <ul style="list-style-type: none"> <li>● <b>class size reduction programs limited to 10% of Title II funds</b></li> </ul>



<p style="text-align: center;"><b>Senate Committee Bill Every Child Achieves Act</b> (as reported by Committee)</p>	<p style="text-align: center;"><b>H.R. 5 Student Success Act</b> (includes amendments adopted on House floor to date)</p>
<p>students with disabilities and English learners</p> <ul style="list-style-type: none"> <li>• Providing programs to increase knowledge of early learning strategies</li> <li>• Providing support for school library services</li> <li>• Providing in-service training on early identification of mental health issues, use of referral, and forming partnerships between school-based mental health programs and community and private organizations</li> <li>• Providing programs to prepare for postsecondary coursework, including AP, IB, early college or dual enrollment, or other advanced learning programs for G&amp;T students</li> <li>• Providing programs to support extended learning opportunities</li> <li>• Providing general liability insurance for purchase by teachers</li> <li>• Support teacher residency programs</li> <li>• Reforming teachers and principal preparation programs</li> <li>• Carrying out other evidence-based activities identified by the LEA to meet the purpose of Title II</li> <li>• Meets principles of effectiveness</li> </ul>	
<p><u>State Report and LEA Report</u> Must provide number of licensed/certified teachers, principals and school leaders, number with emergency licensure, first time passage rate on state licensure exam, description of how professional development improved teacher and principal performance, and if funds used to improve equitable access a description of improved access. (LEAs required to provide this information to the SEA)</p>	<p><u>State and LEA Reports</u> Must provide information on how the agency is meeting the purposes of the program and how it is using the funds. For LEA that are implementing teacher or principal evaluation systems, the results of those evaluations.</p>

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	<p><b><u>Criminal Background Checks.</u></b> <b>Requires State Plans to include how States will establish, implement, or improve policies and procedures on criminal background checks for school employees and contractors who have unsupervised access to students including by:</b></p> <ul style="list-style-type: none"> <li>• <b>Expanding registries or repositories searched in conducting background checks, including state of residence checks, state child abuse and neglect registries and databases, NCIC system, FBI fingerprint system, and National Sex Offender registry,</b></li> <li>• <b>Policies and procedures prohibiting employing any individual refusing consent to a background check, making a false statement in the background check; who has been convicted of a listed felony; who is registered or required to register on a state or the national Sex Offender registry; or has been convicted of other crimes determined by the State</b></li> <li>• <b>Policies and procedures to provide background check results to the individual and as appropriate to other employers</b></li> <li>• <b>Mechanisms to assist LEAs to recognize and respond to incidents of child abuse by school employees</b></li> </ul>
<p style="text-align: center;"><i>Part B – Teacher and School Leader Incentive Program</i></p>	<p style="text-align: center;"><i>Part B Teacher and School Leader Flexible Grant</i></p>

<p style="text-align: center;"><b>Senate Committee Bill Every Child Achieves Act</b> (as reported by Committee)</p>	<p style="text-align: center;"><b>H.R. 5 Student Success Act</b> (includes amendments adopted on House floor to date)</p>
<p><u>Purpose</u> To provide competitive grants to assist states, LEAs and nonprofit organizations to develop, implement, improve or expand comprehensive performance-based compensation systems or human capital management systems; and to study and evaluate such systems</p>	<p><u>Purpose</u> To improve student academic achievement by supporting for SEAs and LEAs to pursue innovative and evidence-based practices, and to increase the number of teachers and school leaders who are effective in improving student achievement</p>
<p><u>Grant Awards</u> Secretary awards grants competitively to eligible entities</p> <ul style="list-style-type: none"> <li>• Priority is extended to applicants that concentrate activities in high need schools (school located in area with 30% or more families below the Census poverty line)</li> </ul>	<p><u>National Allocation</u></p> <ul style="list-style-type: none"> <li>• 25% for grants to States based on school age population with a reservation of 1% for national activities, ½% for outlying areas, and ½% for BIA</li> <li>• ½% for small state minimum</li> </ul>
<p><u>Limitations</u></p> <ul style="list-style-type: none"> <li>• Duration of 3 years with 2 year renewal</li> <li>• LEA (or as part of consortium or partnership) may receive grant only twice as of enactment</li> <li>• Equitable geographic distribution</li> <li>• 50% non-federal match in cash or in-kind</li> <li>• Retains traditional supplement not supplant requirements</li> <li>• 1% may be reserved by Secretary for evaluation</li> </ul>	<p><u>State Activities</u></p> <ul style="list-style-type: none"> <li>• establish criteria for awarding competitive grants to eligible entities</li> <li>• carry out alternative certification programs</li> </ul>
	<p><u>State Allocation of Funds</u></p> <ul style="list-style-type: none"> <li>• 92% for subgrants to eligible entities</li> <li>• 1% for state administration</li> <li>• up to 4% for:</li> </ul>

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	<ul style="list-style-type: none"> <li>- reforming certification, licensure, and tenure systems</li> <li>- alternative certification, improving teacher preparation, including through use of achievement data</li> <li>- performance based pay incentives</li> <li>- advancement and career ladder</li> <li>- induction and mentoring, professional development, technical assistance, and other activities</li> <li>• up to 3% for: <ul style="list-style-type: none"> <li>- teacher or school leader academies with a required 10% match and not more than 5% provided to state authorizers</li> </ul> </li> </ul>
	<p><u>Local Competitive Grant</u></p> <ul style="list-style-type: none"> <li>• peer review required</li> <li>• geographic distribution within state</li> <li>• duration of up to 5 years</li> <li>• at least 10% match</li> </ul>
<p><u>Local Uses of Funds</u></p> <p>To develop, implement, improve, or expand performance-based compensation systems</p> <ul style="list-style-type: none"> <li>• Developing evaluation systems with clear and fair measures based on improving student achievement;</li> <li>• Conducting outreach to gain input and support;</li> <li>• Paying bonuses and increased salaries for raising achievement or teaching in high need schools or subjects</li> </ul>	<p><u>Local Use of Funds</u></p> <p>Developing and implementing recruitment and retention programs, incentives, performance pay, induction, mentoring, other preparation programs, and evidence-based strategies to improve student achievement. Must meet Principles of Effectiveness regarding need, evidence-based research or effective strategies, and broad consultation</p>
<p><u>Eligible Entities</u></p> <ul style="list-style-type: none"> <li>• LEA or consortium of LEAs including a charter school which is an LEA</li> </ul>	<p><u>Eligible Entities</u></p> <ul style="list-style-type: none"> <li>• LEAs and consortium of LEAs</li> </ul>

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<ul style="list-style-type: none"> <li>• SEA or other state agency designated by the Governor</li> <li>• Partnership of any of above entities with at least one nonprofit or for-profit organization</li> </ul>	<ul style="list-style-type: none"> <li>• IHEs or consortium in partnership with LEA(s)</li> <li>• for-profit or non-profit organizations or consortium in partnership with LEA(s)</li> <li>• consortium of entities</li> </ul>
	<p>Title II – Part D: General Provisions <b><u>Charter Schools Inclusion</u></b> <b>The term LEA includes a charter schools that, in the absence of this section, would not have received funds under this title</b></p>
<p align="center"><i>Part C – American History and Civics Education</i></p>	
<p><u>Purpose</u> To improve the quality of American history, civics, and government education about the history and principles of the Constitution, and improve the quality of teaching, including the teaching of traditional American history.</p>	
<p><u>Funding Allotment</u></p> <ul style="list-style-type: none"> <li>• 85% for competitive grants for the Teaching of Traditional American History as a separate subject</li> <li>• 10% for not less than 12 competitive grants to establish Presidential Academies and Congressional Academies for American History and Civics awarded to higher education institutions, non-profit organizations, museums, libraries or research center, or consortium</li> <li>• 5% for competitive grants for innovative projects awarded to higher education institutions, or non-profit or for-profit organizations</li> </ul>	

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<i>Part D – Literacy Education for All</i>	
<p><u>Purpose</u> To improve student academic achievement in reading and writing through comprehensive state plans and targeted subgrants</p>	
<p><u>Eligible Entity</u></p> <ul style="list-style-type: none"> <li>• One or more LEA with the highest number or proportion of Title I eligible students in the State, are among the highest number or percentage of children reading or writing below grade level, or serve a significant number or percentage of schools identified under sec. 1114</li> <li>• One or more State-designated early childhood education programs with a demonstrated record of comprehensive literacy instruction</li> <li>• LEA or consortium of LEAs or a State designated early childhood education program acting in partnership with one or more public or private nonprofit organizations with demonstrated records of effectiveness</li> </ul>	
<p><u>Comprehensive Literacy State Development Grants</u></p> <ul style="list-style-type: none"> <li>• 5% for National Activities</li> <li>• ½% for BIA</li> <li>• ½% for outlying areas</li> <li>• Remainder for competitive grants to States for 5 years with 2 year renewal</li> </ul> <p>Types of Activities</p> <ul style="list-style-type: none"> <li>• Not less than 15% of birth to kindergarten entry</li> <li>• Not less than 40% for K-5</li> <li>• Note less than 40% of grades 6-12</li> </ul> <p>Subgrant Priority to entities serving children from birth to age 5 from families</p>	

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<p>below 200% of the federal poverty level, or LEAs serving high number or percentage of high need schools (50% FRPL for elementary and middle schools and 40% FRPL for high schools)</p> <p>Supplement Not Supplant required for other federal or state funds.</p>	
<p style="text-align: center;"><i>Part E – Improving Science, Technology, Engineering and Mathematics Instruction and Student Achievement</i></p>	
<p><u>Purpose</u> To improve student achievement in science, technology, engineering and mathematics, including computer science</p>	
<p><u>Allocation to SEAs</u></p> <ul style="list-style-type: none"> <li>• 35% on school-age population</li> <li>• 65% on school-age poverty</li> <li>• ½% small state minimum</li> </ul> <p><u>State Reservation</u></p> <ul style="list-style-type: none"> <li>• 5% for state administration, technical assistance and evaluation</li> <li>• 15% to 20% for other state activities</li> </ul>	
<p><u>Eligible Subgrantee</u></p> <ul style="list-style-type: none"> <li>• A high-need LEA</li> <li>• An educational service agency serving more than one high-need LEA</li> <li>• A consortium of high-need LEAs</li> <li>• A partnership of above</li> </ul>	
<p>Competitive Subgrants</p> <ul style="list-style-type: none"> <li>• Must be of sufficient size and scope</li> <li>• SEA may require subgrantees to secure an outside matching funds</li> </ul>	

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<ul style="list-style-type: none"> <li>• Performance metrics developed by the Department will be used to evaluate effectiveness of activities</li> </ul>	
<p style="text-align: center;"><i>Part F – General Provisions</i></p> <ul style="list-style-type: none"> <li>• Prohibition Against Federal Mandates</li> <li>• Rule of Construction not to construe any effect on labor agreements</li> </ul>	
	<p><u>Parents’ Right to Know Under Title II</u> LEA shall notify parents that they may request information regarding the professional qualifications of their child’s teachers, and policies on assessments</p>
<p style="text-align: center;"><b>Title III English Language Instruction for LEP and Immigrant Students</b></p>	<p style="text-align: center;">TITLE I, PART A, SUBPART 4 – ENGLISH LANGUAGE ACQUISITION</p>
<ul style="list-style-type: none"> <li>• Authorizes such sums as necessary through FY21</li> <li>• Eliminates NCLB competitive grants and funding level trigger</li> <li>• Maintains the 0.5% set-aside for outlying areas and 6.5% for the national activities including the National Clearinghouse at not more than \$2 million</li> </ul>	<ul style="list-style-type: none"> <li>• Authorized at a 4.6% reservation from the Title I appropriation\</li> <li>• Eliminates NCLB categorical grant authorities</li> <li>• Maintains the 0.5% set-aside for outlying areas and 6.5% for the national activities including the National Clearinghouse at not more than \$2 million</li> </ul>



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<p><u>State Allocations</u> Based 80% on the number of English learners and 20% on the number of immigrant children</p> <ul style="list-style-type: none"> <li>• English learner data determined by the American Community Survey (allowing multiyear estimates), or the number of students assessed for English language proficiency on the State ELPA (allowing multiyear estimates) , or a combination, and</li> <li>• Immigrant data based on the American Community Survey (allowing multiyear estimates)</li> <li>• Small state minimum of \$500,000</li> <li>• No change to Puerto Rico allotment not to exceed 0.5%</li> </ul>	<p><u>State Allocations</u> Based 80% on the number of English learners and 20% on the number of immigrant children</p> <ul style="list-style-type: none"> <li>• English leader data determined by the American Community Survey (allowing multiyear estimates), or State-reported data on the number of students assessed for English language proficiency (allowing multiyear estimates) , or a combination, and</li> <li>• Immigrant data based on the American Community Survey</li> <li>• Small state minimum of \$500,000</li> <li>• Puerto Rico allotment not to exceed 0.5%</li> </ul>
<p><u>Within-State Allocations</u> Conforming changes only</p>	<p><u>Within State Allocation</u> Maintains current law with a 95% pass-thru to local subgrantees including the 15% state reservation for significant increases in the percentage or number of immigrant children, and the \$10,000 minimum qualification amount</p>
<p><u>State Plans and State Activities</u></p> <ul style="list-style-type: none"> <li>• Basically maintains as in current law while adding another authorized activity for the expenditure of the state 5% reservation to establish and implement statewide entrance and exits procedures</li> <li>• <b>Requires the SEA to establish and implement standardized, statewide entrance and exit procedures</b></li> <li>• <b>Requires the SEA to assist LEAs in meeting the annual timelines and goals for progress under Title I in English proficiency and meeting state standards</b></li> <li>• <b>Requires the SEA to assist LEAs in decreasing the number of long-term ELs who have not acquired English</b></li> </ul>	<p><u>State Plans</u> Basically maintained as in current law</p>

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<p><b>proficiency within 5 years of initial classification</b></p> <ul style="list-style-type: none"> <li>• Requires state monitoring and progress evaluation and taking steps to assist LEAs if funded strategies are not effective</li> </ul>	
<p><u>Subgrants, Local Plans, Required and Authorized Activities</u></p> <ul style="list-style-type: none"> <li>• Basically maintains as in current law</li> <li>• Maintains the current Title III supplement not supplant requirement</li> <li>• Clarifies that local administrative cost limitation of 2% is for direct costs rather than the current interpretation that also includes any indirect costs</li> <li>• <b>Describes how the LEA will ensure schools receiving Title III funds will assist ELs annual timelines and goals for progress in English language acquisition under Title I and state academic standards</b></li> <li>• Requires an assurance of compliance with the parent notification requirements of Title I for language instructional programs in sec. 1112(d)(2)</li> <li>• Bases the LEA plan on high-quality research on teaching ELs</li> </ul>	<p><u>Subgrants, Local Plans, Required and Authorized Activities</u></p> <p>Basically maintains as in current law including the current Federal, state and local supplement not supplant requirement</p>
<p><u>National Professional Development Project</u></p> <ul style="list-style-type: none"> <li>• Adds public and private organizations to higher education institutions as eligible applicants (with SEAs and LEAs in consortia)</li> </ul>	<p><u>National Professional Development Project</u></p> <ul style="list-style-type: none"> <li>• Streamlines provisions</li> <li>• Adds public and private organizations to higher education institutions as eligible applicants (with SEAs and LEAs in consortia)</li> </ul>

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<p><u>Definitions</u></p> <ul style="list-style-type: none"> <li>• Maintains local Eligible Entity definition, adding collaboration with educational service agencies</li> <li>• Defines long-term EL as an EL who has attended US schools for not less than 5 years and not yet exited from EL status</li> </ul>	<p><u>Definitions</u></p> <ul style="list-style-type: none"> <li>• Adds new Eligible Entity for receiving subgrants in addition to one or more LEA but also higher education, community organizations, or SEAs in consortia (or collaboration) with LEA(s) (thereby allowed to be the fiscal agent of these EL subgrant awards)</li> </ul>
<p><u>New Reporting Requirements</u></p> <ul style="list-style-type: none"> <li>• <b>Requires the LEA to report biennially on Title III activities and children served including:</b></li> </ul> <ol style="list-style-type: none"> <li>1) a description of programs and activities,</li> <li>2) the number and percentage of ELs who meet the annual State-determined goals for progress including disaggregation at minimum by long-term ELs and ELs with a disability,</li> <li>3) the number and percentage of ELs attaining English language proficiency on the state ELPA,</li> <li>4) the number and percentage of EL who exit language instruction educational programs based on attainment of English proficiency,</li> <li>5) the number and percentage of ELs meeting state academic standards for each of the 2 years after no longer receiving Title III services disaggregated at minimum by long-term ELs and ELs with a disability, and</li> </ol>	<p><u>New Reporting Requirements</u></p> <p>Establishes biennial reporting requirement for each subgrantee on activities conducted and students served analogous to the current biennial evaluation, including:</p> <ul style="list-style-type: none"> <li>• A description of the program and activities conducted with funds received and how state and local funds were supplemented</li> <li>• A description of progress made in learning English and meeting State standards</li> <li>• The number and percentage attaining English proficiency as determined by the State’s ELPA</li> <li>• The number of students exiting programs based on attainment of proficiency and transition to classes not tailored for English learners</li> <li>• A description of the progress of English learners for 2 years after no longer receiving services</li> <li>• The number and percentage of students not attaining English language proficiency within five</li> </ul>

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<p align="center"><b>6) other SEA required information.</b></p> <ul style="list-style-type: none"> <li>• Report to be used by the LEA and SEA for improvement of Title III programs and activities</li> </ul>	<p>years of initial classification and first enrollment in the LEA</p> <ul style="list-style-type: none"> <li>• Any other information required by the SEA</li> <li>• The Report will be used by the subgrantee and SEA to determine program effectiveness in obtaining English proficiency and making progress in meeting State standards, and in deciding how to improve programs</li> </ul>
<p><u>Accountability Provisions and AMAOs Repealed</u></p> <p><u>Unfunded Categorical Programs under Part B Repealed</u></p>	<p><u>Accountability Provisions and AMAOs Repealed</u></p>
<p align="center"><b>Title IV Safe and Healthy Students</b></p>	<p align="center"><b>Title III Parental Engagement and Local Flexibility</b></p>
<p><u>Authorization of Appropriations</u></p> <ul style="list-style-type: none"> <li>• Such sums as necessary for Part A- Grants to States and LEAs through FY21</li> <li>• Such sums as necessary for Part B- 21<sup>st</sup> Century Community Learning Centers through FY21</li> <li>• Such sums as necessary for Part C – Elementary and Secondary School Counseling Program through FY21</li> <li>• Such sums as necessary for Part D – Physical Education Program through FY21</li> </ul>	<p><u>Authorization of Appropriations</u> (annually through FY21)</p> <p>Charter Schools -- \$300 million Magnet Schools -- \$91.6 million Parent Engagement -- \$25 million Local Academic Flexible Grant -- \$2.3 billion</p>
<ul style="list-style-type: none"> <li>• Relocates Gun-Free Schools provisions to Title IX</li> </ul>	

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<ul style="list-style-type: none"> <li>• Relocates Transfer of Disciplinary Records to Title IX</li> <li>• Relocates Anti-Smoking Provisions to Title IX</li> </ul>	
	<p align="center"><i>Part B – Local Academic Flexible Grant</i></p>
<p><u>Purpose</u> To improve students’ safety, health, well-being and academic achievement during and after the school day by increasing the capacity of LEAs, schools and communities to create safe, healthy, supportive, and drug-free environments; to carry out programs to improve school safety, and promote physical and mental health and well-being; preventing and reducing substance abuse, school violence and bullying; and strengthening parent and community engagement</p>	<p><u>Purpose</u> To provide LEAs (through their SEAs) with funds to support initiatives to improve academic achievement and protect student safety; and nonprofit and for-profit entities the opportunity to work with students to improve academic achievement</p>
<p><u>National Allocation</u></p> <ul style="list-style-type: none"> <li>• Not more than 5% for technical assistance and national evaluation</li> <li>• ½ % for the territories and ½% for BIA</li> <li>• Such funds as necessary for Project SERV – school emergency response to violence program</li> </ul> <p><u>State Allocations</u></p> <ul style="list-style-type: none"> <li>• Based on students from families below the poverty line</li> <li>• ½% for small state minimum</li> </ul> <p><u>Within State Allocation</u></p> <ul style="list-style-type: none"> <li>• 95% allocated to LEAs based on students from families below the poverty line (2% limit on “direct” local administrative costs)</li> </ul>	<p><u>National Reservations</u></p> <ul style="list-style-type: none"> <li>• ½% for technical assistance</li> <li>• ½% for outlying areas and BIA</li> </ul> <p><u>State Allocations</u></p> <ul style="list-style-type: none"> <li>• Based on Title I share</li> <li>• ½% small state minimum</li> </ul> <p><u>Within State Allocation:</u></p> <ul style="list-style-type: none"> <li>• 75% for eligible entities</li> <li>• 8% minimum for nongovernmental entities</li> <li>• up to 17% for State activities including State assessments, audits</li> </ul>

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<ul style="list-style-type: none"> <li>• Not more than 1% used for state administrative costs</li> </ul>	<p style="text-align: center;">of statewide assessments, and blended learning projects (limited to 5%)</p> <ul style="list-style-type: none"> <li>• 5% limitation on administration</li> </ul>
<p><u>Local Use of Funds</u></p> <ul style="list-style-type: none"> <li>• Requires comprehensive needs assessment in order to be eligible for funding, taking into account risk factors in the community, school, family and peer-individual domains</li> <li>• Continues broad range of allowable activities, including mental health services and programs that offer well-rounded educational experience, and retains the principles of effectiveness</li> <li>• Retains the traditional Title IV supplement not supplant requirement</li> </ul> <p><u>Limitations</u></p> <ul style="list-style-type: none"> <li>• Construction prohibited</li> <li>• Medical services and drug treatment and rehab prohibited except for integrated supports or referral</li> <li>• Prohibits requiring medication as a condition of services under Title IV</li> </ul>	<p><u>Local Use of Funds</u></p> <ul style="list-style-type: none"> <li>• evidence-based activities to improve student achievement</li> <li>• allowable under state law</li> <li>• one or more projects from two categories <ul style="list-style-type: none"> <li>- supplemental student support activities such as before and after school, summer school, tutoring and expanded learning time, but not in-school learning activities or athletics, OR</li> <li>- student support activities such as subject specific programs, extended learning, adjunct teachers, parent engagement, but not smaller class sizes, construction, or staff compensation equitable private schools participation required</li> </ul> </li> </ul>
	<p><b><u>Eligible Entities for State Subgrants:</u></b></p> <ul style="list-style-type: none"> <li>• LEA in partnership with CBO, business or nongovernmental entity</li> <li>• consortium of LEAs in partnership with CBO, business or nongovernmental entity</li> <li>• CBO in partnership with LEA and if applicable a business entity or nongovernmental entity</li> </ul>

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	<ul style="list-style-type: none"> <li>• Business entity in partnership with LEA and if applicable CBO or nongovernmental entity</li> </ul> <p><u>Awards to Nongovernmental Entities:</u> To increase academic achievement of public schools students [students benefiting from program must continue to maintain enrollment in public school]</p> <ul style="list-style-type: none"> <li>• 50% non-federal match</li> <li>• administrative costs limited to 1%</li> <li>• priority extended to supporting students from high-need LEAs and ensuring geographic diversity</li> </ul> <p><b><u>Blended Learning Projects:</u></b> States required to carry out a blended learning project with a 10% match limited</p>
	<p><u>Program Requirements</u></p> <ul style="list-style-type: none"> <li>• peer review required</li> <li>• geographic distribution within state</li> <li>• duration of 5 years</li> <li>• \$10,000 minimum grant for all eligible applicants equitable participation for private school children</li> </ul>
<p align="center">Part B – 21<sup>st</sup> Century Community Learning Centers</p>	
<p><u>Purpose</u> To establish and expand community learning centers for academic enrichment, a broad array of additional services and activities, and provide opportunities for family engagement including literacy and related educational development</p>	
<p><u>Authorization of Appropriations</u> Such sums as necessary through FY21</p>	
<p><u>Eligible Entity</u></p> <ul style="list-style-type: none"> <li>• LEA</li> <li>• Community-based organization,</li> </ul>	

<p style="text-align: center;"><b>Senate Committee Bill Every Child Achieves Act</b> (as reported by Committee)</p>	<p style="text-align: center;"><b>H.R. 5 Student Success Act</b> (includes amendments adopted on House floor to date)</p>
<ul style="list-style-type: none"> <li>• Indian tribe or tribal organization</li> <li>• Other public or private entity</li> <li>• Consortium of above</li> </ul>	
<p><u>Allotments to States</u></p> <ul style="list-style-type: none"> <li>• Continue awards under terms of current grants</li> <li>• Up to 1% for National Activities</li> <li>• 1% for BIA</li> <li>• Remainder based on Title I allocation</li> </ul> <p><u>Use of State Funds</u></p> <ul style="list-style-type: none"> <li>• 2% for state administration</li> <li>• 5% for other state activities</li> <li>• 93% for subgrants</li> </ul>	
<p><u>Local Competitive Grants</u></p> <ul style="list-style-type: none"> <li>• Duration of 3 to 5 years</li> <li>• Minimum grant of \$50,000</li> <li>• Expanded learning activities allowed if at least 300 hours before, during or after the traditional school day</li> <li>• Location in non-school facilities allowed if as accessible as schools</li> <li>• Local matching requirement is permitted by State</li> <li>• Priority provided to applications that target services to students and families in schools identified under sec. 1114 and other schools in need of intervention by the LEA; submitted jointly by an LEA and other eligible entity; and propose activities not otherwise accessible to students or expand accessibility</li> <li>• Priority may not be provided for extending the regular school day</li> </ul>	
<p>Part C – Elementary and Secondary School Counseling Program</p>	



<p style="text-align: center;"><b>Senate Committee Bill Every Child Achieves Act</b> (as reported by Committee)</p>	<p style="text-align: center;"><b>H.R. 5 Student Success Act</b> (includes amendments adopted on House floor to date)</p>
<p><u>Purpose</u> To establish and expand elementary school and secondary school counseling programs</p>	
<p><u>Authorization of Appropriations</u> Such sums as necessary through FY21</p>	
<p><u>Special Consideration</u> The Secretary gives special consideration to programs demonstrating the greatest need for new or additional services based on current ratios, promising innovative approaches, and showing strong potential</p> <p><u>Priority</u></p> <ul style="list-style-type: none"> <li>• Schools serving students in rural and remote areas,</li> <li>• School in need of improvement and persistently lowest achieving schools, or</li> <li>• Schools with a high percentage of students in poverty under census, FRPL, TANF, or Medicaid measures</li> </ul> <p>Equitable Geographic Distribution required</p>	
<p><u>Limitation</u></p> <ul style="list-style-type: none"> <li>• Not more than 4 percent for administrative costs</li> </ul>	
<p><u>Eligible Entity</u></p> <ul style="list-style-type: none"> <li>• LEA</li> <li>• Educational service agency serving more than one LEA</li> <li>• Consortium of LEAs</li> </ul>	
<p>Part D – Physical Education Program</p>	
<p><u>Purpose</u> To initiate, expand and improve physical education programs for all students in kindergarten through grade 12</p>	
<p>Program Elements (1 or more required)</p> <ul style="list-style-type: none"> <li>• Fitness education and assessment</li> <li>• Instruction in motor skills and physical activities</li> <li>• Development of cognitive concept of motor skills and physical fitness</li> </ul>	

<p style="text-align: center;"><b>Senate Committee Bill Every Child Achieves Act</b> (as reported by Committee)</p>	<p style="text-align: center;"><b>H.R. 5 Student Success Act</b> (includes amendments adopted on House floor to date)</p>
<ul style="list-style-type: none"> <li>• Development of positive social and cooperative skills</li> <li>• Instruction in healthy eating habits and good nutrition</li> <li>• Professional development for PE teachers</li> </ul> <p>[Does not include team sports and ROTC]</p>	
<p><u>Applications</u></p> <ul style="list-style-type: none"> <li>• Submitted by LEAs or community-based organization containing a plan to make progress toward meeting State standards for physical education</li> <li>• May provide for participation by private school or home-schooled students</li> </ul>	
<p>Limitation</p> <ul style="list-style-type: none"> <li>• Not more than 5% for administrative costs</li> <li>• Federal share may not exceed 90% for the first year and 75% in subsequent years</li> <li>• Equitable geographic distribution required</li> <li>• Supplement not supplant required</li> </ul>	
<p style="text-align: center;"><b>Title V Empowering Parents and Expanding Opportunity Through Innovation</b></p> <p style="text-align: center;"><i>Part A Charter Schools Programs</i></p>	<p style="text-align: center;"><b>Title III, Part A – Subpart 1 Charter School Program</b></p>
<p><u>Purpose</u> To support the planning, design, and initial implementation of charter schools, increase the number of high quality charter schools, evaluate impact and share best practices, encourage State facility support, expand opportunities for underserved subgroups of</p>	<p><u>Purpose</u> To support innovation in public education, support the planning, design, expansion and initial implementation of charter schools, expand the number of high quality charter schools, evaluate impact, encourage State facility</p>

<p align="center"><b>Senate Committee Bill Every Child Achieves Act</b> (as reported by Committee)</p>	<p align="center"><b>H.R. 5 Student Success Act</b> (includes amendments adopted on House floor to date)</p>
<p>students, and strengthen charter school authorizing agencies</p>	<p>support, increase opportunities for subgroups of students, strengthen charter school authorizing agencies, and support accountability and transparency</p>
<p><u>National Allocation</u></p> <ul style="list-style-type: none"> <li>• 25% for National Activities</li> <li>• 12.5% for Facilities Program</li> <li>• Remainder for High Quality Charter School Grants</li> <li>• Continuation grants to receive funding to meet current terms and conditions</li> </ul>	<p><u>National Allocation</u></p> <ul style="list-style-type: none"> <li>• 10% for National Activities</li> <li>• 12.5% for Facilities Program</li> <li>• 77.5%% for Grants to States</li> </ul>
<p><u>Eligible Entities</u></p> <ul style="list-style-type: none"> <li>• State entity (SEA, State charter board, Governor, charter support organization)</li> <li>• Authorized public chartering agency</li> <li>• LEA</li> <li>• Charter management organization</li> </ul>	<p><u>Within State Allocation</u></p> <ul style="list-style-type: none"> <li>• 90% for Subgrants to Local Applicants</li> <li>• 10% for State administration and technical assistance for charter schools and authorizing agencies</li> </ul>
<p><u>Competitive Charter School State Grant Program</u> The Secretary awards grants competitively to eligible state entities to award subgrants to open, replicate or expand charter schools and provide technical assistance and work with chartering agencies to improve quality</p>	<p><u>Priority for State Grant Awards</u></p> <ul style="list-style-type: none"> <li>• States allowing at least one non-LEAs to be an authorizing agency, or has an appeal process from LEA-based authorizers</li> <li>• State without limits on the # or % of charter schools or students</li> <li>• States providing equitable financing</li> <li>• State uses best practices from charter schools to help improve struggling schools</li> <li>• State partners with a charter management organization with a record of success</li> <li>• State supports charter schools serving at-risk students through targeted activities</li> <li>• State authorizes all charter schools to serve as food service authorities</li> <li>• State demonstrates assistance in facility funding, acquisition of facilities, access to public facilities, right of first refusal to purchase</li> </ul>

<p style="text-align: center;"><b>Senate Committee Bill Every Child Achieves Act</b> (as reported by Committee)</p>	<p style="text-align: center;"><b>H.R. 5 Student Success Act</b> (includes amendments adopted on House floor to date)</p>
	<p>public buildings, low or no cost leasing privileges</p>
<p><u>Program Requirements</u></p> <ul style="list-style-type: none"> <li>• 90% for subgrants for charter schools</li> <li>• 7% for technical assistance and improving quality of authorized chartering organizations</li> <li>• 3% for administrative costs</li> <li>• Duration of 3 years with a 2 year renewal based on performance (subgrants have same duration)</li> <li>• No entity may receive more than one grant at a time, and no local applicant may receive more than subgrant for any grant period except in the case of a strong track record of results</li> <li>• Priority given to State entities that has at least one authorizing agency is not an LEA or has an appeal process if LEAs are chartering agencies; provide equitable financing compared to traditional public schools; provides one or more forms of facility assistance; uses best practices; supports at-risk students; and ensures a high degree of autonomy over budget, operations and personnel decisions</li> <li>• Use of weighted lottery for admissions allowed</li> <li>• Nothing to be construed to prohibit schools specializing in specific services for students with demonstrated need</li> <li>• Secretarial waiver of requirements authorized</li> </ul>	<p><u>Program Requirements</u></p> <ul style="list-style-type: none"> <li>• Duration of 5 years for State Grants</li> <li>• Duration of 3 years for subgrants</li> <li>• No entity or subgrantee may receive more than one grant at a time for the program period, except if demonstrated record of success after 3 years of a local subgrant</li> </ul>
<p><u>Federal Formula Grant Allocation Requirements</u> <b>Hold-harmless protections under Title I sec. 1122 and 1125A(g)(3) are to be applied to the updated student count for new and expanded charter schools</b></p>	<p><u>Federal Formula Grant Allocation Requirements</u> Same as current law</p>

<p style="text-align: center;"><b>Senate Committee Bill Every Child Achieves Act</b> (as reported by Committee)</p>	<p style="text-align: center;"><b>H.R. 5 Student Success Act</b> (includes amendments adopted on House floor to date)</p>
<p><u>Facilities Financing Assistance</u> To award not less than 3 competitive grants by the Secretary to demonstrate innovative methods of assisting charter schools to address the cost of acquiring, constructing, and renovating facilities by enhancing the availability of loans and bond financing; and a per-pupil facility aid program</p>	<p><u><i>Facility Financing Assistance</i></u> To demonstrate innovative methods of assisting charter schools with facilities by making available loan and bond financing</p>
<p><u>Grants to Eligible Entities</u></p> <ul style="list-style-type: none"> <li>• Public entity such as a State or a local governmental entity</li> <li>• Private nonprofit entity</li> <li>• Consortium of above</li> </ul> <p>Not less than one grant to each type of entity required</p>	<p><u>Grants to Eligible Entities</u></p> <ul style="list-style-type: none"> <li>• Public entity such as a State or a local governmental entity</li> <li>• Private nonprofit entity</li> <li>• Consortium of above</li> </ul>
<p><u>Allotment of Funds</u></p> <ul style="list-style-type: none"> <li>• At least 3 Innovation Financing Grants with not less than 50% of the 12.5% reservation for Facilities Assistance</li> <li>• Remainder for State Per-Pupil Facilities Aid Program Grants</li> </ul>	<p><u>Use of Funds</u> Establishing a reserve fund for:</p> <ul style="list-style-type: none"> <li>• Guaranteeing, insuring or reinsuring bonds, loans, etc.</li> <li>• Guaranteeing and insuring leases</li> <li>• Encouraging other lending</li> <li>• Facilitating bond issuances</li> </ul>
<p><u>Program Requirements</u></p> <ul style="list-style-type: none"> <li>• No supplement not supplant provision</li> <li>• Administrative costs limited to 2.5%</li> </ul>	<p><u>Program Requirements</u></p> <ul style="list-style-type: none"> <li>• No supplement not supplant provision</li> <li>• Administrative costs limited to 2.5%</li> </ul>
<p><u>Per Pupil Facility Aid Program</u> To provide competitive grants to States to pay the federal share (90% decreasing to 20% in 5 years) of establishing or enhancing per pupil funding of charter school facilities</p> <ul style="list-style-type: none"> <li>• <b>New supplement not supplant requirement referencing the compliance provision under Title I in which the LEA demonstrates that the methodology for allocating State and local funds ensures that each school receiving assistance under this part</b></li> </ul>	<p><u><i>Per Pupil Facility Aid Program</i></u> To provide competitive grants to States to pay the federal share (90% decreasing to 20% in 5 years) of establishing or enhancing per pupil funding of charter school facilities</p>

<p style="text-align: center;"><b>Senate Committee Bill Every Child Achieves Act</b> (as reported by Committee)</p>	<p style="text-align: center;"><b>H.R. 5 Student Success Act</b> (includes amendments adopted on House floor to date)</p>
<p><b>receives all the state and local funds it would otherwise receive if it were not receiving this assistance.</b></p>	
<p><u>National Activities</u></p> <ul style="list-style-type: none"> <li>• Not less than 80% for Grants to Replicate and Expand High-Quality Charter Schools</li> <li>• Remainder for technical assistance, best practices dissemination, evaluation, and awarding competitive grants to eligible applicants in states not receiving State Charter School Grants</li> <li>• Eligible Entities are charter school management organizations and nonprofit organizations overseeing and coordinating activities for a group of charter management organizations with priority to entities serving schools in the aggregate with 60% FRPL eligibility</li> </ul>	
<p style="text-align: center;"><b>Title V, Part B Magnet Schools Assistance</b></p> <ul style="list-style-type: none"> <li>• Authorization of Appropriations at such sums as necessary through FY21</li> <li>• <b>Adds increasing of socioeconomic integration along with current elimination, reduction and prevention or minority group isolation to the purpose of the program; and adds low-income to minority students</b></li> <li>• <b>Adds ethnic and socioeconomic backgrounds to students with different racial backgrounds in the definition of magnet schools with regard to attracting new students</b></li> <li>• <b>Revises the priority for new magnet school programs or significantly revised magnet school programs by adding ‘evidence-based’ to the program, methods or practices</b></li> </ul>	<p style="text-align: center;"><b>Title III, Part A, Subpart 2 Magnet Schools Assistance</b></p> <p>Reauthorized with no substantive changes, other than expanding priority to serving all students in a school.</p>

<p style="text-align: center;"><b>Senate Committee Bill Every Child Achieves Act</b> (as reported by Committee)</p>	<p style="text-align: center;"><b>H.R. 5 Student Success Act</b> (includes amendments adopted on House floor to date)</p>
<ul style="list-style-type: none"> <li>• <b>Adds a two-year renewal period to the 3 year initial grant period</b></li> <li>• Reserves up to 1% for national technical assistance activities</li> </ul>	
<p style="text-align: center;">Part C – Supporting High-Ability Learners and Learning (Javits Gifted and Talented Program)</p>	
<p><u>Authorization of Appropriations</u> Such sums as necessary through FY21</p>	
<p><u>Purpose</u> To initiate a coordinated program of evidence-based, research, demonstrations, innovative strategies, and similar activities to meet the special educational needs of gifted and talented students</p>	
<p><u>Grant and Contract Authority</u></p> <ul style="list-style-type: none"> <li>• The Secretary is authorized to make grants and enter into contracts with SEAs, LEAs, IHEs, other public and private agencies. If funds exceed funding from FY10 for this program, the additional funds will be used to award grants to SEAs, LEAs, or both. Requires a National Center to be funded which would be limited to 30% of the FY10 program funding level.</li> <li>• Equitable participation of private school students and teachers is required</li> </ul>	
<p>Part D – Education Innovation and Research</p>	
<p><u>Authorization of Appropriations</u> Such sums as necessary through FY21</p>	
<p><u>Purpose</u> To make grants to eligible entities by the Secretary for the development, implementation, replication, or scaling, and rigorous testing of entrepreneurial, evidence-based, field-initiated innovations to improve student achievement and attainment for high-need students, including early phase</p>	

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grants, mid-phase grants, and expansion grants	
<u>Eligible Entities</u> <ul style="list-style-type: none"> <li>• LEA</li> <li>• SEA</li> <li>• Consortium of above</li> <li>• SEA or LEA in partnership with a nonprofit, small business, charter management organization, ESA, or IHE</li> </ul>	
<u>Rural Reservation:</u> 25% of funds  <u>Matching Requirement:</u> 10% except in exceptional circumstances	
Part E – Accelerated Learning	
<u>Authorization of Appropriations</u> Such sums as necessary through FY21	
<u>Purpose</u> Reauthorizes assistance for the Advanced Placement and International Baccalaureate programs, dual enrollment programs and early college high school programs, including priority to cover associated fees	
Part F – Ready To Learn TV	
<u>Authorization of Appropriations</u> Such sums as necessary through FY21	
<u>Purpose</u> Reauthorizes grants by the Secretary for preschool and elementary educational video programming, and family educational television programming	
Part G – Innovative Technology	
<u>Authorization of Appropriations</u> Such sums as necessary through FY21	
<u>Purpose</u> To improve achievement, academic growth, and college and career readiness for all students, ensure access to personalized learning experiences, ensure educators and district leaders have knowledge and skills to use technology, ensure rural access, ensure	



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<p>access to online dual and concurrent enrollment opportunities, and ensure SEAs, LEAs, and schools have capacity, infrastructure, and support necessary.</p>	
<p><u>Allotment of Funds</u></p> <ul style="list-style-type: none"> <li>• 1.5% for national activities</li> <li>• ¾% for BIA</li> <li>• 1% for outlying areas</li> <li>• Remainder to SEAs based on Title I-A allocations</li> <li>• ½% for small state minimum</li> </ul> <p><u>Matching Funds for Non-Federal Sources</u></p> <ul style="list-style-type: none"> <li>• 10% which may be waived if undue financial hardship</li> </ul>	
<p><u>Within State Allocation</u></p> <ul style="list-style-type: none"> <li>• Not more than 10% reserved by SEA for state activities with 1% for state administration if subgrants awarded by formula based on Title I allocations (with a \$20,000 minimum), and 3% if subgrants awarded competitively based on an appropriation of less than \$300 million</li> <li>• Additional 1% state reservation if SEA forms state purchasing consortium and additional amounts with approval from LEAs receiving subgrants</li> <li>• 90% for subgrants to LEAs</li> </ul>	
<p><u>Priorities for Competitive Subgrants</u></p> <ul style="list-style-type: none"> <li>• LEAs with substantial need in acquiring and using technology based on technology readiness survey</li> <li>• Rural and remote schools, schools identified under sec. 1114, school with high percentage of low-income students based on census data, FRPL, TANF or Medicaid</li> </ul>	

<p style="text-align: center;"><b>Senate Committee Bill Every Child Achieves Act</b> (as reported by Committee)</p>	<p style="text-align: center;"><b>H.R. 5 Student Success Act</b> (includes amendments adopted on House floor to date)</p>
<p>Local Allocation of Funds</p> <ul style="list-style-type: none"> <li>• Not less than 50% for professional development</li> <li>• Not less than 25% for technology acquisition</li> <li>• SEA approval to modify the percentage of funds</li> <li>• Blended learning projects allowable provided that a 10% non-federal match is contributed</li> </ul>	
<p>Part H – Literacy and Arts Education</p>	
<p><u>Authorization of Appropriations</u> Such sums as necessary through FY21</p>	
<p><u>Purpose</u> To provide competitive grants to eligible entities to promote arts education for disadvantaged and disabled students, and to promote literacy programs in low-income communities, including providing high-quality books.</p>	
<p><u>Eligible Entities</u></p> <ul style="list-style-type: none"> <li>• LEAs with 20% or more census poverty</li> <li>• A consortium of such LEAs</li> <li>• An eligible national nonprofit organization</li> </ul>	
<p>Part I – Early Learning Alignment and Improvement Grants</p>	
<p><u>Authorization of Appropriations</u> Such sums as necessary through FY21</p>	
<p><u>Purpose</u> To assist States to efficiently using existing Federal resources for high-quality early childhood education as determined by the State, coordinate existing funding streams and delivery models, and improve access for low-income children to high-quality early childhood education in order to enhance school readiness</p>	

<p style="text-align: center;"><b>Senate Committee Bill Every Child Achieves Act</b> (as reported by Committee)</p>	<p style="text-align: center;"><b>H.R. 5 Student Success Act</b> (includes amendments adopted on House floor to date)</p>
<p><u>Eligible Child</u></p> <ul style="list-style-type: none"> <li>• A child less than 6 years of age, and</li> <li>• Whose family income does not exceed 200% of the poverty line, 85% of the State median income (with assets less than \$1 million), or a State-determined threshold not exceeding any of the above</li> </ul>	
<p><u>Competitive Grants to States</u></p> <ul style="list-style-type: none"> <li>• Secretary reserves not less than 30% for States that propose to carry out the activities for eligible children living in rural areas.</li> <li>• Priority given to States using funds to focus on eligible children ages 3 and 4 with family incomes below 130% of the poverty line</li> <li>• 3 year grant duration</li> <li>• Limit of one grant per State except if State proposes carrying out activities in rural areas with the additional grants or if there are no other applicants.</li> <li>• Equitable distribution required</li> <li>• State must partner with an eligible partnership</li> <li>• 30% matching from Federal or non-Federal sources required for the first year and not less than 30% in year 2 and 3</li> <li>• States required to prioritize parental choice of providers and evidence-based practices as permitted under State and local law</li> </ul>	
	<p style="text-align: center;"><b>Title III, Part A, Subpart 3 Statewide Family Engagement Centers</b></p>

<p style="text-align: center;"><b>Senate Committee Bill Every Child Achieves Act</b> (as reported by Committee)</p>	<p style="text-align: center;"><b>H.R. 5 Student Success Act</b> (includes amendments adopted on House floor to date)</p>
	<p>National grants to statewide organizations and consortia of not less than \$500,000</p>
<p style="text-align: center;"><b>Title VI State Innovation and Flexibility</b> (Grants for State Assessment moved from Title VI, Part A to Title I, Part B)</p>	
<p><u>Transferability of Funds</u> States and LEAs prohibited from transferring funds out of Title I and III</p> <ul style="list-style-type: none"> <li>• Eliminates the 50% transferability limitation for State-level activities and applies provision to Title II-A, IV-A and V-G (Technology)</li> <li>• Removes 50% limitation for State-level activities for transfers into Title I</li> <li>• Eliminates the 50% and 30% limitations for local transfers and applies provision to Title II-A, IV-A, and V-G (Technology)</li> <li>• Removes limitation reference for local transfers into Title I</li> </ul>	<p>No applicable provision</p>
<p><u>Weighted Student Funding Flexibility Pilot Program</u></p>	<p>No applicable program</p>
<p><b>Title VI, Part B, Rural Schools Program</b></p> <ul style="list-style-type: none"> <li>• Such sums as necessary through FY21</li> </ul>	<p style="text-align: center;"><b>Title I, Part A, Subpart 5 Rural Schools Program</b></p> <ul style="list-style-type: none"> <li>• Authorized at a 0.6% reservation from the Title I appropriation for the Rural School Achievement Program</li> </ul>
<p style="text-align: center;"><b>Title VII Indian, Native Hawaiian, Native Alaskan Education Programs</b></p>	<p style="text-align: center;"><b>ESEA Title V – Indian and Native Education</b></p>

<p style="text-align: center;"><b>Senate Committee Bill Every Child Achieves Act</b> (as reported by Committee)</p>	<p style="text-align: center;"><b>H.R. 5 Student Success Act</b> (includes amendments adopted on House floor to date)</p>
<p>Such sums as necessary through FY21 for:</p> <ul style="list-style-type: none"> <li>• Part A-1 --Indian Education Formula Grants</li> <li>• Part A-2 &amp; 3 -- Special Projects and National Activities</li> <li>• Part B --Native Hawaiian Education</li> <li>• Part C --Alaska Native Education</li> <li>• Part D -- Native American and Alaska Native Language Immersion Program</li> </ul>	<p>Title V – Indian and Native Education</p> <ul style="list-style-type: none"> <li>• \$105.9 million for Indian Education LEA Formula Grants</li> <li>• \$ 24.9 million for Special Projects and Professional Development</li> <li>• \$ 33.2 million for Alaska Native Education</li> <li>• \$ 34.2 million for Native Hawaiian Education</li> </ul>
<p style="text-align: center;"><b>Title VIII -- Impact Aid</b></p> <p>Such sums as necessary through FY21 for :</p> <ul style="list-style-type: none"> <li>• Section 2</li> <li>• Basic Payments</li> <li>• Children with Disabilities</li> <li>• Construction</li> <li>• Facilities Maintenance</li> </ul>	<p style="text-align: center;"><b>Impact Aid</b></p> <p>Title IV -- Impact Aid annually through FY21</p> <ul style="list-style-type: none"> <li>• \$66.8 million for previous Section 2</li> <li>• \$1.15 billion for Basic Payments</li> <li>• \$48.3 million for children with disabilities</li> <li>• \$17. million for construction</li> <li>• \$4.84 million for facilities maintenance</li> </ul>
<p style="text-align: center;"><b>Title IX -- ESEA General Provisions</b></p>	<p style="text-align: center;"><b>ESEA Title VI – General Provisions</b></p>
	<p style="text-align: center;"><i>Part A – Definitions</i></p> <ul style="list-style-type: none"> <li>• Adds a number of new definitions</li> </ul>
	<p><u>Direct Student Services</u> Public school choice or high-quality tutoring to increase academic achievement</p>
	<p><u>English Learner</u> Same as previous definition of Limited English Proficient student</p>

<p style="text-align: center;"><b>Senate Committee Bill Every Child Achieves Act</b> (as reported by Committee)</p>	<p style="text-align: center;"><b>H.R. 5 Student Success Act</b> (includes amendments adopted on House floor to date)</p>
<p><u>Evidenced-Based</u> Defined as an activity that demonstrates statistically significant effect on outcomes by:</p> <ul style="list-style-type: none"> <li>- Strong evidence from at least one well-designed experimental study;</li> <li>- Moderate evidence from at least one well-designed quasi-experimental study;</li> <li>- Promising evidence from at least one well-designed correlational study with statistical controls for selection bias,</li> </ul> <p>or</p> <p>By a rationale based on high-quality research findings that would likely improve outcomes</p> <p><b>For Title I Part A programs, the strong evidence or moderate evidence criteria above is a requirement</b></p>	
<p><u>Graduation Rate</u> (references current federal regulations)</p>	<p><u>Graduation Rate</u> Means the adjusted cohort graduation rate</p> <p><u>Four-Year Adjusted Cohort Graduation Rate</u> The denominator is the number of students who form the original cohort of entering first time 9<sup>th</sup> grade students, adjusted by those that entered or left the cohort, and the numerator is the number of students in the cohort earning a regular high school diploma</p> <p><u>Extended-Year Adjusted Cohort Graduation Rate</u> The number of students entering at the entry grade, adjusted by those that entered or left the cohort, and earned a</p>

<p align="center"><b>Senate Committee Bill Every Child Achieves Act</b> (as reported by Committee)</p>	<p align="center"><b>H.R. 5 Student Success Act</b> (includes amendments adopted on House floor to date)</p>
	<p>high school diploma one or more years beyond the fourth year of high school or a summer session following the additional year</p>
<p>(maintains HQT definition from NCLB <u>only</u> for other federal laws using the term)</p>	<p><u>Highly Qualified Teacher</u> Repeals the HQT definition</p> <p>Also repeals the IDEA Sec. 602(10) definition of a highly qualified special education teachers</p> <p><u>High Quality Academic Tutoring</u> New definition similar to SES with LEA and non-governmental provider approved by the state and selected by the parent</p>
	<p><u>Professional Development</u> Sets out a multi-page definition of professional development</p>
<p><u>Core Academic Subjects</u> <b>Adds to current 11 federally-defined core subjects: writing, technology, engineering, computer science, music, physical education and any other subject determined by SEAs or LEAs</b></p>	<p>No applicable provision</p>
	<p><u>Regular High School Diploma</u> The standard high school diploma awarded to the preponderance of students that is aligned to state standards, or a higher diploma. Does not include a GED or other equivalent, certificate of attendance, or lesser diploma. Provides exception for students with significant cognitive disabilities assessed with an alternate assessment aligned to alternate standards and receiving a standard diploma or a State-defined alternate</p>

<p style="text-align: center;"><b>Senate Committee Bill Every Child Achieves Act</b> (as reported by Committee)</p>	<p style="text-align: center;"><b>H.R. 5 Student Success Act</b> (includes amendments adopted on House floor to date)</p>
	<p>diploma within the time period allowed under IDEA to be counted as graduating with a regular diploma for ESEA purposes.</p>
	<p style="text-align: center;"><i>Parts B &amp; C Flexibility in the Use of Administrative and Other Funds</i></p> <ul style="list-style-type: none"> <li>• Consolidated State Plans and Local Plans continue to be allowed</li> </ul>
<p><u>Sec. 9401 – Waivers</u> Revises state and local waiver authority</p> <ul style="list-style-type: none"> <li>• Removes LEAs from authority to submit waiver requests directly to the Secretary and requires submission to SEA which may then submit the request to the Secretary</li> <li>• Requires a waiver implementation plan, monitoring, evaluation</li> <li>• Removes requirements relating to increasing instructional quality and improving students achievement, as well as measurable goals</li> <li>• Secretary shall approve a waiver request within 60 days unless it does not meet requirements or waives an inapplicable provision</li> <li>• Opportunities to revise and resubmit waiver request is required</li> <li>• Maintains all current non-waivable provisions</li> <li>• Prohibits the Secretary from placing any requirements on the requesting applicant as a condition of approval or disapproval for conditions outside the scope of the waiver request</li> </ul>	<p style="text-align: center;"><i>Part D – Waivers</i></p> <p>Reauthorizes state and local waiver authority</p> <ul style="list-style-type: none"> <li>• Requires waiver approval within 60 days and may be approved without peer review</li> <li>• Peer review must be used before any disapproval</li> <li>• Approval within 60 days is required if requirements are met and with deference to state and local judgment during review unless there is no reasonable evidence of enhanced student achievement or does not provide for an adequate evaluation</li> <li>• Opportunities to revise and resubmit waiver request is required</li> <li>• Continues current waiver prohibitions except repeal of maintenance of effort</li> <li>• Prohibits the Secretary from adding further requirements in order to receive a waiver, including criterion regarding standards, assessments, accountability, or staff evaluations</li> </ul>



<p style="text-align: center;"><b>Senate Committee Bill Every Child Achieves Act</b> (as reported by Committee)</p>	<p style="text-align: center;"><b>H.R. 5 Student Success Act</b> (includes amendments adopted on House floor to date)</p>
<p style="text-align: center;"><i>General Provisions</i></p> <p>Remaining provisions of Title IX mostly unchanged unless noted</p>	<p style="text-align: center;"><i>Part E – Uniform Provisions</i></p>
<p><u>Title IX, Part G – Approval and Disapproval of State and Local Plans (Sec. 9701-9702)</u> State Plans deemed to be approved by the Secretary unless a written determination of disapproval within 90 days due to non-compliance or a substantial body of research clearly demonstrating that requirements are not met or the likelihood of ineffectiveness or inappropriateness for the intended purpose; and provide an opportunity for hearing</p> <p>LEA Plans deemed approved by the SEA unless a written determination of non-compliance within 90 days or a substantial body of research clearly demonstrating that requirements are not met or the likelihood of ineffectiveness or inappropriateness for the intended purpose; and provide an opportunity for a hearing</p>	
<p>Revises current Maintenance of Effort Requirements to allow a one-year failure to meet the 90% requirement</p>	<p>Repeals Maintenance of Effort Requirements</p>
<p><u>Private School Provisions</u> Makes minimal changes to Consultation provisions</p>	<p><u>Subpart 1 -- Private School Provisions</u></p> <ul style="list-style-type: none"> <li>• <b>Requires obligation of funds and carryover of unused funds</b></li> <li>• Add new documentation requirements and affirmation of consultation from Title I</li> <li>• Authorizes the SEA to provide services directly or through contract including if an LEA has more than 10,000 low-income children in private schools in a participating school attendance</li> </ul>

<p style="text-align: center;"><b>Senate Committee Bill Every Child Achieves Act</b> (as reported by Committee)</p>	<p style="text-align: center;"><b>H.R. 5 Student Success Act</b> (includes amendments adopted on House floor to date)</p>
	<p>area that are not being served or 90% of the eligible private school students in a participating attendance area are not being served</p> <ul style="list-style-type: none"> <li>• Shortens the period for the Secretary to resolve complaints</li> </ul>
<ul style="list-style-type: none"> <li>• Revises Federally Sponsored Testing provision</li> <li>• Revises Limitations on National Testing of Teachers</li> </ul>	<p>SUBPART 2 – PROHIBITIONS</p> <ul style="list-style-type: none"> <li>• Federal Mandates, Direction or Control (including any requirement relating to the Common Core or other common academic standards)</li> <li>• School Building Standards</li> <li>• Federally Sponsored Testing</li> <li>• Limitations on National Testing or Teacher Certification</li> <li>• Various Limitations on Use of Funds</li> <li>• Consideration in State Aid</li> <li>• Prohibition on Requiring State Program Participation and inapplicability of requirements</li> <li>• Prohibits the Secretary from exercising governance and budgeting requirements unless explicitly authorized in the Act, issuing regulations without consulting and fairly addressing local stakeholder concerns, or denying the right to object to administrative requirements including burdens and costs</li> </ul>
<ul style="list-style-type: none"> <li>• Makes technical revision to Armed Forces recruiting</li> </ul>	<p>SUBPART 3 – OTHER PROVISIONS</p> <ul style="list-style-type: none"> <li>• Armed Forces Recruitment Access</li> <li>• Rulemaking Limits</li> <li>• Peer Review Requirements</li> </ul>

<p style="text-align: center;"><b>Senate Committee Bill Every Child Achieves Act</b> (as reported by Committee)</p>	<p style="text-align: center;"><b>H.R. 5 Student Success Act</b> (includes amendments adopted on House floor to date)</p>
	<ul style="list-style-type: none"> <li>• Parent Consent would trigger withdrawal from Title III-B programs upon written notice</li> </ul>
<p>No applicable provision</p>	<p><u>Protection from Abortion Providers</u> ESEA funds may not be used by an SEA or LEA under an agreement with a school-based health center providing health services to students unless the agency certifies that abortions are not performed by the center and abortion-related materials, referrals, or directions are not provided to any student. Non-abortion health services are allowed for pregnant students.</p>
<p>No applicable provision</p>	<p><u>Reduction in Education Department.</u> Requires staff reductions in Education Department in accordance with programs that have been eliminated or consolidated within one year.</p> <p><u>Reduction in Federal Spending</u> Requires the director of the Institute for Education Science to contract with an economist on government efficiency and issue a report on cost savings by reduction of federal requirements under this Act, the need for federal funds, and funding amounts and reduced number of employees resulting from H.R. 5</p>
<p>No applicable provision</p>	<p><u>Restoration of State Sovereignty over Public Education</u> Prohibits enforcement of any ESEA requirements unless the State Legislature by law expressly approves the program and affirmatively agrees to the terms and conditions. Any funds not accepted are not reallocated and are used for deficit reduction</p>
<p><u>Evaluations</u> Authorizes Secretary to reserve .5% of each categorical program for evaluation unless</p>	<p><u>Part F – Evaluations</u> Authorizes Secretary to reserve .5% of each categorical program for evaluation</p>

<p style="text-align: center;"><b>Senate Committee Bill Every Child Achieves Act</b> (as reported by Committee)</p>	<p style="text-align: center;"><b>H.R. 5 Student Success Act</b> (includes amendments adopted on House floor to date)</p>
<p>otherwise specified in the Act (not applicable to Title I)</p>	<p>unless otherwise specified in the Act (not applicable to Title I)</p>
<p style="text-align: center;"><b>McKinney-Vento Homeless Assistance Act</b></p> <p>Minimal amendments and authorization of appropriations at such sums as necessary annually through FY21</p>	<p style="text-align: center;"><b>McKinney-Vento Homeless Assistance Act</b></p> <p>Amendments and an authorization of appropriations at \$65 million annually through FY21</p>

## Update to Superintendents on ESEA and Title I Formula

**From:** Michael Casserly  
**Sent:** Thursday, May 28, 2015  
**To:** Superintendents  
**Subject:** ESEA and Title I Formula Update

Great City School Superintendents/Chancellors/CEOs--

We wanted to provide you with an update on the status of the Elementary and Secondary Education Act (ESEA) reauthorization, since it's been a few weeks since there has been action on Capitol Hill. The Senate education committee approved reauthorization legislation, titled *The Every Child Achieves Act* (S. 1177), on a unanimous vote of 22-0 in mid-April. Although there were significant concerns with the legislation from both the left and the right -- and from the Great City Schools as well -- the good faith effort by Chairman Lamar Alexander (R-TN) and Ranking Member Patty Murray (D-WA) to accommodate the diverse interests of committee members led to the broad support we have seen so far.

While the timing remains unclear, the next step in the Senate reauthorization process is consideration of the committee-approved bill and amendments on the Senate floor. This action is possible in mid- to late-June, but could also get pushed back until after the July 4<sup>th</sup> recess. We expect committee leaders to allow an "open amendment" process on the Senate floor, just as they did during the committee markup. This open amendment process could result in significant changes in the legislation, and the bill's broad support could erode if there are controversial amendments regarding "portability," private school vouchers, or changes to the Title I funding formula.

**The Council remains opposed to any amendment that seeks to change the Title I formula.** Without an increased appropriation for Title I (a non-starter in the current federal budget), the result of any formula amendment will be a major shift in existing funds around the country, creating a set of winners and losers based on the preferences of the amendment sponsor. Specific changes to the Title I formula will likely depend on whether the amendment's sponsor is from a particular state or region (the north or south), a member of the House or the Senate, or any number of other factors. In general, once the Title I funding formula becomes open to revisions, the ultimate winners and losers, and the size of the losses, cannot be predicted—and cannot be controlled. **We are asking all Great City School members to oppose a formula change regardless of whether you are likely to win or lose under one proposal or another. If you win, you are going to take it out of one of your sister city school systems. If you lose, you could lose big. This is a time for all of us to stick together.**

On the House side, final approval of their ESEA legislation -- *The Student Success Act* (H.R. 5) -- has not been rescheduled for the House floor since the bill was pulled from consideration in late February. The pending House ESEA reauthorization is a very different bill from the pending Senate measure, and the uncertainty of how a House and Senate conference committee would reconcile their respective bills is another reason to avoid changes to the Title I formula from the outset.

We will keep you updated on the timing of floor action in the Senate. Please feel free to contact me if you have any questions in the meantime.

## Sample Email Alert on Title I Formula Amendment in the U.S. Senate

**From:** Michael Casserly  
**Sent:** Tuesday, June 16, 2015  
**To:** Fran Rabinowitz; Sauda Baraka  
**Cc:** Jeff Simering; Manish Naik  
**Subject:** Title I Formula Amendment Expected--Action Needed!

Fran and Sauda--

The ESEA reauthorization bill is scheduled to hit the Senate floor within a week or so, and the Congressional Research Service (CRS) has provided estimates on the funding cuts your district and state will receive if the pending Title I formula amendment is approved. **Bridgeport is estimated to lose \$2 million from the district's current Title I funding level, and Connecticut overall would lose \$18 million.**

Please call both Senator Blumenthal and Senator Murphy immediately to let them know the amount of the cuts to the state and your district.

The amendment to change the Title I formula will be offered by Senator Richard Burr (R-NC), and, as expected, cuts existing Title I funding from states like Connecticut and diverts the money to low-spending and low-cost states.

### **Requested Action by the Great City Schools:**

- Please contact Senators Blumenthal and Murphy through their local offices and their Washington office, and speak with both Senators' education aide AND both Senators themselves.
- Inform them of the amount of Title I funding that the Burr Title I formula amendment will cut from your school district and your state. Make it clear that there are no education policy changes in the bill that are more important than the loss of Title I funding for your school district.
- Specifically, ask each Senator to:
  1. Inform Education Committee Ranking Member Patty Murray that they are opposed to the Burr amendment, and will vote against the overall bill if the Burr amendment is approved;
  2. Be prepared to speak against a Title I formula amendment during floor consideration of the ESEA reauthorization bill (and offer to provide information on what Title I provides to your district and how a funding cut would hurt services for disadvantaged students);
  3. Vote against the Burr Title I formula amendment on the Senate floor; and
  4. Vote against the overall ESEA bill if a Title I funding amendment is approved.

Please let us know the response from Senators Blumenthal and Murphy's offices, and if any additional follow-up is needed. And thanks once again for your immediate action on this critical federal funding formula issue. If you have questions, please call my cell at 202/421-8578.

--Michael Casserly  
Council of the Great City Schools

## Legislative Update on ESEA Reauthorization

**From:** Jeff Simering  
**Sent:** Tuesday, June 30, 2015 11:36 AM  
**To:** Legislation  
**Subject:** Update on Senate ESEA reauthorization bill (S. 1177)

### **Update on the Senate ESEA Reauthorization Bill (S. 1177)**

The full Senate is scheduled to begin consideration of the ESEA reauthorization bill (S. 1177) next week after the July 4<sup>th</sup> recess. The current Committee-passed version of the Senate ESEA bill is now 790 pages compared to the initial 367-page “discussion draft.” Since we have yet to see a realistic characterization of the pending Senate bill, the Council is providing this update.

### **The Senate ESEA Committee Bill**

The Council of the Great City Schools offered preliminary support for the Senate ESEA reauthorization bill as introduced in Committee. The Council has not changed our qualified support for the Senate bill, even though we have concerns with numerous provisions in the legislation. [In contrast, the Council unequivocally opposed the House ESEA reauthorization bill (H.R. 5).]

Our qualified support followed the Senate Committee removing the earlier funding portability and funding freeze provisions of the discussion draft. Yet, the Committee only made inadequate modifications to other draft provisions, including allowing a one-year grace period for reducing state maintenance of effort in state education funding and allowing schools with even small percentages of poor students to spend Title I funds on all students as a “schoolwide Title I program.”

### **Potential Senate Floor Amendments**

The expected open amendment process on the Senate floor will allow for numerous amendments which will likely include amendments reinstate funding portability, allow for private schools vouchers, and propose changes in the Title I funding formula. Other destructive amendments are possible as well. Adoption of any of these amendments will result in the Council opposing the passage of the Senate ESEA bill.

### **The Positive**

Currently, the Senate bill includes some positive revisions to NCLB. The pending measure eliminates a number of unnecessary and unproductive requirements from the current ESEA statute including the Adequate Yearly Progress-based accountability system, the rigid multi-tiered school improvement sanctions, and many of the required “set-aside” expenditure requirements contained in NCLB. The Senate bill also retains the current Title I comparability provisions without change. It is expected that the “state-designed differentiated accountability system” under the new Senate bill would be less complex than the NCLB system. [However, there is no guarantee under a new state-designed system that achievement gaps and ongoing underperformance of traditional at-risk subgroups of students would receive the same level of attention in all schools as now occurs under current law.]

### **The Negative**

On the other hand, the Senate bill also now includes many new provisions and multiple new requirements -- some that exceed current NCLB language and others that are hard to distinguish as either mandatory or permissive. These include expansions of state and local Title I plans, increased funding for private school services and charter schools, more prescriptive within-district Title I allocation rules, and multiple new reporting requirements including new disaggregated subgroups. The new "state-designed" accountability system actually entails more federally-required elements than the current NCLB system, including the addition of a new nonacademic indicator for all schools, adding EL English language acquisition to the accountability system, as well as mandating state-set timelines and a state-determined number of years for ELs reaching English proficiency. And, the pending bill could complicate and narrow the range of allowable activities in Title I schools and restrict Title II expenditures for class-size reduction based on the restrictive language and definitions in the legislation.

### **The Uncertain**

In short, the Senate bill is clearly a work in progress, but comparatively better than the House bill with its funding freezes, portability, elimination of maintenance of effort, and quasi-block grants. Nonetheless, there are many troubling provisions in the Senate bill with operational consequences to school districts that other organizations have conveniently overlooked. The duration of Senate floor action on the ESEA bill is expected to be lengthy, and the results are unpredictable at this point.

It may be prudent to wait for further Senate floor action on the bill before locking your school district into a position that may have to change depending on the disposition of potential floor amendments.

Please let us know if you have additional questions.

- Jeff Simering



**USDA**

## **Child Nutrition Programs – Preliminary Issues for the 2015 Reauthorization of the Healthy and Hunger-Free Kids Act (HHFKA)**

### **ADDRESS PROGRAM COSTS**

#### Financial Burdens:

- HHFKA regs increased breakfast costs of approximately 20 cents per meal from a survey of a dozen urban districts, primarily due to fruit and whole grain requirements (27 cents per meal cost increase was projected according to USDA final regulation summary with NO increased reimbursement)
- HHFKA regs increased lunch costs seem to range more broadly from 10 and 35 cents per meal primarily due to increased fruits and vegetables, whole grain requirements and proliferating costs overall (15 cents per meal cost increase was projected according to USDA final regulation summary with only a 6 cents additional reimbursement)

#### Commodities:

- Provide USDA commodities for breakfast program (analogous to lunch program) and allow for local farm purchase option

#### Competitive Foods:

- Allow al la carte entrees served anytime during the week as a part of the reimbursable meal to be offered on the lunch line without having to meet the competitive foods requirements

#### Paid Meals:

- Codify that the increased paid meal price provisions are not applicable to programs with positive fund balances from the preceding year

### **PROGRAM FLEXIBILITY**

#### Multi-Grade Span:

- Allow for additional flexibility in meeting calorie levels for schools with multiple grade spans by allowing for weekly averages and/or expanding the permissible range in these schools

#### Fresh Fruit/Veggies:

- Allow 1/2 cup decrease in fruit volume for breakfast
- Allow for substitutions, combinations, or double servings of either fruits or vegetables for lunch
- Allow for local program flexibility in form and color requirements if the reimbursable meal meets all nutrient standards
- Explore revisions in Offer Versus. Served to address the volume and waste issues with particular attention to OVS difficulties in elementary schools and in breakfast delivery options (e.g. Breakfast in the Classroom)

#### Meeting Nutrient Standards:

- Provide for general local flexibility in food items if reimbursable meals meet all nutrient standards

## **PROGRAM EFFICIENCY**

### Community Eligibility:

- Add Medicaid to the Direct Certification programs for Community Eligibility
- Ensure access to direct certification data bases by appropriate LEA staff (including direct certification and status eligibility data)
- Allow school meals account to pay for household income survey in CEP schools (as long as food service account has positive balance at the end of the preceding year)

### Seamless Meal Services:

- Require USDA to issue multi-program guidance which eliminates or simplifies requirements not common to all programs (provide statutory authority to implement)
- Allow local flexibility in congregate meal service requirements for summer and CACFP programs

### Program Reviews:

- Require states to conduct concurrent program reviews for LEAs that operate multiple USDA meal programs (except for summer site monitoring)
- Require consistent procedures, and simplified and consistent requirements where not common across programs (provide statutory directive to implement)
- Return to 5 year review cycle for programs in substantial compliance

### Fresh Fruit and Veg Program:

- Allow funds to be used for nutrition education as well

### Competitive Foods:

- Require USDA to conduct nutrition analysis for product compliance with competitive foods nutrition standards for any commercial product voluntarily submitted to USDA) -- LEAs would continue to conduct their own nutrition analysis of products not in USDA competitive foods data base

## **MODIFY OTHER CURRENT REQUIREMENTS**

### Freeze Sodium requirement at current level

### Personnel Standards:

- Require only minimum standards for all LEAs, not differentiated qualifications by size of LEA

### Training Requirements:

- Codify local discretion in the format and subjects of training activities

### Wellness Plan:

- Create separate program funding line or eliminate the requirement
- Define periodic report as every three years rather than the proposed 1 year
- Require only a district level report without reporting school-by-school activities

# COMMUNICATIONS

**PRESS RELEASES**

**News...News...**



**News...News...**

Council of the Great City Schools  
1301 Pennsylvania Avenue, N.W. ♦ Suite 702 ♦ Washington, D.C. ♦ 20004  
<http://www.cgcs.org>

FOR RELEASE  
March 16, 2015

CONTACT: Henry Duvall at (202) 393-2427  
[hduvall@cgcs.org](mailto:hduvall@cgcs.org)

## **Urban School Leaders Meet President Obama To Discuss Legislation, Reforms and Challenges**

WASHINGTON, March 16 – The Council of the Great City Schools, the nation’s primary coalition of large urban public school systems, today led more than 10 urban school superintendents and board members to a meeting with President Obama at the White House to discuss a range of issues, reforms and challenges aimed at improving American urban public education.

The president heard from urban school leaders on the negative impact the U.S. House of Representatives’ proposed legislation to reauthorize the Elementary and Secondary Education Act – HR5 – would have on urban schools, which serve a large percentage of minority and disadvantaged students, English language learners and students with disabilities.

“From our perspective, we would rather have no reauthorization at all than a bill that wrecks the momentum we have been creating,” Casserly told the president. “But we worry that the fragile progress we are making under the initiatives you have launched and other programs would now be put in jeopardy if anything close to the House ESEA bill emerges from Congress.”

Urban-school leaders described academic progress that has been made in their school districts, including the implementation of the Common Core State Standards, increased student participation in Advanced Placement courses, turning around struggling schools, and helping males of color and English language learners succeed.

Superintendent Barbara Jenkins of Florida’s Orange County Public Schools in Orlando told the president that much of urban-school progress that has been created under his leadership would be at risk if a bill is passed that undercuts accountability, annual testing, high college and career-ready standards and equity.

“Now is not the time for Congress to be pulling back on resources that urban schools have used to produce substantial progress,” Casserly stressed.

Other urban-school leaders who met with the president today were Oakland School District board member Jumoke Hinton Hodge, San Francisco School District Superintendent Richard Carranza, District of Columbia Public Schools Chancellor Kaya Henderson, St. Paul Public Schools Superintendent Valeria Silva, Kansas City (Mo.) school board member Airick West, Fresno School District Superintendent Michael Hanson, Cleveland Municipal School District CEO Eric Gordon, Boston Public Schools board member Michael O’Neil, Milwaukee Public Schools Superintendent Darienne Driver and El Paso School District Superintendent Juan Cabrera.

###

The White House

Office of the Press Secretary

For Immediate Release

March 16, 2015

## **Remarks by the President After Meeting with the Council of the Great City Schools**

Roosevelt Room

11:51 A.M. EDT

THE PRESIDENT: I want to thank the Council of the Great City Schools. This is an organization that represents the superintendents, the board members and educators from some of the largest school districts in the country. And we just had a terrific conversation about some of the extraordinary progress that's being made at the local levels.

The good news is that we are seeing, as a consequence of some of the reforms that we've initiated and partnered with at the state and local levels, we're seeing improved reading scores, improved math scores, improved graduation rates. We're seeing improvement in some of the previously lowest-performing schools.

And this organization I think has taken on the challenge and has been able to begin a process of turning school districts around and making sure that young people are getting the kind of education that they need to be able to compete in the 21st century. That's the good news.

The challenge that we face is that this is a monumental task and it requires resources. And I'm very proud of what we've been able to do in terms of helping schools to initiate improvements in how they train teachers, in how they engage kids in the classroom, in how they start moving education around math and science and technology; how they reach populations that are particularly difficult to reach; how they're bringing new technology into the classroom. But all that is dependent on a budget and approach at the federal level that says we care about all kids and not just some.

Now, the Republican House and Senate are about to put forward their budget. My hope is that their budget reflects the priorities of educating every child. But I can tell you that if the budget maintains sequester-level funding, then we would actually be spending less on pre-K to 12th grade in America's schools in terms of federal support than we were back in 2000. And that's adjusting for inflation. The notion that we would be going backwards instead of forwards in how we're devoting resources to educating our kids makes absolutely no sense.

In addition, we've got a major debate obviously taking place about the reauthorization of the major education act that shapes federal policy towards our schools. There is, I think, some useful conversations taking place between the chairman of relevant committee, Lamar Alexander, and Patty Murray. But there's some core principles that all the leaders here believe in: Making sure that we continue to provide resources to the poorest school districts and not creating a situation where we can suddenly shift dollars from wealthy districts -- or from poorer districts to wealthy districts, or alternatively, that education aid suddenly can start going to sport stadiums or tax cuts at the state level. That's something that these school districts feel very strongly about

Making sure that we continue to focus on low-performing schools and that they are getting additional resources. Making sure that we are continuing to assess in a smart way, on an annual basis, how young people are performing, and that we're disaggregating so that we can see in various subgroups how young people are performing, to make sure they're on track. That's something that people here care very much about.

Making sure that we've got high standards and high expectations for all our kids, and making sure that we are providing the resources to teachers and principals to meet those high standards. That's going to be important.

Making sure that we are investing in special education and English learning for large portions of our student population that may need extra help. That's going to be critically important.

So the set of principles that are reflected in my budget and I hope will be reflected in the Republican budget -- but if it is not, then we're going to have to have a major debate. We are making too much progress now in terms of graduation rates, improved reading scores, improved math scores, increasing standards, increasing access to the resources the kids need for us to be going backwards now. And this is something worth fighting for.

So I am very grateful for all the folks here for the work they're doing. I hope that people get familiar with some of the stories of progress that have been made. If you look at what's happened in the D.C. public schools, or you look at the efforts that are being made in places like Fresno, which it's a poor city in a poor school district, but despite that is seeing real strides; if you look at what's going on in Cleveland where I'll be visiting tomorrow [Wednesday] -- these are school districts that, despite enormous challenges, have made real progress.

And the idea that we go backwards on that progress, in some cases for ideological reasons, as opposed to because of what the evidence says, that's something that -- that's not the kind of legacy we want to leave for the next generation. And I'm going to continue to fight to make sure that this progress continues.

So I want to thank everybody who's around this table and know that they're going to have a strong partner in my administration.

All right? Thank you very much, everybody.



# Press Release

*Monday, March 23, 2015*

## **State Leaders Discuss Progress in Efforts to Maintain Quality, Reduce Testing Time for Students**

**Contact:** Olympia Meola [olympia.meola@ccsso.org](mailto:olympia.meola@ccsso.org) 202-336-7071

**Washington, D.C. (March 23, 2015)** - Just months after the nation's state and large-city district leaders announced efforts to evaluate the quality of assessments and eliminate any redundant tests, states are already making significant progress.

State education leaders on Monday highlighted their progress during a state-led discussion at the Council of Chief State School Officers' (CCSSO) 2015 Legislative Conference in Washington, D.C.

During the discussion, representatives from Illinois and Ohio detailed their efforts to maintain high-quality measures for students while also working to reduce the amount of time kids spend testing in school. They were joined by Achieve President Michael Cohen, who discussed Achieve's Student Assessment Inventory Tool. Several states are using Achieve's tool to work more closely with local districts to evaluate the assessments they are administering at all levels.

"As we transition to new assessments aligned with college- and career-ready expectations across the country, states have taken the lead to review their assessments at all levels and make sure they are of the highest quality and delivering meaningful information for parents, students and teachers. I am impressed by the progress we have made so far, and look forward to seeing how these best practices can be used in other states and local school districts in the future," said Chris Minnich, CCSSO's executive director.

In October, CCSSO joined the Council of the Great City Schools in announcing a series of established principles to guide state and district leaders to make sure every test administered is of high-quality, coherent and meaningful to students, parents and teachers. More than 30 state and urban school leaders offered strong statements of support for the work at that time.

"The states and city school systems continue to move aggressively to ensure that the amount and quality of testing that is done in our schools across the country are appropriate and coherent," said Michael Casserly, executive director of the Council of the Great City Schools.

"I applaud the states for the progress they have made and value the partnership between our two organizations in addressing these important assessment issues," Casserly continued. "The nation's urban schools will be making additional announcements on their progress soon."

State education leaders specifically committed to increase the transparency of the state assessment system, evaluate the state assessment system for quality and coherence, work with educational stakeholders to eliminate redundant tests, and partner with school districts to review their benchmark and formative assessments.

Many states have taken action in these areas since October; Illinois and Ohio are just two examples.

The Illinois State Board of Education in November 2014 released the [\*Student Assessment Inventory for School Districts\*](#), which is an adaptation of [\*Achieve's assessment inventory\*](#). Illinois developed this tool with the idea that districts could take ownership and adapt the inventory based on local needs and compile a stock take of their district's assessments. Illinois also developed the [\*Assessment Inventory Facilitation Process\*](#) which is a guide for districts using the assessment inventory. These resources from ISBE will provide districts with a comprehensive analysis of their assessment system and help them develop recommendations on how to reduce testing time for students.

The Ohio Department of Education in January 2015 released [\*Testing Report and Recommendations\*](#), a comprehensive evaluation of the Ohio testing landscape focused on the amount of time students spend on testing. The Ohio Department of Education surveyed districts and had conversations with education stakeholders regarding testing time. Ohio was able to use these conversations and survey results to calculate the average amount of time a student spends on taking a test each year. Based on the data collection and conversations, Ohio was able to make more informed decisions and propose recommendations on how to reduce the testing time for students. Ohio is an example of how a state education department has taken the lead on reducing testing time for students by working with districts to create a comprehensive review of their state's testing landscape.

Other examples of states that have taken action are [\*Colorado\*](#), [\*Connecticut\*](#), and [\*North Carolina\*](#), to name a few.

###



Council of the Great City Schools  
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<http://www.cgcs.org>

FOR RELEASE  
April 10, 2015

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## **Austin Schools Superintendent Elected To Executive Committee of National Urban Schools Group**

WASHINGTON, April 10 – Superintendent Paul Cruz of the Austin Independent School District in Texas has been elected to the 24-member Executive Committee of the Council of the Great City Schools, the nation’s primary coalition of large urban public school systems.

He will serve a three-year term, beginning this July 1 through June 30, 2018. The Executive Committee meets four times a year.

The Executive Committee of the Council is the group’s main policymaking body and is responsible for leadership, guidance, and oversight of the national organization, which represents 67 of the country’s largest big-city public school systems. The governing group sets the organization’s policies in federal legislation, research, instruction, management, and other programs.

Superintendent Cruz was elected to the Executive Committee at the most recent meeting of the organization’s Board of Directors in March.

“We look forward to Paul Cruz’s participation on the Executive Committee to help improve urban education in America,” says Council Executive Director Michael Casserly. “Paul Cruz brings valuable expertise and an important perspective from Austin that will help inform the important work of the organization during a period when Congress is reauthorizing the federal Elementary and Secondary Education Act and the nation is debating the implementation of new standards, testing systems, and immigration policies,” Casserly adds.

# # #



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FOR RELEASE  
April 13, 2015

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## **Tool Developed to Help Schools Assess Classroom Materials For College and Career Readiness**

WASHINGTON, April 13 – The Council of the Great City Schools today released a new tool that it developed to help schools in their selection of instructional materials aimed at preparing students for college and career readiness.

The Council’s academic staff and a team of many of the nation’s foremost experts in reading and mathematics worked for more than a year designing and writing what’s called the “Grade-level Instructional Materials Evaluation Tool (GIMET).” The new tool is aligned with the Publisher’s Criteria and the Instructional Materials Evaluation Tool (IMET) developed by Student Achievement Partners.

“The unique feature of these new tools is that they allow districts, schools, and teachers to review commercial materials on a grade-by-grade basis, and they permit educators at all levels to identify where supplemental materials might be needed,” says Council Executive Director Michael Casserly.

Together with the Publisher’s Criteria, the IMET tool, the Council’s English-language learner framework, and other resources, GIMET should provide school districts with all the tools they need to make informed decisions about which materials are compatible with the Common Core Standards.

The new tools provide selection criteria grade-by-grade in both English-language arts and mathematics and have been distributed to big-city school systems across the country. They are also available to others at no cost.

# # #



Council of the Great City Schools  
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FOR IMMEDIATE RELEASE  
June 3, 2015

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## ***Urban Students Named 2015 Math and Science Scholars***

### ***Council of the Great City Schools Awards ExxonMobil Bernard Harris Scholarships***

WASHINGTON, DC (Business Wire) — Four high school seniors have been selected by the [Council of the Great City Schools](#) (CGCS) to receive the 2015 ExxonMobil Bernard Harris Math and Science Scholarship. The students were chosen from several hundred applicants across the country for their academic performance, leadership qualities and community involvement.

Now in its sixth year, the scholarship was created by former NASA astronaut [Dr. Bernard Harris Jr.](#), the first African American to walk in space, and [ExxonMobil](#) to assist and encourage promising students of diverse backgrounds who plan to pursue science, technology, engineering and math (STEM) studies.

The awards are given annually to African-American and Hispanic seniors from high schools in the 67 urban school districts represented by CGCS.

“These highly competitive scholarships provide an enormous opportunity for talented urban students to pursue STEM post-secondary studies and careers,” said Michael Casserly, executive director, Council of the Great City Schools. “The generous support of Dr. Harris and ExxonMobil contributes to the growth of these young men and women as they begin the next stage of their lives.”

Each scholar will receive \$5,000 for continued education in a STEM-related field. This year’s award winners are:

- Matthew Guillory, Robert A. Millikan High School, Long Beach (CA) Unified School District;
- Sofia Kennedy, Liberal Arts and Science Academy, Austin (TX) Independent School District;
- Summer Kollie, Girard Academic Music Program, School District of Philadelphia (PA); and
- Nicolas Pena, Western High School, Broward County (FL) Public Schools.

In the fall, Guillory plans to attend Harvey Mudd College to become a biomedical engineer with career aspirations to design artificial limbs and organs. Kennedy has been accepted to Harvard University, where she hopes to pursue a degree in scientific research, particularly focused on untraditional uses for Botox.

With long-term aspirations of becoming a physician and researcher concentrating on communicable diseases in Africa, Kollie will attend the University of Pennsylvania in the fall. Pena will study engineering at Stanford University in hopes of becoming an inventor and entrepreneur developing high-technology products.

“Technological advancements are making our world a better place every day, but in order to keep those achievements coming, we need creative and analytical minds in our workforce,” said Dr. Harris. “By providing these scholarships, we are growing another generation of strategic thinkers who will foster diversity in ideas, applications and products.”

Administration of the scholarship program, including the application process, pre-selection and presentation of awards, is provided by the CGCS. Dr. Harris makes the final selection of recipients.

# # # #

### **About The Council of the Great City Schools**

The Council of the Great City Schools is the only national organization exclusively representing the needs of urban public schools. Composed of 67 large city school districts, its mission is to promote the cause of urban schools and to advocate for inner-city students through legislation, research and media relations. The organization also provides a network for school districts sharing common problems to exchange information, and to collectively address new challenges as they emerge in order to deliver the best possible education for urban youth. [www.cgcs.org](http://www.cgcs.org)

### **About ExxonMobil**

Exxon Mobil Corporation, the largest publicly traded international oil and gas company, uses technology and innovation to help meet the world’s growing energy needs. ExxonMobil engages in a range of philanthropic activities that advance education, with a focus on math and science in the United States, promote women as catalysts for economic development, and combat malaria. In 2014, together with its employees and retirees, ExxonMobil, its divisions and affiliates, and the ExxonMobil Foundation provided \$279 million in contributions worldwide. Additional information on ExxonMobil’s community partnerships and contribution programs is available at [www.exxonmobil.com/community](http://www.exxonmobil.com/community).

### **About The Harris Foundation**

Founded in 1998, The Harris Foundation is a 501 (c) (3), non-profit organization based in Houston, Texas, whose overall mission is to invest in community-based initiatives to support education, health and wealth. The Foundation supports programs that empower individuals, in particular minorities and economically and/or socially disadvantaged, to recognize their potential and pursue their dreams. The education mission of The Harris Foundation is to enable youth to develop and achieve their full potential through the support of social, recreational, and educational programs. The Harris Foundation believes that students can be prepared now for the careers of the future through a structured education program and the use of positive role models. More than 15,000 students annually participate and benefit from THF programs. [www.theharrisfoundation.org](http://www.theharrisfoundation.org)



Council of the Great City Schools  
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FOR RELEASE  
July 1, 2015

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## **San Francisco Superintendent to Lead Council of the Great City Schools**

*Long Beach Board Member, D.C. Chancellor Part of 2015-16 Leadership Team*

WASHINGTON, July 1— Superintendent Richard Carranza of the San Francisco Unified School District today becomes chair of the Council of the Great City Schools’ Board of Directors.

He will preside over the national urban education policy and research organization that represents 67 urban public school districts for a one-year term. The Council’s 134-member policymaking board is composed of the superintendent and a school board member from each of the districts represented.

“The Council of the Great City Schools is extremely fortunate to have as its next chair a person of Richard Carranza’s caliber and expertise ;” says Council Executive Director Michael Casserly. “His leadership will provide important direction to urban education nationally at a critical point in our reform and improvement efforts.”

Carranza succeeds Jumoke Hinton Hodge, a school board member with California’s Oakland Unified School District, who led the Council’s board since last July.

Moving up to chair-elect is Felton Williams, a school board member with California’s Long Beach Unified School District, who served as secretary-treasurer of the Council.

District of Columbia Public Schools Chancellor Kaya Henderson has been elected to the secretary-treasurer post to round out the Council’s new leadership team for the upcoming 2015-16 school year.

# # #

# **STATEMENTS**



**News...News...**



**News...News...**

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FOR RELEASE  
March 20, 2015

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**Statement on the Financial Support of the School District of Philadelphia**  
**By**  
**Michael Casserly, Executive Director**  
**Council of the Great City Schools**

WASHINGTON -- The Council of the Great City Schools, the nation's primary coalition of large urban public school systems, strongly supports U.S. Secretary of Education Arne Duncan's call this morning for greater resources to our highest poverty urban school systems generally, and for the School District of Philadelphia particularly. Our urban school systems are making important strides in improving academic attainment, lowering dropout rates, boosting graduation, and reducing suspensions and expulsions. Now is not the time for either Congress or the states to be pulling back on the investments that have helped fuel that progress.

Historically, the School District of Philadelphia and the children it serves have been badly underfunded. In fact, the school district continues to be one of the most inequitably funded of all big-city school systems anywhere the country. The state needs to step forward to correct this long-standing injustice. And Congress needs to rethink both its budget and the Elementary and Secondary Education Act (ESEA) reauthorization proposals that would further disinvest in the city.

For instance, an ESEA proposal called "portability" would reduce the federal Title I allocation to Philadelphia by some \$44.5 million, funds that are badly needed by the city school system in order to provide the teachers, materials, and supports students need to improve their academic attainment. Other potential formula proposals would decrease federal aid to the city by similar amounts, and Congressional budget proposals could cut deeper if approved and implemented.

The nation needs an ESEA reauthorization and federal budget that continues to invest in our schools and support our students. Secretary Duncan's visit to Philadelphia today to highlight these issues is a step in the right direction. Earlier this week, President Obama indicated that the nation faces an important choice. The Council of the Great City Schools couldn't agree more. We trust that Congress and the states will make the right ones.

###

**ARTICLES**

# The Washington Post

[Education](#)

## Obama meets with city school chiefs, outlines education spending priorities

During a meeting with the Council of the Great City Schools leadership, President Obama said improvements are being made in U.S. education, but more needs to be done at a federal level. (Reuters)

By [Emma Brown](#) March 16 at 2:56 PM

President Obama on Monday praised recent academic gains in the nation's urban public school systems and warned of a fight if the Republican-led Congress fails to provide adequate funds for the neediest students.

House and Senate Republicans are expected to unveil their budget blueprints this week. Obama said that if funding remains at sequester levels, the federal government will be spending less on pre-K through 12th-grade education than it did in 2000.

“The notion that we would be going backwards instead of forwards in how we're devoting resources to educating our kids makes absolutely no sense,” Obama said at the White House after meeting with a group of urban school superintendents. The president also spoke about focusing dollars on the lowest-performing schools, ensuring that teachers have the resources they need to meet higher academic standards, and continuing to test children each year.

If the Republican budget does not include those principles, Obama said, “then we're going to have to have a major debate.”

He spoke shortly after his meeting with members of the Council of the Great City Schools, a coalition of urban school systems that has its annual conference in Washington this week. They discussed not only the federal budget but also the pending revision of No Child Left Behind, the main federal education law.

As Congress works to rewrite the law, a key sticking point has been how to allocate Title I funds, which are meant to provide additional services for poor children.

Democrats favor the current policy, in which Title I funds are directed to schools with the highest concentrations of poverty. Republicans are seeking “Title I portability,” which would allow the money to follow a child to a different school.

The Obama administration has said that portability would devastate schools in the poorest neighborhoods. On Monday, superintendents said they appreciated the president's position.

"Will we continue to want equity for all of our children and all of our schools, or will we turn back the clock so some children don't have as much?" said Barbara Jenkins, superintendent of Florida's Orange County Public Schools, which includes Orlando.

Rep. John Kline (R-Minn.), the chairman of the House education committee, previously responded to criticisms of Title I portability with this statement:

"Encouraging good schools to serve more low-income students is the right thing to do. Ensuring low-income children receive the best possible education and their fair share of federal assistance is the right thing to do."

# President Obama and Urban School Leaders Discuss NCLB and Budget

By Denisa R. Superville on March 17, 2015 8:30 AM

President Obama promised superintendents and leaders from a dozen of the nation's largest school districts that he will continue to focus on equity during his presidency and fight to continue support for the academic gains that urban school districts have made during his administration.



In a Monday meeting at the White House, Obama praised the leaders of big-city districts for the gains their students have made in recent years—in reading and math proficiency and graduation rates—and warned that Republican proposals for reauthorizing the Elementary and Secondary Education Act and the federal education budget could jeopardize that progress.

The president said that if the Republican budget, which is expected to be unveiled this week, maintains federal education spending at sequester-levels, then federal support for K-12 education would be on the same level as 2000, even adjusting for inflation.

The group of superintendents, school board members, and the executive director of the Council of the Great City Schools met with Obama to discuss a host of issues important to both, including the reauthorization of ESEA; ensuring that financial resources continue to be directed

to the poorest students in the poorest districts; assessments that measure student growth; common-core standards implementation; a focus on low-performing schools, and investments in STEM, early-childhood education, and English-language learners.

The meeting, which was also attended by Education Secretary Arne Duncan, came as urban leaders were in Washington for the Council of Great City Schools' annual [legislative conference](#) and as Republicans and Democrats in Congress wrestle with the reauthorization of the ESEA.

Democrats and Republicans are still far apart on how to rewrite the federal education law, known as the No Child Left Behind Act. Democrats and urban school representatives argue that a Republican proposal that would allow Title 1 funds for low-income students to follow them wherever they choose to attend school, would take money away from districts with higher concentrations of poverty.

Monday's meeting came as [new graduation numbers](#) were released, showing that four-year graduation rates for African-American, Hispanic, English-language learners and other disadvantaged groups had increased, though they still lagged behind whites and Asian/Pacific Islanders.

Obama said that any congressional action to cut aid to schools serving those students would roll back the progress made under his administration. And, he promised "a major debate" if the principles in his budget were not reflected in a Republican budget.

"We are making too much progress now in terms of graduation rates, improved reading scores, improved math scores, increasing standards, increasing access to the resources the kids need for us to be going backwards now," he said. "And this is something worth fighting for."

That kind of language buoyed the group of urban representatives, who argued that no bill is preferable to a "bad bill."

"From our perspective, we would rather have no reauthorization at all than a bill that wrecks the momentum we have been creating," said Michael Casserly, the executive director of the Council said in a statement after the meeting. "But we worry that the fragile progress we are making under the initiatives you have launched and other programs would now be put in jeopardy if anything close to the House ESEA bill emerges from Congress."

Airick West, a school board member from the Kansas City, Mo., district, who was among the representatives to meet with Obama on Monday, said he left the meeting energized by the president's willingness to exercise his veto power.

"The president made it very clear that he is prepared to veto anything that comes across his desk that damages our ability to continue the academic gains our children have earned over the past few years," West said.

"It's encouraging," he said of the president's support. "It's fashionable for [public education] to be under attack. The fact of the matter is that that data [do] not support that level of cynicism. When we look at literacy and numeracy and graduation rates, those things are on the rise."

West pointed to progress in Kansas City in the last four years, and the programs that his and other districts have put in place focusing on boosting outcomes for their students.

"We know that the strategies that we are implementing, with the support of this administration, are beginning to bear fruit," he said. "But it's something else entirely to hear a sitting president offer this level of full-throated support for the work. Clearly, we are nowhere near the finish line, but it's absolutely encouraging to have that level of support as we continue that day-to-day journey of bringing children who are dramatically behind, and clearly disadvantaged, forward..."

District of Columbia schools Chancellor Kaya Henderson, who was elected this weekend as secretary/treasurer of the Council, spoke to the president about some of the successes at DCPS, including higher graduation and proficiency rates, three straight years of increases in enrollment after nearly four decades of declining numbers, and city students' upward movement at every grade level and in every subject area on the National Assessment of Educational Progress.

Those improvements, she said, were possible through the administration's "commitment to equity and innovation."

Programs under this administration—including Teacher Incentive Fund grants and Race to the Top funds—have helped the district move forward with its teacher-evaluation system, its innovative teachers' union contract and performance pay system, she said.

She said the group was firm in their conversation with the president about ESEA reauthorization that "while we want to see a great bill, we'd rather see no bill than see a bad bill."

"I think there are people who are pressuring the administration to just sign any bill to show that Congress and the president can work together, but this is a leader whose legacy is around equity," she said. "This is a leader whose legacy is around ensuring that every single kid in this country has a chance at success, and signing a bill that is not the right bill could compromise that entire legacy, and so we said to him, unequivocally, 'we will fight with you, we will stand with you, we will back you and be behind you to ensure that our kids don't get shortchanged.'"

She said it "was just really amazing" to hear that the president shared those same values and reiterated them to the press after the meeting.

"I was totally blown away," she said.

The president also spoke to the urban school representatives about their progress in implementing aspects of the ["My Brother's Keeper"](#) program. The Council of the Great City Schools [pledged](#) to take specific, targeted actions—including increasing participating in Advanced Placement courses, improving graduation rates, reducing suspensions, and boosting college-going rates—for boys of color in their schools.

West, from Kansas City, said he told the president about the partnership that his district has forged with the city, the local Boys and Girls of America, and the law enforcement community.

The president, he said, stressed building community partnerships and being assertive in soliciting participation from community partners to ensure the integrity and long-term sustainability of the work around supporting boys of color, he said.

*Photo Credit: President Barack Obama, sitting next to Cecilia Muñoz, Director of the White House Domestic Policy Council, right, and Budget Director Shaun Donovan, meets with the Council of the Great City Schools Leadership on Monday at the White House. In the foreground at right is Richard Carranza, Superintendent of the San Francisco Unified School District.*

*--Jacquelyn Martin/A*



*The Washington Post*

## Meeting with Obama highlights D.C. Public Schools as leader in reforms

By [Michael Alison Chandler](#) March 18 at 3:37 PM

The D.C. public school system has long been used as an example of what's broken in American public education, listed at the bottom of national rankings, and written off for its low performance. But this week, President Obama held up the city's school district as an example of what's promising in education today.

Obama cited the District along with Fresno, Calif., and Cleveland as examples of positive change.

“These are school districts that, despite enormous challenges, have made real progress,” he said. And he said he would fight for them “to make sure that this progress continues.”

The remarks came after a [conversation with a group of urban school leaders from the Council of the Great City Schools](#), including D.C. Schools Chancellor Kaya Henderson, on Monday.

Afterwards, Henderson said it was “one of the most inspiring days” of her time as chancellor.

“This job is really hard. People criticize you every day. Something goes wrong every day. It's hard work. Progress is not fast enough for anyone,” she said. “But it really feels heartening when the President of the United States is with you on the same issues you are fighting for and the things that are important to you are important to him”

She gave an emotional account of the meeting that afternoon. She said the day started at 4 a.m., when she woke with nerves, through when she was humming on adrenaline during the mid-day meeting. By 3 p.m., she was exhausted.

As the leader of one of the most closely watched urban school reform efforts in the country — which also happens to be in Obama’s back yard — Henderson has had invitations to the White House before. The school system also has played host on many occasions to the President or First Lady or to members of the administration, including U.S. Education Secretary Arne Duncan.

But Henderson said the meeting this week was a more intimate and prolonged opportunity to share the work and progress in the city’s schools and to talk about the future.

The District has aggressively pursued many of the reforms that the Obama administration has championed, spearheading a controversial overhaul of teacher evaluations and putting hefty investment into early childhood education.

The District was an early adopter of the Common Core State Standards and rewrote its curriculum to reflect them. The city’s school system has remained a steady supporter, despite increasing political fallout nationally.

The city has embraced the president’s call for innovation and has directed millions of dollars in funding for turnaround schools. More recently, Henderson pushed for a major investment in programs and supports tailored to minority boys in the schools, echoing work that the president has done for minority males through his “My Brother’s Keeper” initiative.

Henderson said the political support and resources from the Obama administration have been fundamental to improvements.

The District received a \$75 million federal Race to the Top Grant to support many of its reforms and a \$62 million federal Teacher Incentive Fund grant to support compensation, retention, and training for teachers and principals.

Henderson said the urban school leaders went to the White House this week to talk about progress but also to ask for continued support for these reforms, as Congress debates the federal No Child Left Behind law and the nation debates the role of testing in schools and the Common Core.

She said they left with the message that Obama shared their priorities.

In his closing remarks, Obama said: “I want to thank everybody who’s around this table and know that they’re going to have a strong partner in my administration.”

## Cleveland schools CEO Eric Gordon joins meeting with President Obama to press for continued aid for disadvantaged kids



President Barack Obama speaks during a meeting with the Council of the Great City Schools Leadership, Monday, March 16, 2015, in the Roosevelt Room of the White House in Washington. From left are, Education Secretary Arne Duncan, the president, Cecilia Munoz, Director of the White House Domestic Policy Council, and Budget Director Shaun Donovan. *(Jacquelyn Martin)*



By [Patrick O'Donnell, The Plain Dealer](#)

[Follow on Twitter](#)

on March 16, 2015 at 6:57 PM, updated March 17, 2015 at 7:27 AM

CLEVELAND, Ohio - [Cleveland schools](#) CEO [Eric Gordon](#) was happy to boast of Cleveland's improving graduation rate to President Obama today, while also pressing - along with representatives of nine other big-city districts - for continued funding for poor students and for testing that highlights those students' needs.

Gordon was one of 10 representatives of the [Council of the Great City Schools](#) to meet with the President at the White House today, urging reauthorization of the Elementary and Secondary

Education Act, of the [Title I funds for disadvantaged students](#) that comes with it, and of some of the testing that came with No Child Left Behind.

The meeting lined up with a Council event all weekend in Washington and a White House announcement today of [increasing graduation rates for black and Hispanic students](#).

After the meeting, Obama pointed to Cleveland as one of three districts that he sees as making improvements despite real challenges.

He said: "If you look at what's happened in the D.C. public schools, or you look at the efforts that are being made in places like Fresno, which it's a poor city in a poor school district, but despite that is seeing real strides; if you look at what's going on in Cleveland where I'll be visiting tomorrow [Wednesday] -- these are school districts that, despite enormous challenges, have made real progress."

Gordon said the visit was personally exciting - a "once-in-a-lifetime experience" that included a group photo in the Oval Office - but also an important one. In the one-hour meeting in the Roosevelt Room, school officials told the President and Education Secretary Arne Duncan that they want ESEA reauthorized and dread [proposed Republican cuts to Title I that would hit Cleveland especially hard](#).

Gordon said President Obama also made sure to hear from all 10 representatives. Gordon said the administration is already aware of Cleveland's [PRE4CLE efforts to increase preschool seats](#) for young children, so he highlighted the district's graduation rate gains.

The [state still gives the district an F grade for its graduation rate, but it has risen](#) from 52.2 percent in 2009-2010 to 64.4 percent for 2012-13, as reported on last fall's report cards. Graduation rates are reported on a year's delay.

"It really was a very personal dialogue with each of us," Gordon said.

Gordon will see the President again Thursday when Obama speaks at the City Club. Gordon will attend with a table of students from Max Hayes vocational high school.

Click here for [the President's full remarks after the meeting](#).

Attending the meeting were: Oakland School District board member Jumoke Hinton Hodge, San Francisco School District Superintendent Richard Carranza, District of Columbia Public Schools Chancellor Kaya Henderson, St. Paul Public Schools Superintendent Valeria Silva, Kansas City (Mo.) school board member Airick West, Fresno School District Superintendent Michael Hanson, Boston Public Schools board member Michael O'Neil, Milwaukee Public Schools Superintendent Darienne Driver, Superintendent Barbara Jenkins of Florida's Orange County Public Schools in Orlando and El Paso School District Superintendent Juan Cabrera.

# The Fresno Bee



## Fresno Unified leader Hanson backs Obama education plan at White House meeting

By Michael Doyle

Bee Washington Bureau March 16, 2015

THE FRESNO BEE

WASHINGTON — President Barack Obama on Monday found an ally in Fresno Unified School District Superintendent Michael Hanson.

During an hour-long meeting, Obama pitched his education priorities to Hanson and other superintendents. For the school leaders and administration officials now facing some high-stakes legislative struggles, the White House session came at a key time.

“We were reinforcing to him the importance of his continued support,” Hanson said, adding that Obama’s “articulated vision for what goes on in public schools gives us the room to do this very difficult work.”

Hanson is a member of the executive committee of the Council of Great City Schools, which represents 67 districts serving cities that include Sacramento, San Francisco and Los Angeles.

The late morning meeting in the White House’s Roosevelt Room came as part of the council’s annual legislative conference, a four-day program that features speeches, receptions and briefings. Politically, the timing was apt, as the Republican-controlled Congress and the Democratic White House are now maneuvering for position across several fronts.

“This is a pretty polarized city,” Hanson said, standing on the driveway outside the West Wing of the White House. “You can feel it when you come here.”

This week, the polarization will intensify when House and Senate budget committees unveil budget resolutions that spell out Republican priorities on everything from education to defense. The House committee members include Rep. Tom McClintock, R-Calif., a staunch conservative whose district stretches from Fresno County in the south to Amador County in the north.

Separately, House GOP leaders have been struggling to pass a bill reauthorizing the Elementary and Secondary Education Act. The bill, dubbed the No Child Left Behind Act during the George W. Bush administration, has roiled conservatives critical of the federal government’s role in

education, but it has also worried educators who fear funds will be diverted away from the neediest.

After failing to rally a majority on Feb. 27, Republican leaders pulled the bill from the House floor and have not yet rescheduled a vote. The Obama administration has warned that the president would veto the bill, now renamed the Student Success Act.

“We are making too much progress now in terms of graduation rates, improved reading scores, improved math scores, increasing standards, increasing access to the resources the kids need for us to be going backwards now,” Obama said following the meeting with superintendents.

Nationwide, high school graduation rates for African American, Hispanic and Native American students have increased during the past two years, Education Department records released Monday show. The nation’s overall high school graduation rate reached a record 81.4 percent during the 2012-13 school year.

The Fresno district’s graduation rate of about 76 percent during that school year was somewhat lower than the national average. The other superintendents who met with Obama on Monday, serving cities like Kansas City, San Francisco and Washington, D.C., struggle with similar challenges.

“The students they work with are largely poor, and they’re largely people of color,” Education Secretary Arne Duncan said.

One specific sticking point between congressional Republicans and the White House involves the distribution of Title I funds, designed to help districts serve low-income students. The Fresno Unified School District relies heavily on the funds and currently receives about \$46 million annually through Title I.

The stalled House bill revises the funding through an idea called “portability,” which would attach dollars to individual students rather than to the district as a whole. If the student moved, the old district would lose the money.

Republican supporters say portability promotes parental choice and ensures all low-income students receive their fair share of federal dollars. Skeptics don’t buy it; by Obama administration estimates, the Fresno district would lose upwards of \$4.9 million.

“A raid on those Title I dollars,” Hanson said, “would be a significant problem.”

## **Darienne Driver shares MPS initiatives with Obama at White House**

By [Erin Richards](#) of the Journal Sentinel  
March 16, 2015

Milwaukee Public Schools Superintendent Darienne Driver said she shared details of local education initiatives with President Barack Obama Monday during a meeting at the White House.

Driver and a small group of urban school superintendents and school board members and representatives of the [Council of the Great City Schools](#) also stressed the importance of maintaining a federal funding stream known as Title I that supports low-income students.

Obama met with 11 representatives from urban districts at a time when [legislation that would re-authorize the No Child Left Behind law](#) is being discussed by federal lawmakers. Driver said the White House selected the attendees.

"Our best wish is that we can have a re-authorized bill that is reflective of meeting the needs of all of our students," Driver said in a telephone interview Monday.

She said she talked with the president about the initiative MPS has with the [GE Foundation to implement Common Core](#), and also about the district's efforts to funnel more resources [toward its lowest-performing schools](#).

"It's important for people to know that Milwaukee is not in this alone," Driver added. "We have the support of the White House and we were given the opportunity to share what is happening in our district."



## Superintendent Jenkins meeting with Obama to discuss school success

By [Lauren Roth](#) Sentinel School Zone



President Barack Obama meets with the Council of the Great City Schools Leadership in the Roosevelt Room of the White House on Monday. Orange County Superintendent Barbara Jenkins is at forefront in bright blue. (Olivier Douliery / TNS)  
Orange's superintendent got an audience with the president today. Topic? School funding.

[Orange County](#) schools Superintendent [Barbara Jenkins](#) was able to take her concerns about federal education legislation straight to the top on Monday. Jenkins was among a group of 11 school leaders who met with President [Barack Obama](#) during the Council of Great City Schools legislative summit in Washington, D.C.

The group, along with U.S. Education Secretary [Arne Duncan](#) and Council of Great City Schools Executive Director Michael Casserly, took concerns about proposals that could cut funding to urban school districts to the president during a meeting in the Roosevelt Room at the White House. Jenkins is on the council's executive committee.

"We are concerned that there will be shortfalls that will be harm education," said Jenkins, citing ideas that would dilute spending per student by either allocating money for poor students directly to the states or by shifting dollars when a child moves. Those plans could make it difficult for schools to put initiatives in place that address poverty in the schools where it is concentrated, Jenkins said.

They also expressed concerns that groups including low-income students, English-language learners, students with disabilities and minorities could be left out if their progress isn't mandated by law. And the leaders said they support testing -- within reason.

"Urban districts are not in opposition to high standards and rigor," Jenkins said. "Our children have to be able to compete, but we need additional resources to get there." Reasonable annual measurement is part of tracking that progress, she said.

The superintendents didn't have to do a lot of convincing -- the president already agreed with them, Jenkins said.

They also took the chance to talk about some of the positive things going on in their districts, including a recent youth leadership summit by young males of color in Orlando.

Jenkins had met Obama when he visited [Valencia College](#) to talk about college affordability and also at the launch of the president's My Brother's Keeper initiative. But this was the smallest setting she'd ever met him in, Jenkins said.

"The president is so gracious and down to earth," she said. "It was certainly an inspiring moment."

## Obama Plans to Use Week to Press Economic Case

By JULIE HIRSCHFELD DAVIS  
MARCH 16, 2015



WASHINGTON — With Congress pushing to complete a budget plan this week that reflects the cost-cutting priorities of the new Republican majority, [President Obama](#) plans to devote much of his week to laying out an alternative approach that would increase spending on domestic programs such as education and health care.

Mr. Obama met at the White House on Monday with school leaders from cities across the nation to discuss the need for education investments and reforms, arguing that spending reductions that Republicans want would be harmful for students.

“This is a monumental task, and it requires resources,” Mr. Obama said after meeting with representatives of the [Council of the Great City Schools](#), an organization representing urban public schools. “All that is dependent on a budget and approach at the federal level that says we care about all kids, and not just some.”

If the Republicans’ budget does not invest in education, he added, “then we’re going to have to have a major debate.”

On Wednesday, Mr. Obama will go to Cleveland for a speech on his economic agenda, pressing his case that at a time of financial recovery, the government must do more to spread prosperity to middle-class Americans who have seen few of its benefits.

The events constitute Mr. Obama's effort to frame the budget debate to his advantage at a time when Republicans, working to create their first fiscal blueprint in nearly a decade, are struggling to present a unified front and a cohesive agenda.

They present an opportunity for the president to portray Republicans as shortsighted and even meanspirited as he looks ahead to battles over whether and how to replace a decade-long set of spending caps and cuts known as sequestration.

In his budget plan unveiled last month, Mr. Obama proposed raising the caps in the fiscal year beginning in October by about \$75 billion — split evenly between military and domestic programs. It was an attempt to lay the groundwork for a spending deal between Republicans, many of whom support raising national security spending, and Democrats who, like Mr. Obama, believe that any increase to such spending must be paired with an increase for domestic programs.

Republicans have pledged to present a plan that balances the budget within a decade, so many of them are loath to lift spending limits that are in line with their goal of reining in the size of government. But some Republican defense hawks, like Senators John McCain of Arizona and Lindsey Graham of South Carolina, advocate raising national security spending, even if they have to agree to domestic spending increases in the process.

The White House is trying to capitalize on those divisions.

“On the eve of the release of the Republican budget, the question is whether Republicans will put aside ideas of the past — letting go of a strategy that focuses on tax cuts for the wealthy and deep cuts to investments in the middle class — and instead join the momentum around middle-class economics,” Brian Deese, a senior adviser to Mr. Obama, [wrote](#) Monday in a blog post.

Mr. Deese said that Republican leaders had been mired in “defensiveness and disarray” since taking control of Congress.

Three months into the new Republican majority, the White House sees the budget debate as a ripe opportunity both to press Mr. Obama's priorities and to keep Republicans on the defensive on budget matters, hoping that they feel compelled to respond to the president's policy prescriptions.

One official called this week's budget maneuvering a “target-rich” environment, acknowledging that Mr. Obama's team was relishing watching Republicans try to make the difficult fiscal decisions they used to deride Democrats for failing to make.

Mr. Obama, at his meeting on Monday, sought to put the onus on Republicans to answer his call for more educational resources, arguing that his policies have yielded higher reading and math scores and improved graduation rates.

“The idea that we go backwards on that progress — in some cases for ideological reasons, as opposed to because of what the evidence says — that’s not the kind of legacy we want to leave for the next generation,” the president said. “I’m going to continue to fight to make sure that this progress continues.”

Even though Republicans control both houses of Congress, Mr. Obama is using the considerable tools at his disposal to try to build public support for his own agenda. Just as Republicans were preparing to unveil a budget that would propose to repeal Mr. Obama’s signature [health care law](#), the administration released new figures showing that 16.4 million Americans had obtained [health insurance](#) since it took effect.

The growth of health care costs has slowed over the same period.

“This progress is scrambling traditional cost-versus-coverage debates that said we had to choose between providing more Americans with the economic security of affordable health care and constraining health care costs,” Mr. Deese wrote.

## ***Education Week***

# **Big-City Districts Buoyed by Obama's Extension of 'My Brother's Keeper'**

By Denisa R. Superville on May 1, 2015 4:24 PM

The announcement that President Barack Obama's work on improving education and career opportunities for young men of color will likely continue beyond his time in the White House was welcomed Friday by the Council of the Great City Schools, which has partnered with the president on his signature [My Brother's Keeper](#) initiative.

"I am delighted to see that he is going to stay with this priority," said Michael Casserly, the executive director of the organization, which represents 67 school districts, the vast majority of them urban.

The president is expected to announce Monday the creation of the My Brother's Keeper Alliance, a new nonprofit foundation, which is expected to carry on the program's work after Obama leaves office in 2017. The president's role in the new organization remains unclear.

Since My Brother's Keeper's launched last year, more than \$300 million has been pledged to finance programs aimed at helping young men color. More than 200 mayors, tribal chiefs, and county executives across the country have also signed on to the program, according to the [one-year report](#) released in March.

As one of the partners in the My Brother's Keeper initiative, the council's member [districts pledged to take concrete steps](#) to reduce barriers that keep students of color from achieving the highest successes in and out of school. The districts pledged to: reduce chronic absenteeism; cut disproportionate suspension and expulsion rates for boys of color; increase participation rates in Advanced Placement, honors and gifted programs; improve graduation rates for boys of color; increase financial aid application completions; and more.

Casserly said that the council had already committed to keeping its emphasis on young men of color beyond the Obama presidency, but a new foundation dedicated to those same concerns will help sustain the council's programs. (The council's efforts to drill down on the challenges boys of color face and ways to address them predate the president's My Brother's Keeper initiative.)

"We had committed, as a coalition, to retain this priority well beyond the administration, and this new mechanism is going to make it easier for us to sustain this priority going forward," he said. "It will be a big help to us."

Casserly said he was not surprised that the president was likely to continue to work on issues of equity in his post-White House life.

In March, council representatives, including superintendents and school board members, met with the president to discuss their legislative priorities and the progress the districts had made in implementing the pledges. Some of the chiefs left the meeting with the strong impression that the boys of color work was going to be part of the president's focus after leaving the White House.

"It was very clear that this was a deep, personal priority for him," Casserly said. "He didn't say anything in the meeting about what he was going to do, but it was very clear that it meant something very important and profound to him; so, in some ways, it doesn't surprise me that he'd want to continue this work well beyond his presidency."

# National Public Radio

## *Marketplace*

### Obama's plan to keep up with My Brother's Keeper

*by Tim Fitzsimons*

*Monday, May 4, 2015 - 05:00*

President Obama is scheduled to speak Monday at the launch of a new nonprofit organization — the My Brother's Keeper Alliance.

If that sounds familiar, it's because it's a spinoff of the My Brother's Keeper Initiative launched by the President in 2014 as a White House program aimed at helping minority boys and young men stay in school and graduate prepared for college.

Michael Casserly, executive director of the **Council of the Great City Schools** and one of the Initiative's first partners, says "The fact that he is setting this up now is important in signaling what a major priority this is for him personally."

And perhaps the President will continue to be involved after he leaves office in January 2017. Last week, he told a group of school children that he will "go back to doing the kinds of work I was doing before," leading some to speculate he may return to community organizing.

*Featured in: Marketplace Morning Report for Monday, May 4, 2015*



## *McClatchy Newspapers*

# Sen. Burr would shift funds to aid poor schools

By Renee Schoof, McClatchy Washington Bureau, April 30, 2015

WASHINGTON — North Carolina would get an additional \$27.3 million a year for schools as a result of a change in federal education funding that Sen. Richard Burr, R-N.C., added to the new version of the K-12 education law that's now before Congress.

Burr said his bill fixed what he said was an inequity in federal funding for schools that dated back 14 years to when the legislation was last updated, as the No Child Left Behind law.

“It’s pretty simple. North Carolina’s been cheated since the last time this was reauthorized, along with 33 other states,” Burr said in an interview on Wednesday. “Now we’ve revised it to where the money is going to follow the population and the kids that are at risk.”

Burr’s legislation would phase out a provision in the original 2001 measure that allowed states that were receiving [Title II funds](#), named for part of the [Elementary and Secondary Education Act](#), to keep the same level of funds even if their populations were declining. Title II funds are used for teacher preparation and incentives, as well as other needs. They’re largely directed to aid low-income students.

Another Burr amendment changed the formula so that 80 percent of Title II money is based on poverty. Currently it’s 65 percent.

The Senate Health, Education, Labor and Pensions Committee, where Burr is a member, approved both of his amendments in mid-April just before it unanimously passed a bipartisan revision of the education law.

One amendment would phase out a “hold harmless” provision that has allowed states to keep their funding levels even if their populations declined. Some states, such as Pennsylvania, would lose money under Burr’s approach, and Sen. Bob Casey, D-Pa., fought it during a hearing. In the end, the committee voted in favor of Burr’s amendments.

Explaining why he “put up a fight” in the committee over getting the change inserted into the law, Burr said: “If we really are serious about fixing elementary and secondary education for all kids, then you can’t not face the reality that low-income kids typically have more challenging schools, probably don’t have the best teachers in the system, and to overcome those it takes additional resources to do it.”

Views of Burr's change could vary, depending on whether states were winners or losers. But with 33 states expected to gain, he said he felt confident his plan would have enough support in the Senate.

"The Burr amendment benefits some urban districts, and disadvantages others," said Henry Duvall, a spokesman for the [Council of the Great City Schools](#), an advocacy group for urban education. He said the council hadn't taken a position on it.

The additional \$27.3 million would be added to the \$49.7 million North Carolina now receives in Title II money for a total of \$77 million annually.

Burr said the rewrite of the education law that the committee passed "has embraced everything that was on my wish list to accomplish, and maybe a little bit more."

He said the bill "dismantled the national school board," a reference to the Education Department's ability under current law to tell states what they had to do to get waivers from what were seen nationally as the law's unworkable requirements.

"We've pushed the majority of the decisions to the state and localities," he said

He said he expected the bill to go through smoothly when it reaches the Senate floor. The biggest challenge will be getting a bill from the House of Representatives so that the two chambers could work out differences and send a measure to the president, Burr said. "But I think that's doable," he added.

The House stopped discussions on the bill earlier this year when some conservative Republicans said it didn't go far enough in eliminating a federal role in education.

## *Education Week*

### Rep. Bobby Scott Urges Big-District Leaders to Press GOP on Title I Portability

By Lauren Camera on March 16, 2015 3:22 PM

Members of the Council of the Great City Schools headed to Capitol Hill Monday afternoon to lobby lawmakers in Congress about rewriting the No Child Left Behind Act—and many will be pushing hard against Republican proposals that would make Title I money for low-income students portable.

"The matter of the fact is that low-income areas aren't going to do well politically in getting their fair share of resources [compared to] the wealthier areas," said Rep. Bobby Scott, D-Va., the ranking member of the House education committee, who spoke Monday afternoon during a luncheon at the group's annual legislative conference.

When asked by one member of the group what they should focus on during their congressional visits, Scott urged them to press Republicans on [Title I portability and other funding issues](#), like the elimination of maintenance of effort, that he (and most Democrats, including the administration) see as harmful for low-income communities.

"When you lobby, you need to lobby for the old funding formula so the ones who really need the help get the help," said Scott. "If not, we're back to pre-1965. Funding is the most important."

"In the place of public education, separate but equal has no place," Scott added.

Scott's comments come nearly three weeks after [GOP leaders in the House of Representatives were forced to yank a Republican-backed overhaul of the NLCB law from the floor](#) after members of their own party began withdrawing support for the measure. A final vote on the bill has not yet been rescheduled.

Meanwhile, we're going on week four of negotiations between Sens. Lamar Alexander, R-Tenn., and Patty Murray, D-Wash., the chairman and ranking member of the Senate education

committee. The two are trying to broker a bipartisan NCLB rewrite that would appeal to enough members in each caucus to overcome a 60-vote threshold and clear the chamber.

Congressional efforts to give the outdated law a facelift headlined this year's CGCS annual legislative conference.

In addition to Scott's speech, members heard from the majority and minority policy staff on both chambers' education committees. A few members of the group were even handpicked to meet with President Barack Obama and U.S. Secretary of Education Arne Duncan to talk about the administration's priorities for overhauling the federal K-12 law.

You can read more about the president's pitch to the attendees—a list that included CGCS executive director Mike Casserly, Washington, D.C., schools Chancellor Kaya Henderson, Richard Carranza, the superintendent of the San Francisco Unified School District, Michael O'Neill, school board chair of the Boston Public Schools, and others—[here](#) and [here](#).

Unfortunately, the discussion with committee staff, which was filled with juicy nuggets about the ongoing negotiations, was announced off-the-record at the last minute, so I cannot share any of it with you. (Trust me, I'm just as disappointed as you.)

So **where do things currently stand** in each chamber?

**In the House**, Rep. John Kline, R-Minn., Chairman of the education committee and author of the bill that was pulled from the floor, said he hopes his bill will get a vote as early as this week, though that's unlikely since it has not been scheduled for floor time by leadership. Last week, Kline's committee blasted out emails touting the measure's conservative principles—something that was questioned by his colleagues after a [blog post on an anti-Common Core State Standards website](#) that railed against Kline's bill went viral.

However it's unclear whether the bill will ever be rescheduled, a prospect that becomes more grim the closer the chamber gets to appropriations season, which typically clogs the congressional calendars with spending measures.

And since we're on the topic, efforts to fund the 2016 fiscal year officially kicked off March 4, when [Duncan defended the president's budget request](#) before the House appropriations

subcommittee that makes decisions about education funding. The House and Senate budget committees plan to release their fiscal year 2016 spending blueprints this week.

**In the Senate**, Alexander and Murray announced that they [plan to mark up their forthcoming bill](#) the week of April 13. They'll likely unveil it a week or two before the markup in order to gather feedback from colleagues and stakeholders, so stay tuned for more news on that front.

## *Chalkbeat*

# Elia promises to communicate as state ed policy faces new tests

By: [Geoff Decker](#)

Published on: May 27, 2015 - 6:22 am EST

A statewide “opt-out” movement is flourishing. A required teacher-evaluation overhaul has district leaders wary. The Board of Regents is newly skeptical of education policy decisions made over the last five years.

MaryEllen Elia, appointed New York state’s new education chief on Tuesday, will soon wade into those issues and others, having been tasked by the Regents with plotting a course forward. In her first interview after the announcement, Elia indicated that she will bring a shift in tone and style while not backing away from the controversial policies implemented by her predecessors — walking a fine line between the old and the new.

“I have, in my experience, always felt like communication is key to any kind of an implementation and any kind of change,” Elia said during a press conference in Albany after the Regents vote. “Listening to people,” she said later, “is extremely important.”

[Read more about [Elia’s past](#) and [reaction to the announcement](#).]

The comments signify changes to what is expected of the state’s education leader. Buoyed by the state’s \$700 million [Race to the Top grant in 2010](#), the state’s last two education commissioners, [David Steiner](#) and [John King](#), were brought in as outsiders with a mandate to quickly push through changes to teacher evaluations, state tests, and learning standards, a pace that helped spark a growing opposition movement.

Elia, on the other hand, was hired because of her decades of experience as a teacher and district administrator, and for possessing a management style well-suited to the moment, officials said.

“When we asked her questions, it was clear to us that she was a listener, and that was something we placed very high on our list of attributes that we want in our next commissioner,” said Vice Chancellor Anthony Bottar, who led the search.

Elia has spent her career working in traditional public schools, beginning as a social studies teacher outside of Buffalo in 1970. She spent 19 years teaching and the last 10 years as superintendent of Hillsborough County, Florida, an unusually lengthy tenure for a leader of one of the country’s largest school districts.

As superintendent, she built a track record of implementing big changes without stirring widespread opposition. Elia received flexibility from Florida's evaluation law, drawing praise from her district's teachers union. Funded with a seven-year, \$100 million grant from the Bill and Melinda Gates Foundation, Hillsborough County introduced a new evaluation system in which 40 percent of a teacher's rating (compared to 50 percent in the rest of the state) was based on local and state tests and the rest was based on observations from principals and other teachers. Hillsborough has used the grant to pay more than 200 teachers to observe peers or mentor beginner teachers and to award bonuses to top-rated teachers.

"I think most people saw MaryEllen as being very pragmatic and forward-thinking in trying to stay ahead of that curve of things being crammed down our throats by the state," said Jean Clements, president of the Hillsborough County Teachers Association.

There were times when she disagreed with Elia, Clements said, noting that she had regularly fought the district in a bid to get her members more time to plan their lessons. But Elia believed that teachers were "the key to any success we had" in raising student achievement, the union leader said.

That's not to say Elia wasn't controversial. Her contract was terminated in January after a 4-3 vote, with some school board members criticizing her leadership style and outreach efforts, and a recent report showed that support for her teacher-evaluation plan had slipped. But the relationship between teachers unions and education leaders has been much more combative in New York.

Last year, King received a "no confidence" vote from the statewide teachers union after union leaders repeatedly called to delay tying test scores to evaluations. Moving forward, Elia will be contending with Gov. Andrew Cuomo, who refers to teachers unions as "special interests" and the public education system as a "monopoly."

Michael Casserly, executive director of the Council of the Great City Schools, a national coalition of large urban school districts, said Elia's close relationship with teachers throughout the changes bodes well for her time in New York.

"She brings to New York a lot of skills that people in the state have been looking for," Casserly said. "I can't imagine a better fit."

Elia differs much less from her predecessors when it comes to policy priorities. On Tuesday, she vowed to press forward as New York schools implement the Common Core standards, and said that standardized tests should continue to be used to evaluate schools and teachers.

"I am totally in favor of accountability," Elia said, nodding to Florida's reputation as an early adopter of using tests for evaluations. "We were one of the first states that implemented high-stakes tests, and I am favor of having tests that are fair, reliable, and valid."

Elia said New York's teacher evaluation system was headed in the right direction, but that a "review" of the policy was needed. Under a law passed in the state budget this year,

districts will have to change their evaluation systems to increase the weight of state test scores and require that teachers be observed by independent evaluators.

She indicated that she thought less of the decision to simultaneously align New York's standardized tests to the Common Core standards and start evaluating teachers using test results, though.

"Some of this across the nation, in specific places, was done very quickly without the implementation explained and without enough time," Elia said. "I would suggest that sometimes in haste we haven't taken the time for people to understand and to become part of the change that needs to occur."

Elia said Hillsborough had "few opt-outs, if any" after the introduction of tests aligned to the state's Common Core-like "Florida Standards," which schools began implementing before she left. Elia said anxieties were eased in meetings with parents the district to explain why the changes would benefit students.

But in a sign that Elia will have a harder time stemming New York's growing opt-out movement, anti-testing parent groups criticized her selection and vowed to continue their protest.



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# ***Minneapolis Star Tribune***

## **Minneapolis interim superintendent not holding back**

By Alejandra Matos Star Tribune

June 29, 2015 — 9:28am

Minneapolis interim Superintendent Michael Goar is plowing ahead with significant changes to the school district like no other temporary chief in recent history.

In just a few months, he has hired a new chief financial officer and cut more than 100 central office employees, the largest staff reduction in at least two decades. Goar and central office staff already have dropped the term “interim,” even though school board members say they are a year away from naming a new superintendent.

“There are things we have to get done,” said Goar, who wants the job permanently. “I have nothing to lose.”

Goar finds himself in a precarious position, leading the state’s most troubled school district as it faces a multimillion-dollar shortfall and as he searches for a breakthrough on a persistent and dramatic achievement gap between white and minority students. Already, he has clashed with school board members over the cost of a new swimming pool, hired outside public relations consultants and embarked on a plan to dramatically trim the administrative ranks to increase classroom spending.

When Goar served as the top deputy to former Superintendent Bernadeia Johnson, he was the behind-the-scenes administrator in the shadow of her big-picture and gregarious leadership style. Now, for the first time, he is front and center.

Some community members and current and former staffers say privately that Goar is aggressive, dives deep into details and has a very guarded persona. He doggedly tracks each department and insists on reviewing every presentation before it goes to the school board. He is quick to push back when he believes his staff is wrong.

Community leaders already are noticing a difference at the district headquarters.

“This is a town that often likes leadership that makes us feel comfortable,” said former Minneapolis Mayor R.T. Rybak. Rybak is leading Generation Next, a nonprofit that works closely with the school district to close the achievement gap. “I don’t think we should always love our leaders. We should seek out people we respect, that can make tough calls.”

Rybak, who meets with Goar monthly, said he has left meetings with Goar feeling uncomfortable with his style. “I certainly don’t leave feeling comfortable with everything he said,” Rybak said.

Goar’s willingness to implement significant changes is a departure from previous interim school leaders. Since 1980, the district has had eight temporary superintendents who mostly acted as caretakers of the district until the new leader took over.

Michael Casserly, the executive director of the Council of the Great City Schools, said school boards generally decide how much latitude to give an interim leader. He met with the Minneapolis board as they were beginning their search process.

“There is no rule that the interim has to just sit and have the trains running on time,” Casserly said.

Whether the board will pick Goar as the next superintendent remains a question. Mitch Trockman, the district’s board liaison, who works closely with the board and the superintendent’s office, said the board is serious about its nationwide search.

Boards have appointed internal candidates in the past without conducting a search, Trockman said. The hiring of a search firm signals the board is serious about finding the best candidate and not just considering Goar as its de-facto leader.

“The board is really having an opportunity to watch him,” said Trockman, who has served as interim superintendent in the past.

Goar has worked as a top administrative officer in Boston, Memphis and Minneapolis. He said he is learning to adjust to the superintendent role, but he admits he is sometimes too easily drawn into the intricate details of the district’s business.

At the end of each day, his secretary gives him about seven folders with copies of e-mails he needs to respond to, appointment requests, his calendar and other pending matters. He said he takes them home, makes dinner, watches some basketball and goes through each task.

At a recent meeting with top district leaders, Goar heard a presentation set to go before the board about a new internal operations improvement plan. Along the way, he would stop to ask questions and recommend different language.

“Not to say that I somehow know best, but I need to help you to frame it to give it more depth,” Goar said in an interview afterward.

He acknowledges what some current and former staffers have said privately, that his micromanaging can discourage top leadership from publicly disagreeing with him.

“I’m reflecting on this. Maybe it’s something wrong with me,” Goar said. “They should feel comfortable to push back. I want to create that dialogue with my Cabinet members.”

He often finds himself seeking advice from Carol Johnson, his mentor and former superintendent of Minneapolis schools. He said he doesn’t feel he has anyone internally who can be a sounding board and will give him honest feedback.

“I need someone who can criticize and critique me so I can be a better leader,” Goar said.

Outside of the central office, Goar is trying to build stronger relationships with a community that has at times grown weary of the district. Along with district staff, he recently visited People Serving People, a homeless shelter in Minneapolis, to serve food to residents. They served nearly 250 meals to families whose children mostly attend Minneapolis Public Schools.

“It’s very humbling,” he said.

Gear is rethinking other long-held practices. He instructed staff to meet with various branches of the military who want to be able to recruit in Minneapolis and offer students scholarships and job opportunities.

Terry Henry, who heads the district’s college and career readiness department, said these groups have been excluded from the district because of a policy passed several years ago. But Goar said the district should not “limit a student’s opportunities.”

There have been some setbacks in gaining the community’s trust. The Roosevelt High School community was angry about the way their budget had been allocated, forcing Goar to publicly admit that the district needs to be more transparent.

Most recently, some parents have been critical about changes in the district’s autism program and accuse Goar and his leadership team of being dishonest about what they will be doing with the program.

“There are always going to be people who will still be unhappy,” he said. “This is not a popularity contest.”

## *Virginia Pilot*

# Norfolk faces hurdles in recruiting for superintendent

By [Ben Werner](#)  
The Virginian-Pilot  
© March 23, 2015

### NORFOLK

The imminent departure of Superintendent Samuel King - the third Norfolk Public Schools chief to leave in five years - has community members wondering how to find a leader who sticks.

School Board members and King announced Wednesday they had a "mutual agreement" to end his contract. King will leave with a year's pay and medical benefits, just months after the board voted to extend his contract through 2018.

An interim superintendent will be named before King's last day on April 30; the board has not outlined how it will seek his permanent replacement.

"My concern is, who is going to want the job?" said Norfolk parent Vicky Manugo Greco, a founder of education advocacy group Norfolk GAINS. "Three superintendents in five years?"

Norfolk faces several recruiting challenges for its top schools spot. Approximately 70 percent of its 32,000 students live in poverty. The division ranks among the worst performing in the state according to test scores. And The Pilot has revealed problems within the division, including the forfeiture of \$1.6 million in federal funding intended to help its poorest schools and students because of missed spending deadlines.

"It's unconscionable you would have to turn away almost \$2 million in federal money," said Stephen C. Jones, former Norfolk Schools superintendent.

That sends a message to potential candidates, said former Norfolk city manager Jim Oliver - a distant relationship between the superintendent and School Board and the City Council.

A successor needs to bridge that gap, he said.

"There's going to be some potholes," Oliver said. "But sometimes when there's a crisis there's a change."

Administrative upheaval in the division's top ranks, along with political tension, can influence who applies for the job, said Michael Casserly, executive director of the Council of the Great

City Schools. Norfolk is a member of the Washington, D.C.-based coalition of the nation's largest school divisions.

A successful search requires School Board members to clearly state what they expect of a superintendent, he said. Candidates looking at Norfolk's top schools job will likely consider the recent run of superintendents, along with upcoming School Board elections, scheduled to begin next year.

"The main question every candidate will ask themselves is 'will I succeed here?... and if so, for how long?' " Casserly said. "Nobody wants to take a job if they don't think they'll be effective."

Another factor to consider: The Board appears to be willing to pay for talent. King's salary of \$246,750 rated above the average of \$211,000 for superintendents of divisions with fewer than 50,000 students, according to a fall 2014 report issued by the Council of the Great City Schools.

Norfolk's pay compares favorably to other urban school divisions in the state. According to news reports, Richmond City Schools hired a new superintendent at the end of 2013 for a base salary of \$225,000, with performance incentives worth another \$22,500. Richmond's schools educate about 23,000 students.

While the School Board has not said how it will search for King's successor, it used national executive search firm Ray & Associates to find him and his predecessor, Richard Bentley. Bentley left after only 15 months on the job, and Ray & Associates waived its consulting fee for the division's search to replace him. (Michael Spencer served as interim superintendent between Bentley and King and left to become headmaster at the private Williams School in Ghent.)

Greco worried that casting a wide net attracts candidates more interested in padding their resumes than building a lasting relationship with the community. When she met King, she said, he didn't know what Norfolk GAINS was.

"It doesn't have to be a Norfolk native," said Greco, a lifelong Norfolk resident. "But somebody who is all-invested in the system and buys a home."

King sent a message to the community that he didn't plan to put down roots, Jones said. Last year The Pilot reported that King lived in a Norfolk apartment despite receiving \$12,000 in his contract "to partially defray the cost of selling and buying a home." The Pilot also reported last year that King had planned to interview for the top job in the Bibb County, Ga., school system.

Jones, who served as Norfolk's superintendent for about five years and retired in June 2010, said he would have offered King his perspective on various issues - but King never asked.

Another group has urged the board to conduct a national search. But that search must include plenty of input from residents, wrote Andria McClellan, a member of Better Together Norfolk, which advocates for School Board members to be elected at-large. The group asked for public forums, questionnaires, public interviews with each candidate and for each finalist's application to be posted online for review by residents.



"We can't afford to proceed with yet another search process conducted behind closed doors," said a statement by the group. "Please ensure that this process includes all of our voices."

Jones said Norfolk has a big selling point: it's primed to do everything possible to help its superintendent and schools succeed. Jones said he chose Norfolk over offers to remain in Syracuse, N.Y.; return to Baltimore; or work in Connecticut because of the reception he received in a series of community meetings during the superintendent vetting process. He felt as if the community hired him, and the School Board simply confirmed it.

Plus, Jones said, Norfolk is near the water in an urban area full of cultural institutions. Although he left the division five years ago, Jones remained in Norfolk because he fell in love with the city.

Norfolk has advantages to offer a new superintendent, Jones said - a City Council that appears committed to improving school performance, a business community willing to assist through efforts such as pushing career and technical education, and parent groups ready to volunteer time and expertise.

All that's missing is a leader.

"I think there's a great deal of potential in the division," Jones said. "But you can't get the buy-in if there's going to be a revolving door."

# Education Week

## Common-Core Alignment Tool: Looking at Grade-Level Textbooks

By [Liana Heitin](#) on April 14, 2015

The toolkit for determining whether publishers' instructional materials are aligned to the Common Core State Standards has grown once again.

Yesterday, the Council of the Great City Schools [put out a series of rubrics, separated by grade level](#), to help schools and educators decide if the reading and [math curriculum materials](#) they're using meet the common core's expectations.

Here's a page from the [English/language arts rubric](#) for 3rd grade:

GUIDING STATEMENTS	SPECIFIC EVIDENCE FROM THE TEXT/MATERIALS	EVIDENCE RATING
1c. Materials include a rich and diverse sampling of literary texts including, but not limited to: <ul style="list-style-type: none"> <li>• Fables, folktales, and myths from diverse cultures</li> <li>• Stories, drama, and poetry</li> <li>• Multiple stories by the same author</li> </ul>		<input type="checkbox"/> 4) extensive <input type="checkbox"/> 3) sufficient <input type="checkbox"/> 2) some <input type="checkbox"/> 1) weak <input type="checkbox"/> Rating Pending
1d. The range of informational texts include selections that: <ul style="list-style-type: none"> <li>• Present historical events</li> <li>• Describe technical procedures</li> <li>• Present scientific ideas or concepts</li> <li>• Contain relevant visual representations of information</li> <li>• Contain at least two texts on the same topic</li> </ul>		<input type="checkbox"/> 4) extensive <input type="checkbox"/> 3) sufficient <input type="checkbox"/> 2) some <input type="checkbox"/> 1) weak <input type="checkbox"/> Rating Pending
1e. Student reading materials contain a range of increasingly challenging selections that allow teachers to build students' ability to comprehend complex text and expand vocabulary throughout the school year.		<input type="checkbox"/> 4) extensive <input type="checkbox"/> 3) sufficient <input type="checkbox"/> 2) some <input type="checkbox"/> 1) weak <input type="checkbox"/> Rating Pending
<b>OVERALL RATING:</b> <input type="checkbox"/> 4) extensive evidence <input type="checkbox"/> 3) sufficient evidence <input type="checkbox"/> 2) some evidence <input type="checkbox"/> 1) weak evidence		
<b>SUMMARY STATEMENT (Explain why the materials received this overall rating):</b> <div style="border: 1px solid #ccc; height: 40px; width: 100%;"></div>		

The tool is based on another evaluation tool created by Student Achievement Partners, the professional-development group founded by the common-core writers, that is used

to **assess whole textbooks and textbook series**. The Council's new tool (known as the Grade-Level Instructional Materials Evaluation Tool, or GIMET) looks at each grade level separately. Teachers can use it to see where a textbook falls short and supplementary materials might be necessary.

Achieve, the nonprofit that helped launch the common standards, **also has a materials-vetting system called EQUIP**—but that one is for examining individual lessons and units.

The newest tool comes on the heels of a widely viewed release by **EdReports.org**, a website that purports to be the *Consumer Reports* of common-core classroom materials. (EdReports.org differs from GIMET in that it is not a rubric or tool but a set of completed evaluations.) The first round of reviews, which looked at K-8 math materials, found that **nearly all of the curricula by the major publishers were not aligned** to the common standards. The EdReports.org group has since **come under fire for its methodology**.

## **Education Week** (Published in Print: May 13, 2015)

# **New Read-Aloud Strategies Transform Story Time**

By **Catherine Gewertz**

*North Las Vegas, Nev.*

Reading a picture book aloud from her armchair, 20 children gathered on the rug at her feet, kindergarten teacher Jamie Landahl is carrying on a practice that's been a cornerstone of early-literacy instruction for decades. But if you listen closely, you'll see that this is not the read-aloud of your childhood. Something new and very different is going on here.

What's happening in Ms. Landahl's classroom at Ruby Duncan Elementary School reflects a major shift in reading instruction brought about by the Common Core State Standards. In place in more than 40 states, the standards expect children to read text carefully and be able to cite evidence from it to back up their interpretations. That approach requires teachers to pose "text-dependent" questions—those that can be answered only with a detailed understanding of the material, rather than from students' own experience. And it's not just for complex high school books; it's increasingly being used in reading stories aloud to young children.

Ms. Landahl's lesson on a recent afternoon showed the strategy in action. As she turned the pages of Patricia Polacco's *Thunder Cake*, she didn't ask her students to share their feelings or experiences. Instead, she posed a series of questions that gently guided the class back to the story for answers.

The book recounts how the author's grandmother taught her to manage her fear of thunderstorms by learning to tell how far away they were and hurrying to bake a cake before the rain began.

The teacher asked a cluster of questions aimed at helping the children understand that the author is also the narrator. "I wonder who's telling this story? Turn and talk to your buddy," she said.

And then: "Oh, so the character is also the author?"

When the narrator described the "sharp crackling light" that frightened her, Ms. Landahl said: "What is she scared of?"

Hands shot up. "Thunder!" some children called out.

"Well, that's the *sound*," Ms. Landahl replied. "She can see the light, right?"

There was a momentary pause, and then a girl said: "It's lightning."

Ms. Landahl embedded vocabulary instruction into the lesson, too. When the story said that Grandma took a deep breath as she watched the horizon, Ms. Landahl put on a confused face and said: "Hmmm. What do you think 'horizon' means?"

The pupils took several passes at a definition, but struggled. Ms. Landahl pointed to the place in the picture where the sky meets the land. Continuing, she asked: "Why did Grandma take a deep breath when she looked at the horizon?"

"Maybe she was thinking about something," one boy volunteered.

"Or maybe she was trying to calm down," a girl next to him said.

"She was thinking what will she do, because the storm is coming," said another girl.

### **Teacher-Written Lessons**

In that way, the children made their way through the book, piecing together its meaning. Then Ms. Landahl read the story again, and they acted out the parts in the book. Some children jumped up and roared when thunder appeared, and others stood up and shook little paper lightning bolts. Others played the protagonist, counting aloud the seconds between the lightning and the thunder, as the book shows her grandmother teaching her to do.

The *Thunder Cake* lesson is one of 82 that have been written collaboratively by more than 300 teachers across the country and stored online as part of a **collective effort called the Read-Aloud Project**. The Washington-based **Council of the Great City Schools**, which represents large urban districts, and Student Achievement Partners, in

New York City, which supports common-core implementation, launched the project in 2013 to build a warehouse of free common-core-aligned lessons that teachers can use as is, or modify to fit their students' needs.

The 318,000-student Clark County school district has waded deep into the work, using the Read-Aloud Project in all 218 of its elementary schools this year. A good chunk of the \$7.5 million it spent on elementary-level books was for the texts that Read-Aloud Project lessons are built around, said Wendy Roselinsky, the district's director of K-12 literacy and language development. District leaders see the Read-Aloud Project—dubbed "RAP"—as a key strategy in improving literacy skills in a student population that often struggles with reading.

### **Focus on Content**

Lindsay Tomlinson, the assistant principal at Ruby Duncan Elementary, which enrolls 685 children, helped bring RAP to Clark County after participating in its early development. She's a big fan of the text-dependent-question technique. Keeping the children's focus on the content of the book helps ensure that they understand the story and that they build vocabulary and content knowledge, before they move on to discussing their feelings or personal experiences, she said.

The intense content focus also helps all children access the story equally, regardless of their individual life experiences, said Katrina Martinez, the instructional coach for the district region that includes Ruby Duncan.

"There's a fine balance between when to ask questions that help children connect personally with the story and when to ask questions that help them understand the content," she said. "In classes like ours, asking 'Who's been to the ocean?' might reach only a couple of our kids. We're in the middle of a desert."

The books chosen for the read-alouds occupy a distinct niche in overall class text selection, Ms. Tomlinson said. Teachers tend to choose on-grade-level books for whole-group instruction and books at each student's instructional level for individual reading, she said. But since children can understand oral language before written language, teachers try to use read-aloud books that are two to three grade levels above their students' assigned grade to help them develop higher-level skills with teacher support, she said.

Reading aloud to children has a long history as a powerful classroom technique to build foundational literacy skills. It exposes children to different kinds of text structures and language, builds awareness of how sounds are connected to words, and demonstrates phrasing and fluency. Most importantly, in the eyes of many educators, it can foster a loving—and they hope lifetime—relationship with reading.

Some experts worry, however, that an approach like RAP's can undermine the joy of the read-aloud.

"We have to be very careful that we don't turn them off more than we turn them on," said Jim Trelease, the author of *The Read-Aloud Handbook*. It's important to prepare children for a challenging book by acquainting them with its new vocabulary, he said. But "breaking up the story constantly with, 'Let's talk about this,' and 'What about that?,' Well, gee, how about the plot? All that stopping and starting can become an impediment."

### **Finding a Balance**

Susan B. Neuman, the chairwoman of the department of teaching and learning at New York University's Steinhardt School of Education, praised the Read-Aloud Project's emphasis on helping children understand the content of the story. The trick, she said, is ensuring the right balance between reading for the sheer joy of it and delving into specifics for vocabulary and content mastery.

"Too many of our poor readers don't focus enough on the text itself, and that's a problem," she said. "They really need that rich content development. But some teachers can tilt too much toward obsessing about specific words without the larger picture, the sound, the feel of the book that's being read. If it's not done right, it can look too exercise and can get excruciatingly boring."

To guard against that, the Read-Aloud Project approach reserves the first reading of a book for pleasure. Deeper dives are reserved for the second and third readings of a story. Each lesson envisions three or more readings of a book, each with a distinct focus, over several days. Children have the opportunity to make personal connections with the story early on, and again in the classroom activities built around the story.

After the second reading of *Thunder Cake*, the children in Ms. Landahl's class filled out worksheets with graphic organizers shaped like thunderclouds to help them get ready to write about the story. They listed things that scare them, like thunderstorms, and talked about their experiences with big rainstorms. "I saw a storm one time that was so big it flooded a whole road," one boy told Ms. Landahl.

### **Building Background Knowledge**

In another wing of the school on the same day, 2nd grade teacher Nikki Longmore was using a RAP lesson to read aloud a nonfiction book: *14 Cows for America*, which recounts how a Maasai tribe in Kenya sent cows to the United States as a gift of comfort after the Sept. 11 attacks.

On the second reading of the book, she stopped to ask the children to point out things in the story that showed the compassion of that gift: the Maasai's deep reverence for cows, and the pain of 9/11, conveyed to them by a native son who had returned to his village from his medical studies in New York.

Ms. Longmore and her colleagues chose to customize that lesson. As written for RAP, it focused on themes of past and present, since the story flips back and forth between the two, a structure that can prove challenging for young students. But the 2nd grade team wanted to use the story to build students' background knowledge of 9/11 also, so they chose to focus more discussion on that and paired it with another book: *Sept. 12th: We Knew Everything Would Be All Right*. That book was written and illustrated by 1st graders at a Missouri school who were upset by the plane crashes, but found reassurance and security in the recurring events of their days, such as their teacher reading to them at school.

During the read-aloud of *14 Cows for America*, Ms. Longmore's 2nd graders were absorbing the messages of the Maasai's gift and the tragedy of 9/11. The teacher asked the children to "turn and talk" with one another about a phrase in the story: The villager who told his tribesmen about 9/11 said that it "burned a hole in his heart."

"What is the author trying to tell us?" Ms. Longmore asked the children.

"That it made him sad," a boy said.



"Can you provide some more support for your answer from what you've read?" the teacher asked.

"Because the author told us that many people lost their lives," a girl said.

Ms. Tomlinson, the assistant principal, said that kind of focus on a story's meaning leads her students more often to deeper understanding.

"Listening to what they say in class," she said, "it's proof that they can reach those higher levels, with scaffolding, and they can get it."

*Coverage of the implementation of college- and career-ready standards is supported in part by a grant from the Bill & Melinda Gates Foundation. Education Week retains sole editorial control over the content of this coverage.*

# *Alaska Dispatch News*

[Tegan Hanlon](#) [2]

March 31, 2015

A newly released review of the Anchorage School District's facilities operations highlights numerous deficiencies in how the district estimates the costs of capital projects, how it secures funding for those projects and how it manages them.

The review, made public Tuesday, offers 28 recommendations on how the district could improve, including filling critical job vacancies on a timely basis, noting that the top facilities position went unfilled for three years.

ASD administrators and the Council of the Great City Schools presented the review at a special School Board meeting Tuesday afternoon -- a week before the April 7 municipal election, when voters [will decide the fate of a \\$59.3 million school bond](#) [3] to pay for capital projects at eight schools.

Mike Abbott, ASD's chief operating officer, said Monday that the special meeting was called because the school district did not want to create the perception that it held back the review's findings until closer to the vote. Under typical protocol, the administration would have presented the findings at the next School Board meeting, scheduled for the day before the election, Abbott said.

The review was completed by the Council of the Great City Schools, a coalition of 66 of the nation's largest urban public school systems. The council has previously [completed several reviews for the Anchorage School District](#) [4] in areas including math instruction, food services and organizational structure.

In its 14-page facilities review, the council said the school district did some things well. It praised ASD for the competent, hardworking and dedicated employees within the Facilities and the Maintenance and Operations departments, as well as its six-year facilities plan. It noted that ASD had a robust preventive maintenance program as well as a strategic plan that called for high operational efficiency.

But the council also found items it didn't like. For one, the review said the school district's Facilities Department went three years without a director. During that span, the department lacked an executive to champion capital projects and maintenance programs, the review said.

Abbott said the previous facilities director retired in 2011. At the time, a couple of school bonds had failed, he said. Without funding coming in for capital projects -- which also fund the staff that manage those projects -- the district intentionally left the position vacant for six months. Then, bonds were passed.

The district recruited for the position four times. It wasn't until December 2014 that it hired a new director. In the interim, Abbott, along with two other school district employees, made the decisions on capital projects. But Abbott acknowledged that during that time the department lacked professional development and staff support.

“It took much longer than we had hoped it would to recruit a candidate for the position,” Abbott said. “We never thought we were more than a few months away from solving the problem permanently.”

Other findings and observations included:

- There was no School Board-level committee that focused on facilities.
- The council heard concerns about the Facilities Department's ability to accurately estimate the cost of capital projects. For example, a review of six bid documents for capital projects found that the school district's cost estimates exceeded related bids by about 35 percent.
- The council found no formal process within the school district to report budgeted vs. actual costs, along with explanations, for bond or legislative grant projects.
- It was reported to the council that staff morale was low within the Facilities and Maintenance and Operations departments.

The council also took issue with the framework for the school district's legislative grant process. Under the current process, each school completes a list of capital requests and the Legislature decides what to fund. The projects are not prioritized at a district-wide level, Abbott said.

Abbott said the process has created relationships between individual schools and legislators and many projects have received grant funding during flush financial times. However, he said, the School Board and administration became concerned about the process when it grew quickly and price tags increased.

In its review, the council noted that there was little connection between the grant requests and the school district's six-year facilities plan.

Of the 28 recommendations included in the review, the school district agreed with 24, said ASD Superintendent Ed Graff. He said none of the recommendations came as a surprise. The School Board and administration requested the review in fall 2014.

“I think this report confirms that we're on the right track,” Graff said. “We're focused on continuous improvement.”

The review's recommendations included:

- Merge all facilities-related departments, offices and programs into a new Facilities Department that is headed by one person. Develop a business plan for that department. Graff said the school district would analyze the benefits of reorganization.
- Review funding options for capital projects and identify if there are stable, longer-term financing options to pay for larger, multiyear projects. Abbott said about 90 percent of funds for capital projects come from annual bonds, which have [recently come under fire in the Legislature](#) [5].
- Centralize, coordinate and prioritize all capital funding requests. The school district agreed that funding requests could be better coordinated.

School Board member Natasha von Imhof said after the meeting Tuesday that the review allowed the school district to see how its operations compared to those of similar U.S. districts.

“I would argue that it takes some courage for us to parade this across the public,” she said.

Von Imhof said that after looking over the review she wanted to see a breakdown of capital project costs, referring to one of the review’s findings.

The review said that design and engineering costs amount to roughly 30 percent of total project costs, which the council said appeared high.

School district administration speculated that the district included costs associated with design that most other school districts did not. But the council said Tuesday that the guidelines of what to include were clear.

Graff said the school district would follow up with the council. By summer, the school district will develop plans for each of the recommendations and present them to the School Board, he said.

“We expect this to be something we continue to monitor and support over the next several months and into the next school year,” he said.

*Austin American-Statesman*

# Austin district hopes billboards, bus ads will help it retain students

Wednesday, June 3, 2015

By [Melissa B. Taboada](#)- American-Statesman Staff

As the Austin school district plans for a third consecutive year of declining student enrollment next fall, district leaders are launching a multifaceted campaign to reverse the trend and attract families.

Billboards were put up last week, and ads this month will be slapped on the sides of public transit buses as well as the district's own yellow fleet. Flyers are being stuffed into mailboxes in target areas of town. Radio ads are being taped.

School board members say it's about time that the Austin district — long considered one of the best urban districts in Texas by those in education circles — spread the word to families, in part to keep students from leaving for charter schools that have been out-marketing the district for years.

“We recognize we have to be as nimble and as good as our competitors,” said Trustee Kendall Pace, adding that marketing is about telling the district's story, building interest and creating loyalty. “We have great things going on. We just don't have a systematic way of getting that message out there.”

Austin's marketing push mirrors a strategy used by other districts across the U.S.

In 2013, San Antonio area school districts started their “We Go Public” effort to tout the benefits of traditional public schools. The Palm Beach County school district in Florida also recently began a multimedia marketing campaign. The campaigns for those districts have included television advertising, which the Austin district has not yet embraced.

Henry Duvall, director of communications for the [Council of Great City Schools](#), which represents 67 urban districts throughout the country, said Austin's efforts sound like a smart move, particularly the emphasis on highlighting more openings in early childhood and specialty programs, such as Early College High School, which allows high school students in two of the lower-performing schools to earn an associate degree. Such programs elsewhere, like in St. Louis, have driven up enrollment, he said.

“If they do this right, it should be a success because we definitely have seen success in other districts that have done this,” Duvall said. “Public school districts didn't really have to do too much advertising in the past, but with the advent of charter schools, it makes the public schools think, ‘We have good programs and need to let the public know.’ ”

For now, the Austin district is attempting to market its schools in more cost-effective ways, school officials said, but trustees could decide to put aside funding specific to marketing efforts starting in the 2015-16 budget,

which is to be adopted in August. It is unclear how much money, if any, will be designated specifically for marketing. The current efforts cost about \$23,300, cobbled together from unspent funds for professional development and copy paper purchasing, among other things.

A few of the area's top public relations and marketing firms, including Elizabeth Christian Public Relations, have lent their expertise pro bono to help the district brand itself. And the district is working with the Austin Board of Realtors to help educate real estate agents on the various programs schools offer.

Sendero Health Plans also donated 10 billboards for the district to boast about its Early College High School programs, for which students can earn associate degrees during high school, and pre-kindergarten programs, which are free and start as early as age 3, in a handful of low-income neighborhoods where schools' enrollment is low.

Charter schools have targeted many of those neighborhoods for their recruiting and have doubled their enrollment in recent years.

By contrast, the 85,000-student Austin district dwindled by nearly 2,000 students in the past two years and is bracing to lose another 569 this fall.

Each student brings about \$7,400 in state funding, so the last two years of declining enrollment have meant a loss of millions for the district.

The new marketing push stretches to the grass roots, where a handful of parents and campus administrators have visited homes and businesses to get the word out about their schools.

Colin Clark, whose son is a first-grader at Travis Heights Elementary, said he got involved to boost enrollment at the school, as charter schools "market heavily to our students." He has visited businesses near the school to let employees know that it is an option for their children.

"We recognized the need to do everything we can," Clark said.

## ***Long Beach Press Telegram***

### **Levar Burton, Jose Hernandez, Fareed Zakaria to speak at Long Beach education conference**

By Nadra Nittle , Long Beach Press Telegram (May 16, 2015)



Actor Levar Burton, former NASA astronaut Jose Hernandez and CNN anchor Fareed Zakaria will speak at a national education conference in Long Beach in October.

Actor Levar Burton, former NASA astronaut Jose M. Hernandez and CNN anchor Fareed Zakaria will speak at the Council of the Great City Schools' 59th Annual Fall Conference in Long Beach.

The Long Beach Unified School District will host the conference, which will take place from Oct. 7-11.

The Council of the Great City Schools is a coalition of urban school systems, including LBUSD.

Thousands of education leaders are expected to take part in the conference. "The conference planning is off to a great start. These are impressive speakers who know the value of a good education," stated Felton Williams, LBUSD school board vice president and CGCS secretary-treasurer.

Burton is known for his performances in "Roots," "Star Trek" and "Reading Rainbow." Hernandez belonged to the crew of the Space Shuttle STS-128 Discovery mission.

Foreign policy expert Zakaria analyzes economic and political trends for CNN and the Washington Post.



**OP-EDS**

*San Francisco Chronicle*

# Proposed federal budget would set back urban schools' gains

By Jumoke Hinton Hodge and Michael Casserly

March 27, 2015

The nation's urban public schools are often described as troubled or in crisis, but many people don't realize that they have made enormous progress over the last 10 years. Their students' academic performance has improved. They have raised their standards and strengthened their non-instructional operations. Our urban schools still lag on many important indicators, to be sure, but the public would be encouraged by the amount of effort and innovation that is going into improvement.

Earlier this month, we had the opportunity to join other school leaders in a meeting with President Obama to discuss the successes we've seen and the challenges we face. The progress we have made is now in jeopardy as Congress considers a new budget and prepares to reauthorize the federal Elementary and Secondary Education Act. The congressional budget jeopardizes federal investments in public education, which have not even fully recovered from prior-year budget cuts known as sequester cuts. Both the House and Senate versions of the reauthorization of the education act further freeze funds through 2021. If such levels are approved by Congress, the federal government would spend less on our schools in 2021 than in 2012.

What would that mean? In Oakland, fewer after-school opportunities and less tutoring. In Houston, the loss of nearly 120 teachers. And in Miami, the loss of \$15 million in badly needed Title I educational aid for poor children.

On top of this loss of federal funding, the House bill to renew the nation's elementary and secondary education programs allows state and local education funding to be cut without any risk of losing federal dollars. In a very counterproductive proposal called "portability," the House bill would dismantle the system by which federal funds are targeted to schools and districts with the highest concentrations of poverty, moving these scarce dollars into schools and districts with less overall need. The proposal then further dilutes funding by allowing federal funds to be used for any student within a school, or any school with as few as one poor student, thereby undercutting the original intent of Congress to concentrate federal funds where they are most needed to offset the impact of poverty on learning.

These proposals put at risk the significant gains that our urban public schools have made over the last few years. In fact, these academic gains are helping to fuel the progress that the nation in general is making. For instance, between 2003 and 2013, fourth-graders in the nation's large city schools improved their reading attainment by 33 percent on the National Assessment of Educational Progress (sometimes called the nation's report card.) In math, fourth-graders in our large city public schools improved by 63 percent over the same period. We see similar gains among eighth-graders. And movement is now evident in improving graduation rates, particularly among our African American and Hispanic students.

This progress is the result of work by a great many people at the local level who have not tolerated the low expectations to which too many of our children have been historically held. As urban educators, we did not get into this important work to see our schools reflect — much less perpetuate — the inequities that too many of our children endure. Our job is to help our children overcome barriers and to put them on the road to success.

But this largely unheralded progress is at risk if Congress begins to undermine the gains we are making, gains that our elected representatives have had a hand in creating through the investments they have made over the years. Now is not the time to back away; now is the time to double-down on behalf of all our children. So we

urge Congress to pass a good bill that addresses our concerns and invests in our children.

*Jumoke Hinton Hodge is a member of the Oakland Unified School District Board.*

*Michael Casserly is the executive director of the Council of the Great City Schools, the nation's primary coalition of large urban public school systems.*

**COMMON CORE COMMUNICATIONS**

To: Henry Duvall, Council of the Great City Schools

From: GMMB

Date: June 15, 2015

RE: Common Core PSA Monitoring Report for May 1, 2015 – May 31, 2015

**Overall**

This monitoring report represents the fourth summary of the results of the public service announcement distribution for the Council’s Common Core English and Spanish language television PSAs “Conversation – English Language Arts” and “Conversation – Math” and English and Spanish language radio PSAs, “Conversation – English Language Arts” and “Conversation – Math” covering the period between May 1 and May 31.

All data in this report comes from coding embedded in the PSA tapes distributed to television and radio stations that is subsequently tracked and reported by Nielsen Media Research.

Below is a summary of cumulative airings since the beginning of the campaign on January 21, 2015 across the eight PSAs. A breakdown of airings of the television PSA by market and station is available in the Appendix.

PSA	Cumulative Airings	Cumulative Audience Impressions	Cumulative Media Value	Placements in Top 15 Markets This Month
English Language TV PSAs	1,821	36,248,269	\$844,714	Chicago, Boston, Washington, Detroit, Seattle
Spanish Language TV PSAs	2,045	29,448,007	\$741,205	New York, Los Angeles, Philadelphia, San Francisco, Washington, Tampa-St. Petersburg
English Language Radio PSAs	1,520	7,599,550	\$95,905	New York, Chicago, Philadelphia, Washington, Atlanta, Phoenix, Minneapolis-St. Paul
Spanish Language Radio PSAs	1,043	1,288,600	\$57,828	New York
<b>Total</b>	<b>6,429</b>	<b>74,584,426</b>	<b>\$1,739,652</b>	<b>New York, Los Angeles, Chicago, Philadelphia, San Francisco, Boston, Washington, Atlanta, Phoenix, Detroit, Tampa-St. Petersburg, Seattle, Minneapolis-St. Paul</b>

### English Language Television

For the May monitoring period, the English language television PSAs aired 577 times on 23 stations in 17 markets, amounting to 12,863,046 audience impressions and \$339,645 in donated media value.

“Conversation – English Language Arts” aired 274 times on 18 stations in 13 markets, amounting to 6,278,078 audience impressions and \$165,793 in donated media value, while “Conversation – Math” aired 303 times on 21 stations in 15 markets, amounting to 6,584,968 audience impressions and \$173,852 in donated media value.

In the Nielsen ratings, “Conversation – English Language Arts” ranked 360<sup>th</sup> out of 1286 PSAs tracked during May, while “Conversation – Math” ranked 344<sup>th</sup>.

New markets reached this month	1 market: Johnstown-Altoona, PA
Stations with over 500,000 impressions this month	WHDH-TV (Boston): 40 airings and 3,755,336 impressions WLNS-TV (Lansing): 165 airings and 2,346,130 impressions WLVI-TV (Boston): 79 airings and 1,811,844 impressions WFXT-TV (Boston): 24 airings and 1,112,092 impressions WIS-TV (Columbia): 28 airings and 765,367 impressions WTOV-TV (Wheeling-Steubenville): 48 airings and 548,662 impressions
Cumulative percentage of airings by daypart	30% during Daytime hours (9 AM – 4 PM) 27% during Early Morning hours (5 AM – 9 AM) 22% during Late Night hours (1 AM – 5 AM) 11% during Late Evening hours (10 PM – 1 AM)
Cumulative demographic reach	Women aged 25-54: 9,375,074 impressions, or 26% overall Men aged 25-54: 8,193,011 impressions, or 23% overall

### Spanish Language Television

For the May monitoring period, the Spanish language television PSAs aired 460 times on 13 stations in 11 markets, amounting to 6,429,285 audience impressions and \$174,866 in donated media value.

“Conversación – artes del lenguaje en inglés” aired 235 times on 10 stations in 8 markets, amounting to 3,438,318 audience impressions and \$96,216 in donated media value, while “Conversación – matemáticas” aired 225 times on 10 stations in 8 markets, amounting to 2,990,967 audience impressions and \$78,650 in donated media value.

In the Nielsen ratings, “Conversación – artes del lenguaje en inglés” ranked 351<sup>st</sup> out of 1286 PSAs tracked during May, while “Conversación – matemáticas” ranked 356<sup>th</sup>.

New markets reached this month	1 market: Yakima, WA
Stations with over 100,000 impressions this month	KUNP-TV (Portland): 244 airings and 1,977,520 impressions WFDC-TV (Washington): 70 airings and 1,354,697 impressions WMDO-TV (Washington): 57 airings and 819,764 impressions WTFX-TV (Philadelphia): 5 airings and 687,734 impressions WNJU-TV (New York): 14 airings and 683,452 impressions WFTX-TV (Fort Myers-Naples): 31 airings and 628,130 impressions KWWL-TV (Cedar Rapids): 25 airings and 277,359 impressions
Cumulative percentage of airings by daypart	22% during Late Night hours (1 AM – 5 AM) 27% during Daytime hours (9 AM – 4 PM) 15% during Early Morning hours (5 AM – 9 AM) 16% during Late Evening hours (10 PM – 1 AM)
Cumulative demographic reach	Women aged 25-54: 7,780,738 impressions, or 26% overall Men aged 25-54: 9,346,819, or 32% overall

### English Language Radio

For the May monitoring period, the English language radio PSAs aired 400 times on 26 stations in 17 markets, amounting to 2,021,850 audience impressions and \$24,036 in donated media value.

“Conversation – English Language Arts” aired 215 times on 21 stations in 14 markets, amounting to 1,384,800 audience impressions and \$13,060 in donated media value, while “Conversation – Math” aired 185 times on 20 stations in 12 markets, amounting to 637,050 audience impressions and \$10,976 in donated media value.

New markets reached this month	1 market: Toledo, OH
Stations with over 100,000 impressions this month	WTOP-FM (Washington): 19 airings and 571,900 impressions WBBM-AM (Chicago): 16 airings and 528,000 impressions WCTK-FM (Providence): 19 airings and 178,600 impressions WCCO-AM (Minneapolis): 11 airings and 147,400 impressions WWBN-FM (Flint): 55 airings and 132,200 impressions
Cumulative demographic reach	Women aged 25-54: 1,067,100 impressions, or 134% overall Men aged 25-54: 1,909,600 impressions, or 25% overall

### Spanish Language Radio

For the May monitoring period, the Spanish language radio PSAs aired 310 times on 9 stations in 78 markets, amounting to 414,300 audience impressions and \$17,321 in donated media value.

“Conversación – artes del lenguaje en inglés ” aired 177 times on 7 stations in 6 markets, amounting to 231,100 audience impressions and \$10,393 donated media value, while “Conversación – matemáticas”



aired 133 times on 8 stations in 7 markets amounting to 183,200 audience impressions and \$6,928 in donated media value.

New markets reached this month	1 market: New York, NY
Stations with over 50,000 impressions this month	KXSE-FM (Sacramento): 46 airings and 128,800 impressions WNMA-AM (Miami-Fort Lauderdale): 93 airings and 83,700 impressions KRCX-FM (Sacramento): 33 airings and 69,300 impressions
Cumulative demographic reach	Women aged 25-54: 229,400 impressions, or 18% overall Men aged 25-54: 553,400 impressions, or 43% overall

### Summary Analysis

During the month of May, the Council's Common Core PSA campaign produced strong performances across all PSAs. All four of the PSAs received airings in top 15 markets, including the New York market, where the potential audience is largest and reaching viewers is toughest; in total, the PSAs have aired in 13 of the top 15 markets in the country. The only Top 15 markets where a PSA hasn't aired, Houston and Dallas, are in a state that never implemented the Common Core in the first place. In just over four months, the PSA campaign has already resulted in almost 75 million audience impressions, and with a cumulative donated media value of \$1,739,652 through four months, this PSA campaign is in line with the performance of the Council's successful PSA campaign for "Staircase" and "Future", which had accumulated \$1,781,795 in donated media value through four months.

The English language television PSAs in particular performed strongly with 577 airings leading to 12,863,046 impressions and \$339,645 in donated media value in May. Total audience impressions increased by 71% over the April numbers, while total donated media value was more than double the April haul. Out of the 23 stations that aired one of the English language television PSAs, sixteen achieved more than 100,000 impressions each, and four stations achieved more than 1 million impressions. Only three of the 23 stations did not register at least 50,000 impressions. "Conversation-English Language Arts" (274 airings) received fewer airings than "Conversation-Math" (303 airings) in May. In May, 29% of the English language television PSAs airings occurred in Top 10 markets, which compares very favorably with the industry average of 9%.

The Spanish language television PSAs continued to perform well. Six out of the 13 stations that aired Spanish language television PSAs in May reported over 500,000 million impressions. Seven stations contributed at least 100,000 impressions. Those seven stations contributed a combined 446 airings of the Spanish language television PSA out of a total 460 airings, or 97 percent of all May airings of the Spanish language television PSAs. "Conversación – artes del lenguaje en inglés" received more airings (235 airings) than "Conversación – matemáticas" (225 airings). A whopping 88% of the Spanish language television PSA airings occurred in Top 25 markets, which easily trumps the industry average of 19%. With 29,448,007 audience impressions and \$741,205 in donated media value thus far, the Spanish language television PSAs are vastly outperforming the Spanish language television PSA versions of the Council's "Staircase" and "Future" campaign, which registered 10,035,355 audience impressions and \$182,896 in

donated media value through their first four months of airing, meaning that the current Spanish language television PSA campaign has been nearly three times as successful thus far.

The English language radio PSAs garnered at least 100,000 audience impressions in six markets, including four top 15 markets: Chicago (#3), Washington (#8), Phoenix ((#11), and Minneapolis-St. Paul (#15). The English language radio PSAs reached New York and Chicago, the two of the three toughest markets to penetrate in the country, during the month of May. The Spanish language radio PSAs aired in a Top 15 market for the first time in May, reaching New York, which is not just a Top 15 market but the largest media market in the country. The Spanish language radio PSAs aired 193 times combined between New York, Miami-Fort Lauderdale, and Sacramento, meaning that over 60% of the airings occurred in Top 20 markets. The PSA also aired in Milwaukee, Tucson, Chattanooga, Santa Barbara, and Bakersfield.

In the fourth full month of airing, the PSAs made promising progress, and we can look forward to these numbers continuing to grow in the months to follow as the initial distribution's full effects continue to take shape. We will continue to follow up with stations to ensure that public service directors have received the PSAs and are aware of the importance of educating audiences about the Common Core.

Appendix: Detail of Television PSA Airings

English Television PSA: Station Airing Detail (May 1, 2015 - May 31, 2015)													
Station	Affiliation	City	State	ELA Airings This Month	Math Airings This Month	Total Airings This Month	Audience Impressions This Month	Media Value This Month	Total ELA Airings	Total Math Airings	Total Airings	Total Audience Impressions	Total Media Value
<b>New York, NY (#1 DMA)</b>													
WPIX-TV	CW Television Network	New York	NY	-	-	-	-	\$0	4	3	7	791,169	\$10,235
<b>Subtotal:</b>				-	-	-	-	<b>\$0</b>	<b>4</b>	<b>3</b>	<b>7</b>	<b>791,169</b>	<b>\$10,235</b>
<b>Chicago, IL (#3 DMA)</b>													
WGN-TV	CW Television Network	Chicago	IL	-	2	2	97,401	\$3,184	-	7	7	347,487	\$7,509
<b>Subtotal:</b>				-	<b>2</b>	<b>2</b>	<b>97,401</b>	<b>\$3,184</b>	-	<b>7</b>	<b>7</b>	<b>347,487</b>	<b>\$7,509</b>
<b>Philadelphia, PA (#4 DMA)</b>													
WMCN-TV	Independent	Cherry Hill	NJ	-	-	-	-	\$0	2	2	4	38,773	\$687
<b>Subtotal:</b>				-	-	-	-	<b>\$0</b>	<b>2</b>	<b>2</b>	<b>4</b>	<b>38,773</b>	<b>\$687</b>
<b>Boston, MA (#7 DMA)</b>													
WFXT-TV	FOX Broadcasting Company	Dedham	MA	9	15	24	1,112,092	\$23,175	55	64	119	4,858,987	\$98,516
WHDH-TV	NBC Television Network	Boston	MA	22	18	40	3,755,336	\$121,878	44	39	83	6,686,518	\$195,208
WLVI-TV	CW Television Network	Boston	MA	40	39	79	1,811,844	\$44,406	103	101	204	4,723,308	\$109,465
WWDP-TV	NBC Television Network	West Bridgewater	MA	1	1	2	8,906	\$166	1	1	2	8,906	\$166
<b>Subtotal:</b>				<b>72</b>	<b>73</b>	<b>145</b>	<b>6,688,178</b>	<b>\$189,625</b>	<b>203</b>	<b>205</b>	<b>408</b>	<b>16,277,719</b>	<b>\$403,355</b>
<b>Washington, DC (#8 DMA)</b>													
WDCA-TV	MyNetwork TV	Washington	DC	4	11	15	221,176	\$6,346	6	12	18	262,985	\$7,284
WTTG-TV	FOX Broadcasting Company	Washington	DC	3	4	7	382,904	\$8,680	5	5	10	523,380	\$11,611
<b>Subtotal:</b>				<b>7</b>	<b>15</b>	<b>22</b>	<b>604,080</b>	<b>\$15,026</b>	<b>11</b>	<b>17</b>	<b>28</b>	<b>786,365</b>	<b>\$18,895</b>
<b>Detroit, MI (#12 DMA)</b>													
WADL-TV	CBS Television Network, Independent	Clinton Township	MI	3	4	7	79,934	\$1,052	4	5	9	102,295	\$1,299
<b>Subtotal:</b>				<b>3</b>	<b>4</b>	<b>7</b>	<b>79,934</b>	<b>\$1,052</b>	<b>4</b>	<b>5</b>	<b>9</b>	<b>102,295</b>	<b>\$1,299</b>
<b>Seattle, WA (#14 DMA)</b>													
KSTW-TV	CW Television Network	Seattle	WA	3	5	8	126,892	\$2,602	10	10	20	258,834	\$5,132
<b>Subtotal:</b>				<b>3</b>	<b>5</b>	<b>8</b>	<b>126,892</b>	<b>\$2,602</b>	<b>10</b>	<b>10</b>	<b>20</b>	<b>258,834</b>	<b>\$5,132</b>
<b>Sacramento, CA (#20 DMA)</b>													
KCRA-TV	NBC Television Network	Sacramento	CA	-	3	3	117,088	\$2,392	-	11	11	448,757	\$9,721
KQCA-TV	MyNetwork TV	Sacramento	CA	-	7	7	120,274	\$2,702	-	11	11	189,002	\$4,126
<b>Subtotal:</b>				-	<b>10</b>	<b>10</b>	<b>237,362</b>	<b>\$5,094</b>	-	<b>22</b>	<b>22</b>	<b>637,759</b>	<b>\$13,847</b>
<b>Honolulu, HI (#69 DMA)</b>													
KIKU-TV	Independent	Honolulu	HI	-	-	-	-	\$0	6	8	14	53,574	\$912
<b>Subtotal:</b>				-	-	-	-	<b>\$0</b>	<b>6</b>	<b>8</b>	<b>14</b>	<b>53,574</b>	<b>\$912</b>
<b>Des Moines, IA (#72 DMA)</b>													
KCCI-TV	CBS Television Network	Des Moines	IA	20	-	20	276,735	\$6,035	115	-	115	1,938,250	\$38,184
<b>Subtotal:</b>				<b>20</b>	-	<b>20</b>	<b>276,735</b>	<b>\$6,035</b>	<b>115</b>	-	<b>115</b>	<b>1,938,250</b>	<b>\$38,184</b>
<b>Spokane, WA (#73 DMA)</b>													
KSKN-TV	CW Television Network	Spokane	WA	8	4	12	56,898	\$1,345	11	6	17	85,923	\$1,919
<b>Subtotal:</b>				<b>8</b>	<b>4</b>	<b>12</b>	<b>56,898</b>	<b>\$1,345</b>	<b>11</b>	<b>6</b>	<b>17</b>	<b>85,923</b>	<b>\$1,919</b>
<b>Columbia, SC (#77 DMA)</b>													

WIS-TV	NBC Television Network	Columbia	SC	14	14	28	765,367	\$12,332	41	43	84	2,132,049	\$30,515
<b>Subtotal:</b>				<b>14</b>	<b>14</b>	<b>28</b>	<b>765,367</b>	<b>\$12,332</b>	<b>41</b>	<b>43</b>	<b>84</b>	<b>2,132,049</b>	<b>\$30,515</b>
<b>Rochester, NY (#78 DMA)</b>													
WROC-TV	CBS Television Network	Rochester	NY	3	6	9	198,000	\$6,076	23	12	35	752,141	\$19,612
<b>Subtotal:</b>				<b>3</b>	<b>6</b>	<b>9</b>	<b>198,000</b>	<b>\$6,076</b>	<b>23</b>	<b>12</b>	<b>35</b>	<b>752,141</b>	<b>\$19,612</b>
<b>Cedar Rapids, IA (#90 DMA)</b>													
KWWL-TV	NBC Television Network	Waterloo	IA	25	-	25	256,647	\$5,439	97	-	97	1,231,735	\$22,422
<b>Subtotal:</b>				<b>25</b>	<b>-</b>	<b>25</b>	<b>256,647</b>	<b>\$5,439</b>	<b>97</b>	<b>-</b>	<b>97</b>	<b>1,231,735</b>	<b>\$22,422</b>
<b>Charleston, SC (#95 DMA)</b>													
WCSC-TV	CBS Television Network	Charleston	SC	2	4	6	32,526	\$774	5	9	14	180,311	\$3,884
<b>Subtotal:</b>				<b>2</b>	<b>4</b>	<b>6</b>	<b>32,526</b>	<b>\$774</b>	<b>5</b>	<b>9</b>	<b>14</b>	<b>180,311</b>	<b>\$3,884</b>
<b>Johnston-Altonna, PA (#104 DMA)</b>													
WATM-TV	ABC Television Network	Johnstown	PA	-	1	1	6,215	\$68	-	1	1	6,215	\$68
<b>Subtotal:</b>				<b>-</b>	<b>1</b>	<b>1</b>	<b>6,215</b>	<b>\$68</b>	<b>-</b>	<b>1</b>	<b>1</b>	<b>6,215</b>	<b>\$68</b>
<b>Boise, ID (#109 DMA)</b>													
KTRV-TV	Independent	Boise	ID	14	10	24	132,276	\$4,381	22	15	37	198,351	\$6,169
<b>Subtotal:</b>				<b>14</b>	<b>10</b>	<b>24</b>	<b>132,276</b>	<b>\$4,381</b>	<b>22</b>	<b>15</b>	<b>37</b>	<b>198,351</b>	<b>\$6,169</b>
<b>Lansing, MI (#114 DMA)</b>													
WLAJ-TV	ABC Television Network	Lansing	MI	13	14	27	332,500	\$8,423	45	44	89	1,044,080	\$23,715
WLNS-TV	CBS Television Network	Lansing	MI	82	83	165	2,346,130	\$61,258	254	252	506	6,774,688	\$166,554
<b>Subtotal:</b>				<b>95</b>	<b>97</b>	<b>192</b>	<b>2,678,630</b>	<b>\$69,681</b>	<b>299</b>	<b>296</b>	<b>595</b>	<b>7,818,768</b>	<b>\$190,269</b>
<b>Wheeling, WV-Steubenville, OH (#157 DMA)</b>													
WTOV-TV	FOX Broadcasting Company	Mingo Junction	OH	-	48	48	548,662	\$13,665	-	166	166	1,989,887	\$45,848
<b>Subtotal:</b>				<b>-</b>	<b>48</b>	<b>48</b>	<b>548,662</b>	<b>\$13,665</b>	<b>-</b>	<b>166</b>	<b>166</b>	<b>1,989,887</b>	<b>\$45,848</b>
<b>Biloxi-Gulfport, MS (#160 DMA)</b>													
WXXV-TV	FOX Broadcasting Company	Gulfport	MS	8	10	18	77,243	\$3,266	48	42	90	369,786	\$15,155
<b>Subtotal:</b>				<b>8</b>	<b>10</b>	<b>18</b>	<b>77,243</b>	<b>\$3,266</b>	<b>48</b>	<b>42</b>	<b>90</b>	<b>369,786</b>	<b>\$15,155</b>
<b>Clarksburg-Weston, WV (#169 DMA)</b>													
WDTV-TV	CBS Television Network	Bridgeport	WV	-	-	-	-	\$0	7	6	13	54,768	\$1,853
WVFX-TV	FOX Broadcasting Company	Bridgeport	WV	-	-	-	-	\$0	18	20	38	196,110	\$6,945
<b>Subtotal:</b>				<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>\$0</b>	<b>25</b>	<b>26</b>	<b>51</b>	<b>250,878</b>	<b>\$8,798</b>
<b>GRAND TOTAL:</b>				<b>274</b>	<b>303</b>	<b>577</b>	<b>12,863,046</b>	<b>\$339,645</b>	<b>926</b>	<b>895</b>	<b>1,821</b>	<b>36,248,269</b>	<b>\$844,714</b>

Spanish Television PSA: Station Airing Detail (May 1, 2015 - May 31, 2015)													
Station	Affiliation	City	State	ELA Airings This Month	Math Airings This Month	Total Airings This Month	Audience Impressions This Month	Media Value This Month	Total ELA Airings	Total Math Airings	Total Airings	Total Audience Impressions	Total Media Value
<b>New York, NY (#1 DMA)</b>													
WNJU-TV	Telemundo	Fort Lee	NJ	7	7	14	593,452	\$8,913	32	27	59	2,479,429	\$34,531
<b>Subtotal:</b>				<b>7</b>	<b>7</b>	<b>14</b>	<b>593,452</b>	<b>\$8,913</b>	<b>32</b>	<b>27</b>	<b>59</b>	<b>2,479,429</b>	<b>\$34,531</b>
<b>Los Angeles, CA (#2 DMA)</b>													
KBEH-TV	Independent	Los Angeles	CA	2	-	2	30,402	\$590	13	-	13	198,796	\$6,599
<b>Subtotal:</b>				<b>2</b>	<b>-</b>	<b>2</b>	<b>30,402</b>	<b>\$590</b>	<b>13</b>	<b>-</b>	<b>13</b>	<b>198,796</b>	<b>\$6,599</b>
<b>Philadelphia, PA (#4 DMA)</b>													
WWSI-TV	Telemundo	Bala Cynwyd	PA	-	-	-	-	\$0	55	17	72	543,625	\$9,481
WPSJ-TV	Independent	Winslow	NJ	2	3	5	25,754	\$416	21	20	41	233,163	\$3,765
WTXF-TV	FOX Broadcasting Company	Philadelphia	PA	2	3	5	687,734	\$14,424	21	20	41	4,351,218	\$89,977
<b>Subtotal:</b>				<b>4</b>	<b>6</b>	<b>10</b>	<b>713,488</b>	<b>\$14,840</b>	<b>97</b>	<b>57</b>	<b>154</b>	<b>5,128,006</b>	<b>\$103,223</b>
<b>San Francisco, CA (#6 DMA)</b>													
KCNS-TV	MundoFOX	San Francisco	CA	1	1	2	24,718	\$1,276	7	8	15	140,294	\$6,697
<b>Subtotal:</b>				<b>1</b>	<b>1</b>	<b>2</b>	<b>24,718</b>	<b>\$1,276</b>	<b>7</b>	<b>8</b>	<b>15</b>	<b>140,294</b>	<b>\$6,697</b>
<b>Boston, MA (#7 DMA)</b>													
WFXZ-TV	MundoFOX	Newton	MA	-	-	-	-	\$0	6	-	6	53,436	\$1,306
<b>Subtotal:</b>				<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>\$0</b>	<b>6</b>	<b>-</b>	<b>6</b>	<b>53,436</b>	<b>\$1,306</b>
<b>Washington, DC (#8 DMA)</b>													
WFDC-TV	Univision Television	Washington	DC	36	34	70	1,354,597	\$39,413	176	172	348	6,641,076	\$186,390
WMDO-TV	UniMas	Washington	DC	28	29	57	819,764	\$31,119	167	166	333	4,447,270	\$140,839
<b>Subtotal:</b>				<b>64</b>	<b>63</b>	<b>127</b>	<b>2,174,361</b>	<b>\$70,532</b>	<b>343</b>	<b>338</b>	<b>681</b>	<b>11,088,346</b>	<b>\$327,229</b>
<b>Tampa-St. Petersburg, FL (#13 DMA)</b>													
WSPF-TV	MundoFOX	Tampa	FL	-	2	2	7,942	\$112	-	3	3	11,546	\$266
<b>Subtotal:</b>				<b>-</b>	<b>2</b>	<b>2</b>	<b>7,942</b>	<b>\$112</b>	<b>-</b>	<b>3</b>	<b>3</b>	<b>11,546</b>	<b>\$266</b>
<b>Miami-Fort Lauderdale, FL (#16 DMA)</b>													
KMOH-TV	MundoFOX	Miami Lakes	FL	-	2	2	6,498	\$128	1	4	5	16,245	\$305
<b>Subtotal:</b>				<b>-</b>	<b>2</b>	<b>2</b>	<b>6,498</b>	<b>\$128</b>	<b>1</b>	<b>4</b>	<b>5</b>	<b>16,245</b>	<b>\$305</b>
<b>Portland, OR (#23 DMA)</b>													
KUNP-TV	Univision Television	Portland	OR	125	119	244	1,967,552	\$51,389	452	459	911	6,966,646	\$172,756
KRCW-TV	CW Television Network	Beaverton	OR	-	-	-	-	\$0	1	-	1	11,889	\$215
<b>Subtotal:</b>				<b>125</b>	<b>119</b>	<b>244</b>	<b>1,967,552</b>	<b>\$51,389</b>	<b>453</b>	<b>459</b>	<b>912</b>	<b>6,978,535</b>	<b>\$172,971</b>
<b>Fort Myers-Naples, FLA (#62 DMA)</b>													
WFTX-TV	FOX Broadcasting Company	Cape Coral	FL	31	-	31	628,130	\$21,139	109	-	109	2,161,618	\$66,245
<b>Subtotal:</b>				<b>31</b>	<b>-</b>	<b>31</b>	<b>628,130</b>	<b>\$21,139</b>	<b>109</b>	<b>-</b>	<b>109</b>	<b>2,161,618</b>	<b>\$66,245</b>
<b>Cedar Rapids, IA (#90 DMA)</b>													
KWWL-TV	NBC Television Network	Waterloo	IA	-	25	25	277,359	\$5,855	-	87	87	1,186,373	\$21,741
<b>Subtotal:</b>				<b>-</b>	<b>25</b>	<b>25</b>	<b>277,359</b>	<b>\$5,855</b>	<b>-</b>	<b>87</b>	<b>87</b>	<b>1,186,373</b>	<b>\$21,741</b>
<b>Yakima, WA (#122 DMA)</b>													
KUNW-TV	Univision Television	Yakima	WA	1	-	1	5,383	\$92	1	-	1	5,383	\$92
<b>Subtotal:</b>				<b>1</b>	<b>-</b>	<b>1</b>	<b>5,383</b>	<b>\$92</b>	<b>1</b>	<b>-</b>	<b>1</b>	<b>5,383</b>	<b>\$92</b>
<b>GRAND TOTAL:</b>				<b>235</b>	<b>225</b>	<b>460</b>	<b>6,429,285</b>	<b>\$174,866</b>	<b>1,062</b>	<b>983</b>	<b>2,045</b>	<b>29,448,007</b>	<b>\$741,205</b>

## Hits for the Three-Minute Common Core **CONVERSATION** Video

### VIMEO

Three-Minute Common Core CONVERSATION Video in **English** 01/09/15 to 07/01/15

**Plays:** 56,948

Plays occur when the entire video is watched

**Loads:** 17,511,585

Loads occur when the video is downloaded or accessed

Top Websites to Access Video on YouTube

<b>Organization Name</b>	<b>Website Domain</b>	<b>No. of Plays</b>	<b>No. of Loads</b>
Common Core State Standards Initiative	Corestandards.org	48,194	17,271,944
Council of the Great City Schools	Cgcs.org	1,175	45,372
Council of the Great City Schools	Commoncoreworks.org	1,496	14,520
Google	Google.com	748	70,082
Connecticut Core Standards	ctcorestandards.org	129	9,017

## VIMEO

Three-Minute Common Core CONVERSATION Video in **Spanish** 01/09/15 to 07/01/15

**Plays:** 2,095

Plays occur when the entire video is watched

**Loads:** 17,326,434

Loads occur when the video is downloaded or accessed

Top Websites to Access Video on YouTube

<b>Organization Name</b>	<b>Website Domain</b>	<b>No. of Plays</b>	<b>No. of Loads</b>
Common Core State Standards Initiative	Corestandards.org	1,164	17,199,347
Council of the Great City Schools	Cgcs.org	146	3,718
Council of the Great City Schools	Commoncoreworks.org	123	2,875

## YOUTUBE

Three-Minute Common Core **CONVERSATION** Video in **English** on YouTube  
03/03/15 to 06/28/15

**Views:** 49

Top Websites to Access Video on YouTube

<b>Traffic Source: External Video Player</b>		
<b>Organization Name</b>	<b>Website Domain</b>	<b>No. of Plays</b>
Facebook	Facebook.com	17
GMMB	Gmmb.com	2
Google	Google.com	1

<b>Traffic Source: Embedded Video Player</b>		
<b>Organization Name</b>	<b>Website Domain</b>	<b>No. of Plays</b>
GMMB	Gmmb.com	2



## YOUTUBE

Three-Minute Common Core **CONVERSATION** Video in **Spanish** 03/03/15 to 06/28/15

**Views:** 4

Top Websites to Access Video on YouTube

<b>Traffic Source: External Video Player</b>		
<b>Organization Name</b>	<b>Website Domain</b>	<b>No. of Plays</b>
N/A	N/A	N/A

<b>Traffic Source: Embedded Video Player</b>		
<b>Organization Name</b>	<b>Website Domain</b>	<b>No. of Plays</b>
N/A	N/A	N/A

## Hits for the Three-Minute Common Core Video

### VIMEO

Three-Minute Common Core Video in **English** on Vimeo 10/20/12 to 07/01/15

**Plays:** 774,568

Plays occur when the entire video is watched

**Loads:** 59,425,549

Loads occur when the video is downloaded or accessed

Top Websites to Access Video on Vimeo

Organization Name	Website Domain	No. of Plays	No. of Loads
Common Core State Standards Initiative	Corestandards.org	407,603	52,190,258
Council of the Great City Schools	Commoncoreworks.org	27,706	168,347
Council of the Great City Schools	Cgcs.org	10,030	241,981
Orange County Public Schools	Pdsonline.ocps.net	6,670	11,692
Google	Google.com	5,360	224,571
Arizona Department of Education	Azed.gov	4,098	63,685
Lifehacker	Lifehacker.com	3,689	69,955

## VIMEO

Three-Minute Common Core Video in **Spanish** on Vimeo 10/20/12 to 07/01/15

**Plays:** 17,278

Plays occur when the entire video is watched

**Loads:** 938,451

Loads occur when the video is downloaded or accessed

Top Websites to Access Video on Vimeo

<b>Organization Name</b>	<b>Website Domain</b>	<b>No. of Plays</b>	<b>No. of Loads</b>
Council of the Great City Schools	Commoncoreworks.org	2,478	49,788
Council of the Great City Schools	Cgcs.org	1,462	105,955
Santa Ana Unified School District	Sausd.us	272	42,003
Arizona Department of Education	Azed.gov	223	828
Bing	Bing.com	194	269

## YOUTUBE

Three-Minute Common Core Video in **English** on YouTube 03/15/13 to 06/28/15

**Views:** 19,810

Top Websites to Access Video on YouTube

<b>Traffic Source: External Video Player</b>		
<b>Organization Name</b>	<b>Website Domain</b>	<b>No. of Plays</b>
State of California	Ca.gov	545
Google	Google.com	182
Facebook	Facebook.com	126
Arkansas Department of Education	arkansased.org	65

<b>Traffic Source: Embedded Video Player</b>		
<b>Organization Name</b>	<b>Website Domain</b>	<b>No. of Plays</b>
State of California	Ca.gov	12,823
Hemet Unified School District (Hemet, CA)	Hemetusd.k12.ca.us	1,192
Raise The Bar Parents	Raisethebarparents.org	202
Google	Google.com	185
Higher Ed for Higher Standards	Higheredforhigherstandards.org	25
Bonita Unified School District (San Dimas, CA)	Bonita.k12.ca.us	121

## YOUTUBE

Three-Minute Common Core Video in **Spanish** on YouTube 03/15/13 to 06/28/15

**Views:** 1,377

Top Websites to Access Video on YouTube

<b>Traffic Source: External Video Player</b>		
<b>Organization Name</b>	<b>Website Domain</b>	<b>No. of Plays</b>
Google	Google.com	154
State of California	Ca.gov	16
Bing	Bing.com	7
Alum Rock Union (San Jose, CA)	arusd.org	5
Van Nuys MS Math and Science Magnet (Sherman Oaks,CA)	vannuysms.org	5

<b>Traffic Source: Embedded Video Player</b>		
<b>Organization Name</b>	<b>Website Domain</b>	<b>No. of Plays</b>
Hemet Unified School District (Hemet, CA)	Hemetusd.k12.ca.us	505
Google	Google.com	46
Davis Joint Unified School District	DjUSD.net	20

## VIMEO

From the Page to the Classroom: Implementing the Common Core State Standards – English Language Arts and Literacy 6/12/12 to 07/01/15

**Plays:** 13,705

Plays occur when the entire video is watched

**Loads:** 53,331

Loads occur when the video is downloaded or accessed

Top Websites to Access Video on Vimeo

<b>Organization Name</b>	<b>Website Domain</b>	<b>No. of Plays</b>	<b>No. of Loads</b>
Fresno Unified	Beta.fresnounified.org	99	184
Bing	Bing.com	78	142
Boston Public School Curriculum and Instruction	bpscurriculumandinstruction.weebly.com/	57	3,001
Yahoo	Yahoo.com	55	96
Atlanta Public Schools	AtlantaPublicSchools.us	48	2,945

From the Page to the Classroom: Implementing the Common Core State Standards – Mathematics 6/12/12 to 07/01/15

**Plays:** 10,535

Plays occur when the entire video is watched

**Loads:** 59,056

Loads occur when the video is downloaded or accessed

Top Websites to Access Video on Vimeo

<b>Organization Name</b>	<b>Website Domain</b>	<b>No. of Plays</b>	<b>No. of Loads</b>
Boston Public School Mathematics	<a href="http://bpsmathematics.weebly.com/">http://bpsmathematics.weebly.com/</a>	244	11,744
Atlanta Public Schools	<a href="http://Atlanta.k12.ga.us">Atlanta.k12.ga.us</a>	87	2,682
Bing	<a href="http://Bing.com">Bing.com</a>	62	118
Fresno Unified	<a href="http://Beta.fresnounified.org">Beta.fresnounified.org</a>	61	104
Yahoo	<a href="http://Yahoo.com">Yahoo.com</a>	45	72

**Parent Roadmaps**  
**Council of the Great City Schools' Combined Web Site Statistics**

**Parent Roadmaps- English Language Arts 6/1/12 to 06/30/15**

**Page views:** 245,944

Page views are defined as number of times a web page was viewed

**Unique Page views:** 176,919

Unique page views are the total number of unique (individual) visitors to a specific web page during the same session (visit)

**Parent Roadmaps- Mathematics 6/1/12 to 06/30/15**

**Page views:** 232,172

Page views are defined as number of times a web page was viewed

**Unique Page views:** 168,017

Unique page views are the total number of unique (individual) visitors to a specific web page during the same session (visit)

**Parent Roadmaps- English Language Arts (Spanish) 6/1/12 to 06/30/15**

**Page views:** 30,493

Page views are defined as number of times a web page was viewed

**Unique Page views:** 21,516

Unique page views are the total number of unique (individual) visitors to a specific web page during the same session (visit)

**Parent Roadmaps- Mathematics (Spanish) 6/1/12 to 06/30/15**

**Page views:** 27,007

Page views are defined as number of times a web page was viewed

**Unique Page views:** 18,527

Unique page views are the total number of unique (individual) visitors to a specific web page during the same session (visit)



**CAMPAIGN DATES REPORTING:**

- May 22nd, 2015
- May 23rd, 2015
- May 24th, 2015

**COUNCIL OF THE GREAT CITY SCHOOLS**

**OUT-OF-HOME MEDIA REPORT**

**INDY RACE WEEKEND CAMPAIGN**



## IndyCar Series Fans

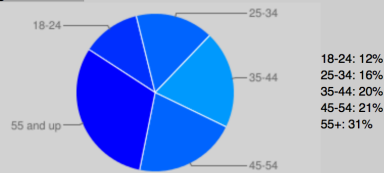
- 40 million IndyCar Series fans worldwide
- 1 in 5 U.S. adults are IndyCar fans
- Desirable and diverse audience
  - Well-educated adults with greater discretionary income
  - Heavy consumers of TV, print, and radio media
  - More brand loyal than average consumer
  - Early adopters of innovation and technology
- Brand loyalty based on brand participation in the series:
  - Nearly three times as likely to try a new brand
  - Twice as likely to remain loyal

**40,000,000 fans**

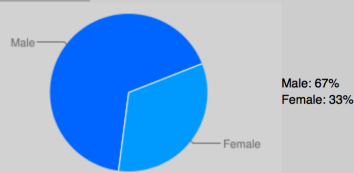
**3X as likely to try new brands**

**2X as likely to remain loyal**

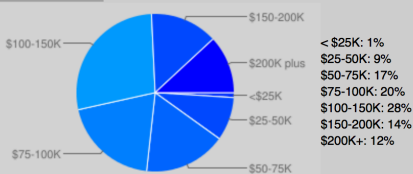
### Age Distribution



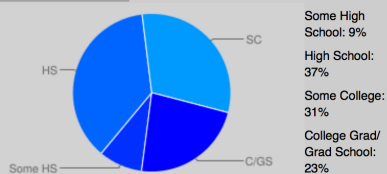
### Gender Distribution



### Income Distribution



### Education Distribution



## INDY 500 FAN DEMOGRAPHICS

- The Indianapolis 500 is the highest attended single day sporting event in the world.
- The Indianapolis 500 produces a greater economic impact (\$336 million) than either the Daytona 500 or the Super Bowl.
- IRL fans are 20% more likely than the average American to have attended college.
- 61% of fans have an annual household income of \$50,000 or more.
- IRL fans own an average of 3 vehicles and 41% have purchased a new car in past 3 years.
- 81% of Indianapolis 500 fans have access to the internet.
- The Indy 500 is everything... what's important is that the Indianapolis 500 is the father, mother, and granddad of all races.
- The Indianapolis 500 encompasses the "Month of May" with three weeks of activity.
- The usual IRL fan watches less TV than the average consumer. Therefore they are harder to reach with conventional advertising / marketing.
- More than half of all IRL fans consciously choose a sponsor's brand because of it's association with the Indy Racing League.
- 61% of attendees are ages 18-45.
- 69% male 31% female



# Out of Home Media Performance Report



### 1. What are the Common Core State Standards ?

- (a) Higher educational standards in English language arts and math;
- (b) New standards for students in kindergarten through high school;
- (c) An initiative to prepare students for college and career success; or
- (d) All of the above? (Answer is D)

**2. The Common Core State Standards were developed by the federal government -- True or False?** The answer: False; they were developed by governors and state education leaders

### 3. Why new academic standards ?

- (a) to improve your child's critical-thinking skills;
- (b) to prepare your child to compete nationally and internationally
- (c) to strengthen teaching and learning; or
- (d) All of the above? The answer: D

### 4. What kind of tests would you expect children to take as a result of the new academic standards?

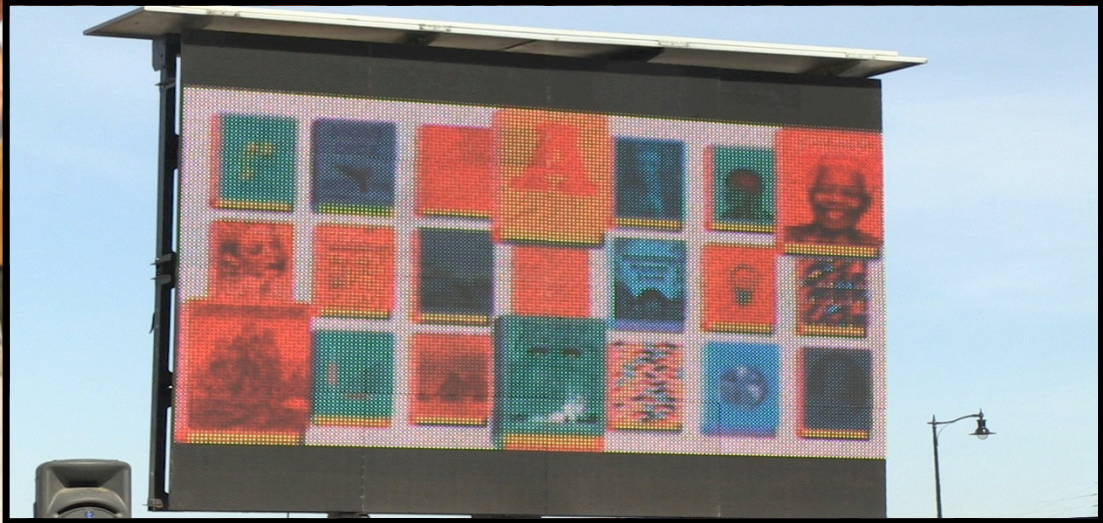
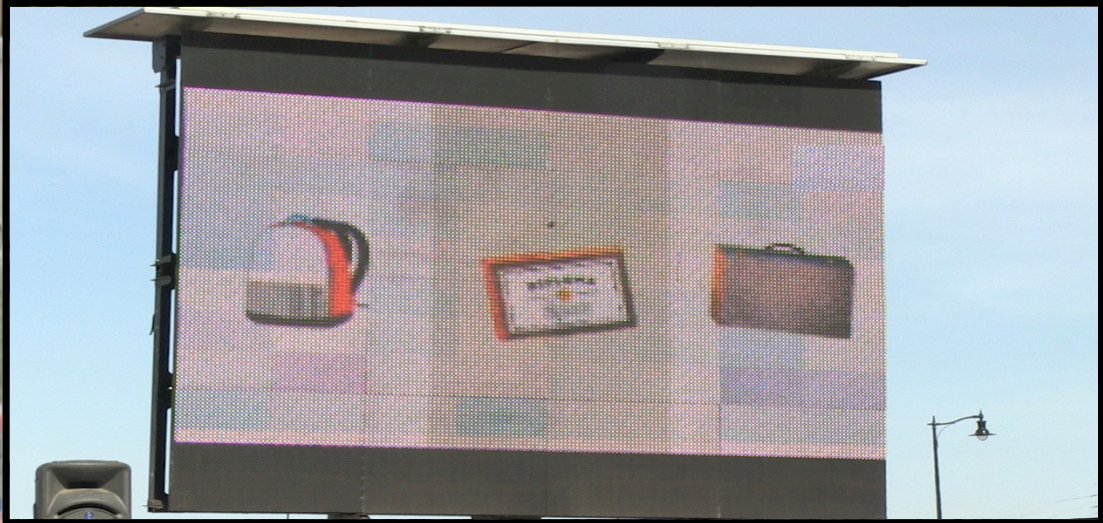
- a) multiple choice;
- b) short answer;
- c) fill in the blanks; or
- d) All of the above? The answer: D



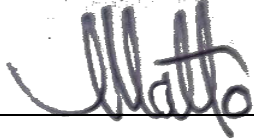
CLIENT:	COUNCIL OF THE GREAT CITY SCHOOLS (CGCS)
Market	Indianapolis, Indiana
Campaign/Event	Indy Race Weekend
Event Begin Date	May 22nd, 2015
Event End Date	May 24th, 2015
# of Days Reported	3 Days
# of Hours Reported May 22nd	12
# of Hours Reported May 23rd	12
# of Hours Reported May 24th	12
Total # of Hours Reported	36 hrs
Estimated Attendance/Impressions	in excess of 1.4 million impressions
Media Format	LED Screen/Jumo-tron
Creative	CGCS Conversation "ELA" & "Math" PSA's (with sound)
Duration	:30 seconds
Frequency	2 x :30 second spot per hour, 12 hours each day
# of Spots Promised	72 Weekend Total
# of Spots Delivered	72
# of Bonus Spots	36
<b>WEEKEND TOTAL</b>	<b>108 Weekend Total Spots</b>







Report Prepared By:



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Matthew Furgiuele, Broadcast Director



**COMMUNICATIONS AWARDS**



Telly Awards Processing Center  
 2000 Ashland Drive  
 Suite 100  
 Ashland, KY 41101  
 (212) 675-3555

### 36th Annual Telly Awards Notification Form

Contact Name: Tonya Harris  
 Entrant: Council of the Great City Schools  
 Address: 1301 Pennsylvania Avenue, NW Suite 702  
 Washington, DC, DC  
 20004  
 United States

**Online Ordering Codes**  
 Entrant Code: 68607  
 Web Code: TWM3615

Date: 03/05/2015

Phone: 202-393-2427

This is your notification form for The 36th Annual Telly Awards. Below is a listing of the work you submitted that has been judged. If you entered at different times or different disciplines, you will receive a separate notification.

The enclosed Notification Letter indicates your total acceptance fees for your winning entries, as well as instructions on how to receive your awards.

Entry #	Title of Entry	Client	Category	Award
26661OV	Conversation: A Three-Minute Video on Common Core State Standards	Council of the Great City Schools	Education	Bronze
26676V	Conversation: A Three-Minute Video on Common Core State Standards	Council of the Great City Schools	Education	Bronze
26677V	Conversation: A Three-Minute Video on Common Core State Standards	Council of the Great City Schools	Use of Animation	Bronze



National School Public Relations Association

**PUBLICATIONS AND  
ELECTRONIC MEDIA AWARDS**

# **HONORABLE MENTION**

Presented to  
**Council of the Great City Schools**

For Distinguished Achievement  
in the Category of  
**Education Agency – Excellence in Writing**

for  
*Big-City School Districts Strive to  
Break the School-to-Prison Pipeline*

**June 2015**

---

Date

408

A handwritten signature in black ink, appearing to read "Richard B. ...", is written over a horizontal line.

Executive Director



**COUNCIL OF THE GREAT CITY SCHOOLS**  
*Communications Department Awards*

1993 - National School Public Relations Association (NSPRA) *Honorable Mention* for *URBAN EDUCATOR*

1994 - NSPRA *Award of Merit* for ORGAZATIONAL LOGO

1994 - NSPRA *Honorable Mention* for *URBAN EDUCATOR*

1994 - Public Relations Society of America (PRSA) *Excalibur for Excellence Award* for  
SCHOOL SAFETY AND VIOLENCE VIDEO PROJECT  
(Houston Independent School District and Council of the Great City Schools)

1995 - NSPRA *Award of Merit* for *URBAN EDUCATOR*

1996 - NSPRA *Award of Merit* for *URBAN EDUCATOR*

1997 - NSPRA *Honorable Mention* for *URBAN EDUCATOR*

1998 - NSPRA *Award of Merit* for *A VISION FOR AMERICA'S URBAN PUBLIC SCHOOLS* booklet

1999 - No entries submitted

2000 - NSPRA *Award of Merit* for *HOW WE HELP AMERICA'S URBAN PUBLIC SCHOOLS* booklet

2000 - NSPRA *Award of Merit* for "URBAN SCHOOLS CAN CLOSE RACIAL GAPS" advertorial in *USA TODAY*

2000 - NSPRA *Honorable Mention* for "CITIES HELPING CITIES" story in the *Urban Educator*

2000 - NSPRA *Honorable Mention* for *URBAN EDUCATOR*

2001 - NSPRA *Award of Excellence* for *ANNUAL REPORT*

2001 - NSPRA *Award of Merit* for *URBAN EDUCATOR*

2002 – NSPRA *Honorable Mention* for PUBLICATIONS CATALOG

2003 – NSPRA *Award of Merit* for *URBAN EDUCATOR*

2003 – NSPRA *Award of Merit* for *2001-2002 ANNUAL REPORT*

2004 – NSPRA *Award of Merit* for “Thank You” PSA

2005 – NSPRA *Award of Excellence* for “Tested” PSA

2006 – Telly Award for “Pop Quiz” PSA (Not-for-Profit Category) for Outstanding Television Commercials

2006 – Telly Award for “Pop Quiz” PSA (Public Service Category) for Outstanding Television Commercials

2006 – NSPRA *Award of Excellence* for “Pop Quiz” PSA

2006 – NSPRA *Award of Excellence* for ‘URBAN DEBATE LEAGUES’ story in the *Urban Educator*

2007- NSPRA, *Honorable Mention* for 2005-2006 ANNUAL REPORT

2007 – NSPRA, *Award of Merit* for URBAN EDUCATOR

2007- NSPRA, *Honorable Mention* for SOUVENIR JOURNAL

2008 – NSPRA *Award of Honorable Mention* for URBAN EDUCATOR

2008 – NSPRA *Award of Honorable Mention* for ANNUAL REPORT

2008-2014 – No entries submitted

2014 – Telly Award for Common Core video (Use of Animation)

2014 – Telly Award for Common Core video (Education)

**BERNARD HARRIS SCHOLARSHIPS**

## 2015 ExxonMobil Bernard Harris Math and Science Scholarship Applicants

Demographic Overview:

Total Candidates from Council Districts: 325

Number of Districts Represented: 52

Number of African American Male Applicants: 76

Number of African American Female Applicants: 101

Number of Hispanic Male Applicants: 78

Number of Hispanic Female Applicants: 70

District Name	African-American or Black		Hispanic		Total Applicants
	Female	Male	Female	Male	
Albuquerque Public Schools	1	0	1	0	2
Atlanta Public Schools	1	1	0	0	2
Austin Independent School District	0	2	4	2	8
Baltimore City Public Schools	2	3	0	0	5
Birmingham City Schools	1	0	0	0	1
Boston Public Schools	0	4	0	0	4
Bridgeport Public Schools	0	0	1	0	1
Broward County Public Schools	8	8	8	7	31
Charleston County School District	1	0	1	1	3
Charlotte-Mecklenburg Schools	2	1	1	0	4
Chicago Public Schools	4	3	1	10	18
Clark County Public Schools	2	2	1	4	9
Cleveland Metropolitan School District	3	0	0	0	3
Columbus City Schools	2	1	0	0	3
Dallas Independent School District	2	2	5	4	13
Dayton Public Schools	0	0	1	0	1
Denver Public Schools	3	0	2	0	5
Des Moines Public Schools	0	0	0	1	1
Detroit Public Schools	5	2	0	1	8
District of Columbia Public Schools	4	0	1	2	7
Duval County Public Schools	3	4	1	0	8
East Baton Rouge Parish School System	1	1	0	0	2
El Paso Independent School District	2	1	0	8	11

District Name	African-American or Black		Hispanic		Total Applicants
	Female	Male	Female	Male	
Fort Worth Independent School District	0	1	1	0	2
Fresno Unified School District	1	0	0	0	1
Guilford County Schools	4	2	0	0	6
Hillsborough County School District	6	2	4	6	18
Houston Independent School District	7	5	8	9	29
Indianapolis Public Schools	1	0	0	0	1
Jefferson County Public Schools	0	0	1	0	1
Kansas City Public Schools	2	3	1	0	6
Long Beach Unified School District	1	2	1	1	5
Los Angeles Unified School District	1	0	0	4	5
Metropolitan Nashville Public Schools	0	1	0	0	1
Miami-Dade County Public Schools	8	4	13	12	37
Milwaukee Public Schools	1	0	2	0	3
New York City Department of Education	2	4	0	0	6
Newark Public Schools	1	0	0	0	1
Norfolk Public Schools	1	0	1	0	2
Oklahoma City Public Schools	0	1	0	0	1
Omaha Public Schools	0	1	1	0	2
Orange County Public Schools	6	4	2	2	14
Portland Public Schools	0	1	0	0	1
Providence Public School District	1	0	1	0	2
Richmond Public Schools	0	2	0	0	2
San Diego Unified School District	2	3	4	3	12
San Francisco Unified School District	0	0	1	0	1
Seattle Public Schools	0	0	1	0	1
St. Paul Public Schools	0	1	0	0	1
The School District of Palm Beach County	4	1	0	1	6
The School District of Philadelphia	4	2	0	0	6
Wichita Public Schools	1	1	0	0	2
<b>Total</b>	<b>101</b>	<b>76</b>	<b>70</b>	<b>78</b>	<b>325</b>

**PRE MEETING**



**Council of the Great City Schools**  
1301 Pennsylvania Avenue, N.W., Suite 702  
Washington, D.C. 20004

## **15th ANNUAL PUBLIC RELATIONS EXECUTIVES MEETING**

**July 10-12, 2015**

**Renaissance Nashville Hotel**  
**Nashville, TN**

### **Working Agenda**

#### **Friday, July 10**

6 – 8:30 p.m.

#### **Dinner**

*The Standard at the Smith House* restaurant  
167 Rosa L. Parks Blvd.  
Nashville, TN  
(Five-minute walk from the Renaissance Hotel)

#### **Welcome**

Henry Duvall, Director of Communications  
Council of the Great City Schools

#### **Greetings**

Dr. Jo Ann Brannon  
Metro Nashville Public Schools Board of Education

#### **Sponsor**

SchoolMessenger

#### **Speaker Introduction**

Tonya Harris, Communications Manager  
Council of the Great City Schools

#### **Guest Speaker**

Daarel Burnette II, Bureau Chief  
*Chalkbeat* Tennessee, a nonprofit news operation

**Saturday, July 11**

7:30 – 10 a.m.                      **Registration** (West Ballroom, Lobby Level, Renaissance Hotel)

8 – 9 a.m.                              **Breakfast** (Fisk Room, Level Two, Renaissance Hotel)

**Sponsor**  
Blackboard

9 - 9:15 a.m.                      **Welcome and Introductions** (West Ballroom)

9:15 – 9:30 a.m.                      **PR Survey Highlights**  
Danyell Taylor, Communications Specialist  
Council of the Great City Schools

9:30 – 10:30 a.m.                      ***Measures that Matter for PR, Marketing, Social Media & Communications***

Nora Carr  
Chief of Staff  
Guilford County Schools, Greensboro, N.C.

10:30 -10:45 a.m.                      **Coffee Break**

11 a.m.- Noon                              ***Communicate with H.E.A.R.T. – Implementing a Proven Customer Service Model to Measure and Increase Customer Satisfaction***

Dr. Roseann Canfora  
District Communications Officer  
Cleveland Metropolitan School District

Noon –1 p.m.                              **Lunch** (Fisk Room, Level Two, Renaissance Hotel)

**Sponsor**  
Education Post

1 – 2 p.m.                                  ***Big Social Media in a Small Amount of Time***

Hanna Frank  
Social Media Manager  
Education Post



2 – 2:15 p.m.

Refreshment Break

2:30 – 4 p.m.

**School Marketing and Branding**

***Revolutionalizing a School District's Marketing Efforts***

Tammy Kuykendall  
Executive Director of Messaging & Marketing Services  
Dallas Independent School District

***The Power of Our Story: Public Education Strong***

Marsha Oliver  
Assistant Superintendent  
Duval County Public Schools, Jacksonville, Fla.

Mark Sherwood  
Director of Marketing  
Duval County Public Schools, Jacksonville, Fla.

***Rebranding Our Schools (Dispelling Urban Legends)***

Le Boler  
Chief Strategist  
Indianapolis Public Schools

Kristin Cutler  
Media Relations Coordinator  
Indianapolis Public Schools

4 p.m.

**Dinner on Your Own**

**Sunday, July 12**

8 - 9 a.m.

Continental Breakfast (West Ballroom)

**Sponsor**  
Peachjar

9 – 10 a.m.

***Beyond the Talking Head: Learning the Essentials of Digital Storytelling***

Sarah Greer Osborne  
General Manager, Communications  
Houston Independent School District

Helen Spencer  
Chief Communications Officer  
Houston Independent School District

10-11 a.m.

***Guilford Parent Academy 101: Parents and Educators Joining Forces***

Lindsay Whitley  
Director, Guilford Parent Academy  
Guilford County Schools, Greensboro, N.C.

11 -11:45 a.m.

**Round Robin Discussion**

- Dealing with a Changing Media Market
- Telling Your Own Story
- Improving Internal Communications
- Making the Case for Your PR Budget
- Creating a Marketing Marketplace

11:45 a.m. – Noon

Wrap-Up

Noon

Meeting Adjourn

12:30 – 1:30 p.m.

**Post-Meeting Lunch**  
(RSVP required)

Merchants restaurant  
401 Broadway  
Nashville, TN  
(10-minute walk from Renaissance Hotel)

**Sponsor**  
Tunheim

**THE URBAN EDUCATOR**



- Cleveland Keeps CEO, p.3
- "Best High Schools", p.7
- LEGISLATIVE**
- Nevada Bill Goes Too Far, p. 10



Orlando student James Turner and his college counselor Margaret Weese Cullen attend a ceremony honoring his academic achievements.

## Foster Care Student Achieves Dream

By the time he was 18, James Turner had lived in more than 10 foster homes and attended as many as 10 schools. A 2015 graduate of William Boone High School in Orlando, Fla., Turner currently lives in a group home and has been in the foster care system since he was a year old; one of the 400,000 youths living in foster care in the United States.

Last August, Turner went with his English class to an orientation in Orange County Schools' College and Career Center, where he met college counselor Margaret Weese Cullen. The following week he returned to see Cullen because he thought he might want to attend Florida State University (FSU) but confessed that he had no clue how to get into college.

"There was never discussion of college admissions in his foster care environment

so we had to start at square one," said Cullen in an email interview with the *Urban Educator*. She liked Turner from the moment she met him and, recognizing his potential, thought he would be a great candidate for FSU's CARE program, which provides services and support to first-generation college students.

Over the course of Turner's senior year, Cullen worked with him to complete multiple college applications, strategized about his standardized testing, completed financial aid forms and labored over his essays.

Turner enrolled in honors courses and challenged himself with Advanced Placement classes and graduated with a 3.1 grade-point average. And the dream that he had in August became a reality when he received an acceptance letter to attend FSU.

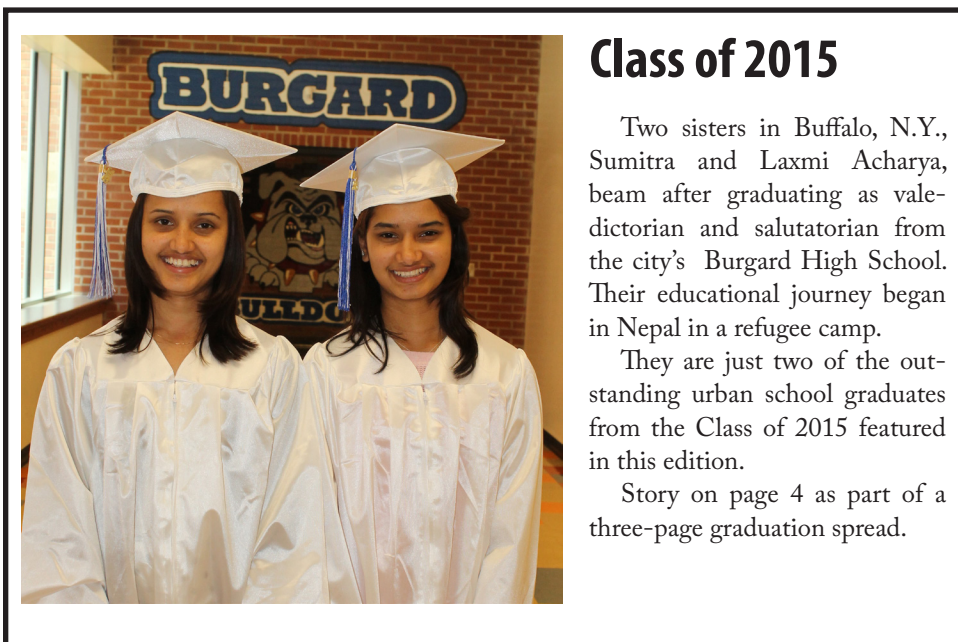
**Achieves Dream** continued on page 5

## L.A. Schools Dominate Academic Decathlon

The U.S. Academic Decathlon® has been held for 34 years and a school from the Los Angeles Unified School District has won the title for 15 of those years.

The winning streak for Los Angeles continues, with the district's Granada Hills Charter High School winning first place in this year's competition. The 2015 champions reclaimed the title after a second-place loss to Los Angeles' El Camino Real Charter High School last year. This year's win marks Granada Hills fourth national

L.A. Schools continued on page 7



## Class of 2015

Two sisters in Buffalo, N.Y., Sumitra and Laxmi Acharya, beam after graduating as valedictorian and salutatorian from the city's Burgard High School. Their educational journey began in Nepal in a refugee camp.

They are just two of the outstanding urban school graduates from the Class of 2015 featured in this edition.

Story on page 4 as part of a three-page graduation spread.

# Council Awards Scholarships with ExxonMobil and Former Astronaut

Four graduating high school seniors from different cities this summer share something in common: ExxonMobil Bernard Harris Math and Science Scholarships.

The Council of the Great City Schools recently named the 2015 math and science scholars among several hundred applicants from across the nation. They were chosen for their academic performance, leadership qualities and community involvement.

Now in its sixth year, the scholarship was created by former NASA astronaut Dr. Bernard Harris, the first African American to walk in space, and ExxonMobil to assist and encourage promising students of diverse backgrounds who plan to pursue

science, technology, engineering and math (STEM) studies.

The awards are given annually to African-American and Hispanic seniors from high schools in the 67 urban school districts represented by the Council.

“These highly competitive scholarships provide an enormous opportunity for talented urban students to pursue STEM postsecondary studies and careers,” says Council Executive Director Michael Casserly. “The generous support of Dr. Harris and ExxonMobil contributes to the growth of these young men and women as they begin the next stage of their lives.”

Each scholar receives \$5,000 for continued education in a STEM-related field.

This year’s award winners are:

- Matthew Guillory, Robert A. Millikan High School, Long Beach (CA) Unified School District;
- Sofia Kennedy, Liberal Arts and Science Academy, Austin (TX) Independent School District;
- Summer Kollie, Girard Academic Music Program, School District of Philadelphia (PA); and
- Nicolas Pena, Western High School, Broward County (FL) Public Schools.

**Scholarships** continued on page 3



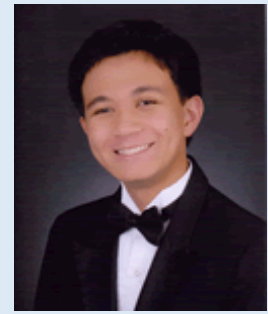
Matthew Guillory



Sofia Kennedy



Summer Kollie



Nicolas Pena



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A newsletter published by the Council of the Great City Schools, representing 67 of the nation’s largest urban public school districts.

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All news items should be submitted to:  
Urban Educator

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Find the Council on:



# Baton Rouge and Providence Name Superintendents; Chicago, Dallas, Newark and K.C. Lose Chiefs; L.A. and Cleveland Keep Leaders



Warren Drake

Louisiana’s East Baton Rouge Parish School System recently selected a veteran educator to lead the school district.

Warren Drake, a top administrator for the Louisiana Department of Education, will become superintendent of the school system in July, succeeding Bernard Taylor.

Drake is no stranger to the East Baton Rouge school system, having served as a teacher, principal and administrator. He also served 10 years as superintendent of Louisiana’s Zachary School District.

And Rhode Island’s Providence school district has named Christopher Ndeki Maher as interim superintendent to replace Susan Lusi, who is resigning from the top post at the end of June.

Maher is currently the president of Mass Insight Education, a public education consultancy firm that has worked with the school district to increase student achievement. He will serve as interim leader for one year while the Providence School

Board conducts a search for a permanent leader.

## Leaders Step Down

Barbara Byrd-Bennett, the CEO of Chicago Public Schools, has resigned from the nation’s third largest public school system after serving in the position since 2012. Chicago school board member Jesse Ruiz is serving as the district’s interim CEO.

Also departing is Superintendent Mike Miles of the Dallas Independent School District after being at the helm since 2012. Deputy Superintendent Ann Smisko will serve as acting superintendent.

Moreover, Superintendent Cami Anderson of New Jersey’s Newark Public Schools is stepping down after heading the state-run district since 2011. And R. Stephen Green, superintendent of Missouri’s Kansas City Public Schools, is leaving after leading the district since 2011. He becomes the superintendent of Georgia’s DeKalb County School District.

## Contracts Extended

Ramon Cortines will be at the helm of the nation’s second largest school district



Eric Gordon

for another year. He was recently given a one-year contract extension to lead the Los Angeles Unified School District through June 2016. This will be Cortines’ third tour of duty leading the school system. He

was interim superintendent from 1999-2000, then 2009-2011.

And in an effort to provide stability, sustain momentum and reward progress, the Cleveland school board recently voted to approve a new four-year contract for Chief Executive Officer Eric Gordon. He has led the school district since 2011 and during his tenure, graduation rates have increased and voters have approved a multi-million dollar school levy and a bond issue.

## Houston Leader Top Communicator

Superintendent Terry Grier of the Houston Independent School District has been selected to receive the National School Public Relations Association’s 2015 Bob Grossman Leadership in School Communications Award, given annually to a top education leader for outstanding leadership in school public relations and communications.

“From the multi-channeled communication program that has been established in Houston ISD, to the commitment to authentic engagement, transparency and accountability at all levels, there is no question that Terry Grier leads by example and ‘walks the walk’ in supporting strategic communication as a management function,” says NSPRA Executive Director Rich Bagin.



### Scholarships *continued from page 2*

In the fall, Guillory plans to attend Harvey Mudd College to become a biomedical engineer with career aspirations to design artificial limbs and organs. Kennedy has been accepted to Harvard University, where she hopes to pursue a degree in scientific research, particularly focused on untraditional uses for Botox.

With long-term aspirations of becoming a physician and researcher concentrating on communicable diseases in Africa, Kollie will attend the University of Pennsylvania in the fall. Pena will study engineering at Stanford University in hopes of becoming an inventor and entrepreneur

developing high-technology products.

“Technological advancements are making our world a better place every day, but in order to keep those achievements coming, we need creative and analytical minds in our workforce,” says Dr. Harris, a physician turned astronaut and businessman. “By providing these scholarships, we are growing another generation of strategic thinkers who will foster diversity in ideas, applications and products.”

Administration of the scholarship program, including the application process, pre-selection and presentation of awards, is provided by the Council. Dr. Harris makes the final selection of recipients.



## Anchorage Student's Hard Work Pays Off

Julie Vincek, an on-the-job training coordinator at Anchorage School District's King Career Center in Alaska, vividly remembers when 12th grader Preston Bolton came to her and expressed his desire to join the International Brotherhood of Electrical Workers (IBEW) apprenticeship program. The program is highly coveted, with up to 300 people a year applying for the few available spots.

But Bolton knew that he wanted a career in construction electricity, so Vincek obtained an internship for him with a local company. After successfully completing the internship, Bolton underwent a rigorous interview process, and then received the good news that he had earned a spot into the IBEW apprenticeship program.

"We just kept seeing this guy who kept going after his dreams," said Vincek. "We didn't know, until long after he had been selected, his life story."

That story includes leaving Anchorage

with his family and then dropping out of high school in the 10th grade to work two jobs as his family's sole breadwinner. But Bolton soon realized that he couldn't get anywhere in life without finishing school.



Preston Bolton

He was able to contact a relative to care for his siblings, and a friend's family in Anchorage agreed to take him. So Bolton came back to Anchorage and caught up on all the work he missed in order to receive his diploma.

The Anchorage school district recently held a big signing event recognizing vocational students who obtained direct entry into a union. At the event, Bolton shared his story and, according to Vincek, there was not a dry eye in the room.

"He really wants to be an example," said Vincek. "He said 'I want other people to see me and know that they can achieve too, even if they have had hard times in their life.'"

## NYC Teen Mom Defies the Odds and Graduates Early with Honors

Janira Moore refused to let teen pregnancy statistics dictate her future. After becoming a mother at age 15, the ambitious scholar worked hard and graduated early and with honors from University Heights Secondary School in New York City.

Moore, 16, navigated the new demands of motherhood while maintaining a B+ average, participating in extracurricular

activities such as track and field and completing the STEM (Science, Technology, Engineering and Mathematics) Program at New York's City College last year.

Her academic success also came with support. Moore has been part of New York Schools' Living for the Young Family through Education (LYFE) program,

*Teen Mom continued on page 12*

## Buffalo Sisters Find Success in America

Laxmi Acharya is the valedictorian of the 2015 graduating class at Burgard High School in Buffalo, N.Y., while her sister Sumitra is the salutatorian. But the two sisters' path to the top was not easy.

The sisters were born in Nepal in a refugee camp where they lived with their parents in a small hut. Despite their poverty, the sisters did well at the school in the refugee camp. Sumitra finished 10<sup>th</sup> grade but could not further her studies because the family did not have enough money, so she spent her time helping her younger sister Laxmi with her schoolwork.

Three years later, the sisters' life took a turn for the better when, in 2013, their family received an opportunity to come to America and resettle in Buffalo. The girls enrolled in English as a Second Language classes at Burgard High School, but difficulty with the language did not stop them from achieving academic success. Laxmi did so well she was able to skip her junior year and complete high school in just three years. And both of the sisters met all New York State examination requirements in just two years, even though it typically takes students four years.

"Either of the sisters on their own would be an amazing story, but to have done this together is unbelievable," said Burgard school counselor Brian Woods.

In the fall, Sumitra will attend Buffalo State College as a biomedical major, while Laxmi plans to study pre-med at the University of Buffalo.



Janira Moore and her son Joshua

## Student Admitted to All Ivy League Schools

Alexander Roman, a senior at Harding Senior High School in St. Paul, Minn., could not decide which Ivy League school he wanted to attend so he applied to all eight of them. And the 17-year-old received an acceptance letter from every one.

Roman is a full International Baccalaureate Diploma Programme candidate and is taking seven IB classes, including a special online business and management course from a college in England.

In addition, he serves on his school's transition program that welcomes freshmen and helps them get acquainted with high school. For three years, he played baseball and was the starting first baseman and he is also a youth leader at his church.

One of five children, Roman's father was born in Mexico and overcame many financial struggles and barriers to earn his U.S. citizenship.



Alexander Roman

"That drive for him to get citizenship has really helped me have a drive for academics and my future," said Roman, who was profiled on St. Paul school district's web site. Thinking about studying environmental engineering, he plans to be the first

person in his family to graduate from college.

Even though Roman was admitted to 20 colleges and universities, the acceptance letter that excited him the most was from the Massachusetts Institute of Technology (MIT).

He previously participated in a summer program at the college, which was called MITS (Minority Introduction to Engineering and Science) and credits his participation as helping him get accepted into MIT.

As a result, Roman will be headed to MIT in the fall.

### Achieves Dream *continued from page 1*

As a member of the university's CARE program, Turner will receive support from an academic advisor, financial aid specialist and college-life coach for the entire time he is a student.

Studies have found that only 2 to 9 percent of former foster care youths attain a bachelor's degree, and that campus support programs can increase postsecondary educational attainment for youths formerly in foster care.

At a recent celebration held by a local organization that advocates for foster care children, Turner received a surprise from Cullen—a special video message from FSU President John Thrasher welcoming him to the university.

The high school counselor is also making sure that Turner has a support system in college, arranging a laptop for him to learn keyboarding skills, making sure there will be clothing and school supplies, and

that there will be a plan for housing for Turner during breaks at FSU since he cannot return to his group home.

"James sees life through a glass half full, making him resilient to the many, many challenges he has faced in his life," wrote Cullen. "James is persistent, articulate and hardworking; he is a great candidate for success at the college level."

In his college essay for admittance to FSU, Turner explained that he doesn't want to use his history as a crutch, but instead as a stepping stone for children in similar situations.

"I have lived my whole life and worked through a state system that is flawed, but I have succeeded in spite of it," wrote Turner, who will major in business management at FSU. "I'm passionate and committed not only to succeeding personally, but also to helping kids who will go through the [foster care system]."

## Denver Student With Disability Thrives

Kaitlin Hooks, a student at Denver Online High School, has faced numerous obstacles in her life, but she has not let those obstacles stand in her way.

At 10 months old she was diagnosed with cerebral palsy, which has affected her speech as well her physical capabilities. She has endured 13 surgeries and currently lives with severe acid reflux, requiring her to use a specialized pump to intake her body's nourishment.

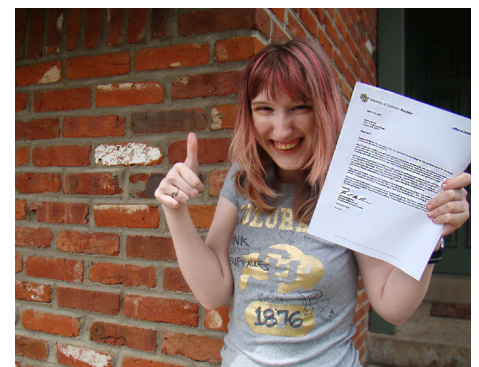
But Hooks hasn't let her health challenges slow her down. She was a member of a dance team and she was recently selected as a Children's Hospital Colorado volunteer, where she will volunteer three to four times every week.

Eager to attend college, she applied to 10 schools but was rejected by many of them, with one college in Florida denying her application because of her handicap.

But she recently received good news that she had been accepted at the University of Colorado Boulder. And not only did college officials want Hooks, but they offered her a scholarship.

At college, she will seek a major in biology or physiology. So what advice would Hooks, who was once told by doctors that she would never walk, give to others?

"Don't let people tell you what you can and can't be," said Hooks, whose story was featured on Denver Public Schools' web site profiling inspiring graduates. "Find out for yourself."



Kaitlin Hooks holds her college acceptance letter.



## Des Moines Teen Pursues STEM Career

Kwizera Imani, a senior at North High School in Des Moines, Iowa is such a big fan of STEM (science, technology, engineering and math) that he was the keynote speaker at the 2015 Iowa STEM Summit, sponsored by the governor.

Imani will take his love of STEM with him to Iowa State University, where he plans to study aerospace engineering. But his journey to college began half-a-world away in Tanzania, where he lived the first 10 years of his life in a refugee camp with his family.

He experienced hardships, including the death of his mother and sister because of a lack of medication at the camp.

When Imani was in the fifth grade, his family was selected by the United Nations to settle in Des Moines. He had difficulty adjusting to his new environment because of his inability to speak English but, after only three years, he became fluent, and at the end of his junior year he had taken all the required classes a student needs to graduate.



JROTC squad commander Kwizera Imani

Imani was accepted into the aviation program at the Des Moines airport, which inspired him to pursue a career in the STEM field.

And in an effort to prepare himself for college, he took five Advanced Placement courses as a senior.

He also excelled outside the classroom, playing on his school's football team and serving as commander of his school's JROTC squad, where during his junior and senior year he participated in the Marine JROTC physical fitness national championship in San Diego.

Imani, who received a full scholarship to attend Iowa State, eventually plans to return to Africa and help develop communities and build schools.

"I want to somehow pull in some of those engineering classes that we have here in the United States to give those kids the same opportunities that I was able to get," said Imani in an interview with *One News Page*, a news web site.

## Albuquerque Valedictorians Earn Highest GPA



Eli Echt-Wilson and Albert Zuo

They earned a 5.0 grade-point average (GPA) and they were co-valedictorians of their senior class.

Albert Zuo and Eli Echt-Wilson have a lot in common: they attended La Cueva High School in Albuquerque, N.M., where they never received less than

an "A". They earned a 5.0 grade-point average (GPA) and they were co-valedictorians of their senior class.

The students, who are also good friends, are only the second and third students in Albuquerque history to earn a 5.0 GPA.

In their junior year of high school, the duo began teaming up on science projects and competitions. Their partnership resulted in them winning a \$100,000 scholarship prize for placing first in the 2014 Siemens Competition in Math, Science and Technology.

Echt-Wilson will use his half of the prize money to help cover the cost of attending Stanford University to study computer science, while Zuo will attend Princeton University.

## Teacher Donates Kidney to Student

Many teachers in urban schools are dedicated to their students, but Nadirah Muhammad, a physical education and health teacher at Detroit's West Side Academy, stands out for recently donating a kidney to one of her students.

AJa Booth was a student in Muhammad's dance class when the teacher noticed a book that Booth had written, chronicling her journey of undergoing dialysis treatments and her need for a transplant. Muhammad immediately offered to help and, after doctors found they were the perfect match, underwent surgery in December to remove her kidney. She returned to school a few weeks later.

In May, Booth returned to school for her first full day of class, where she was reunited with Muhammad and her classmates during a "red carpet" welcome-back ceremony in the school's gymnasium.

"Words can't explain how I feel about what she did and how she did it," said a tearful Booth, during the ceremony. "... I really look at her as a second mom."

Booth graduated in June and plans to attend Oakland University and become a nurse.

Muhammad believes that what she did was not so unusual. "I just happened to help my student in this fashion, but I believe that teachers throughout DPS [Detroit Public Schools] do this every day for their students. I don't feel that I'm any different."



Detroit teacher Nadirah Muhammad, right, walks with student AJa Booth to attend a welcome-back ceremony in her honor.

## Council Names New Leadership For 2015-16



**Richard Carranza**

San Francisco Unified School District Superintendent Richard Carranza takes the reins as chair of the Council of the Great City Schools' Board of Directors for a one-year term, effective July 1.

He succeeds Jumoke Hinton Hodge, a board member with California's Oakland Unified School District, to lead the policymaking body of the national coalition representing 67 of the nation's largest urban public school systems. The Council's 134-member board is composed of the superintendent and a school board member from each of the districts represented.

"The Council of the Great City Schools is extremely fortunate to have as its next chair a person of Richard Carranza's caliber and expertise," says Council Executive Director Michael Casserly. "His leadership will provide important direction to urban education nationally at a critical point in our reform and improvement efforts."

As part of the Council's leadership team for the 2015-16 academic year, Felton Williams, a board member with California's Long Beach Unified School District, becomes chair-elect, moving up from the secretary-treasurer post.



**Felton Williams**

Chancellor Kaya Henderson of the District of Columbia Public Schools has been elected the new secretary-treasurer.

## A Dallas Public School Tops Rankings Of 'Best High Schools' for Fourth Year

Dallas Independent School District's School for the Talented and Gifted recently topped *U.S. News & World Report's* "Best High Schools" national rankings for the fourth consecutive year.

The school ranked No. 1 of the more than 21,000 public high schools in 50 states and the District of Columbia that were awarded gold, silver or bronze medals "based on their performance on state assessments and how well they prepare students for college," said the newsmagazine.

Twelve big-city schools located in districts represented by the Council of the Great City Schools ranked in the top 25 of the "Best High Schools" list.

In addition to the School for the Talented and Gifted, another Dallas school – the School of Science and Engineering Magnet -- ranked No. 5. The other schools in Council districts ranked in the top 25 awarded gold medals are:

■ Carnegie Vanguard High School in Houston, No. 6;

■ Academic Magnet High School in North Charleston, S.C. No. 7;

■ The High School of American Studies at Lehman College in Bronx, N.Y., No. 11;

■ American Indian Public High School in Oakland, Calif., No. 12;

■ International Studies Charter High School in Miami-Dade, No. 13;

■ High School for Dual Language and Asian Studies in New York City, No. 14;

■ Northside College Preparatory High School in Chicago, No. 15;

■ Design & Architecture Senior High in Miami-Dade, No. 21;

■ Michael E. DeBakey High School for Health Professions in Houston, No. 23; and

■ Queens High Schools for the Sciences at York College in Jamaica, N.Y., No. 25

A number of urban schools won medals in the 2015 *U.S. News* national rankings.

### L.A. Schools continued from page 1

championship in the last five years and 16 national titles won by a Los Angeles school.

The two-day competition was held this year in Garden Grove, Calif., with more than 450 students from 46 high schools nationwide competing. Each nine-member team can earn a possible 60,000 points, and the crowned champs scored 53,592.3 points. The competition's topic was Alternatives in Energy: Ingenuity & Innovation.

"Congratulations to the members of the Granada Hills Charter team for your exemplary performance," said Los Angeles Schools Superintendent Ramon Cortines

in a statement. "With your laser-like focus, team spirit and devotion, you proudly represented the LAUSD to the rest of the country."

The U.S. Academic Decathlon® is a rigorous ten-event scholastic competition for teams of high school students. Each high school enters a team of nine students: three "A" or honor students, three "B" or scholastic students and three "C or below" varsity students. The decathlon has come to be recognized as the most prestigious high school academic team competition in the United States.

## Urban Schools, Communities Honored For Working Together

When schools, families and communities work together, student success can follow.

That's the focus of the National Community Schools Awards of Excellence, recently given to seven communities and schools that have collaborated to bolster student achievement, improve outcomes for families, and unite neighborhoods.

Work in Baltimore, Chicago and Los Angeles are among the individual schools and multi-site community initiatives honored.

The Coalition for Community Schools recognized the winners as tackling some of today's most pressing issues that influence young people's development, such as poverty, safety and equitable access to opportunities.

"People are taking notice," says Martin Blank, director of the coalition and president of the Institute for Educational Leadership. "The community school movement continues to grow because folks are looking at their schools and realizing that the only way to get young people the opportunities they deserve is through partnership with the community. These winners represent the best of what can be done with teamwork and ingenuity in America's communities."

Four Baltimore schools and initiatives won the National Community Schools Award. Honored were the Family League of Baltimore, Benjamin Franklin High School at Masonville Cove, the Historic Samuel Coleridge-Taylor Elementary School and the Wolfe Street Academy.

The other three awards were bestowed on the John Hancock College Preparatory High School in Chicago, the Social Justice Humanities Academy in Los Angeles and the United Way of Salt Lake County in Utah.

## Baltimore Schools Rise From City Unrest

At Gilmor Elementary School in Baltimore, the school year began with news that the school had won a grant to help fund an Earth Day celebration in the spring. All year long, the 350 pre-k to 5th-grade students at the school learned about environmental sustainability and good citizenship through hands-on activities.

On the day of the event, each class was to bring a decorated planter for the school playground, and games, food and prizes were also part of the planned celebration.

But this spring's unrest in Baltimore, which started about six blocks from the school, changed those plans. The Gilmor Elementary community reacted quickly, broadening the scope of their event to help support healing in the aftermath of the violence that had come so close to home.

"Our kids quickly saw what was missing and really stepped up to do the work that needed to be done...as a community," said event organizer and Gilmor art teacher Victoria Hoffman.

In the rubble strewn throughout their neighborhood, students found broken pieces of tile from a damaged building. Seeing the beauty in the tiles, the students, teachers, and community partners collected and repurposed the pieces, putting them together to create a mural on a wall near the school's playground.



Students at Baltimore's Gilmor Elementary create a mural from rubble.

Gilmor Elementary wasn't unique. Across Baltimore, school communities came together as neighborhood centers of support as schools and students responded positively to the unrest that made national headline news after a man died in police custody.

At Matthew A. Henson Elementary School, 4th-grade students discussed their feelings about the unrest and then wrote a song titled "Let Us Save Baltimore." The students performed the song for the NFL's Baltimore Ravens, when the team made a surprise visit to the school to help stock the school's food bank, which provided food and household supplies to families from the community.

## Chicago Expands Summer 'Safe Haven'

In an effort to keep students safe, active and engaged throughout the summer, the nation's third largest school district is expanding the number of Safe Haven summer program locations to 120.

The havens are the result of a partnership between Chicago Public Schools and Chicago's faith-based communities to provide neighborhood-friendly enrichment learning programs to families.

According to *CBS Chicago*, an additional 20 churches will be hosting students as part of the city's Safe Haven program. Since 2009, the program has kept children engaged in creative, meaningful activities

during winter, spring and summer breaks. This summer's program begins in early July and runs through mid-August and is open five days a week. All activities as well as meals are provided free for district students.

Students who participate in the Safe Haven program benefit from arts, cultural enrichment programs and social-emotional learning that aims to build self-esteem and improves conflict resolution skills. The program also bridges learning between grade levels as students participate in academic programs and receive mentoring from adults in their community.

## Houston Superintendent Surprises Student with \$10,000 Scholarship

Amid turbulent adversity at home, Alisa Hamilton, a graduating senior at Houston's Bellaire High School, constantly felt like school was the only place she could get relief. The standout student has grown to count on district administrators for emotional support, affectionately referring to her favorite counselors as "school parents."

But she wasn't expecting the support from Superintendent Terry Grier, who recently surprised Hamilton with a \$10,000 college scholarship.

Grier selected Hamilton as a scholarship recipient because of her drive to succeed academically, and be involved on campus despite significant personal challenges.

Hamilton, who is homeless, does not live with her parents and has worked two part-time jobs to make ends meet. She has done all of this while maintaining good grades and participating in Bellaire's student business club.

The scholarship was given to Grier last year to give to a student after win-

ning the nation's top urban education leadership award—the Green-Garner Award—at the Council of the Great City Schools' 58<sup>th</sup> Annual Fall Conference in Milwaukee. The award is sponsored by the Council, ARAMARK Education and Voyager/Sopris Learning.

After hearing about her personal struggles, Grier knew Hamilton was the right student for the scholarship.

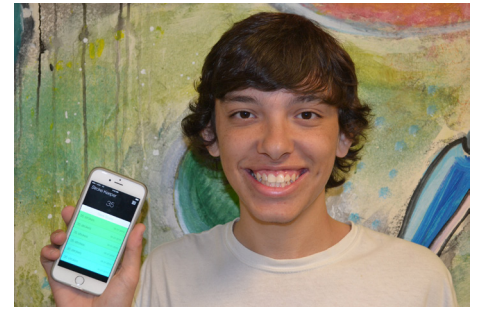
"She understands the realities of the world," said Grier, "and she does not let that hold her back. She knows she has to come to school and make good grades, so I'm honored to recognize her for her perseverance and hard work."

Hamilton will attend East Texas Baptist University, where she plans to study math with the ultimate goal of becoming a forensic accountant.

For others having a tough time, Hamilton has this advice. "No matter how hard or how tough the situation is, you can always overcome anything...I feel like if I tell my story, people will learn from it."



Houston Schools Superintendent Terry Grier gives a hug to student Alisa Hamilton, after presenting her with a \$10,000 college scholarship. Photo credit: Dave Einsel, Houston ISD



Ryan Anderson shows winning golf app on his smartphone called Stroke Keeper.

## Student Develops App Leading To Apple Scholarship

Seventeen-year-old Ryan Anderson plays golf at his high school in North Carolina's Guilford County, the state's third largest school district based in Greensboro.

He recently developed a golf app called Stroke Keeper, which allows golfers to track and maintain their scores on a database.

With his tech skills, Anderson received a scholarship to attend Apple's recent Worldwide Developers Conference in San Francisco. He was one of 350 students worldwide to win the Apple scholarship for developing an IOS application.

"I myself was ecstatic when I received word that I had won, because it is quite some feat to have been among the 350 selected students across the world selected by Apple for the scholarship," Anderson said in the *High Point Enterprise* in High Point, N.C.

"To be honest, I did not think I was going to get it because I created the app two hours before the deadline," he pointed out.

Apple's Worldwide Developers Conference, held in early June, gives scholarship winners an opportunity to meet company executives, attend lectures, work with Apple engineers and tour facilities.

Anderson will be a senior this fall at High Point Central High School with an eye on studying computer science in college. He reportedly hopes to work at Apple when he completes college.

## A Bill Too Far in Nevada

By Jeff Simering, *Director of Legislation*

End-of-session legislating is often chaotic and ill-conceived. And what happened recently in the Nevada legislature is a superb case in point. In this situation, the State of Nevada enacted an expansive educational savings-account bill allowing parents to remove their children from Nevada's public schools and use the funds to pay for almost any alternative education services with the state dollars.

Even choice advocates had to be surprised at the scope of the measure. To be sure, the new state law is broader than the typical private-school voucher bill, because it allows a wide range of eligible services to be paid for from the state-funded accounts. The ultimate impact of the new law is unclear at this point, but the prospect for widespread fraud and abuse seems nearly certain.

Under the new Nevada law, parents of any student currently enrolled in the state's public schools can access up to \$5,000-plus per year in state education aid to attend a private school—or spend the funds on their own for private tutoring, online courses, textbooks, technology, or other educational services—with state approval. The funds are deposited in an education savings account by the Nevada Treasury Office and parents can withdraw the funds for allowable services.

Though the new law—on its face—would not allow funds for home schooling, any parent could apply to be a “participating entity” thereby qualifying for state funding of up to \$5,000-plus to educate each child. It appears that anyone could become a “participating entity” by submitting an application to the state and indicating that they are a parent, a private or parochial school, an accredited tutor, or other service provider. Nevada school districts are already getting calls from parents wanting to know how they can get “their money.” One could also arrange for Aunt Sally or Mother-In-Law Maggie to tutor his or her children and pay her with the education savings account funds. Other than random audits from the Nevada State Treasurer's Office, there is no accountability if Aunt Sally does a bad job and no consequences for academic failure.



In recent years, it has become politically acceptable to allow virtually anyone who can develop a business plan to open and run a “public charter” school with public tax dollars. Similarly, it appears that virtually anyone is permitted to use public dollars to teach school-age children in a home setting, private school, charter school, or to provide state-sanctioned private supplemental education services—i.e., tutoring—arguing that almost anything now constitutes public education. Nevada has taken this idea to a new level, and it won't be long before the U.S. Congress thinks this is a good idea for the nation as well.

The academic results from these alternative delivery systems are often mediocre at best and often no better or frequently inferior to traditional public school programs. Yet a parade of commentators, conservative and progressive alike, generate a steady flow of satisfaction surveys that purport to show that parents are happy with their options—a standard of evidence that choice proponents have historically ridiculed when it came to traditional public schools.

One might expect that these “education reforms” would constitute a substantial improvement over traditional schools, but these new approaches appear to survive on the basis of political, ideological, and financial support rather than academic results. And, it seems to take years of unproductive outcomes to get the federal government, state education agencies, or state legislatures to curb even the most egregious violations of the public trust.

Years ago a chief operating officer of a public school system not-so-jokingly characterized the fringe elements of the K-12 education sector as “missionaries, mercenaries, and kooks.” Under the new Nevada law, some portion of all of them will have a field day plying their snake oil—all well-funded with tax dollars from the state's residents.

Let's see how long it takes before Nevada's elected officials realize that they have passed a remarkably bad law.

## Former First Lady Laura Bush Recognizes Austin School Libraries

Former first lady Laura Bush recently visited an Austin, Tex., elementary school to discuss the importance of reading with students as her foundation awarded grants to six Austin schools.

The six schools received grants up to \$7,000 each as part of more than \$820,000 in grants being awarded to 123 schools in 35 states from the Laura Bush Foundation for America's Libraries

The former first lady visited one of the schools, Austin's Blackshear Elementary Fine Arts Academy, that received a grant. She had once been a librarian at Dawson Elementary School in Texas' capital city.

"This is a happy day for me to be here at AISD {Austin Independent School District}," Bush said. "This is where my girls went to high school. It's fun to be in the school district that means so much to me."



First Lady Laura Bush, center, visits Austin elementary school in recognizing the district's school libraries.

## Urban Teachers Receive \$25,000 Milken Awards

In Michelle Johnson's second-grade class at Seaton Elementary in Washington, D.C., 90 percent of her students finished out the year by moving up a proficiency level, or reaching proficient/advanced level. In addition, Johnson cut the number of students at "far below" grade level in half and improved student's reading at a faster pace than any other teacher in her building.

As a result of her dedication to teaching, Johnson was one of 37 educators to receive the \$25,000 Milken Educator Award.

The award recognizes early to mid-career education professionals for their outstanding achievements and for the promise of what they will accomplish in the future.

In addition to Johnson, five big-city educators received the award, including Shannon Ryan of Albuquerque Public Schools, Jenna White of Anchorage Public Schools, Allyson Vitato of Kentucky's Jefferson County Public Schools in Louisville, Amy Stanislawski of Kansas' Wichita Public Schools and Jana Fukada of Hawaii

Schools.

Established in 1985, the Milken Educator Award program awards and inspires excellence in the world of education by honoring top educators with an unrestricted cash prize.

## Houston Technology Chief Honored

Lenny Schad, chief information officer for the Houston Independent School District, was recently presented with the Distinguished Service Award at the Council of the Great City Schools' Chief Information Officers Conference in Philadelphia.

Sponsored by Houghton Mifflin Harcourt, the award honors distinguished service in urban education.

Schad oversees the classroom technology funds for all district schools and is responsible for the development of the district's network security system.

## Council PSAs Air At Indy 500

More than 1.4 million fans viewed the Council of the Great City Schools' public service announcements on the Common Core State Standards at the recent Indianapolis 500, considered the highest attended sporting event in the world.

This is the second time this year that the Council's two 30-second spots aired multiple times on a jumbo-tron during two major automobile races. In February, the PSAs aired at the Daytona 500, NASCAR's most prestigious race. And in late July, the spots will be featured at NASCAR's Brickyard 400.

The Council in January launched its second PSA campaign to increase public awareness and engagement of the Common Core State Standards, especially around new assessments to help students prepare for college and career success.

The Common Core PSAs – one on English language arts and the other on mathematics – are also airing on television and radio in English and Spanish on broadcast and cable stations throughout the nation.



## Miami Students Ride the Ballet Bus

Educators in Miami-Dade County Public Schools are reaching into the community to provide arts education and access through a partnership with Miami City Ballet.

The district recently announced "Ballet Bus," a year-round dance scholarship program for 30 select students.

**Ballet Bus** continued on page 12



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Des Moines Controller Nicholas Lenhardt, center, is congratulated by, left, Des Moines Chief Financial Officer Thomas Harper and Council Director of Management Services Robert Carlson.

## Council Honors Des Moines Official

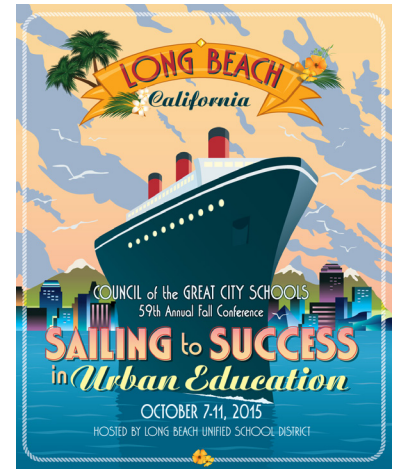
Nicholas Lenhardt, the controller for Iowa's Des Moines Public Schools, was recently presented with the "Certificate of Achievement" by the Council of the Great City Schools for successfully completing the Council's Urban School Executive Program. The program is designed for mid-level managers who have the attributes and aspire to assume senior manager positions as chief financial officers or business managers in large urban school districts.

## Council Fall Conference Registration Begins

The Council of the Great City Schools will hold its 59<sup>th</sup> Annual Fall Conference, Oct. 7-11, in Long Beach, Calif.

Hosted by Long Beach Unified School District, the conference will feature more than 1,000 urban school superintendents and board members who will assemble at the Hyatt Regency Long Beach to discuss initiatives to improve the quality of education for children in big-city schools.

To register for the conference, access the Council's web site at: <http://www.cgcs.org>. Registration for the conference can only be conducted online.



### Teen Mom continued from page 4

which provides student-parents free childcare, supportive counseling, academic guidance, and advocacy services.

In recognition of her excellence in completing her high school education, Moore was awarded the LYFE Academic Achievement Award. Her story does not end there, as Moore was accepted into 11 colleges and will attend New York's Brooklyn College to study forensic accounting.

### Ballet Bus continued from page 11

The nine-month, 34-week program will target children ages 7-10. Selected students will be integrated into the Miami City Ballet student body, and each student will be evaluated annually with the opportunity to advance to the next level of study.

Participating students will receive a full scholarship for ballet training, transportation to and from their elementary school, dancewear and shoes in addition to other perks.

# RESEARCH



**ASSESSMENT SURVEY**



# Assessments in America's Great City Schools

Council of the Great City Schools  
Summer 2015



# Purpose

In October 2013, the Council's board of directors proposed that the organization conduct an inventory of assessments in the member districts to see how much testing city schools did and for what purposes.



# Methodology

Conducted a survey in the summer of 2014 of 66 Council member district assessment plans for 2014-15 school year

- 54 districts completed survey
- 12 district surveys completed by CGCS research team based on district assessment calendars, websites and interviews with assessment staff
- Inventory of all grades, subjects and student groups including summative and formative assessments in the 2014-15 school year
- CGCS research team updated assessment profiles throughout the year (many changed as late as April 2015)
- CGCS research team reviewed the federal, state and local mandates for assessments



# Research Questions

The study asked the following questions on testing in the current 2014-15 school year:

- What assessments do the member districts administer?
- Who requires these assessments?
- What are the assessments used for?
- How are these assessments effected by new common core assessments?
- How are these assessments used for accountability, instruction, and/or diagnostic purposes?



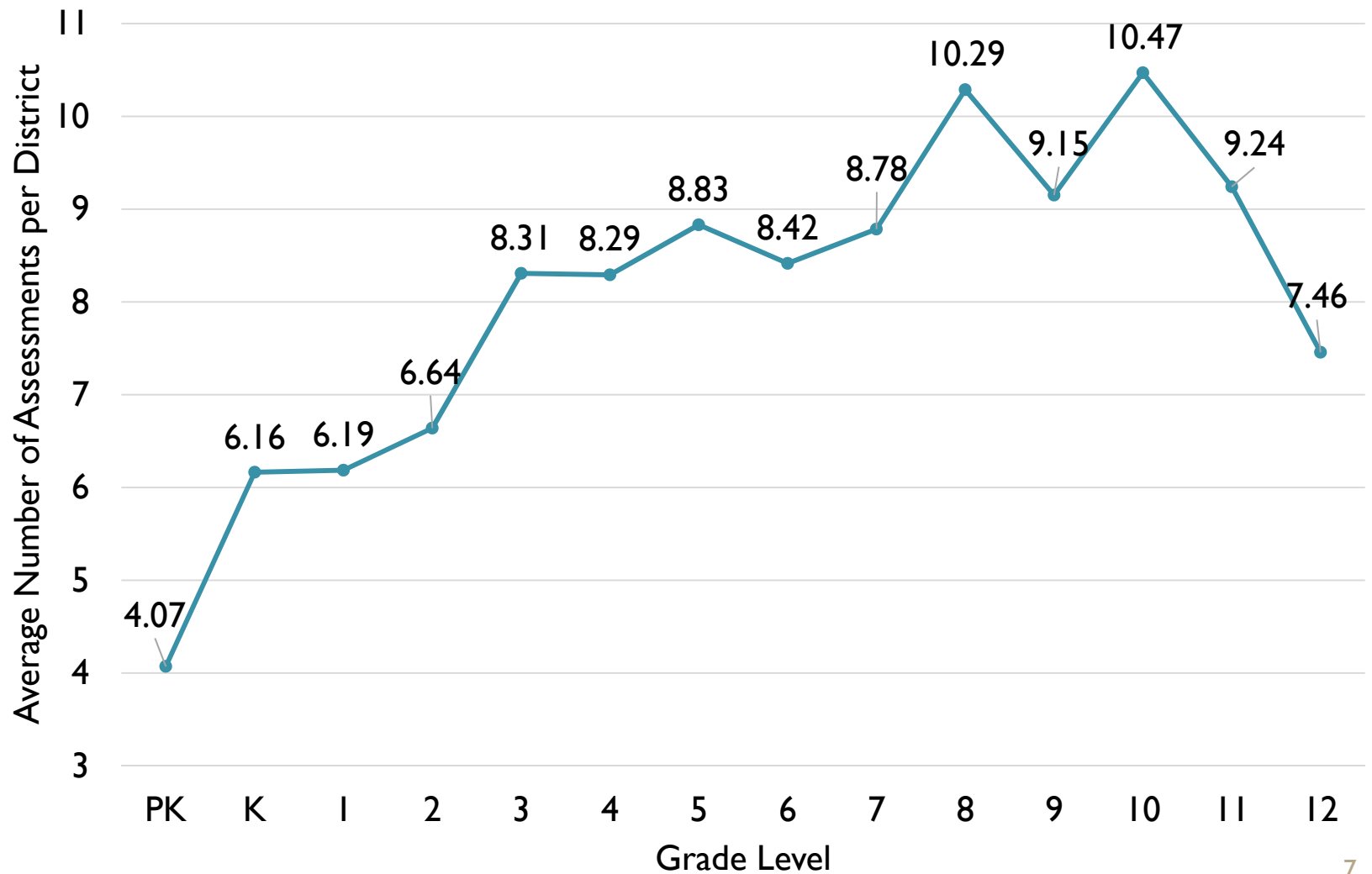
# FINDINGS



# Mandated Assessments for All Students at an Individual Grade Level

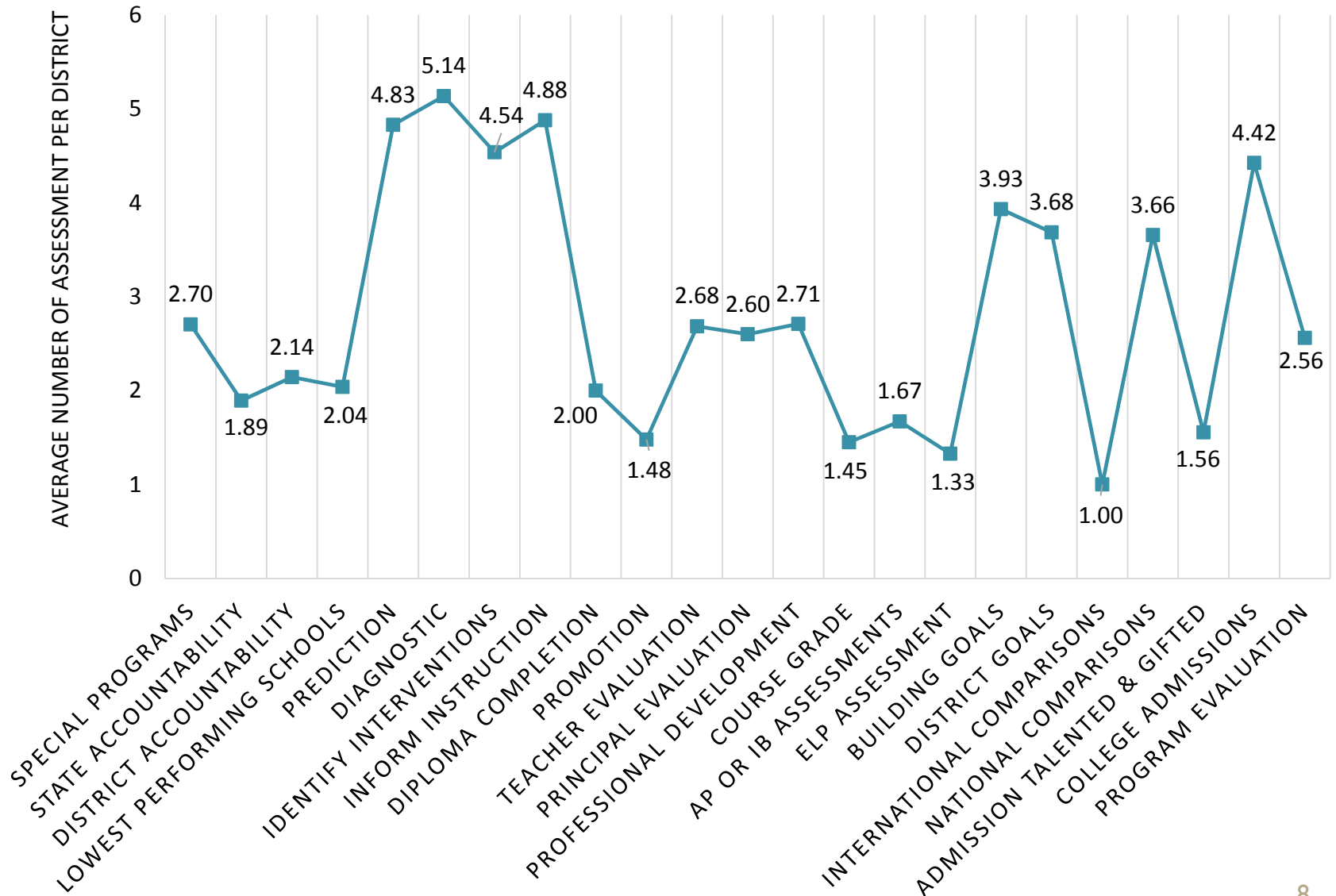
- All districts mandate:
  - Annual state accountability assessments (PARCC, SBAC, FCAT 2.0, etc.,)
- Most districts also mandate one or more of the following assessments for all students at various grade levels
  - NWEA MAP, ACT PLAN/EXPLORE/ASPIRE, DIBELS, DRA, ITBS, etc.
  - District-wide Formative assessments
  - Student learning objectives (SLOs)
  - End-of-course secondary assessments
  - PSAT, SAT, and/or the ACT

# Average Number of Total Assessments Per District Mandated for All Children by Grade Level (PK–12 Average 104.86)

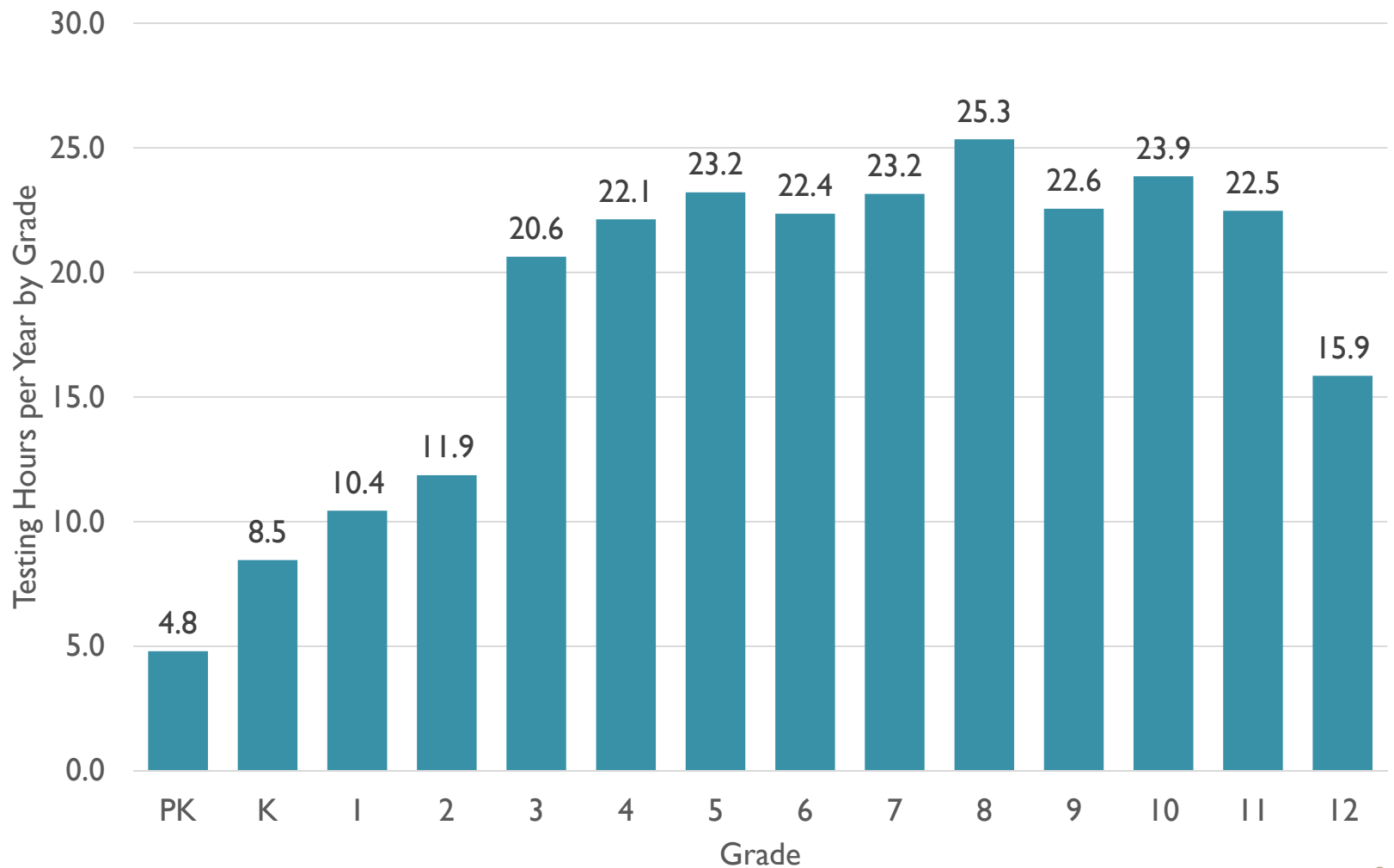




# Average Number of Assessments Mandated for All Children by Type of Use



**Average Testing Time in Hours Per Year for All Mandated Assessments for the Population of Students At Each Grade Level**  
(Assuming 6 hour school day – max testing time is approximately 5/180 days of school or 2.78% of school time)

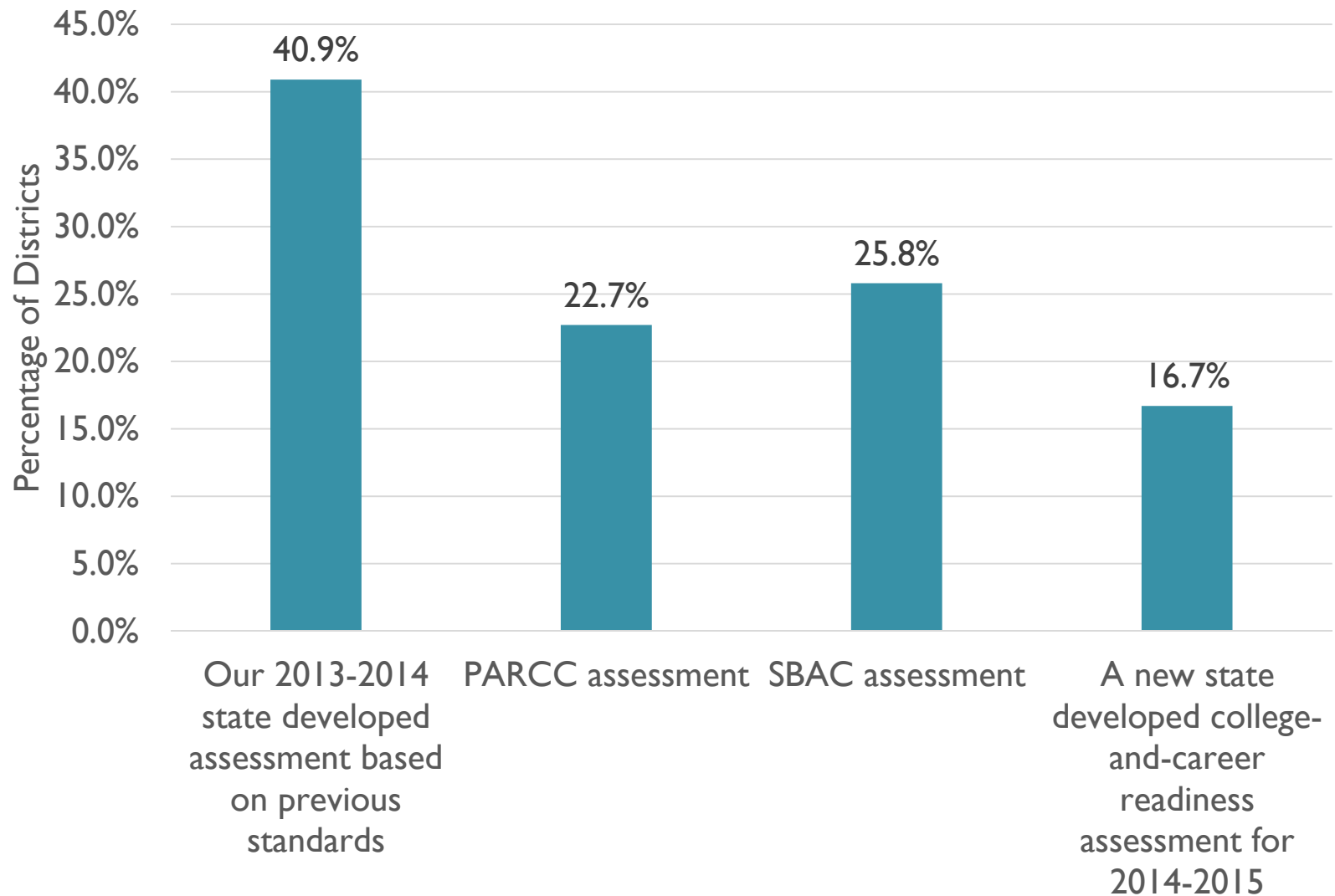




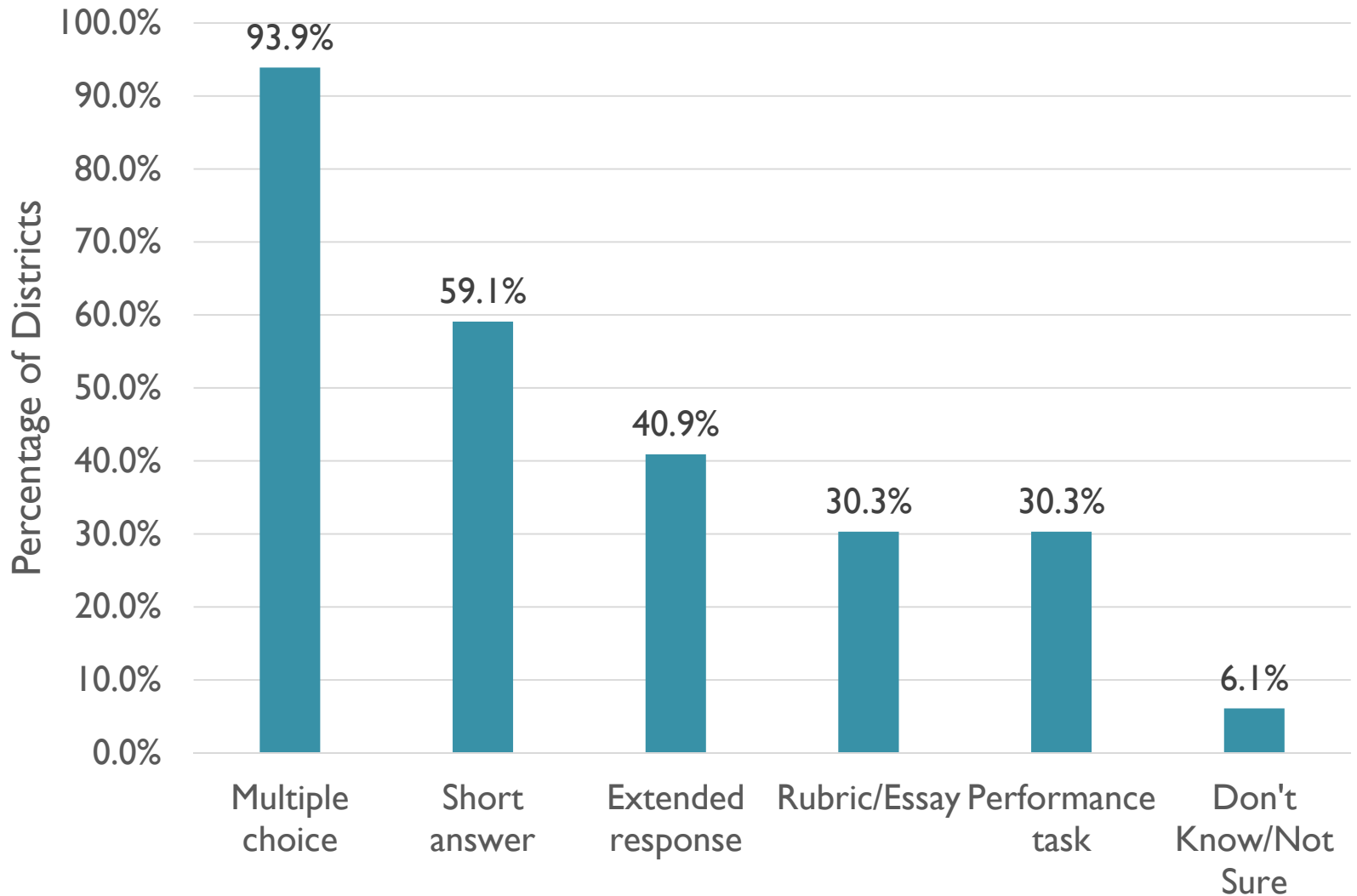
# State Accountability Assessments

- Developed to satisfy federal NCLB requirements – Tests used for federal, state, and district accountability.
- In addition, they are often used:
  - To determine promotion in certain grades.
  - As a factor in annual teacher evaluation programs.
  - To identify school or district priority status or the lowest performing schools in the state or district.

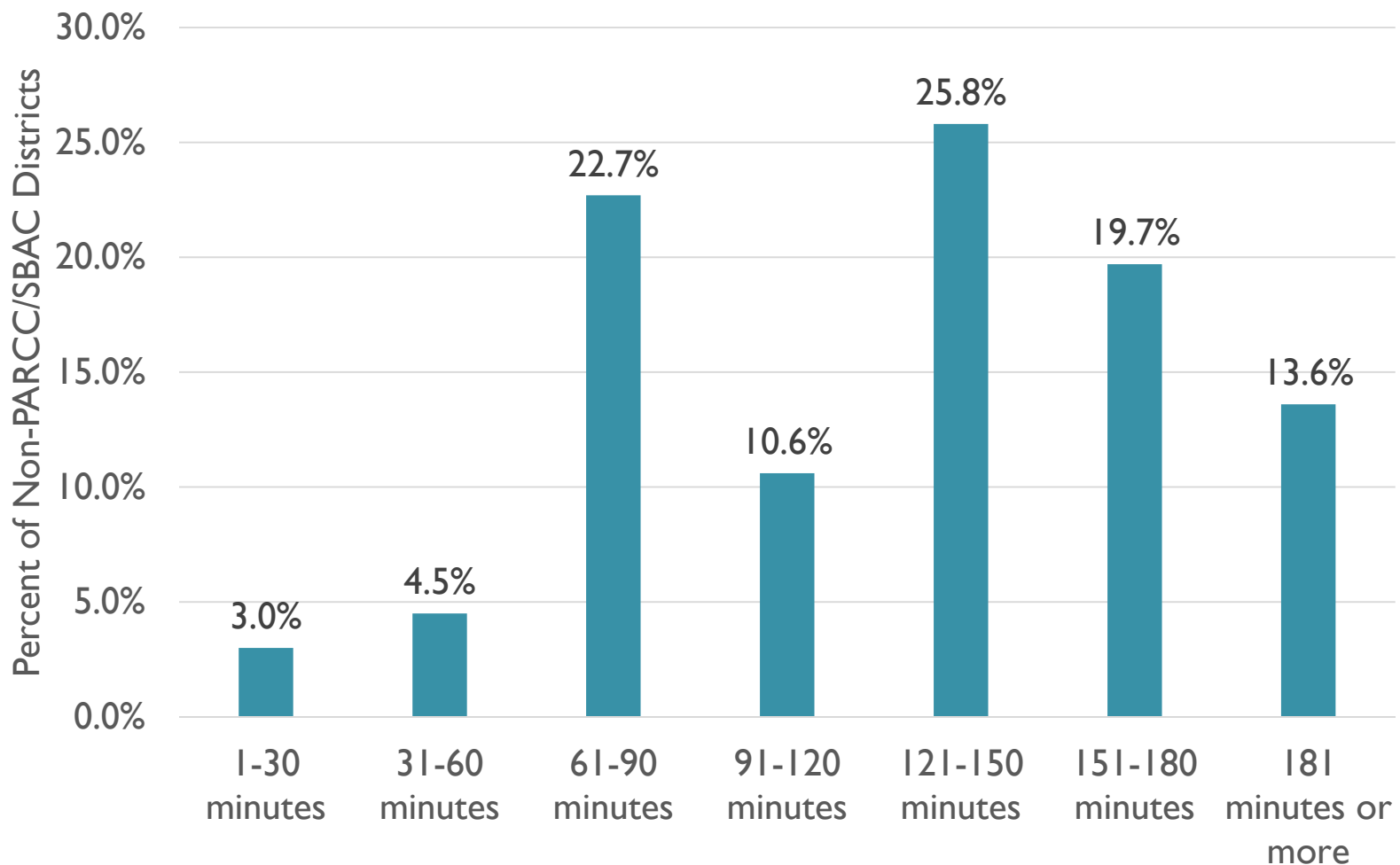
# Types of State Accountability Assessments (PARCC/SBAC/Other)



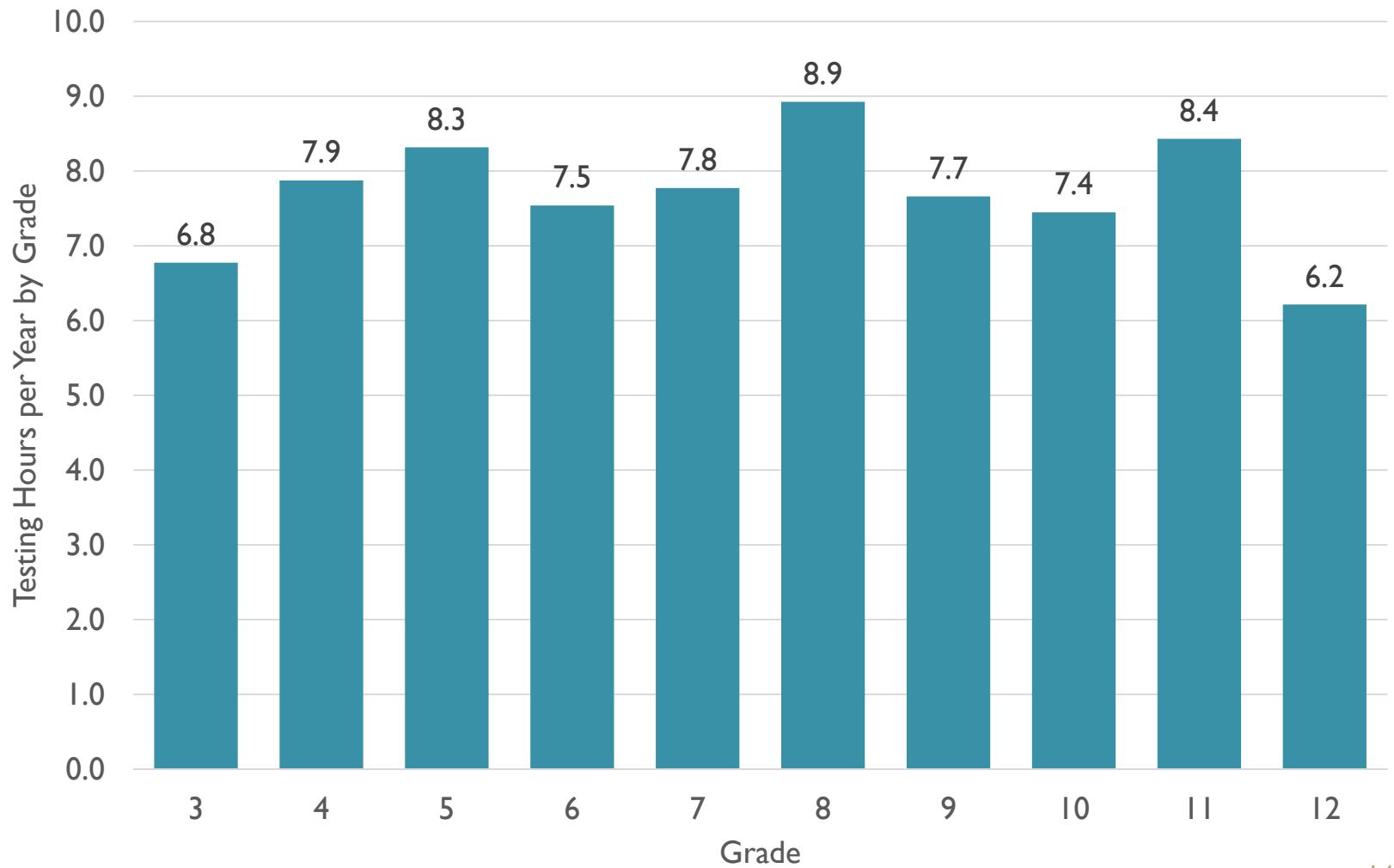
# Item Types for All PARCC/SBAC/State Accountability Assessments



# Time Allotted for General Education Students to Complete State Developed Assessments (Excluding PARCC/SBAC)



## Average Testing Time in Hours Per Year for All PARCC/SBAC/State Assessments At Each Grade Level





## Other Types of Mandated Assessments (At times Stipulated in State NCLB Waivers or Race to the Top Grants)

- End-of-course Assessment – Tests aligned to learning objectives in secondary ELA, math, science, and/or social studies courses.
  - Often used to fulfill student graduation requirements.
- Formative assessments - District developed end-of-unit assessment
- Student Learning Objectives – Teacher developed objectives and/or assessment targets to measure student growth. Sometimes referred to as student assessments in untested grades and subjects (e.g., Health, Physical Education, Music, Art, Zoology, Second Grade Reading, etc.)



## Race to the Top Assessments

### Colorado

“To create instructional materials and classroom-level assessments in all content areas To create a body of classroom-level assessments that can be used as multiple measures of student growth for the purposes of educator evaluation “

### District of Columbia

Revise DC-CAS; Create Interim Assessments (OSSE)

- Create a list of vendor possibilities for interim assessments (OSSE);
- Sign contract with approved vendor (LEA);
- Implement new interim assessments aligned to common standards (LEA).

### Florida

- Florida will expand teacher capacity to use college and career-ready standards, multiple types of assessment (summative, formative, and interim), and lesson study to drive continuous improvement of instructional practices.
- develop Florida Standards English language arts formative assessments (includes grades K-3, 4-5, and 6-8)
- develop Florida Standards mathematics formative assessments for grades K-8, Algebra, and Geometry
- develop a platform to house the assessment items from the state bank and LEA-developed items
- develop item bank, test builder, and test delivery platform for 54 grades/courses aligned to Florida Standards(includes Math: K-8, Algebra 1, Geometry, Algebra 2 (12); ELA: K-12; Science: K-8, Biology, Earth/Space, Chemistry, Physics (13); Social Studies: K-8, World History, US History, American Government, Economics (14); Spanish: Beginning, Intermediate, Advanced (3))
- This project is intended to create high-quality assessment items for identified hard-to-measure and other content areas through a competitive grant which will be awarded to a partnership of LEAs or education consortium. The LEA partnership or consortium will design and develop high-quality items that are cognitively complex and represent a variety of item types. These assessment items for identified hard-to-measure and other content areas will be stored in the Florida Interim Assessment Item Bank and Test Platform for use statewide at multiple levels (state, district, classroom, and public levels). The department will review and monitor the grantee’s work plans, work, and deliverables.
- CTE Assessment Item Development

### Georgia

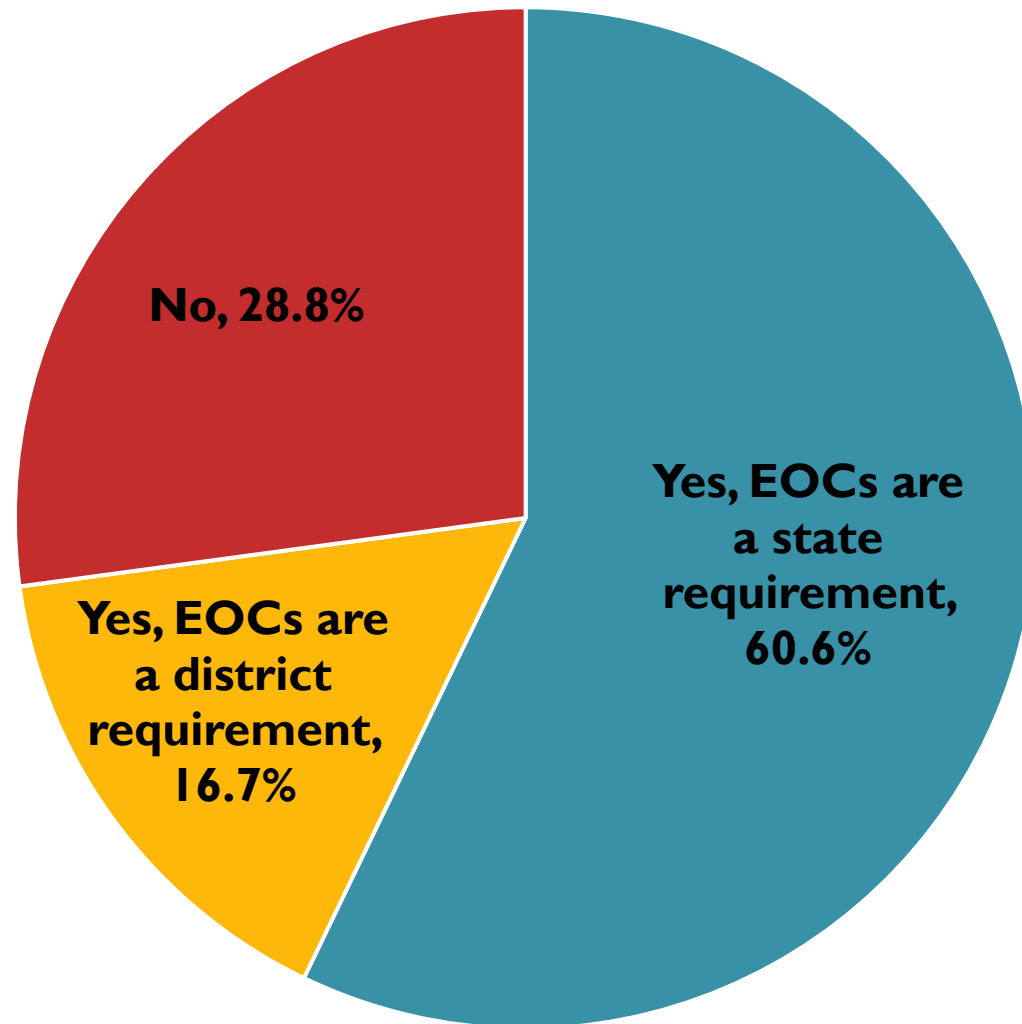
- Create formative assessments;
- Create benchmark assessments
- Provide PSAT examinations and develop new state virtual courses
- To increase the focus on STEM, the State will require activities specific to STEM-related standards and assessments be embedded within the action plan that follows and will include: raising educator awareness of STEM resources, promoting a STEM culture in

schools, developing and disseminating applied STEM modules that promote a problem-based inquiry approach to STEM, and initiating STEM applied learning partnerships.

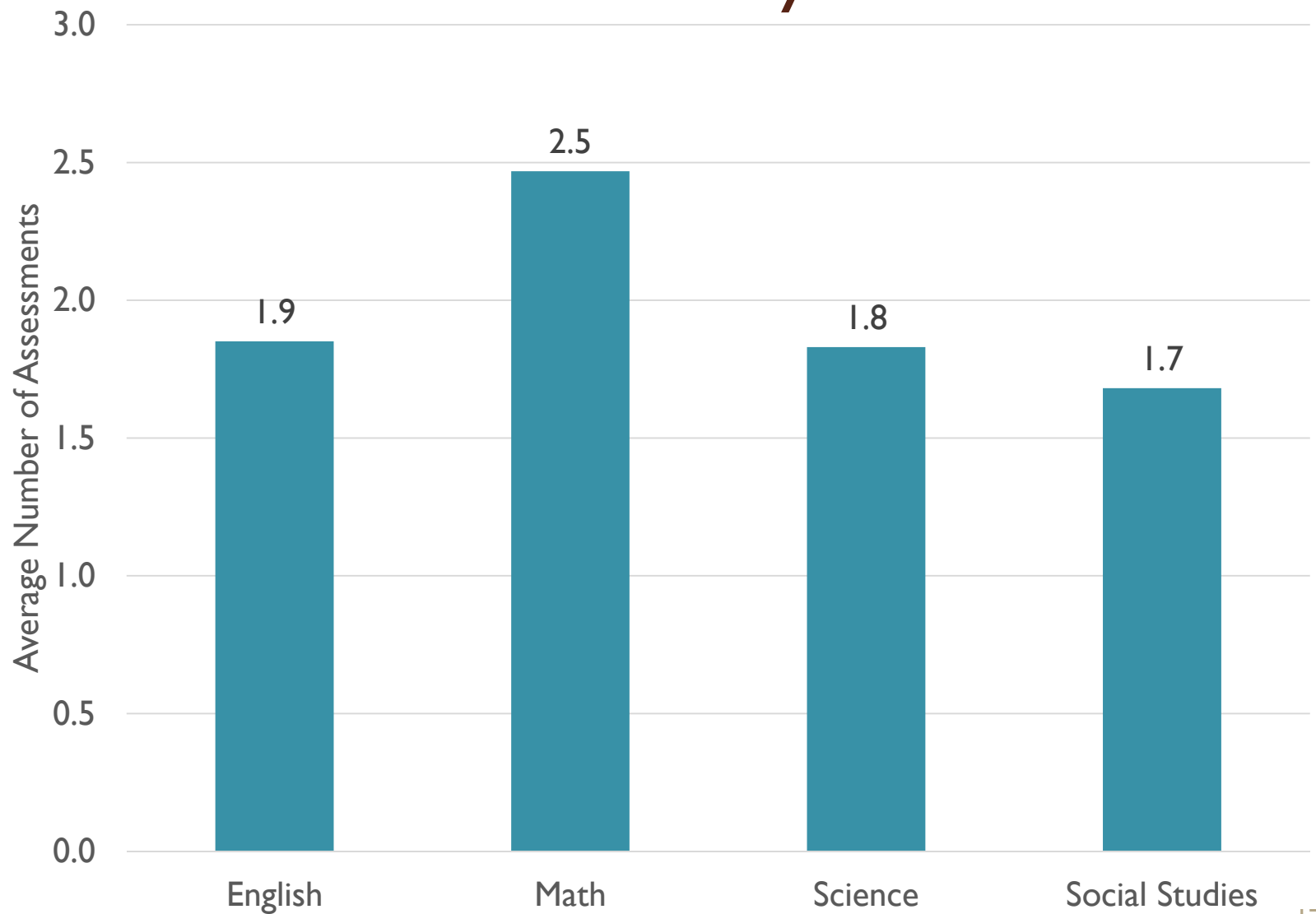
### Hawaii

- To ensure that all students leave high school prepared for postsecondary success in college or a career through a planned sequence of educational experiences and opportunities. Meeting the goal will require the reform and coordination of many elements across the education system, that: includes a quality assessment system that strategically balances summative, interim, and formative components; provides valid measurement across the full range of common rigorous academic standards; and establishing clear, internationally benchmarked performance expectations. The summative assessments reflect the challenging CCSS content, emphasizing not just students “knowing”, but also “doing.” The interim assessments will work in concert with the summative assessments, and will allow for more innovative and fine grained measurement of student progress toward the CCSS. The interim assessments will also provide diagnostic information that can help tailor instruction and guide students in their own learning efforts.
- Fully implement statewide the SBAC summative and interim assessments in grades 3–8 and high school for both English language arts and mathematics
- Prioritize courses for development of End-of-Course Assessments (e.g., Algebra I, English I, etc.)
- BOE adoption of STEM-foundational course requirements in “college- and career-ready” (CCR) diploma

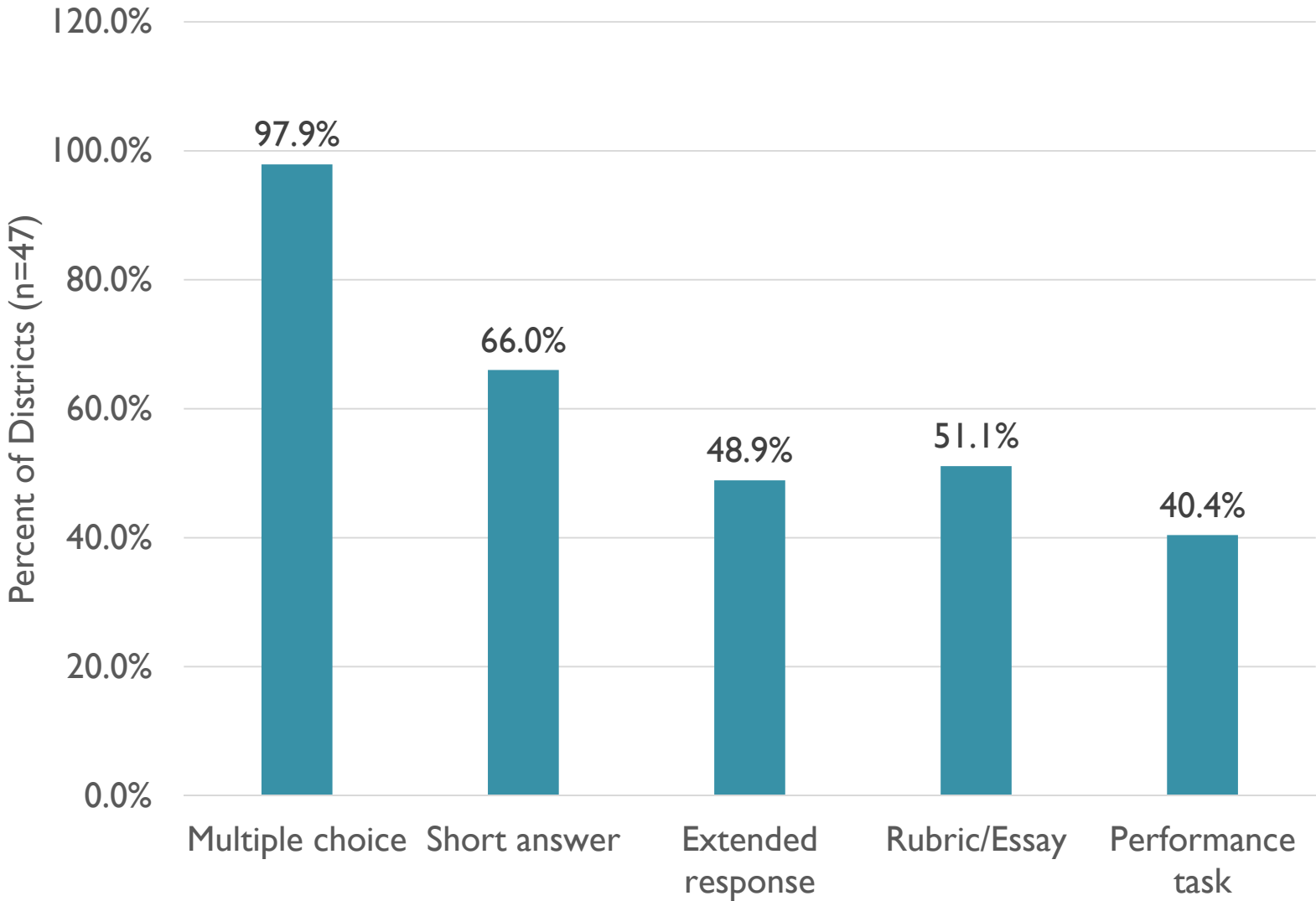
# End-of-Course (EOC) Assessment Requirements



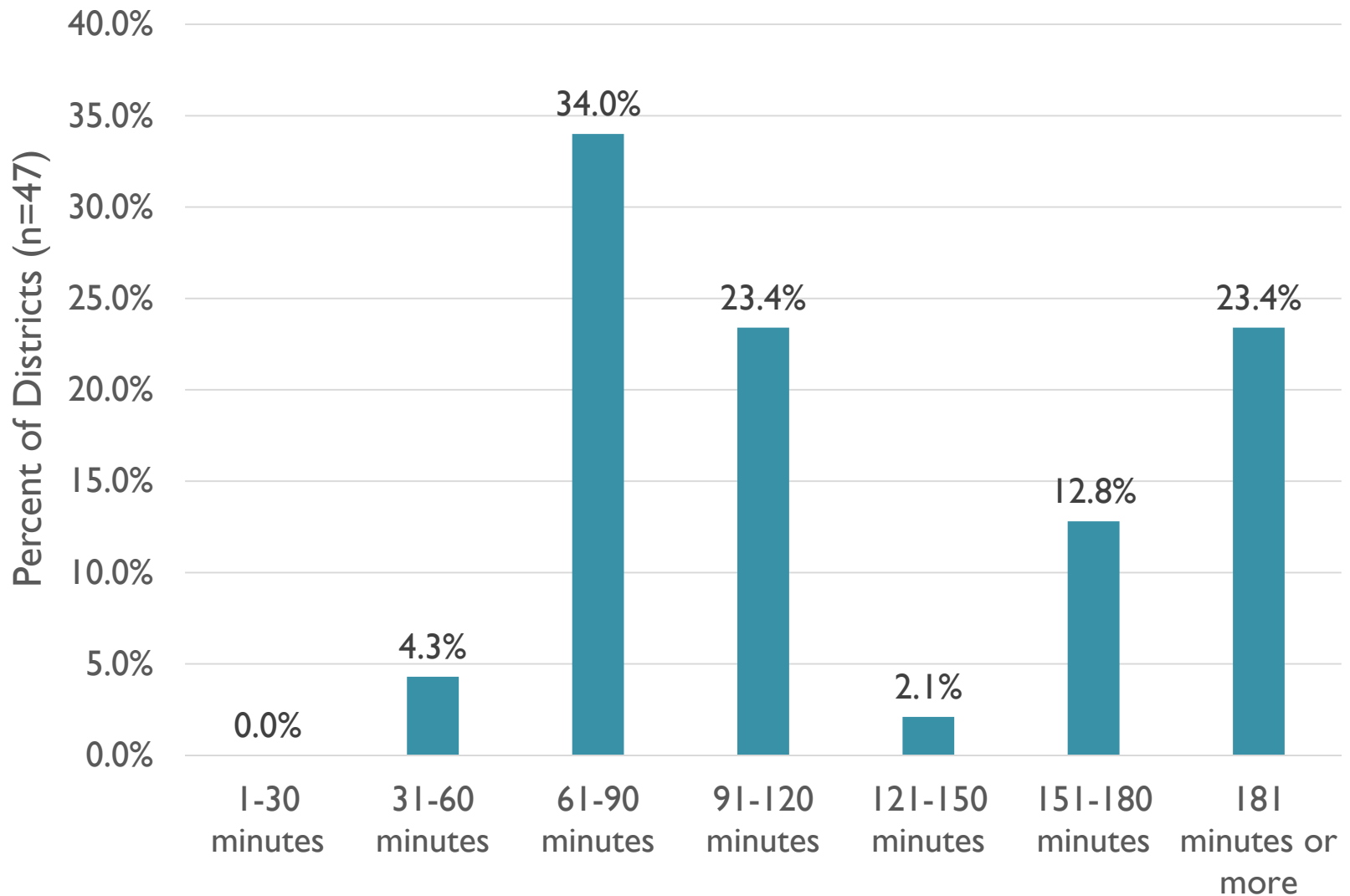
# Average Number of EOCs by Subject Level Across Secondary Grades



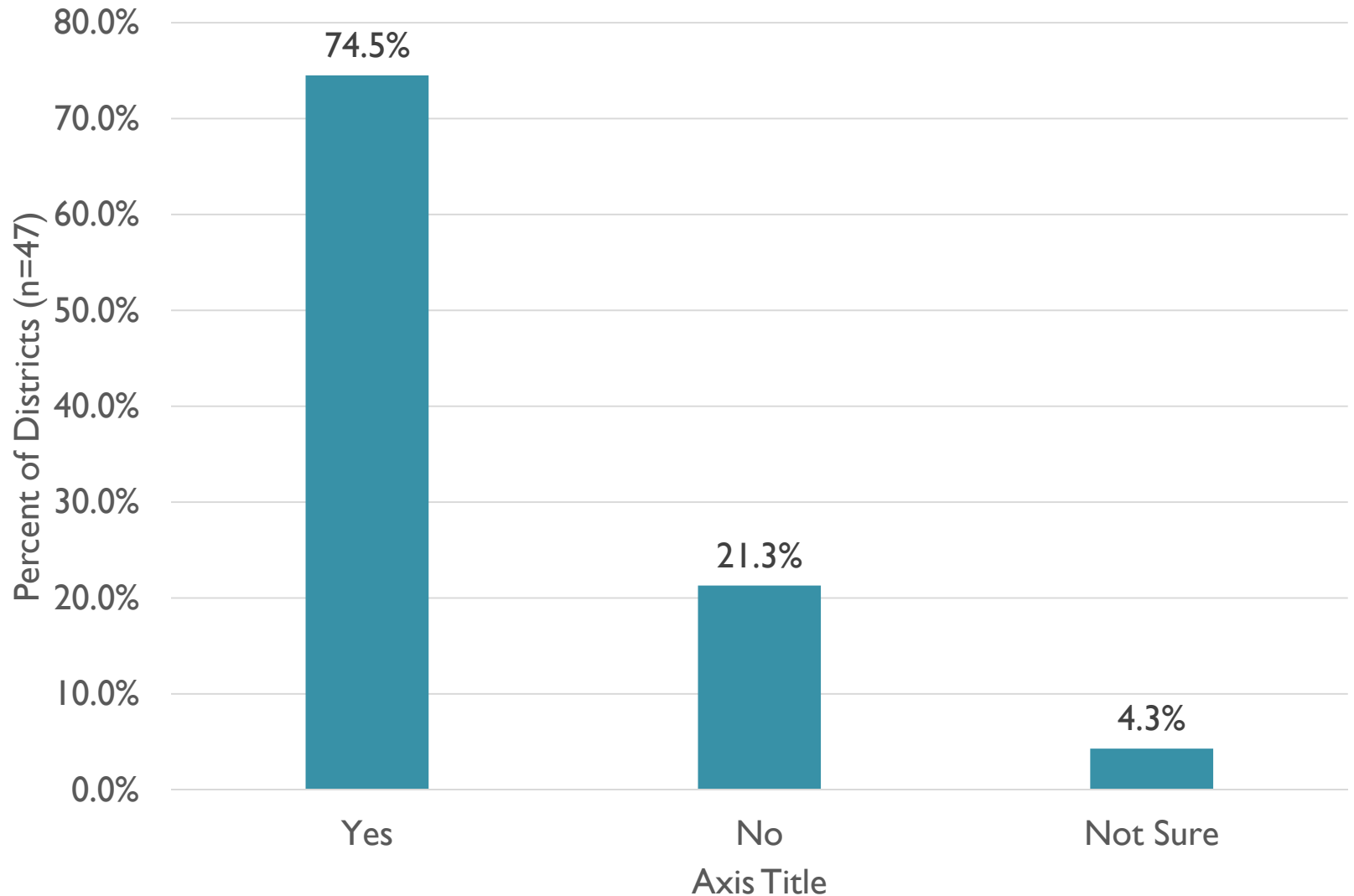
# EOC Item Types



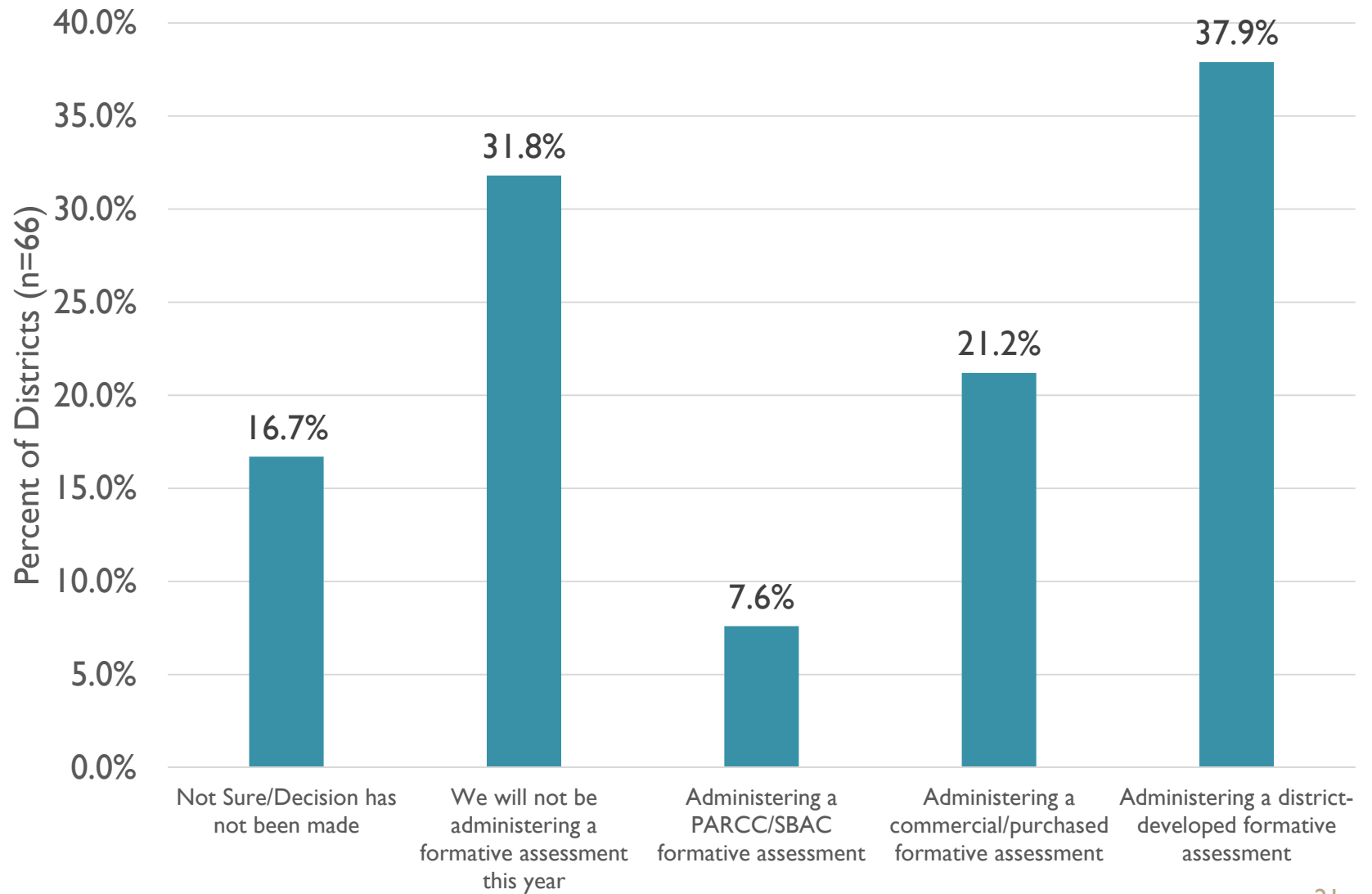
# Time Allotted for General Education Students to Complete EOC Assessments



# EOC Assessments Included in State Accountability as a Result of NCLB Waivers

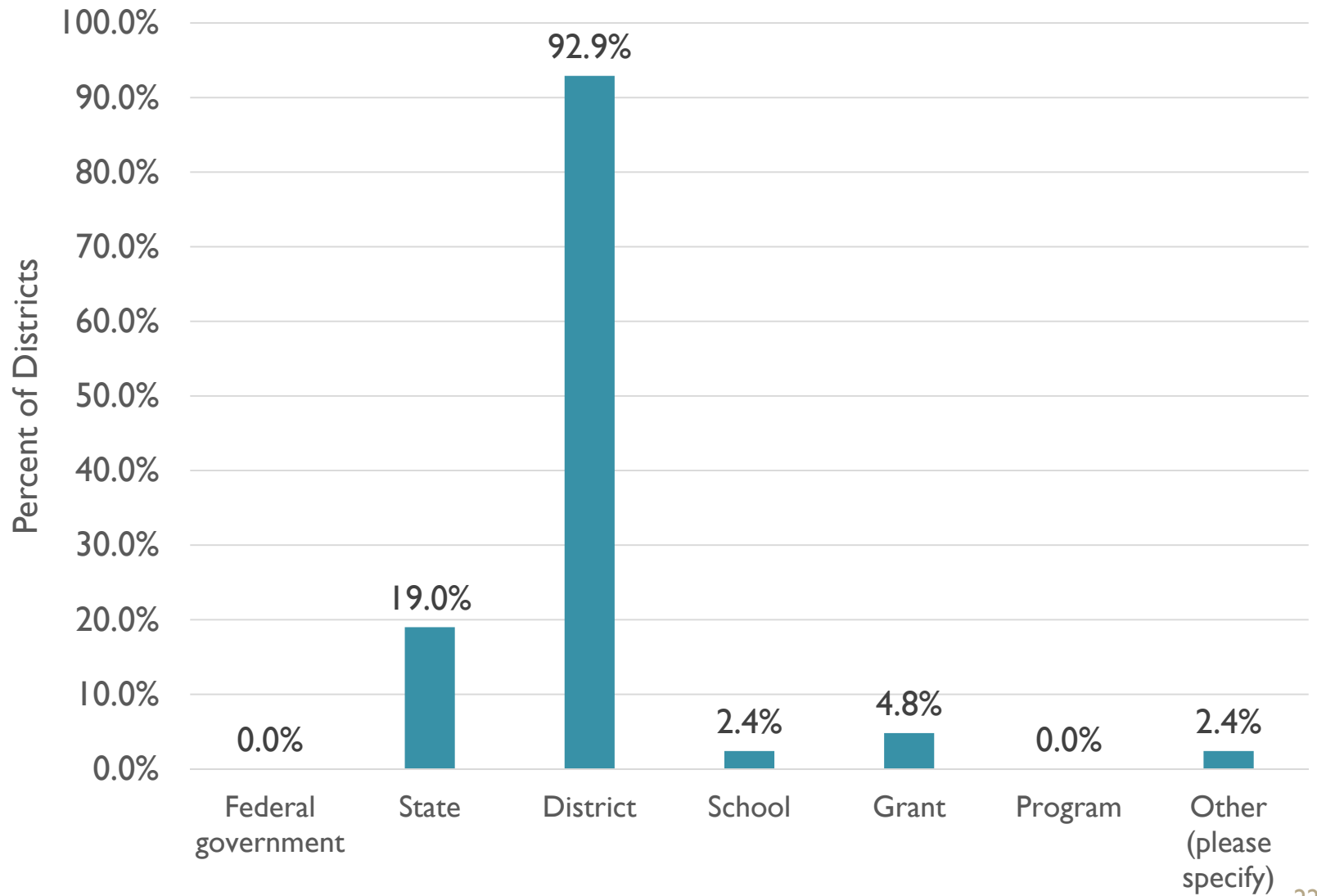


# Districtwide Formative Assessments

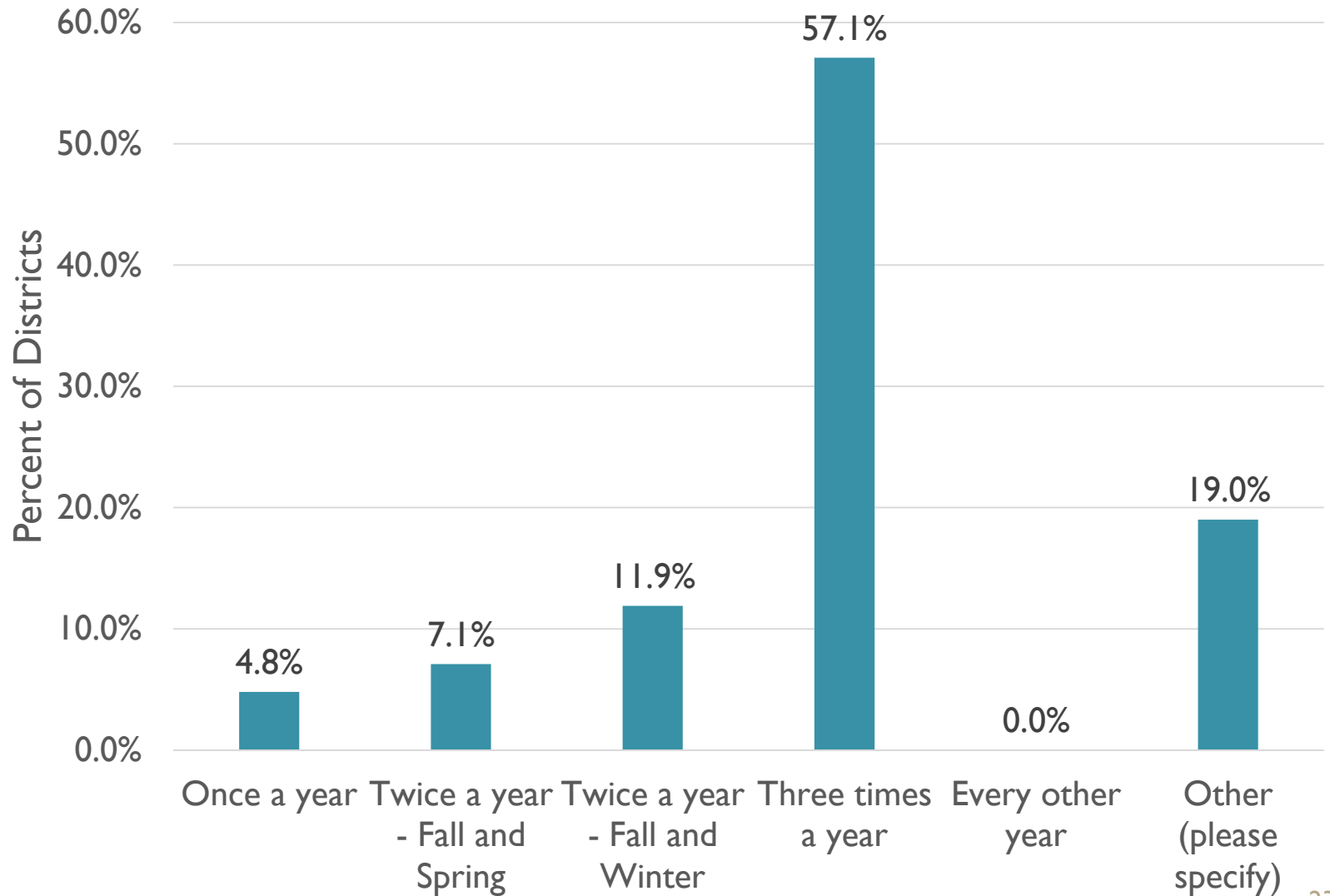




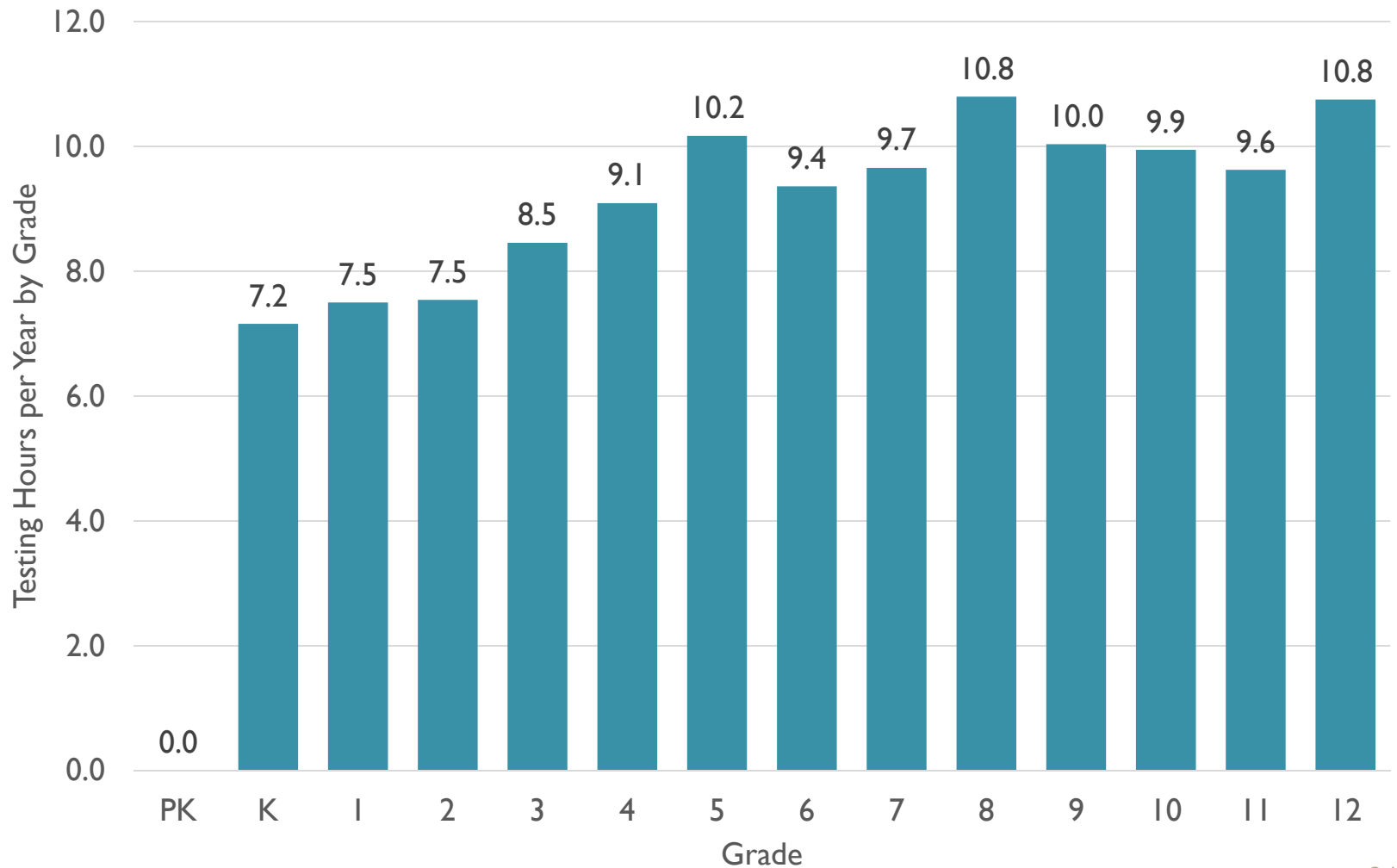
# Formative Assessment Origin



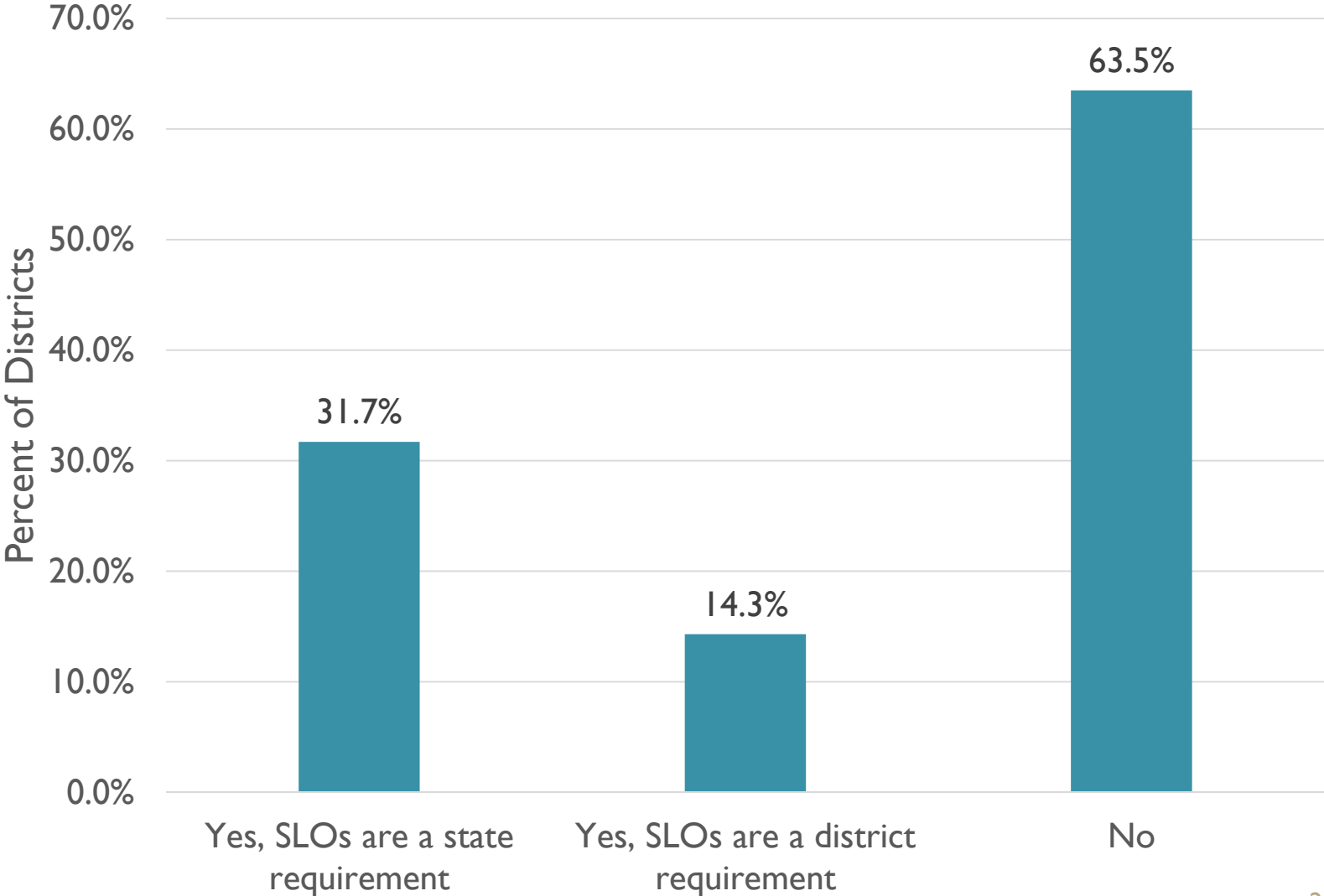
# Formative Assessment Frequency



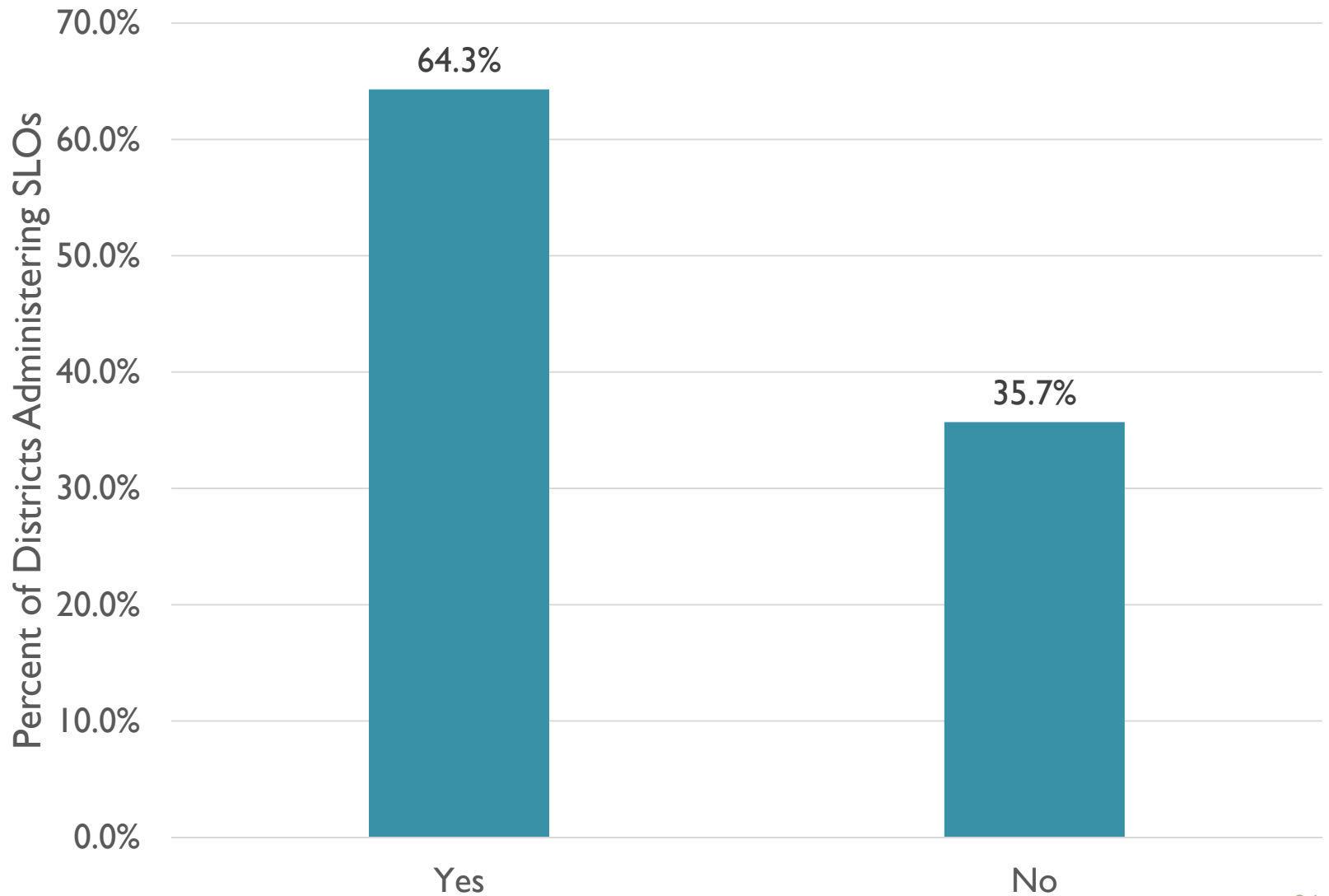
## Average Testing Time in Hours Per Year for Formative Assessments for the Population of Students At Each Grade Level



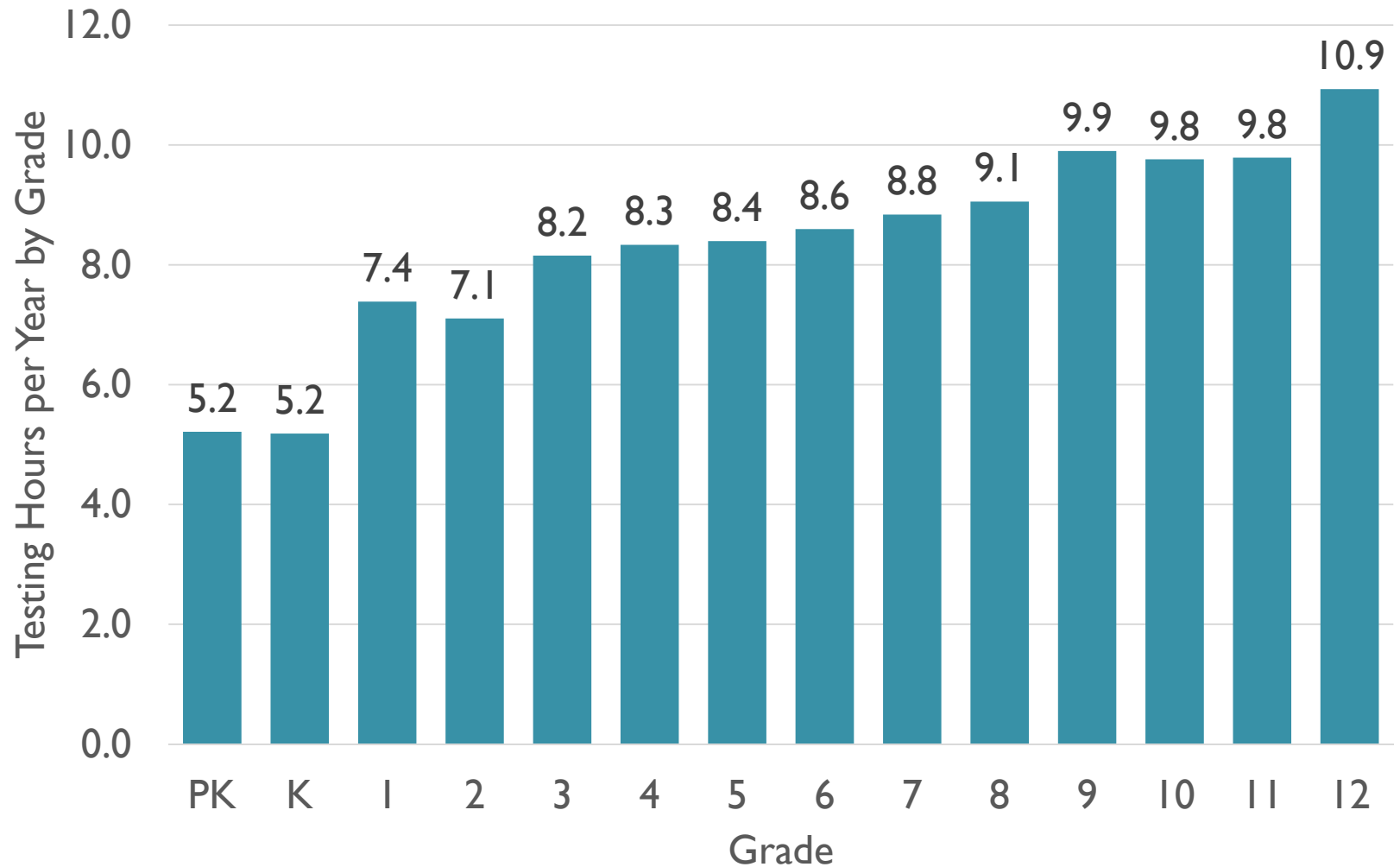
# Student Learning Objective (SLO) Requirements



# SLO Assessments Included in State Accountability as a Result of NCLB Waivers



## Average Testing Time in Hours Per Year for Student Learning Objective (SLO) Assessments for the Population of Students At Each Grade Level

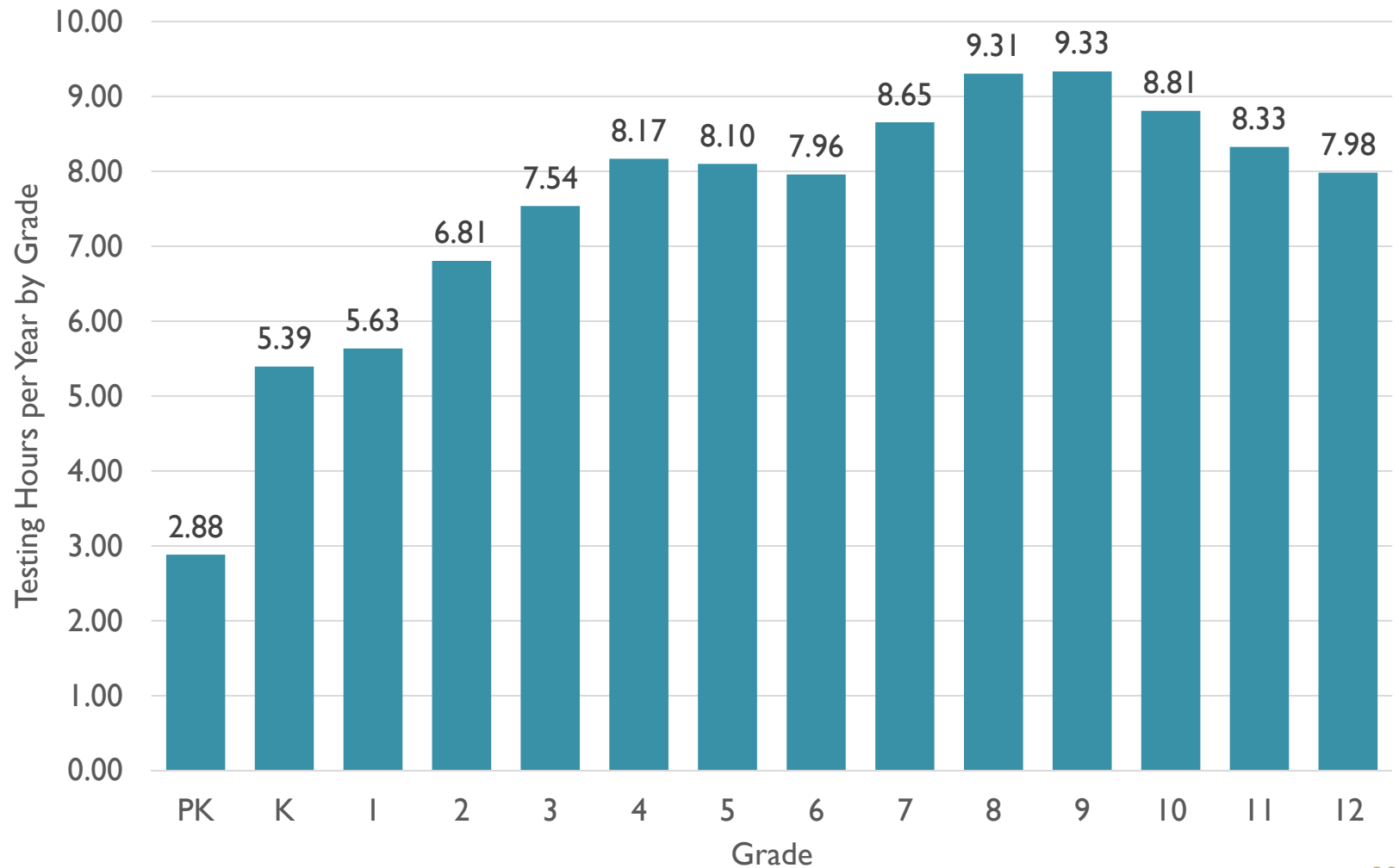




# Other Assessments Administered for All Students At Various Grade Levels

- **Interim/Benchmark Assessments**
  - NWEA, DRA, DIBELS, etc.
- **Nationally Normed Assessments**
  - Iowa Test of Basic Skills (ITBS), Cognitive Abilities Test (CogAT), Stanford Achievement Test (SAT), TerraNova, etc.
- **Other State/District Mandated Assessments**
  - ACT Plan, ACT Explore, ACT Aspire, PSAT, ACT, SAT etc.

## Average Testing Time in Hours Per Year for All Other (District or School Mandated) Assessments for the Population of Students At Each Grade Level





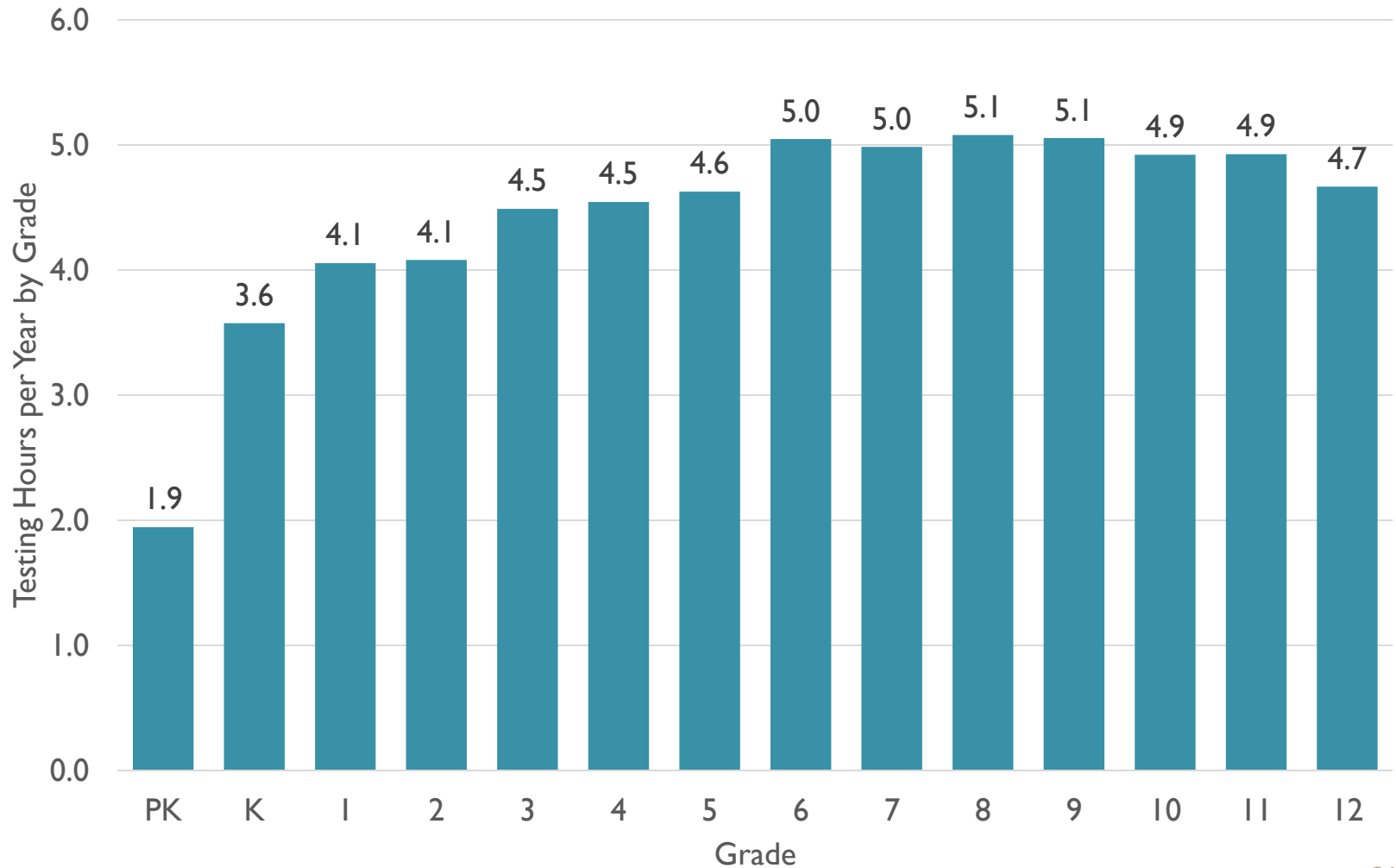


# Optional Assessments for Districts, Schools, and Students

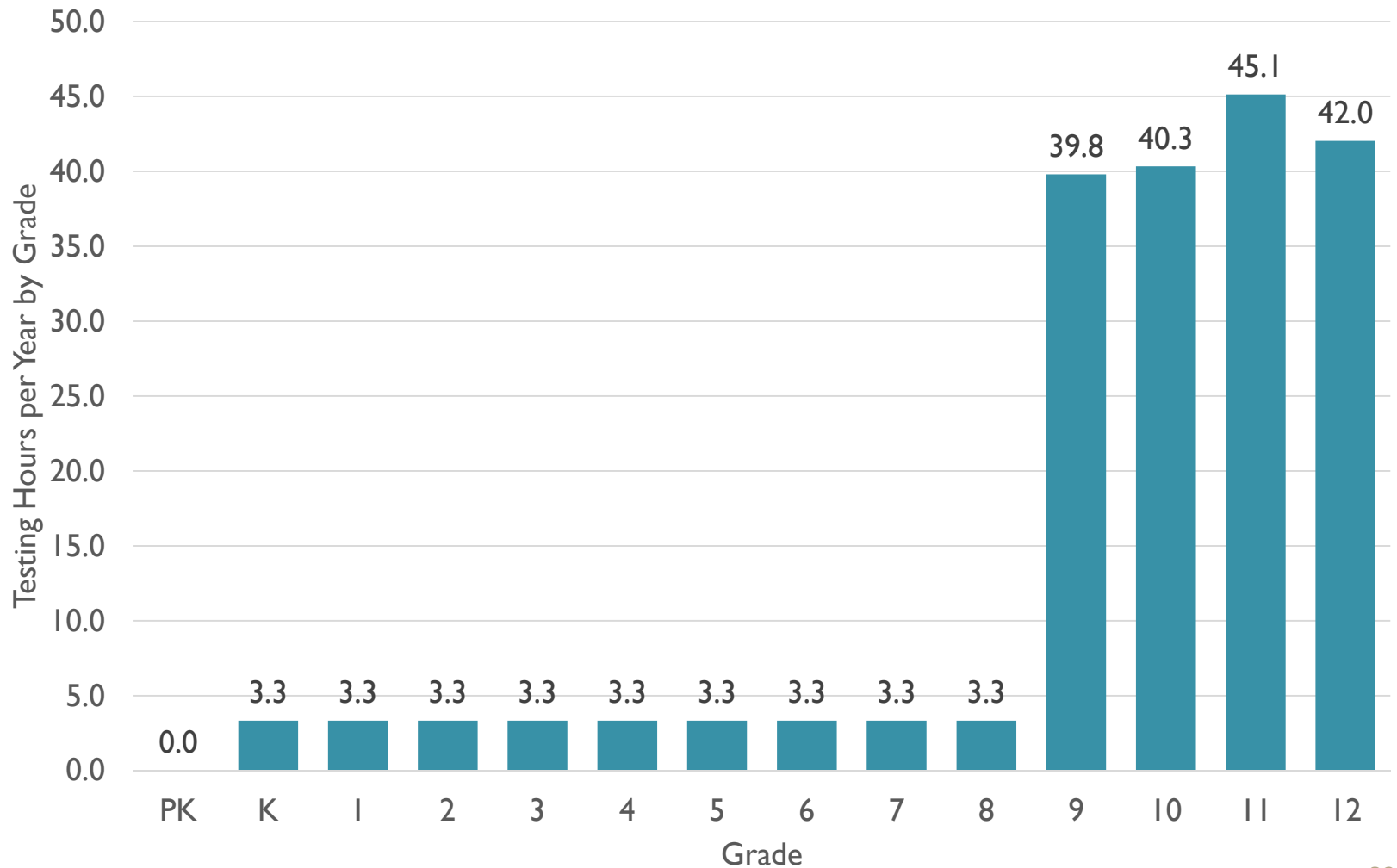
- Optional assessments for schools and districts include:
  - Formative or optional unit exams that are not mandated but districts make them optional
- Optional assessments for students include:
  - College admissions/placement tests
  - IB and AP tests
  - Gifted assessments
  - Promotion and placement tests

# Average Testing Time in Hours Per Year for Optional Sample Assessments of Students At Each Grade Level

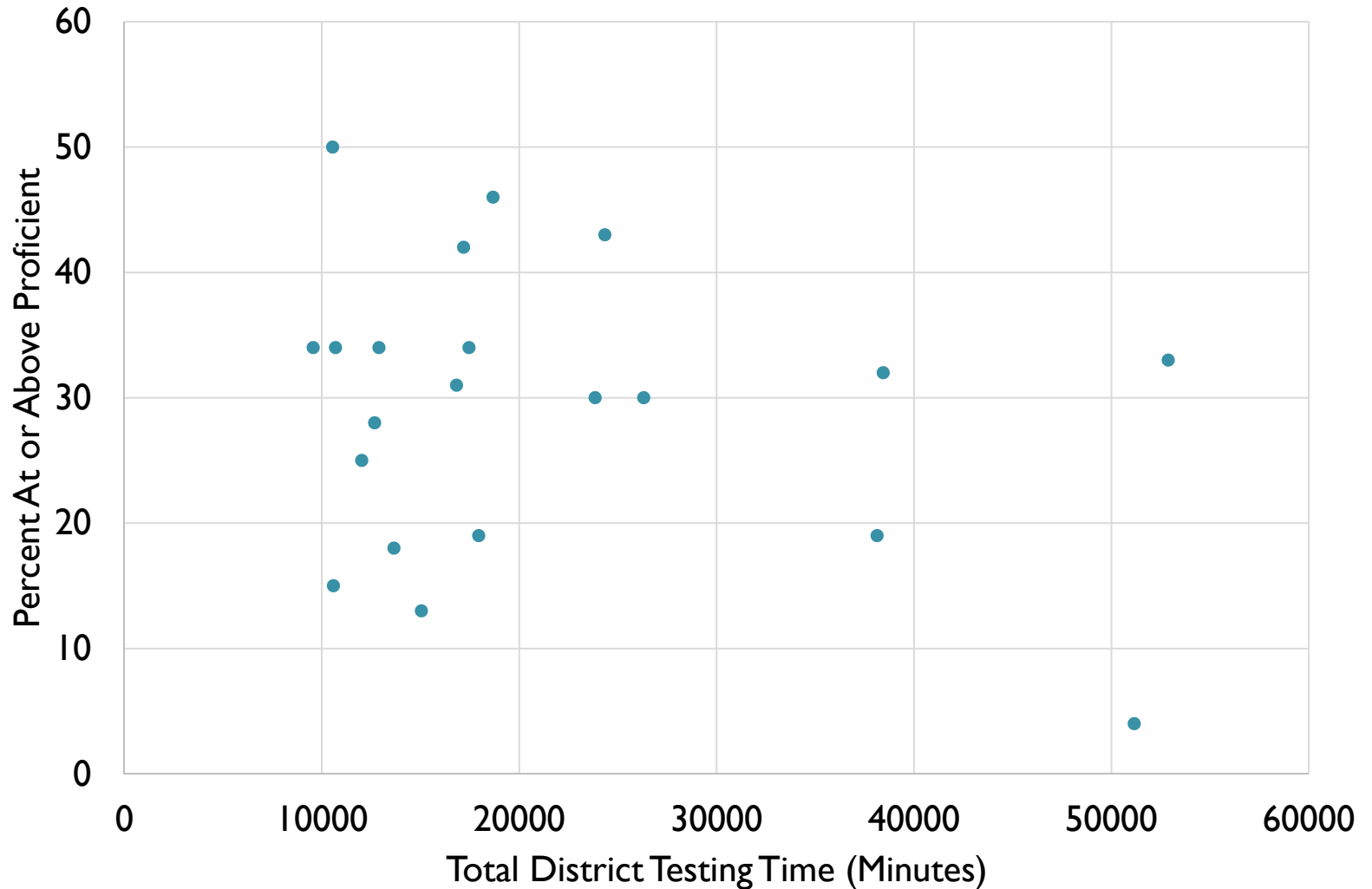
## - School, District and Grant Optional/Potential Testing Time



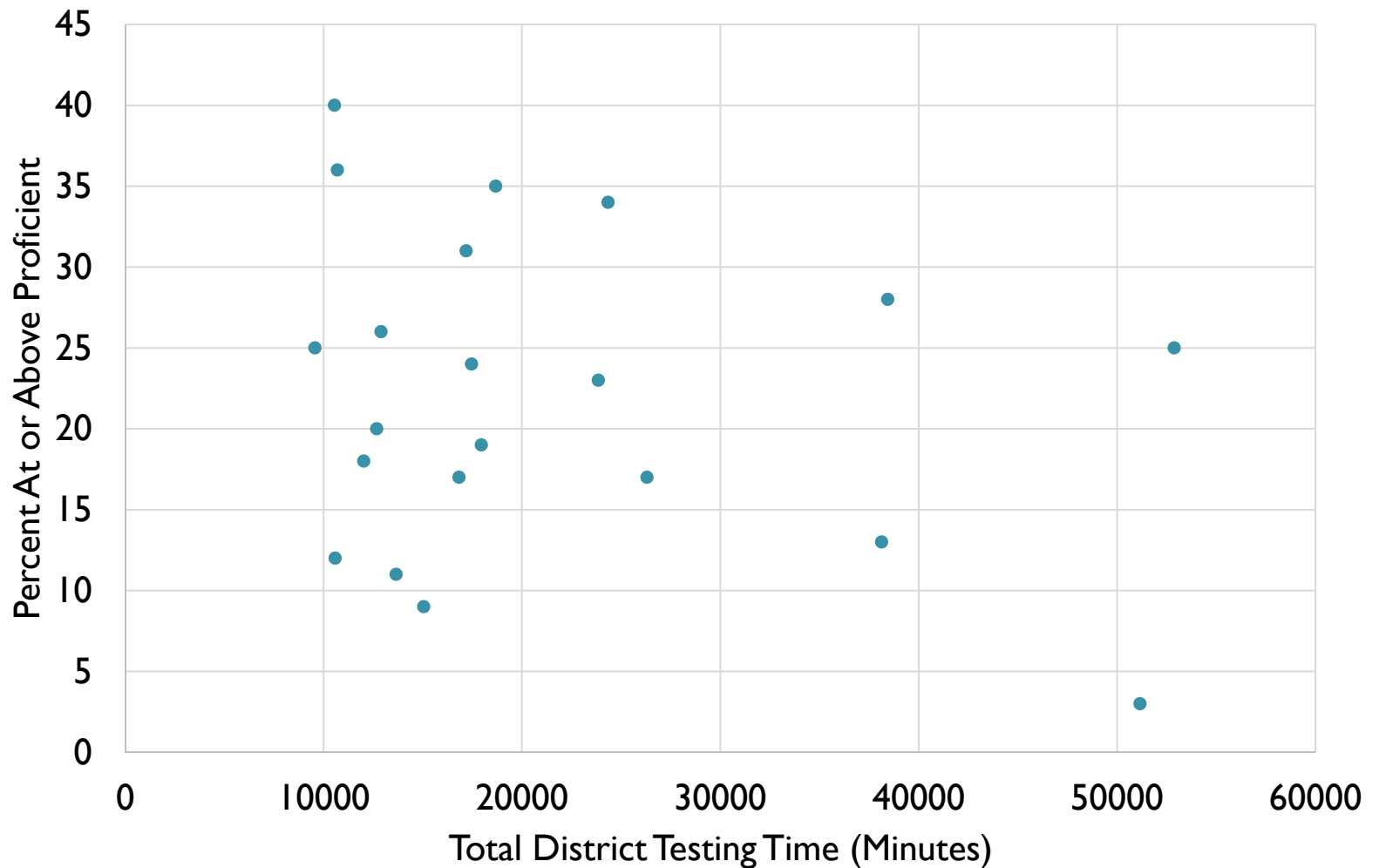
## Average Testing Time in Hours Per Year for Optional Sample Assessments of Students At Each Grade Level – Student Choice/Potential Testing Time



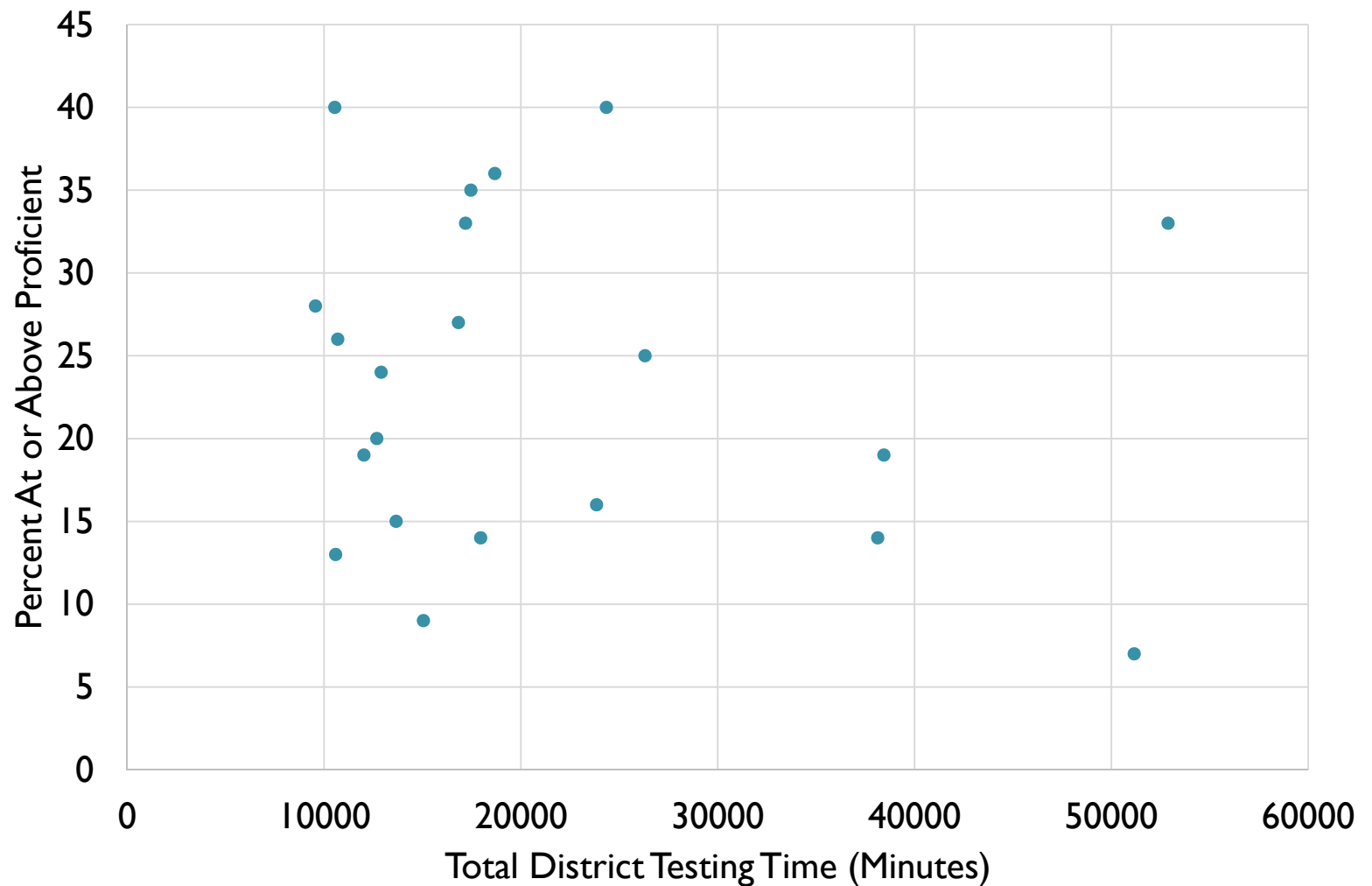
# Percent of Students At or Above Proficient on NAEP 2013 Grade 4 Math vs Total District Testing Time (correlation = -0.261)



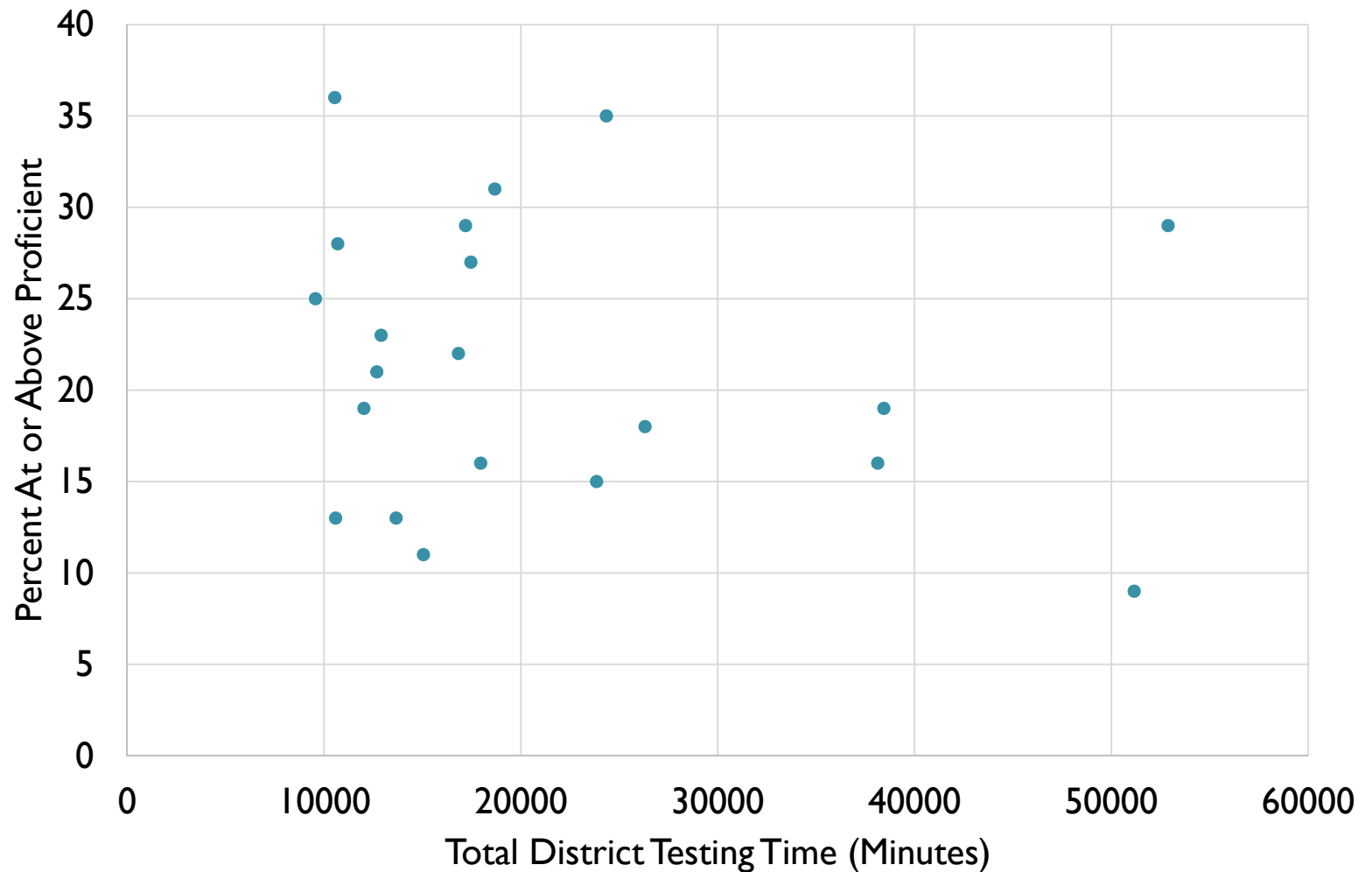
# Percent of Students At or Above Proficient on NAEP 2013 Grade 8 Math vs Total District Testing Time (correlation = -0.252)



# Percent of Students At or Above Proficient on NAEP 2013 Grade 4 Reading vs Total District Testing Time (correlation = -0.158)



# Percent of Students At or Above Proficient on NAEP 2013 Grade 8 Reading vs Total District Testing Time (correlation = -0.175)



# Over 750 Different Assessment Titles administered district-wide in the 66 CGCS districts.

The most common types included:

ACT (61 districts) PLAN (17 districts) EXPLORE (8 districts)	Dibles (20 districts)
SAT (53 districts) PSAT (45 districts) Readistep (8 districts)	Developmental Reading Assessment (DRA) (8 districts)
ACCESS (31 districts)	ITBS (13 districts)
NWEA MAP (17 districts)	Fitnessgram (13 districts)
Scholastic Reading Inventory (SRI) (12 districts)	STAR (8 districts)



# District Selected Assessments: Comparison Example

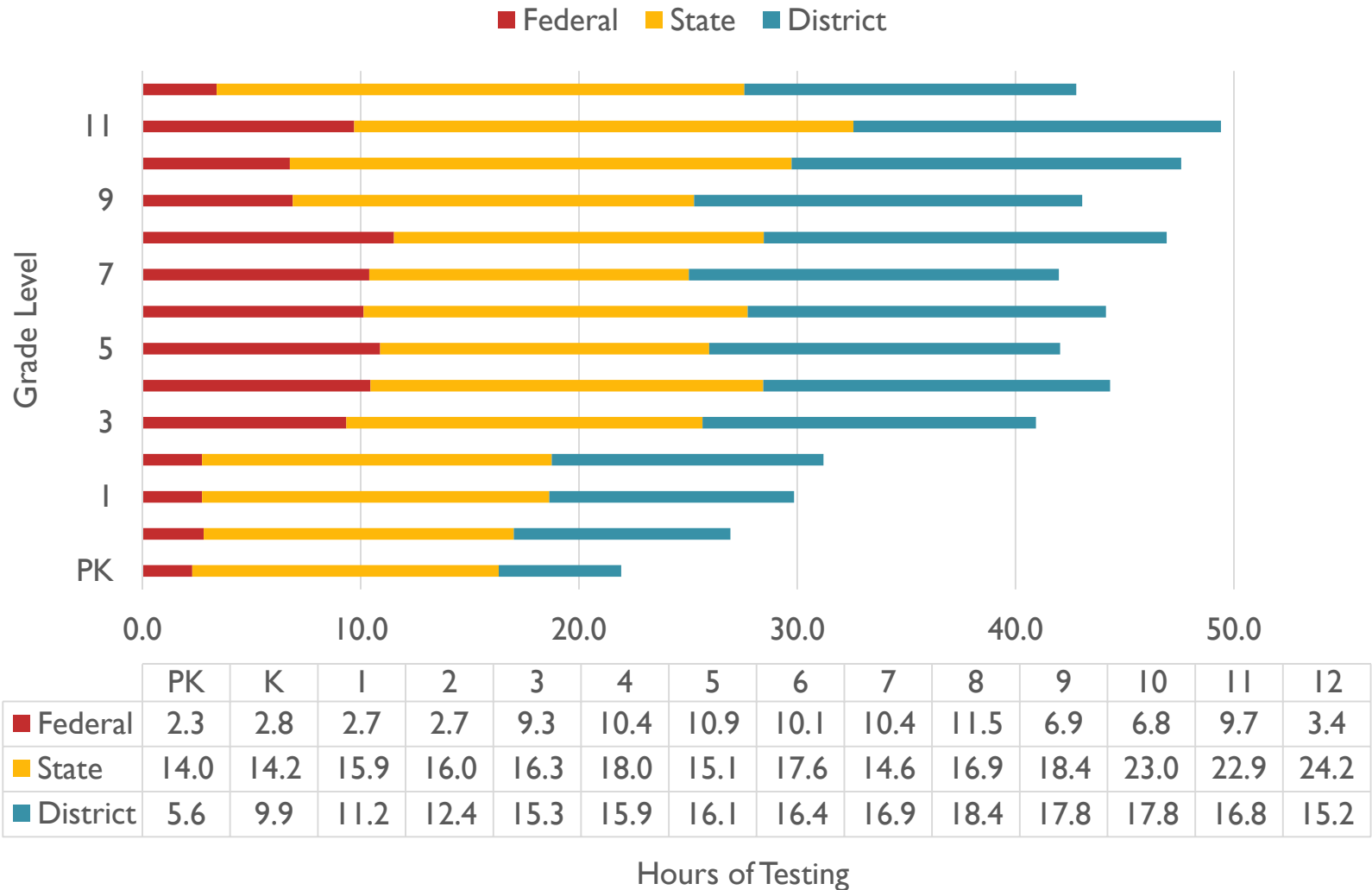
## District A

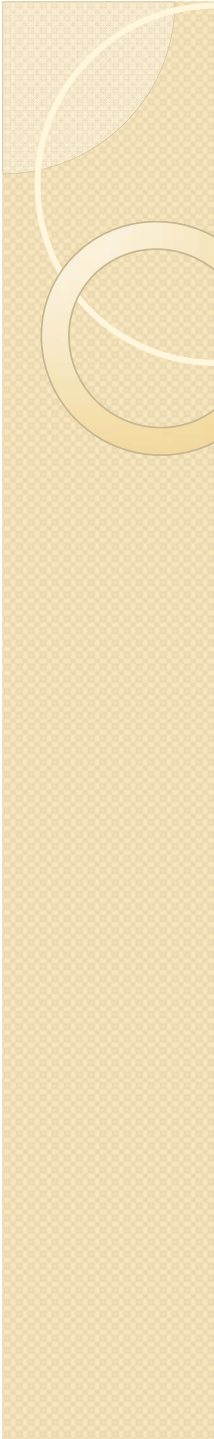
- Measures of Academic Progress
  - 3X per year, 4 subjects (ELA, Math, Reading, Science)
  - Approx 720 minutes per student
- Star
  - 3X per year, 3 Subjects (ELA, Math, Reading)
  - Approx 540 minutes
- 1,260 minutes per student or 21 hours per year

## District B

- Measures of Academic Progress
  - 2X per year, one subject (math focus)
  - Approx 120 minutes per student
- 120 minutes per student or 2 hours per year

# Testing Time as a Result of Federal vs State vs District Mandates





# Individual District Results

## 2014-2015 Assessment Calendar -- Anchorage School District

Assessment	Grade Level												
	K	1	2	3	4	5	6	7	8	9	10	11	12
Alaska Developmental Profile	Sep. 16 - Oct. 10	Sep. 16 - Oct. 10											
Universal Screening (Fall)	Aug. 20 - Sep. 12	Aug. 20 - Sep. 12	Aug. 25 - Sep. 12	Aug. 25 - Sep. 12	Aug. 25 - Sep. 12	Aug. 25 - Sep. 12	Aug. 25 - Sep. 12	Aug. 25 - Sep. 12	Aug. 25 - Sep. 12	Aug. 25 - Sep. 12			
College and Career Ready Assessment Choice: SAT, ACT or WorkKeys (WK)												<b>SAT:</b> Feb. 25, Apr. 29 (make-up) <b>ACT:</b> Mar. 3, Mar. 31 (make-up) <b>WK Paper:</b> Mar. 4, Apr. 1 (make-up) <b>WK Internet Window:</b> Nov. 10-Feb. 13	
Universal Screening (Winter)	Dec. 1 - Dec. 19	Dec. 1 - Dec. 19	Dec. 1 - Dec. 19	Dec. 1 - Dec. 19	Dec. 1 - Dec. 19	Dec. 1 - Dec. 19	Dec. 1 - Dec. 19	Dec. 1 - Dec. 19	Dec. 1 - Dec. 19	Dec. 1 - Dec. 19			
NAEP (selected schools)					Jan. 26 - Mar. 6					Jan. 26 - Mar. 6			Jan. 26 - Mar. 6
TIMSS (Ocean View Elementary)					Apr. 1 - May 29								
English Language Proficiency Assessment (ACCESS)	Jan. 20 - Mar. 5	Jan. 20 - Mar. 5	Jan. 20 - Mar. 5	Jan. 20 - Mar. 5	Jan. 20 - Mar. 5	Jan. 20 - Mar. 5	Jan. 20 - Mar. 5	Jan. 20 - Mar. 5	Jan. 20 - Mar. 5	Jan. 20 - Mar. 5	Jan. 20 - Mar. 5	Jan. 20 - Mar. 5	Jan. 20 - Mar. 5
Alternate Assessment Reading, Writing and Math/Gr. 3-10 Science/Gr. 4, 8 and 10				Mar. 16 - May 1	Mar. 16 - May 1	Mar. 16 - May 1	Mar. 16 - May 1	Mar. 16 - May 1	Mar. 16 - May 1	Mar. 16 - May 1	Mar. 16 - May 1	Mar. 16 - May 1	
AMP - Alaska Measures of Progress English Language Arts and Mathematics				Mar. 30 - May 1	Mar. 30 - May 1	Mar. 30 - May 1	Mar. 30 - May 1	Mar. 30 - May 1	Mar. 30 - May 1	Mar. 30 - May 1	Mar. 30 - May 1	Mar. 30 - May 1	
Alaska Science Assessment (Standards Based Assessment)					Mar. 24 Make-up Mar. 25				Mar. 24 Make-up Mar. 25		Mar. 24 Make-up Mar. 25		
Universal Screening (Spring) Early Literacy Screener Included: Gr. K-2 and identified Gr. 3	Apr. 13 - May 1	Apr. 13 - May 1	Apr. 13 - May 1	Apr. 13 - May 1	Apr. 13 - May 1	Apr. 13 - May 1	Apr. 13 - May 1	Apr. 13 - May 1	Apr. 13 - May 1	Apr. 13 - May 1			

All students =	ASPI =	Early Literacy Screener =
Selected Students/Classrooms Only =  476	All LEP =	Severely Cognitively Disabled =

ASSESSMENT	ELEMENTARY							MIDDLE			HIGH			
	PK	K	1	2	3	4	5	6	7	8	9	10	11	12
ACT*													•	•
AP*											•	•	•	•
BATERIA *	•													
CBE*		•	•	•	•	•	•	•	•	•	•	•	•	•
CIRCLE	•	•												
COGAT (K & 5)		•					•							
FINAL EXAMS									•	•	•	•	•	•
GRADE 8 TLA										•				
HFWE			•	•										
IB*													•	•
IOWA			•	•	•	•	•	•	•	•				
IOWA SURVEY*				•	•	•	•	•	•	•	•	•	•	
IOWA/LOGRAMOS (GT ID)*		•	•	•	•	•	•	•	•	•	•	•	•	•
IPT*		•	•	•	•	•	•	•	•	•	•	•	•	•
ISTATION		•	•	•	•	•	•	•	•	•	•			
LOGRAMOS*			•	•	•	•	•	•	•	•				
NAEP						•				•				•
NON-TARGET*			•	•	•	•	•	•	•	•				
OECD/PISA*												•		
PRE-IPT*	•													
READI-STEP										•				
SAT*													•	•
STAAR A/STAAR A EOC					•	•	•	•	•	•	•	•	•	•
STAAR ALT 2/STAAR ALT 2 EOC					•	•	•	•	•	•	•	•	•	•
STAAR L/STAAR L EOC					•	•	•	•	•	•	•	•	•	•
STAAR SPANISH					•	•	•							
STAAR/STAAR EOC					•	•	•	•	•	•	•	•	•	•
TAKS XL RETEST													•	•
TELPAS		•	•	•	•	•	•	•	•	•	•	•	•	•
WECHSLER*	•													
WOODCOCK-JOHNSON*	•													

\*These assessments are optional for the populations color coded in the legend below.

**LEGEND**

	General Population
	Gifted & Talented (GT)
	English Language Learner (ELL)
	Special Education (SpEd)

**Please Note:**

1) All updates are indicated in red.

2) The District Assessment Plan dates (Snapshots) for elementary and secondary can be found on the HISD Curriculum Department website at <http://www.houstonisd.org/Page/102485>

3) All students in grades PK-12, whose parents/guardians indicate a language other than English on the Home Language Survey, are given the Idea Proficiency Test (IPT) Oral Language Proficiency Test (OLPT). Information can be found on the HISD Multilingual Department website at <http://www.houstonisd.org/Page/71107>.

**September 2014**

- September 2-12:
  - G/T #1  
*(G/T applicants and LEP students new to HISD w/out abilities or achievement test scores)*
- September 2-19:
  - (BOY) I-Station: ES, MS; SRI Grade 9
- September 15-19:
  - Credit-By-Exam (CBE) #1

**October 2014**

- October 15:
  - PSAT/NMSQT
- October 15-November 5:
  - (BOY) CIRCLE PK Assessment – Wave 1
- October 15-29:
  - CIRCLE K Assessment – Wave 3
- October 15-29:
  - REDIStep
- October 20-23:
  - TAKS Exit-Level Retest (Online Only)
    - October 20 – ELA
    - October 21 – Math
    - October 22 – Science
    - October 23 – Social Studies

**November 2014**

- November 3-14:
  - High Frequency Word Exam (HFWE) #1
- November 10-14:
  - Credit-By-Exam (CBE) #2
- November 17-20:
  - G/T Universal CogAT grades K & 5

**December 2014**

- December 1-5:
  - STAAR EOC (English I, English II, Algebra I, Biology, US History)
    - December 1 – English I, Algebra I, Biology, US History
    - December 2 – Algebra I, Biology, US History
    - December 3 – English II, Algebra I, Biology, US History
    - December 4 – Algebra I, Biology, US History
    - December 5 – Algebra I, Biology, US History

*STAAR EOC make-ups can be scheduled any day during this window*

- December 5-12:
  - IOWA/Logramos (Kindergarten)
- December 13-January 17
  - GT #2 CogAT Online Assessment
- December 15-19:
  - High School Finals

### **January 2015**

- January 6-16:
  - (MOY) I-Station: ES, MS; SRI Grade 9
- January 10-17:
  - G/T #2  
*(G/T & Magnet applicants, private school students zoned to HISD, & LEP students new to HISD without abilities or achievement test scores)*
- January 12-30:
  - (MOY) CIRCLE PK Assessment – Wave 2
- January 20-30:
  - Elementary District Level Assessment (DLA)
- January 26-March 6:
  - National Assessment of Educational Progress (NAEP)

### **February 2015**

- January 26-March 6:
  - National Assessment of Educational Progress (NAEP)
- February 2-6:
  - Secondary District Level Assessment (DLA)
- February 9-13:
  - High Frequency Word Exam (HFWE) #2
- February 9-27:
  - STAAR Alternate 2 (STAAR-ALT 2)
- February 16-20:
  - Credit-By-Exam (CBE) #3  
*(Not to be used for spring promotion)*
- February 26-March 4:
  - Non-Target Testing

### **March 2015**

- January 26-March 6:
  - National Assessment of Educational Progress (NAEP)
- February 26-March 4:
  - Non-Target Testing
- March 2-5:
  - TAKS Exit-Level Retest (Online Only)
    - March 2 – ELA
    - March 3 – Math
    - March 4 – Science
    - March 5 – Social Studies
- March 16-April 10:

- Texas English Language Proficiency Assessment System (TELPAS)
- March 30-April 2:
  - STAAR 4 & 7 Writing / 5 & 8 Reading
    - March 30 – Grades 4 & 7 Writing (Day 1)
    - March 31 – Grades 4 & 7 Writing (Day 2) / Grades 5 & 8 Reading
    - April 1 – Make-Ups
    - April 2 – Make-Ups
- March 30-April 2:
  - STAAR EOC (English I & English II)
    - March 30 – English I
    - March 31 – English I Make-Ups
    - April 1 – English II
    - April 2 – English I & II Make-Ups

*STAAR EOC make-ups can be scheduled any day during this window*

#### **April 2015**

- March 23-April 10:
  - Texas English Language Proficiency Assessment System (TELPAS)
- March 30-April 2:
  - STAAR 4 & 7 Writing / 5 & 8 Reading
    - March 30 – Grades 4 & 7 Writing (Day 1)
    - March 31 – Grades 4 & 7 Writing (Day 2) / Grades 5 & 8 Reading
    - April 1 – Make-Ups
    - April 2 – Make-Ups
- March 30-April 2:
  - STAAR EOC (English I & English II)
    - March 30 – English I
    - March 31 – English I Make-Ups
    - April 1 – English II
    - April 2 – English I & II Make-Ups

*STAAR EOC make-ups can be scheduled any day during this window*

- April 1-17:
  - April 1-10 – (EOY) SRI Grade 9
  - April 1-17 – (EOY) I-Station: ES, MS
- April 15:
  - SAT Testing
- April 20-24:
  - High Frequency Word Exam (HFWE) #3
- April 20-May 8:
  - (EOY) CIRCLE PK Assessment – Wave 3
- April 20-May 22:
  - Grade 8 Tech Literacy Assessment (TLA)
- **April 20-24:**
  - **STAAR 3-8**
    - **April 20 – Grades 5 & 8 Math**
    - **April 21 – Grades 3-4 & 6-7 Math / Grade 8 Social Studies**
    - **April 22 – Grades 3-4 & 6-7 Reading / Grades 5 & 8 Science**
    - **April 23 – Make-Ups**



- April 24 – Make-Ups

### May 2015

- April 20-May 22:
  - Grade 8 Tech Literacy Assessment (TLA)
- May 4-8:
  - STAAR EOC (Algebra I, Biology, US History)  
*STAAR EOC make-ups can be scheduled any day during this window*
- May 4-12:
  - IOWA/Logramos (Grades 1-8)
- May 4-15:
  - AP Exams
- May 12-15:
  - STAAR Grades 5 & 8 Retest (Reading Only)
    - May 12 – Grades 5 & 8 Reading
    - May 13-15 – Make-Ups
- May 14-20:
  - G/T #3  
*(Students new to the district with signed applications, phase 2 magnet students, out of district magnet applicants, & G/T & LEP students new to HISD without abilities or achievement test scores)*
- May 21-28:
  - High School Finals

### June 2015

- June 8-11:
  - Credit-By-Exam (CBE) #4
- June 23-24:
  - STAAR Grades 5 & 8 Retest (Reading Only)
    - June 23 – Grades 5 & 8 Reading
    - June 24 – Make-Ups

### July 2015

- July 6-9:
  - TAKS Exit-Level Retest (Online Only)
    - July 6 – ELA
    - July 7 – Math
    - July 8 – Science
    - July 9 – Social Studies
- July 6-10:
  - STAAR EOC (English I, English II, Algebra I, Biology, US History)
    - July 6 – English I, Algebra I, Biology, US History
    - July 7 – Algebra I, Biology, US History
    - July 8 – English II, Algebra I, Biology, US History
    - July 9 – Algebra I, Biology, US History
    - July 10 – Algebra I, Biology, US History

*STAAR EOC make-ups can be scheduled any day during this window*

**TESTING COMMISSION**

Potential Names for the Testing Commission  
Of the  
Council of the Great City Schools<sup>1</sup>

External Representatives

John Easton, President  
Spencer Foundation, and former  
Commissioner of the Institute for Education Sciences

Mark Tucker, President  
National Center for Education and the Economy

Peggy Carr, Associate Commissioner  
National Center for Educational Statistics

Michael Cohen, President  
Achieve

David Thissen, Professor of Psychology  
University of North Carolina, Chapel Hill

Eugene Garcia, Professor Emeritus  
Arizona State University

Tom Hehir, Professor of Education  
Harvard University

Mitchell Chester, Commissioner  
Massachusetts Department of Education

Yue Yin, Associate Professor of Educational Psychology  
University of Illinois, Chicago

Bob Pianta, Dean  
College of Education  
University of Virginia

Tony Bryk, President  
Carnegie Commission for the Advancement of Teaching

Two Teachers

Two Parents

## Member Representatives

Richard Carranza, Superintendent  
San Francisco Unified School District

Jumoke Hinton Hodge, School Board  
Oakland Unified School District

Eric Gordon, CEO  
Cleveland Municipal School District

Airick West, School Board  
Kansas City (MO) Public Schools

Darrienne Driver, Superintendent  
Milwaukee Public Schools

William Sublette, School Board  
Orange County (Orlando) Public Schools

Michael Hanson, Superintendent  
Fresno Unified School District

Doretha Edgecombe, School Board  
Hillsborough County (Tampa) Public Schools

Ritu Khanna, Assistant Superintendent for Research, Planning and Accountability  
San Francisco Unified School District

Bob Rodosky, Chief of Data Management, Planning, and Program Evaluation  
Jefferson County (Louisville) Public Schools

## Ex Officio Members

Michael Casserly, Executive Director  
Council of the Great City Schools

Chris Minnich, Executive Director  
Council of Chief State School Officers

Ray Hart, Director of Research  
Council of the Great City Schools

**TUDA**

<b>Timeline and Activities to Identify Participating Districts for the 2017 TUDA</b>	
<b>Timeline</b>	<b>Activity</b>
April 2015	Governing Board staff discuss the 2017 assessment schedule and eligible districts for TUDA with Council of the Great City Schools (CGCS) and NCES.
May 2015 Board Meeting	Governing Board staff brief Executive Committee on the timeline and process for determining TUDA participants for 2017.
August 2015 Board Meeting	Governing Board decides the number of districts to participate in TUDA.
August 2015	CGCS consults with current TUDA participants to assess informally their interest in participating in the 2017 assessments. Eligible districts may be notified of the opportunity to apply to volunteer for slots in the event of current TUDA participants declining or expansion of the program due to additional funding from Congress.
September 2015	Governing Board staff send notification letters to continuing districts and opportunity to apply to potentially eligible new volunteering districts, if needed.
September – October 2015	Governing Board staff, in consultation with CGCS and Executive and COSDAM Committees and adhering to Board policy and procedures, identify continuing volunteering districts, and obtain their commitment to participate.
October 2015	NCES provides updated list of eligible districts to Governing Board Staff for possible expansion of TUDA program, if needed.
October – November 2015	Governing Board staff confer with COSDAM and Executive Committees on ranking of potential volunteering districts, if needed.
November 2015	Governing Board staff obtain commitment from new volunteering districts to participate in 2017, if needed.
November 2015 Board Meeting	Governing Board determines TUDA participants for 2017.
January 2016	Governing Board staff provide acknowledgement letters to participants in the 2017 TUDA and notify NCES.

## **List of Eligible Districts for 2017 Trial Urban District Assessments (TUDA)**

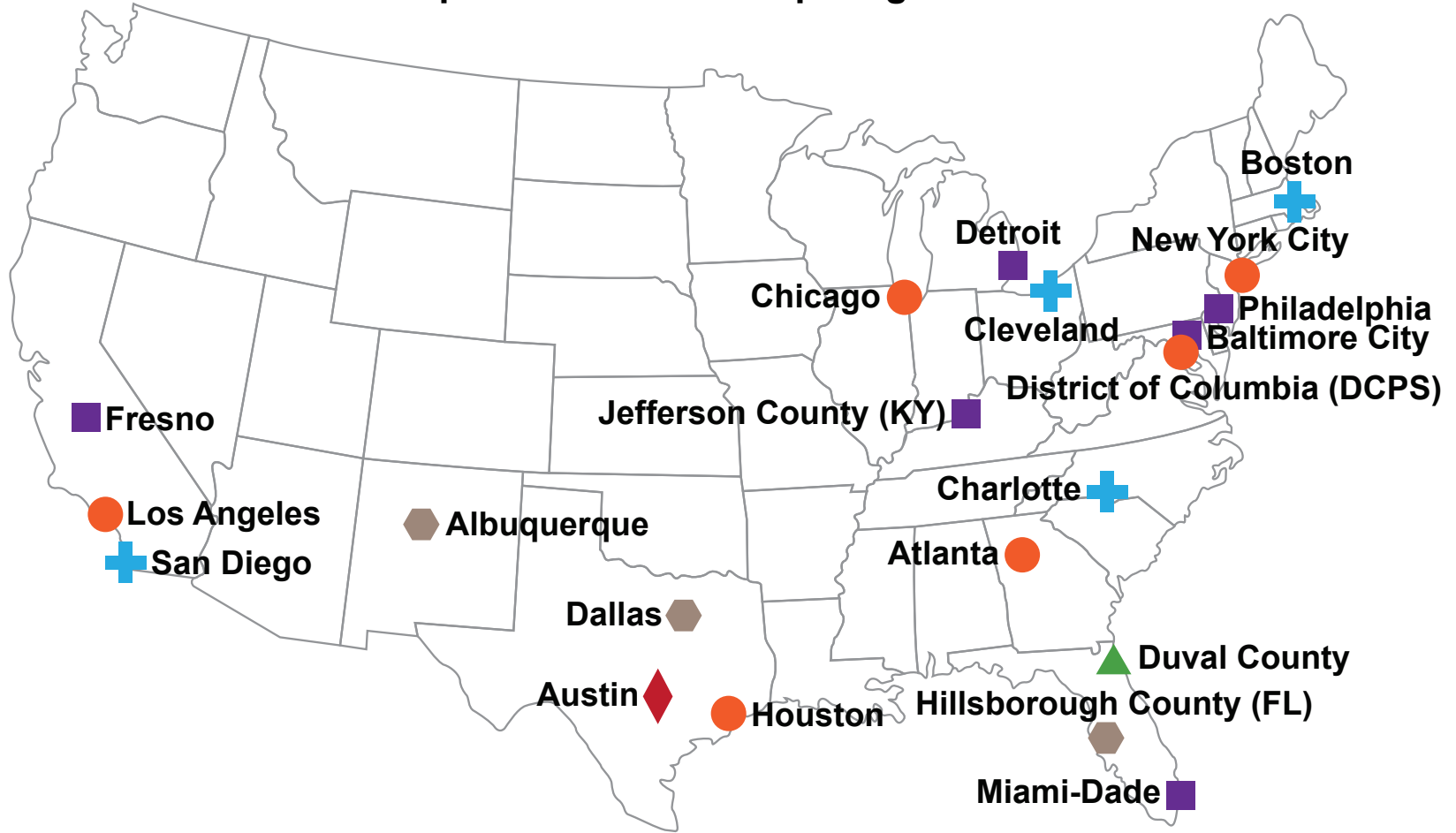
### **Districts Participating in the 2015 TUDA**

- 1) Albuquerque Public Schools (NM)
- 2) Atlanta Public Schools (GA)
- 3) Austin Independent School District (TX)
- 4) Baltimore City Public Schools (MD)
- 5) Boston Public Schools (MA)
- 6) Charlotte-Mecklenburg Schools (NC)
- 7) Chicago Public Schools (IL)
- 8) Cleveland Metropolitan School District (OH)
- 9) Dallas Independent School District (TX)
- 10) Detroit Public Schools (MI)
- 11) District of Columbia Public Schools (DC)
- 12) Duval County Public Schools (Jacksonville, FL)
- 13) Fresno Unified School District (CA)
- 14) Hillsborough County Public Schools (FL)
- 15) Houston Independent School District (TX)
- 16) Jefferson County Public Schools (KY)
- 17) Los Angeles Unified School District (CA)
- 18) Miami-Dade County Public Schools (FL)
- 19) New York City Public Schools (NY)
- 20) School District of Philadelphia (PA)
- 21) San Diego Unified School District (CA)

### **Additional Districts Eligible for Participation in the 2017 TUDA**

- 1) Arlington Independent School District (TX)
- 2) Clark County School District (NV)
- 3) Cypress-Fairbanks Independent School District (TX)
- 4) Davidson County Schools (including Nashville, TN)
- 5) Denver Public Schools (CO)
- 6) El Paso Independent School District (TX)
- 7) Elk Grove Unified School District (CA)
- 8) Fort Bend Independent School District (TX)
- 9) Fort Worth Independent School District (TX)
- 10) Guilford County Schools (NC)
- 11) Katy Independent School District (TX)
- 12) Long Beach Unified School District (CA)
- 13) Mesa Public School (AZ)
- 14) Milwaukee Public Schools (WI)
- 15) North East Independent School District (TX)
- 16) Northside Independent School District (TX)
- 17) Shelby County Schools (including Memphis, TN)

# Map of Districts Participating in TUDA



●  
2002  
(6)

+

2003  
(10)

◆

2005, 2007  
(11)

■

2009  
(18)

⬡

2011, 2013  
(21)

▲

2015  
(21)



**ACHIEVEMENT TASK FORCE**

# **COUNCIL OF THE GREAT CITY SCHOOLS**

## **Task Force on Achievement**

**2015-2016**

### ***Task Force Goal***

To assist urban public school systems in teaching all students to the highest academic standards and in closing identifiable gaps in the achievement of students by race.

### ***Task Force Chairs***

Eric Gordon, Cleveland CEO  
Paula Wright, Duval County School Board

## **ACADEMIC DEPARTMENT OVERVIEW**



# Academic Department Overview

## July 2015

### **Overall Academic Department Goals/Priorities**

The goal of the academic department is to support the work of urban districts to improve student achievement for all students in our member districts. The department collaborates with researchers to determine district systems and resources that correlate with improved student achievement. These results inform our recommendations to instructional leaders.

We share high-leverage information through videos and publications, and we provide on-site strategic support teams, webinars, job-alike conferences and workshops. Additionally, we facilitate networking and collaboration among our members.

Major efforts this year focus on supporting our members with the implementation of the Common Core State Standards and college and career-ready standards, testing the functionality of academic key performance indicators, providing additional opportunities for regional networking as districts implement college and career readiness standards, and piloting tools for alignment of instructional materials.

### **Update on Activities/Projects**

#### ➤ *Academic Key Performance Indicators*

##### *Overview*

The Council received a grant from the Bill and Melinda Gates Foundation to develop 20-25 academic key performance indicators (KPIs). The process is similar to the one used to develop operational KPIs. Three sub-committees have met to engage members in drafting KPIs for general education, special education, and English language learners.

##### *Update*

The list of potential KPIs has now been prioritized and indicators, where possible, link to costs and/or outcomes. A pilot survey form gathered district data from volunteer districts checking the clarity of data requests and the usefulness of initial academic key performance indicators. Draft reporting data graphs were presented to the Achievement Task Force at the March Legislative Conference, and will be discussed at the Curriculum and Research Directors Meeting, July 2015.

➤ *Implementing the Common Core State Standards and College and Career Readiness Standards*

*Overview*

The Council has long advocated for shared standards across states. The Council has received several grants to assist our members in implementing the new standards. The Council is working with member districts and strategic partners to coordinate and deepen successful implementation of the new K-12 standards in mathematics, English language arts and literacy, and science. The Council uses grant funding to enhance its academic support to members and to create and share a powerful selection of tools and videos for internal and external stakeholders.

*Update*

*Gates 2011 Grant*

To support our members, the Council developed the booklet, “**Beyond Test Scores: What NAEP Results Tell Us About Implementing the Common Core in Our Classrooms.**” This booklet analyzes selected released 2013 NAEP items and responses together with their implications for classroom instruction and for central office action. The academic team provided professional development on ways to use this document to refine district plans, coach and support teachers and other instructional staff, and make the necessary shift of focus from what the standards are to how to help students achieve them.

The Academics team joined with other departments in the development of a second set of three-minute public service announcements in English and in Spanish explaining how the Common Core State Standards will help students achieve at high levels and help them learn what they need to know to get to graduation and beyond. Thirty-second announcements derived from these videos are also posted on [www.cgcs.org](http://www.cgcs.org).

*Hewlett Grant for the development of Grade-Level Instructional Materials Tool--Quality Review (GIMET-QR)*

In August 2013, CGCS received a two-year grant from the Hewlett Foundation to develop grade-by-grade rubrics to further operationalize the Publisher’s Criteria in English language arts and literacy and in mathematics. Student Achievement Partners used the Publisher’s Criteria to design its Instructional Materials Evaluation Tools (IMET). Those rubrics address spans of grade levels and include a set of non-negotiables and alignment criteria.

We believe there will never be a perfect textbook that meets all the needs of every district. Even when a textbook series meets the non-negotiables in the IMET, districts will still need to examine the screened materials for the level of alignment within each grade level and the quality with which the materials address the learning aligned to the standards. The Council developed and published grade-by-grade rubrics

consistent with textbook adoption procedures used in urban districts. For each grade level, these rubrics amplify selected non-negotiable areas and alignment criteria so that districts can discriminate which sets of materials best fit their needs. They will also help districts determine priority areas to support the use of the classroom materials the district decides to adopt. The rubric, called the *Grade-Level Instructional Materials Tool-Quality Review (GIMET-QR)*, dovetails with the set of requirements for English language learners, *A Framework for Raising Expectations and Instructional Rigor for English Language Learners*, concurrently developed under the leadership of Gabriela Uro.

While GIMET-QR was designed to support textbook materials adoption, feedback from Council members piloting the tool indicates that there are additional uses: 1) to assess alignment and identify gaps/omissions in current instructional materials; 2) to assess alignment of district scope and sequence, and the rigor and quality of instructional tasks and assessments; and 3) to provide professional development that builds capacity and a shared understanding of the Common Core State Standards in ELA/Literacy and/or Mathematics.

The GIMET-QR tools can be found on [www.commoncoreworks.org](http://www.commoncoreworks.org) under *Quick Links* and on [www.cgcs.org](http://www.cgcs.org) under *Press Releases*.

#### *Gates Working Groups Grant*

The Council is the recipient of a 2014 grant from the Bill and Melinda Gates Foundation to help districts align common core implementation with other key reforms in effective teaching, as well as with efforts to prepare for new online assessments aligned to college and career-ready standards. The project brings together cross-functional teams of academic, research, assessment, technology, and operations staff from member school systems supported by Council staff. The Council also identified experts in key areas that could advance the work and an external consultant for project management.

The first working group developed recommendations for districts that administer on-line tests for PARCC or Smarter Balanced. The document “**Implementing the Common Core Assessments: Challenges and Recommendations**” provides a summary of the PARCC and SBAC assessments, challenges in implementing the new assessment, and recommendations for successfully implementing them.

On October 1-2, 2014, the second working group convened to collaboratively discuss and inform the development of implementation tools and make recommendations for steps districts might take to integrate, collaborate on, and monitor the effectiveness of the implementation of their multiple reform efforts.

#### ➤ *Common Core Website*

The Council launched a website where districts and organizations can potentially share high quality materials. The academic team presented the prototype for a secure portal of the Common Core website to the English Language Arts/Literacy and mathematics advisory committees. The committees provided feedback on the

content, formatting, and functionality of the secure portal. Currently, the academic team is collaborating with the communications department to incorporate this feedback into the design of the portal.

CGCS has placed many materials on its website to support district implementation of the Common Core.

- A set of grade-level rubrics that define the key features for reviewers to consider in examining the quality of instructional materials in **English Language Arts K-12**. This tool is known as the Grade-Level Instructional Materials Evaluation Tool-Quality Review (**GIMET-QR**).

<http://www.cgcs.org/Page/474>

- A set of grade-level rubrics that define the key features for reviewers to consider in examining the quality of instructional materials in **Mathematics K-8**. The key features include examples and guiding statements from the *Illustrative Mathematics* progression documents to clarify the criteria. This tool is known as the Grade-Level Instructional Materials Evaluation Tool-Quality Review (**GIMET-QR**).

<http://www.cgcs.org/Page/475>

- A series of questions about on-going Common Core implementation called a “Calendar of Questions” arranged by month, focusing on particular aspects of implementation for staff roles at various levels of the district, as well as for parents and students.

<http://cgcs.org/Page/409>

- A resource guide “*Communicating the Common Core State Standards: A Resource for Superintendents, School Board Members, and Public Relations Executives*”, that helps district leaders devise and execute comprehensive communication plans to strengthen public awareness about and support for college and career-readiness standards.
- Two 30-second Public Service Announcements (one in English and one in Spanish) that tells the public what the Common Core Standards are.

<http://www.commoncoreworks.org/Page/379>

- Two three-minute videos (one in English and one in Spanish) that explains the Common Core in a slightly longer form. This is particularly good for presentations to community and parent groups.

<http://www.commoncoreworks.org/Page/378>

- Two three-minute videos for 2015 (one in English and one in Spanish) to explain how the Common Core State Standards will help students achieve at

high levels and help them learn what they need to know to get to graduation and beyond.

<http://www.cgcs.org/Page/467>

- Two 30-second Public Service Announcements (one in English and one in Spanish) to increase public awareness regarding Common Core for English Language Arts. Also, two 30-second Public Service Announcements (one in English and one in Spanish) to increase public awareness regarding Common Core for Mathematics.

<http://www.cgcs.org/Page/468>

- A 45-minute professional development video for central office and school-based staff and teachers on the shifts in the Common Core in English language arts and literacy. The video can be stopped and restarted at various spots to allow for discussion.

<http://www.commoncoreworks.org/domain/127>

- A 45-minute professional development video for central office and school-based staff and teachers on the shifts in the Common Core in mathematics. The video can be stopped and restarted at various spots to allow for discussion.

<http://www.commoncoreworks.org/Page/345>

- A series of parent roadmaps to the Common Core in English languages arts and literacy, grades k-12 in English and grades k-8 in Spanish.

<http://www.commoncoreworks.org//site/Default.aspx?PageID=330>

**(English)**

<http://www.commoncoreworks.org//site/Default.aspx?PageID=365>

**(Spanish)**

- A series of parent roadmaps to the Common Core in mathematics, grades k-12 in English and k-8 in Spanish.

<http://www.commoncoreworks.org//site/Default.aspx?PageID=366>

**(English)**

<http://www.commoncoreworks.org//site/Default.aspx?PageID=367>

**(Spanish)**

- Classroom tools for adapting basal texts to the rigor of the Common Core in English language arts and literacy (scroll down to the bottom for directions on signing into EdModo):

<http://www.commoncoreworks.org/domain/112>



- Classroom tools and videos for teaching fractions across grades three through six.

<http://www.commoncoreworks.org/domain/120>

- A white paper outlining the key components of an integrated, multi-tiered system of supports and interventions needed by districts in the implementation of the common core. “Common Core State Standards and Diverse Urban School Students: Using Multi-tiered Systems of Support”

<http://www.commoncoreworks.org/domain/146>

- A 10-minute video of a New York City kindergarten ELL classroom illustrating Lily Wong Fillmore’s technique for ensuring that all students can access complex text using academic vocabulary as students study the metamorphosis of butterflies.

<http://www.commoncoreworks.org/domain/135>

Note: Other organizations have also linked our materials to their websites including the Council of Chief State School Officers, Math Forum, Student Achievement Partners, the National Governors’ Association, and NBC’s Education Nation.

➤ ***Building Awareness and Capacity of Urban Schools***

The department focuses strategically on projects that will benefit our members as they move forward with common core, college and career readiness standards, and with improving student achievement. First, we worked directly with the writers to ensure a shared understanding of the intent of the standards and the instructional and curricular shifts that they require. Now, we focus on enhancing the knowledge base of district curriculum leaders to inform their implementation planning and action steps regarding major implementation systems, including professional development, assessments, instructional resources, and student work products.

*English Language Arts Writing*

- The Council convened its latest two-day writing conference in Portland, Oregon on April 22-23, 2015. The literacy component focuses on practical approaches for teaching argumentative writing, deepening the knowledge of writing instruction that has been presented at previous writing retreats. The session included a new component addressing approaches for developing student writing in mathematics.
- The Council of the Great City Schools and Student Achievement Partners continue to co-sponsor the Text-Set Project to focus on how to use multiple reading selections on a theme or subject designed to deepen student understanding of the world, build academic vocabulary and knowledge of language structure.

The Text-Set Project is a professional learning opportunity that involves coaching and support in selecting the books and articles that could form a solid text set, learning how to sequence the set effectively, and how to support students in building knowledge about the world, words, and language structure as they read

the texts for themselves. District teams will produce text sets that are comprised of annotated bibliographies, suggested sequencing of texts, as well as suggested to provide a coherent learning experience for students. This is accompanied by teacher instructions and supports, as well as a variety of suggested tasks for ensuring students have learned from what they have read.

Expert reviewers work with each production team remotely to review the materials and coach the team until the Text Sets are ready to be published. These sets are currently available free of charge on Edmodo. Text-Set conferences have been held in Chicago, Baltimore, Providence, Clark County, Milwaukee, and Portland.

Any member district can request this professional learning opportunity.

### ***Additional Free Online Resources***

- The Council together with Student Achievement Partners has launched several projects to assist districts in locating useful materials and updating current materials to meet the instructional shifts required by Common Core and College and Career Readiness Standards.
  - For **grades K-2**, the **Read-Aloud Project (RAP)**: Participating districts bring teams of curriculum, English language learning specialists, and Special Education staff for two days of training and then take ownership for writing text-dependent questions to go with chapter and picture books they select. Vetted RAP resources are currently posted on Edmodo. There are more than 100 RAP lessons that have been vetted and posted on Edmodo. The RAP group has grown to nearly 3500 members.
  - For **grades 3-5**, the **Basal Alignment Project (BAP)**: BAP utilizes commonly adopted, existing basal readers and develops text-dependent questions and highlight important vocabulary to update the material to meet shifts required by the Common Core. The Basal Alignment Project Group has grown to over 40,000 members with over 300 revisions to the questions currently published for textbook readings posted on Edmodo.
  - For **grades 6-10**, the **Anthology Alignment Project (AAP)** group has over 9,000 members with approximately 200 AAP revisions posted. Like BAP, teams write text-dependent questions and highlight vocabulary within currently adopted anthologies. Additional units are being added within RAP, BAP, and AAP project groups as they are vetted.

### ***Mathematics and Science***

- The Council is partnering with a University of Chicago team at the Center for Elementary Mathematics and Science Education to review and provide feedback on a toolbox for K-12 teachers, administrators and district leaders. The mathematics advisory committee met with representatives from the University of Chicago to provide feedback on proposed components of the toolbox. This toolbox will help urban districts make decisions about improving computer science education at scale.

- The Council partnered with the Vermont Writing Collaborative and the Lawrence Hall of Mathematics and Science to conduct a two-day professional learning experience. The topics for this meeting include:
  - Argument Writing: The Apex of Deep Understanding
  - Using The Three Reads to Support Close Reading and Problem Solving in Mathematics, which includes attention to ELL students and students with gaps in their learning.

➤ *Curriculum and Research Directors Conference*

The Curriculum and Research Directors Conference met in **Los Angeles, CA** from July 23-26, 2014. Discussions covered common core implementation, summative and formative assessments, analysis of selected 2013 NAEP items aligned with common core and their implications for classroom instruction, tools by which to determine the alignment with new standards and the quality of instructional materials, selecting materials for ELLs, new general education key performance indicators, progress on turnaround schools, disproportionality, and other topics.

The Curriculum and Research Directors' Conference, **Chicago, July 14-18, 2015**. The conference will engage participants on how to communicate across silos to improve alignment and coherence while leveraging resources toward building a shared vision. This year, the Council extended invitations to lead principal supervisors in order to jointly discuss developing and maintaining productive communications across teaching and learning and school divisions that will lead to improved student achievement.

**GRADE-LEVEL INSTRUCTIONAL MATERIALS  
EVALUATION TOOL**

# ELA/Literacy Grade-Level Instructional Materials Evaluation Tool

## Quality Review



Textbooks and their digital counterparts are not only vital classroom tools but also a major expense, and it is worth taking time to find the best quality materials for students and teachers. While there is no perfect set of materials or textbooks, this Grade-Level Instructional Materials Evaluation Tool-Quality Review (GIMET-QR) is designed for use by professionals as a framework for evaluating the quality of instructional materials and choosing materials that are best suited to provide a coherent learning experience for students.

The district should begin its textbook adoption process by screening an entire publisher series with the Instructional Materials Evaluation Toolkit ([IMET](#)), developed by Student Achievement Partners, to see which ones are worthy of deeper consideration. The IMET, built on the [Publishers' Criteria](#) for ELA/Literacy and Mathematics, has two major non-negotiable sections and seven alignment sections. The GIMET-QR mirrors that structure, providing key criteria for each individual grade. But rather than providing an exhaustive list of grade-level standards, GIMET-QR focuses on the most distinctive, key features of the standards by grade, allowing for more in-depth analysis of the quality of the content and the instructional design of the materials—the rigor called for in the [Common Core State Standards \(CCSS\)-English Language Arts and Literacy in History/Social Studies, Science, and Technical Subjects](#).

This document contains Guiding Statements along with references to the CCSS. In response to each Guiding Statement, reviewers are asked to cite specific supporting evidence from the materials themselves, rather than relying on the table of contents or the topic headings. Evidence should include scaffolding to support ALL students including [English language learners](#), students with identified disabilities, and struggling readers with the expectation that they learn and achieve the grade-level standards. This supporting evidence can then be used to rate whether and to what degree the criteria have been met. In some cases, reviewers will want to click on the reference links to obtain more detailed information from the Reading, Writing, Speaking and Listening, and Language strands of the CCSS, as well as the CCSS Appendices.

The review process culminates with a summary in which reviewers cite strengths and weaknesses of the product, thus providing explicit details for the overall assessment. The summary may also indicate any areas that district curriculum leaders may need to augment or supplement prior to making a recommendation for purchase.

**Please note:** [Acrobat Reader](#) or Adobe Acrobat is required to complete this form electronically and save any data entered by users.

## NON-NEGOTIABLE 1: TEXT COMPLEXITY

Even though the materials under review have already met the quantitative and qualitative measures of the *IMET* for grade-band analysis, the guiding statements provided in this section will examine text complexity in order to differentiate quality and richness among the texts your district is considering for adoption. To address the grade three standards, the submitted materials need to create the conditions for rich and robust discussion and writing for ALL students (struggling readers, students with identified academic disabilities, *English language learners*, students who are performing at grade level, and advanced students).

GUIDING STATEMENTS	SPECIFIC EVIDENCE FROM THE TEXT/MATERIALS	EVIDENCE RATING
<p><b>Literature and Informational Text</b></p> <p>NN1a. The texts present rich and embedded relationships between and among characters, ideas, and concepts that are conveyed through masterful style and structure. (See <a href="#">exemplars in CCSS, Appendix B.</a>)</p>		<p>4) extensive 3) sufficient 2) some 1) weak Rating Pending</p>
<p>NN1b. The materials consistently include short, challenging, and complete texts that contain rich content, ideas, and academic language worthy of <u>close</u> reading. (See <a href="#">exemplars in CCSS, Appendix B.</a>)</p>		<p>4) extensive 3) sufficient 2) some 1) weak Rating Pending</p>

<p>NN1c. The materials consistently provide opportunities to read both literary and informational texts in the grades three through five text complexity band with scaffolding as needed at the high end of the range.</p>		<p>4) extensive 3) sufficient 2) some 1) weak Rating Pending</p>
<p>NN1d. Materials provide strategies for grade-level vocabulary acquisition.</p>		<p>4) extensive 3) sufficient 2) some 1) weak Rating Pending</p>
<p><b>OVERALL RATING:</b>    4) extensive evidence    3) sufficient evidence    2) some evidence    1) weak evidence</p>		
<p><b>SUMMARY STATEMENT (Explain why the materials received this overall rating):</b></p>		

## NON-NEGOTIABLE 2: QUESTIONS AND TASKS

At least 80% of all questions in the submission are high-quality text-dependent and text-specific questions. The overwhelming majority of these questions reference specific text and draw student attention to the text they are reading. This requirement is already met if the district used the *IMET* screen. Text-dependent questions that address the grade three standards will be described in greater depth in Alignment Criterion II.

## ALIGNMENT CRITERION I: RANGE AND QUALITY OF TEXTS

Materials must reflect a wide range of text types and genres, as required by the standards. In grade three, and across all other grade levels, there should be ample texts on topics that can support sustained study. Knowledge built at one grade level should be expanded in other grade levels. Topics should take into account individual student academic needs and interests in order to foster independent reading. It is also imperative that the included topics and themes are compelling enough to read multiple times and are aligned to district needs. Pay particular attention to the guidance provided in *Appendix B* of the Common Core State Standards.

GUIDING STATEMENTS	SPECIFIC EVIDENCE FROM THE TEXT/MATERIALS	EVIDENCE RATING
<p><b>Literature and Informational Text</b></p> <p>1a. The range of materials, both <b>print</b> and <b>digital</b>, allows teachers and students to explore content that coherently and systematically builds knowledge and vocabulary across subjects, themes, and topics. (See <a href="#">CCSS Appendix B</a> for examples of grade-level knowledge demands.) Text sets also address a wide variety of student interests, and are likely to foster independent reading.</p>		<p>4) extensive 3) sufficient 2) some 1) weak Rating Pending</p>
<p>1b. Text sets include a diverse range of high-quality, culturally-responsive, and appropriate topics and themes. Texts from diverse cultures reflect the same high-quality features that are demanded of all texts.</p>		<p>4) extensive 3) sufficient 2) some 1) weak Rating Pending</p>



GUIDING STATEMENTS	SPECIFIC EVIDENCE FROM THE TEXT/MATERIALS	EVIDENCE RATING
<p>1c. Materials include a rich and diverse sampling of literary texts including, but not limited to:</p> <ul style="list-style-type: none"> <li>• Fables, folktales, and myths from diverse cultures</li> <li>• Stories, drama, and poetry</li> <li>• Multiple stories by the same author</li> </ul>		<p>4) extensive 3) sufficient 2) some 1) weak Rating Pending</p>
<p>1d. The range of informational texts include selections that:</p> <ul style="list-style-type: none"> <li>• Present historical events</li> <li>• Describe technical procedures</li> <li>• Present scientific ideas or concepts</li> <li>• Contain relevant visual representations of information</li> <li>• Contain at least two texts on the same topic</li> </ul>		<p>4) extensive 3) sufficient 2) some 1) weak Rating Pending</p>
<p>1e. Student reading materials contain a range of increasingly challenging selections that allow teachers to build students' ability to comprehend complex text and expand vocabulary throughout the school year.</p>		<p>4) extensive 3) sufficient 2) some 1) weak Rating Pending</p>
<p><b>OVERALL RATING:</b>    4) extensive evidence    3) sufficient evidence    2) some evidence    1) weak evidence</p>		
<p><b>SUMMARY STATEMENT (Explain why the materials received this overall rating):</b></p>		

## ALIGNMENT CRITERION II. QUESTIONS AND TASKS SUPPORT STUDENT LEARNING

Questions posed to students in the materials under review should support student learning in building reading comprehension, in finding and producing the textual evidence to support responses, and in developing grade-level academic language (*IMET*) and domain-specific words and phrases. Text for grade three students must include text-dependent questions that require the use of higher order thinking skills. There should be a range of questions that require students to attend to the author’s language as his/her vehicle for conveying meaning, as well as to support specific inferences with explicit details from the text. Most questions should require that the student refer to the text in several places in order to devise an answer—rather than asking only literal, “right there” types of questions—and should also require the student to begin comparing texts, authors, and opinions (*CCSS*).

GUIDING STATEMENTS	SPECIFIC EVIDENCE FROM THE TEXT/MATERIALS	EVIDENCE RATING
<p><b>Literature and Informational Text</b></p> <p>2a. <i>Key Ideas and Details</i>. Questions and tasks require students to explicitly attend to the text, including, but not limited to:</p> <ul style="list-style-type: none"> <li>• Asking and answering questions to demonstrate understanding of a text, referring to the text as the basis for answers</li> <li>• Recounting stories, including fables, folktales, and myths from diverse cultures</li> <li>• Determining the central message, theme, or idea of a text, recounting key supporting details</li> <li>• Describing the characters in a story and explaining how their actions contribute to the sequence of events</li> <li>• Describing the relationship between a series of historical events, scientific concepts, or steps in technical procedures</li> </ul>		<p>4) extensive            3) sufficient            2) some            1) weak            Rating Pending</p>

GUIDING STATEMENTS	SPECIFIC EVIDENCE FROM THE TEXT/MATERIALS	EVIDENCE RATING
<p>2b. <i>Craft and Structure</i>. Questions and tasks require students to explicitly attend to the text, including, but not limited to:</p> <ul style="list-style-type: none"> <li>• Determining the meaning of words and phrases used in a text, including general academic and domain-specific words, and distinguishing literal from nonliteral language</li> <li>• Referring to parts of stories, dramas, or poems, using terms such as chapter, scene, and stanza, and how the parts build on earlier sections</li> <li>• Distinguishing their own point of view from that of the author, narrator, or characters in a text</li> <li>• Using text features and search tools such as key words and side bars</li> </ul>		<p>4) extensive 3) sufficient 2) some 1) weak Rating Pending</p>
<p>2c. <i>Integration of Knowledge and Ideas</i>. Questions and tasks require students to explicitly attend to the text, including, but not limited to:</p> <ul style="list-style-type: none"> <li>• Comparing and contrasting the most important points and details presented in two texts on the same topic</li> <li>• Comparing and contrasting the themes, settings, and plots of stories</li> <li>• Explaining how specific aspects of a text's illustrations contribute to what is described in words</li> <li>• Using information gained from illustrations</li> </ul>		<p>4) extensive 3) sufficient 2) some 1) weak Rating Pending</p>
<p><b>OVERALL RATING:</b>    4) extensive evidence    3) sufficient evidence    2) some evidence    1) weak evidence</p>		
<p><b>SUMMARY STATEMENT (Explain why the materials received this overall rating):</b></p>		

## ALIGNMENT CRITERION III. WRITING TO SOURCES AND RESEARCH

The writing standards for each grade level highlight distinctive expectations about student writing. For details on grade-level writing expectations and writing exemplars for grade three, see the [Common Core State Standards for English Language Arts and Literacy](#). The metrics below show key characteristics to look for in your review of materials.

GUIDING STATEMENTS	SPECIFIC EVIDENCE FROM THE TEXT/MATERIALS	EVIDENCE RATING
<p>3a. Writing assignments are explicitly connected to what students are reading, and routinely include writing over shorter time frames (a single sitting or a day or two) and extended time frames (for research, reflection, and revision) for a range of discipline-specific tasks, purposes, and audiences.</p>		<p>4) extensive 3) sufficient 2) some 1) weak Rating Pending</p>
<p>3b. Text-dependent questions generally create the foundation for students to address culminating writing tasks, including:</p> <ul style="list-style-type: none"> <li>• Writing opinion pieces on topics or texts, supporting a point of view with reasons</li> <li>• Writing informative/explanatory texts to examine a topic and convey ideas and information clearly</li> <li>• Writing narratives to develop real or imagined experiences or events using effective technique, descriptive details, and clear sequences of events</li> </ul>		<p>4) extensive 3) sufficient 2) some 1) weak Rating Pending</p>
<p>3c. Reading materials can serve as models to explore writer's craft, demonstrate use of domain-specific words and phrases, and support student production of grade-level narrative, informational, and opinion writing.</p>		<p>4) extensive 3) sufficient 2) some 1) weak Rating Pending</p>

GUIDING STATEMENTS	SPECIFIC EVIDENCE FROM THE TEXT/MATERIALS	EVIDENCE RATING
<p>3d. Materials include explicit support to teachers, either in the teacher’s edition or classroom materials, for writing instruction linked to the grade three writing standards, including:</p> <ul style="list-style-type: none"> <li>• Producing writing in which the development and organization are appropriate to the task and purpose</li> <li>• Developing and strengthening writing by planning, revising, and editing</li> <li>• Using technology to produce and publish writing, as well as to interact and collaborate with others</li> </ul> <p>Materials should also guide the teaching of specific components of grade three writing standards 1-3 (See <a href="#">CCSS</a>).</p>		<p>4) extensive 3) sufficient 2) some 1) weak Rating Pending</p>
<p>3e. Materials provide opportunities and resources for students to conduct short research projects that build knowledge about a topic, including:</p> <ul style="list-style-type: none"> <li>• Recalling information from experiences</li> <li>• Gathering information from print and digital sources</li> <li>• Taking brief notes on sources and sorting evidence into provided categories</li> </ul>		<p>4) extensive 3) sufficient 2) some 1) weak Rating Pending</p>
<p><b>OVERALL RATING:</b>    4) extensive evidence    3) sufficient evidence    2) some evidence    1) weak evidence</p>		
<p><b>SUMMARY STATEMENT (Explain why the materials received this overall rating):</b></p>		

## ALIGNMENT CRITERION IV: FOUNDATIONAL SKILLS

*Materials provide guidance and support for explicit and systematic instruction and diagnostic support in grade-level phonics, vocabulary development, syntax, and reading fluency. Students must be able to recognize and pronounce words fluently in order to focus on the major goal of reading, which is comprehension. Effective foundational skills instruction in grade three includes an explicit and systematic focus on phonics and practice in applying phonics for students who are struggling. Building word analysis skills and fluency must also be contextualized within the materials.*

GUIDING STATEMENTS	SPECIFIC EVIDENCE FROM THE TEXT/MATERIALS	EVIDENCE RATING
<p>4a. Materials provide teachers with guidance and support for explicit and systematic instruction of the <a href="#">grade three Reading Standards for Foundational Skills</a>, including phonics, word analysis, and reading with fluency to support comprehension. (Refer to <a href="#">CCSS, Appendix A</a> for the research detailing the advancement of foundational skills in reading.)</p>		<p>4) extensive 3) sufficient 2) some 1) weak Rating Pending</p>
<p>4b. Materials include a variety of opportunities for students to develop and apply word analysis and decoding skills, including:</p> <ul style="list-style-type: none"> <li>• Understanding grade-level vocabulary</li> <li>• Identifying and knowing the meaning of most common prefixes and derivational suffixes</li> <li>• Decoding words with common Latin suffixes</li> <li>• Understanding multisyllabic words in context and out of context</li> <li>• Reading grade-appropriate irregularly-spelled words</li> <li>• Self-correcting using word recognition skills and context to confirm understanding</li> </ul>		<p>4) extensive 3) sufficient 2) some 1) weak Rating Pending</p>

GUIDING STATEMENTS	SPECIFIC EVIDENCE FROM THE TEXT/MATERIALS	EVIDENCE RATING
4c. Materials provide regular practice in reading grade-level prose and poetry with accuracy, at an appropriate rate, and with appropriate expression.		4) extensive 3) sufficient 2) some 1) weak Rating Pending
4d. Materials guide students in reading grade-level texts with purpose and understanding, making frequent connections between the acquisition of foundational skills and access to the meaning of texts (including a set of text-dependent or text-specific questions to check for understanding).		4) extensive 3) sufficient 2) some 1) weak Rating Pending
<b>OVERALL RATING:</b> 4) extensive evidence    3) sufficient evidence    2) some evidence    1) weak evidence		
<b>SUMMARY STATEMENT (Explain why the materials received this overall rating):</b>		

## ALIGNMENT CRITERION V: LANGUAGE

The Common Core State Standards for language focus on ensuring that students gain adequate mastery of a range of language skills and applications. Students are expected to meet each year's grade-specific standards and retain or further develop skills, knowledge, and vocabulary gained in preceding grades (CCSS).

GUIDING STATEMENTS	SPECIFIC EVIDENCE FROM THE TEXT/MATERIALS	EVIDENCE RATING
<p><b>Conventions of Standard English</b></p> <p>5a. There is evidence that grade-level grammar and conventions are addressed using an integrated and contextualized approach in daily instruction. Materials and tasks in grade three are designed to help build student understanding and use of:</p> <ul style="list-style-type: none"> <li>• Nouns (abstract, regular, and irregular)</li> <li>• Possessive pronouns</li> <li>• Regular and irregular verbs, and the simple verb tenses</li> <li>• Comparative and superlative adjectives and adverbs</li> <li>• Coordinating and subordinating conjunctions in writing compound and complex sentences</li> <li>• Commas (such as in addresses and with quotations in dialogue)</li> <li>• Correct spelling and capitalization, applying knowledge of spelling patterns and generalizations in writing words</li> </ul>		<p>4) extensive 3) sufficient 2) some 1) weak Rating Pending</p>
<p><b>Knowledge of Language</b></p> <p>5b. The materials support instruction on:</p> <ul style="list-style-type: none"> <li>• Choosing words and phrases for effect</li> <li>• Recognizing differences between the conventions of spoken and written English</li> </ul>		<p>4) extensive 3) sufficient 2) some 1) weak Rating Pending</p>



GUIDING STATEMENTS	SPECIFIC EVIDENCE FROM THE TEXT/MATERIALS	EVIDENCE RATING
<p><b>Vocabulary Acquisition and Use</b></p> <p>5c. The materials provide context, support, and strategies for developing vocabulary acquisition skills, including:</p> <ul style="list-style-type: none"> <li>• Using sentence-level context clues to unlock the meaning of words</li> <li>• Using affixes and roots as clues to the meaning of words</li> <li>• Consulting glossaries or beginning dictionaries to determine the meaning of words</li> </ul>		<p>4) extensive 3) sufficient 2) some 1) weak Rating Pending</p>
<p>5d. The materials provide embedded opportunities for students to encounter and develop an understanding of word relationships and nuances in word meanings.</p>		<p>4) extensive 3) sufficient 2) some 1) weak Rating Pending</p>
<p><b>OVERALL RATING:</b>    4) extensive evidence    3) sufficient evidence    2) some evidence    1) weak evidence</p>		
<p><b>SUMMARY STATEMENT (Explain why the materials received this overall rating):</b></p>		

## ALIGNMENT CRITERION VI: SPEAKING AND LISTENING

To be CCSS-aligned, speaking and listening must be integrated into lessons, items, and tasks. These must reflect a progression of communication skills required for eventual college- and career-readiness, as outlined in the standards (see [IMET](#)). If grade three students are able to listen to others, discuss what they are learning, and voice their own confusion or misunderstandings, their learning becomes deeper and more meaningful. They are exposed, at this level, to points of view that may differ from their own, and they learn how to agree and disagree, express their own thoughts, and ask questions when they don't understand or need more clarification (CCSS).

GUIDING STATEMENTS	SPECIFIC EVIDENCE FROM THE TEXT/MATERIALS	EVIDENCE RATING
<p>6a. <i>Comprehension and Collaboration</i>. Materials provide a language framework that guides student participation in academic conversations, including the ability to:</p> <ul style="list-style-type: none"> <li>• Come to a discussion prepared</li> <li>• Follow agreed upon rules/roles</li> <li>• Pose and respond to specific questions to clarify or follow up on information</li> <li>• Review key ideas and explain their own ideas</li> <li>• Differentiate between contexts for formal English and situations where informal discourse is appropriate</li> <li>• Use accurate, grade-appropriate conversational, general academic, and domain-specific words and phrases</li> </ul>		<p>4) extensive            3) sufficient            2) some            1) weak            Rating Pending</p>

GUIDING STATEMENTS	SPECIFIC EVIDENCE FROM THE TEXT/MATERIALS	EVIDENCE RATING
<p>6b. <i>Presentation of Knowledge and Ideas</i>. Materials provide a language framework for student planning of effective presentations, focusing on:</p> <ul style="list-style-type: none"> <li>• How to report on a topic using evidence to present findings from their research</li> <li>• How to tell a story or recount an experience</li> <li>• How to use appropriate facts and relevant details to support ideas</li> <li>• How to speak in complete sentences when appropriate to the task and situation</li> </ul>		<p>4) extensive 3) sufficient 2) some 1) weak Rating Pending</p>
<p><b>OVERALL RATING:</b>    4) extensive evidence    3) sufficient evidence    2) some evidence    1) weak evidence</p>		
<p><b>SUMMARY STATEMENT (Explain why the materials received this overall rating):</b></p>		

## ALIGNMENT CRITERION VII: SCAFFOLDING AND SUPPORTS

*While scaffolds are not a part of the standards themselves, it is important to support teachers in meeting the needs of the range of students in their classrooms.<sup>1</sup> In order to meet the reading, speaking, and writing needs of **all** grade three students, the materials must include supports for students to comprehend texts at the grades three through five complexity band as required, and at the high end of this complexity band with scaffolding. Supports and scaffolds should draw students back to the text and provide strategies for vocabulary acquisition. All scaffolding and support requires ongoing formal and informal assessments that provide multiple opportunities for students to demonstrate their proficiency and inform instruction.*

*As stated in the IMET, it is important to note that scaffolding is not just intended for struggling students, but also for students who are ready for above grade-level work. As text complexity increases and tasks get increasingly challenging, the need for appropriate scaffolds for above grade-level access is equally important (CCSS).*

GUIDING STATEMENTS	SPECIFIC EVIDENCE FROM THE TEXT/MATERIALS	EVIDENCE RATING
<p>7a. The texts promote differentiated instruction and instructional conversations about text to support student learning of:</p> <ul style="list-style-type: none"> <li>• Academic language</li> <li>• Linguistic frames</li> <li>• Repeated grammatical structures and language</li> </ul>		<p>4) extensive 3) sufficient 2) some 1) weak Rating Pending</p>
<p>7b. The materials include student supports such as:</p> <ul style="list-style-type: none"> <li>• Multiple digital and media versions of texts</li> <li>• Illustrations</li> <li>• Graphs and charts</li> <li>• Maps and photographs</li> <li>• Visual cues/notes that draw attention to words in the text that signal sequence or offer clues to meaning (such as where, when, and how key events occur)</li> </ul>		<p>4) extensive 3) sufficient 2) some 1) weak Rating Pending</p>

<sup>1</sup> For additional considerations for ELLs, see *A Framework for Raising Expectations and Instructional Rigor for English Language Learners*

GUIDING STATEMENTS	SPECIFIC EVIDENCE FROM THE TEXT/MATERIALS	EVIDENCE RATING
<p>7c. The materials are designed to support teacher instruction by use of:</p> <ul style="list-style-type: none"> <li>• Explicit instructional directions accompanied by materials that are clearly aligned to stated goals and objectives that build student ability to read and comprehend grade-level text</li> <li>• Strategies to gradually increase difficulty as students' comprehension skills strengthen</li> <li>• Strategies to support student acquisition of knowledge supporting specific common core standards</li> <li>• Clear and detailed teacher directions and guidance for introducing new concepts and skills</li> <li>• Clear guidance for documenting student progress toward meeting grade-level standards</li> </ul>		<p>4) extensive 3) sufficient 2) some 1) weak Rating Pending</p>
<p>7d. The materials provide support for student learning through varying modalities (i.e., there are provisions for print, digital, and other multimedia sources for information attainment).</p>		<p>4) extensive 3) sufficient 2) some 1) weak Rating Pending</p>

GUIDING STATEMENTS	SPECIFIC EVIDENCE FROM THE TEXT/MATERIALS	EVIDENCE RATING
<p>7e. The materials include assessments along with:</p> <ul style="list-style-type: none"> <li>• Suggestions for next steps to address a spectrum of performance levels and needs based on assessment results</li> <li>• Opportunities for students to demonstrate their expertise through the use of performance tasks</li> <li>• Pieces of challenging and complete text that can be used to assess student understanding and next instructional steps</li> <li>• Reading selections and questions that progress in a logical sequence for gradual release<sup>2</sup></li> <li>• Enrichment tasks for students who are on target for meeting grade-level expectations</li> <li>• Steps to take when evidence suggests that students are starting to fall behind</li> </ul>		<p>4) extensive 3) sufficient 2) some 1) weak Rating Pending</p>
<p><b>OVERALL RATING:</b>    4) extensive evidence    3) sufficient evidence    2) some evidence    1) weak evidence</p>		
<p><b>SUMMARY STATEMENT (Explain why the materials received this overall rating):</b></p>		

<sup>2</sup> Gradual release: scaffolding of instruction so that students develop the ability to read and complete tasks and assignments independently and proficiently.

# DECISION RECORDING SHEET

Completed by: \_\_\_\_\_

Date: \_\_\_\_\_

*Based on the substantial evidence collected and the analysis you have done as you reviewed these materials, complete the following form. Please add comments about what influenced your decision in each of the areas listed below.*

RUBRIC SECTION	QUALITATIVE SUMMARY OF EVIDENCE	RATING
<b>Non-Negotiable 1: Text Complexity</b>		4) extensive 3) sufficient 2) some 1) weak
<b>Non-Negotiable 2: Questions and Tasks</b>		meets does not meet
<b>Alignment Criterion I: Range and Quality of Texts</b>		4) extensive 3) sufficient 2) some 1) weak
<b>Alignment Criterion II: Questions and Tasks Support Student Learning</b>		4) extensive 3) sufficient 2) some 1) weak
<b>Alignment Criterion III: Writing to Sources and Research</b>		4) extensive 3) sufficient 2) some 1) weak

RUBRIC SECTION	QUALITATIVE SUMMARY OF EVIDENCE	RATING
<b>Alignment Criterion IV: Foundational Skills</b>		4) extensive 3) sufficient 2) some 1) weak
<b>Alignment Criterion V: Language</b>		4) extensive 3) sufficient 2) some 1) weak
<b>Alignment Criterion VI: Speaking and Listening</b>		4) extensive 3) sufficient 2) some 1) weak
<b>Alignment Criterion VII: Scaffolding and Supports</b>		4) extensive 3) sufficient 2) some 1) weak
<b>OVERALL RATING:</b> 4) extensive evidence    3) sufficient evidence    2) some evidence    1) weak evidence		
<b>GENERAL COMMENTS:</b>		



# ADOPTION COMMITTEE RECOMMENDATION FORM

*Based on the substantial evidence collected, please rank all the grade three materials you reviewed in the order in which you would recommend them for adoption. The program or materials with your highest recommendation should be listed as number one below. Please provide any comments you deem pertinent. Include answers to the following questions based on the evidence cited in your materials review:*

- **What are the top three strengths of this text?**
- **What areas need improvement?**
- **What additional supports would be needed to implement the textbook series or digital materials?**

RECOMMENDED	
PROGRAM NAME/EDITION:	COMMENTS:
1	
2	
3	

*continued >*

**NOT RECOMMENDED**

	PROGRAM NAME/EDITION:	COMMENTS:
1		
2		
3		

Completed by: \_\_\_\_\_

Date: \_\_\_\_\_

# Mathematics Grade-Level Instructional Materials Evaluation Tool

## Quality Review

Textbooks and their digital counterparts are vital classroom tools but also a major expense, and it is worth taking time to find the best quality materials for students and teachers. While there is no perfect set of materials or textbooks, this Grade-Level Instructional Materials Evaluation Tool-Quality Review (GIMET-QR) is designed for use by professionals as a framework for evaluating the quality of instructional materials and choosing materials that are best suited to provide a coherent learning experience for students.

The district should begin its textbook adoption process by screening an entire publisher series with the [Instructional Materials Evaluation Toolkit \(IMET\)](#), developed by Student Achievement Partners, to see which ones are worthy of deeper consideration. The GIMET-QR can then be used to evaluate materials *for each individual grade*. But rather than providing an exhaustive list of grade-level standards, GIMET-QR starts with the progression to algebra continuum as the major area of focus, allowing for the in-depth review of a smaller set of mathematical concepts covered in the [Common Core State Standards Mathematics \(CCSS-M\)](#) at each grade level.

The GIMET-QR focuses on both the quality of the *content* and the instructional *design* of materials—with a specific focus on evaluating whether materials contain a balance of the three components of rigor (conceptual understanding, applications, and fluency) called for in CCSS-M. Unlike many tools that evaluate the presence or absence of required content, the GIMET-QR prompts reviewers to ask, “How *well* do the materials and assignments reflect and support the rigor of the CCSS-M?”

To answer this question, GIMET-QR contains Guiding Statements along with references to the CCSS for each statement. In response to each Guiding Statement, reviewers are asked to cite specific supporting evidence from the materials themselves, rather than relying on the table of contents or the topic headings. This supporting evidence can then be used to rate whether and to what degree the criteria have been met so that all students have access to a quality mathematics program.

It is important to keep in mind that quality is not defined as “compliance” or a mere checklist of topics. The GIMET-QR aims to help schools and districts choose materials that will provide the best overall learning experience for their students. The distinctive features of instructional materials, like style and appeal that contribute to engaging students in mathematics, should therefore be considered along with the mathematical content and cognitive demand.

The review process culminates with a summary in which reviewers cite strengths and weaknesses of the product, thus providing explicit details for the overall assessment. The summary may also indicate, prior to making a recommendation for purchase, any areas that district curriculum leaders may need to augment or supplement.

**Please note:** [Acrobat Reader](#) or Adobe Acrobat is required to complete this form electronically and save any data entered by users.



The *GIMET-QR for Mathematics* is divided into four sections:

### I. “CCSS-M” clusters and standards along the “progression to algebra continuum” for grade three

This first section focuses on the content of the materials under review and on the quality of the explanations and connections that develop the concepts and skills for the algebra continuum in grade three. This section features “guiding statements” that require reviewers to examine the quality of the materials, as well as the assignments that address the level of rigor in CCSS-M. The statements about materials and assignments are similar, but their focus is different. While the materials statements ask the reviewer to show evidence about the quality of how concepts and skills are attended to in the text or digital resource under review, the assignments statements ask the reviewer to cite evidence that students are given the opportunity to apply their understanding of those concepts and skills.

The statements in bold print in GIMET-QR refer to the CCSS-M clusters (i.e., 3.NBT.1-3) for reviewers to use in considering the quality of materials and assignments. The reviewer may notice that the wording of the cluster heading is somewhat different than what is written in CCSS-M. This was done to address what materials and assignments could offer in support of the cluster standards. However, the essential wording of the cluster headings is maintained. The standards indicated within GIMET-QR are listed as written in CCSS-M. In grade three, the “CCSS progression documents,” from the Institute of Mathematics,<sup>1</sup> were used to provide additional specificity and clarity for the reviewers about what to look for in *Operations and Algebraic Thinking*, *Number and Operations – Fractions (Grades 3-5)*, and *K-5 Measurement*. This progression information within the document is indicated using an indentation and preceded by the symbol (▶).

### II. Decision Recording Sheets: Quality Criteria for Conceptual Understanding, Applications, and Fluency with an accompanying rubric for high quality/exciting materials and assignments

The second section asks the reviewer to reflect on the findings from the first section to answer the question of how well the materials reflect and support the rigor of the CCSS-M. Reviewers are asked to consider how well the materials support teachers and engage students. Judgments are made after organizing the evidence around each of three dimensions of rigor—**conceptual understanding, applications, and fluency**. Reviewers assign one of three ratings: **High Quality/Exciting, Good Quality** or **Minimal Quality**. The section also includes a rubric which describes high quality/exciting materials and establishes the highest criteria for both materials and assignments.

### III. Adoption Committee Recommendation Form

The third section, to be completed after reviewing multiple submissions for adoption, is an *Adoption Committee Recommendation Form*. This provides reviewers with an opportunity to list their top three choices and cite specific strengths and weaknesses for all of the materials being reviewed.

### IV. Appendix

The fourth section is an Appendix that includes two items: *The Progression to Algebra Continuum* and a table of *Common Addition and Subtraction Situations*.<sup>2</sup>

GIMET-QR does not attend to all the grade three standards but rather only those listed within the progression to algebra continuum. GIMET-QR does not attend to coherence across grade levels but does look for coherence within a grade when considering the quality of materials and assignments. Similar to CCSS-M, GIMET-QR operates at a very fine grain size, while individual lessons and units under review might work across clusters. GIMET-QR is not a checklist that would fragment the CCSS-M, rather the “fine grain size” deliberately focuses on how well the materials reflect the intent of the CCSS-M.

1 University of Arizona Institute of Mathematics, <http://ime.math.arizona.edu/progressions/>

2 From pages 89-90 of the Common Core State Standards for Mathematics. Adapted from Box 2-4 of *Mathematics Learning in Early Childhood*, National Research Council (2009, pp. 32-33).

## GETTING STARTED

*Completing the GIMET-QR entails a five-step process. Reviewers are expected to read through each of the steps and their explanations, and locate all the pertinent tables and pages before starting. Then complete each step.*

**Step one** – Individual reviewers will evaluate how well the materials and their accompanying assignments develop the algebra continuum content for each grade level. Use the tables that start on page four to capture the evidence of how and where the materials do this. The purpose for noting specific examples as evidence is to contribute to discussions with other reviewers in steps two through four. Cite specific examples of the explanations, diagrams, and pictorial representations in the materials and assignments that prompt students to show their understanding. Additionally, reviewers should consider the interaction of students with the materials in two areas: 1) students as receptive learners (interactions with the explanations and illustrations in the materials) and 2) students producing and showing their understanding (interacting and completing the assignments in the materials).

**Step two** – Discuss your findings and evidence with other reviewers. Reviewers should discuss the evidence cited and use it to confirm or assist you (individually) in reviewing and revising your findings.

**Step three** – Next, reviewers need to consider the interaction of students and teachers with the content of the materials along three dimensions of rigor—**conceptual understanding**, **applications**, and **fluency**—to assign a judgment of quality to each dimension. Reviewers should answer the question: How well do the materials reflect and support the rigor of the CCSS-Mathematics overall? Reviewers will use the guiding questions found in the **Decision Recording Sheet** together with the rubric describing **high quality** to assign ratings. Consider the totality of the collected evidence along the dimensions of rigor, and record your rating at the bottom of each table.

The highest level of quality is described using the words “**High Quality/Exciting**.” We use these words to indicate a high degree of excitement about the materials and the assignments. As the reviewer considers the descriptors, keep in mind that these criteria apply to each dimension of rigor for both the materials and the assignments they present to students. To earn this rating, the evidence must demonstrate grade-level rigor of the CCSS-M in an engaging way.

The other levels represent varying degrees of quality. For example, “**Good Quality**” indicates that the materials and assignments are workable or sufficient. “**Minimal Quality**,” meanwhile, indicates that the materials are sufficient on their own, but would not be conducive to motivating students.

These descriptions will be used for rating the overall quality of the program.

**Step four** – Discuss your findings and conclusions with other reviewers. Include the following questions as a part of the discussion:

- What are the top three strengths of the texts?
- What areas need improvement?
- What additional supports would be needed to implement the textbook series or digital materials?

**Step five** – After discussion, reach consensus and make final recommendations on the **Adoption Committee Recommendation Form**.

# I. CCSS-M CLUSTERS AND STANDARDS

GUIDING STATEMENTS	SPECIFIC EVIDENCE FROM THE TEXT/MATERIALS
<p><b>3.OA.1-4 Materials demonstrate and show how to represent and solve problems involving multiplication and division by:</b></p> <ul style="list-style-type: none"><li>■ Showing how to interpret products of whole numbers as equal groups or arrays, e.g., interpret <math>5 \times 7</math> as the total number of objects in 5 groups of 7 objects each (<i>for example, describe a context in which a total number of objects can be expressed as <math>5 \times 7</math></i>).</li><li>▶ Including a variety of multiplication and division problems for each of the following: <b>unknown product</b>, e.g., <math>3 \times 8 = \square</math>; <b>group size unknown</b>, e.g., If 18 inches of string are cut into three equal pieces, how long is each piece of string?; <b>number of groups unknown</b>, e.g., If 18 pieces of candy are to be packed six to a bag, how many bags are needed?; showing how to determine the unknown number that makes the equation true in each of three equations: <math>8 \times \square = 48</math>; <math>5 = \square \div 3</math>; <math>6 \times 6 = \square</math>?</li><li>■ Illustrating whole-number quotients, e.g., interpret <math>56 \div 8</math> as the number of objects in each share when 56 objects are partitioned equally into 8 shares, or as a number of shares when 56 objects are partitioned into equal shares of 8 objects each.</li><li>■ Use multiplication and division within 100 to solve word problems in situations involving equal groups, arrays, and measurement quantities, e.g., using drawings and equations with a symbol for the unknown number to represent the problem.</li><li>▶ Illustrating the “equal groups” and “arrays, area” to lay the foundation for extending multiplication and division to algebraic expressions (for example, connecting <b>unknown product with equal groups</b>, e.g., There are three bags with six plums in each bag. How many plums in all?; <b>equal group with group size unknown</b>, e.g., If 18 plums are shared equally into three bags, how many plums will be in each bag?; <b>arrays showing an unknown product, group size unknown</b>, e.g., There are three rows of peaches with six in each row. How many peaches are there?).</li></ul> <p style="text-align: right;"><i>continued on next page &gt;</i></p>	

GUIDING STATEMENTS	SPECIFIC EVIDENCE FROM THE TEXT/MATERIALS
<p><i>continued from previous page &gt;</i></p> <ul style="list-style-type: none"> <li>■ Showing how to determine the unknown whole number in a multiplication or division equation relating three whole numbers. <i>For example, determine the unknown number that makes the equation true in each of the equations <math>8 \times ? = 48</math>, <math>5 = \square \div 3</math>, <math>6 \times 6 = ?</math>.</i> <ul style="list-style-type: none"> <li>▶ Attending to and developing the academic language students need to explain their reasoning about unknown products, group size unknown, number of groups unknown, and the relationship between all three. Students often have difficulty recognizing that each multiplication or division problem involves three quantities, each of which could be the unknown. Similarly, students must understand that in equal groups, the roles of the factors differ – which may present potential problems. One factor is the number of objects in a group (like any quantity in addition and subtraction situations), and the other is a multiplier that indicates the number of groups. So, for example, 4 groups of 3 objects is arranged differently than 3 groups of 4 objects. Thus, there are two kinds of division situations depending on which factor is the unknown (the number of objects in each group or the number of equal groups). Whereas in the array situations, the roles of the factors do not differ. One factor tells the number of rows in the array, and the other factor tells the number of columns in the situation. However, rows and columns do depend on the orientation of the array. “Row” and “column” language may be difficult for students, e.g., “The apples in the grocery window are in 3 rows and 6 columns,” is difficult because of the distinction between the number of things in a row and the number of rows. There are 3 rows but the number of columns (6) tells how many are in each row. There are 6 columns, but the number of rows (3) tells how many are in each column. Students do need to be able to use and understand these words, but this understanding can grow over time while students also learn and use the language in the other multiplication and division situations.</li> <li>▶ Laying the foundation for students to “see” the commutative property for multiplication in rectangular arrays and area through row and column language, e.g., when an array is rotated 90°, the rows become columns and the columns become rows.</li> <li>▶ Focusing on the common structure across different problems.</li> </ul> </li> </ul>	

GUIDING STATEMENTS	SPECIFIC EVIDENCE FROM THE TEXT/ MATERIALS
<p><b>3.0A.1-4. Assignments ask students to represent and solve problems involving multiplication and division by:</b></p> <ul style="list-style-type: none"> <li>■ Interpreting products of whole numbers, e.g., interpret <math>5 \times 7</math> as the total number of objects in 5 groups of 7 objects each. <i>For example, describe a context in which a total number of objects can be expressed as <math>5 \times 7</math>.</i> <ul style="list-style-type: none"> <li>▶ Solving a variety of multiplication and division problems for each of the following: <b>unknown product</b>, e.g., <math>3 \times 8 = \square</math>; <b>group size unknown</b>, e.g., If 18 inches of string are cut into three equal pieces, how long is each piece of string?; <b>number of groups unknown</b>, e.g., If 18 pieces of candy are to be packed six to a bag, how many bags are needed?; and determining the unknown number that makes the equation true in each of three equations: <math>8 \times \square = 48</math>, <math>5 = \square \div 3</math>, <math>6 \times 6 = \square</math>?</li> </ul> </li> <li>■ Interpreting whole-number quotients, e.g., interpret <math>56 \div 8</math> as the number of objects in each share when 56 objects are partitioned equally into 8 shares, or as a number of shares when 56 objects are partitioned into equal shares of 8 objects each. <i>For example, describe a context in which a total number of objects can be expressed as <math>5 \times 7</math> or in which a number of shares or a number of groups can be expressed as <math>56 \div 8</math>.</i></li> <li>■ Using multiplication and division within 100 to solve word problems in situations involving equal groups, arrays, and measurement quantities, e.g., by using drawings and equations with a symbol for the unknown number to represent the problem. <ul style="list-style-type: none"> <li>▶ Showing an understanding of “equal groups” and “arrays, area” by connecting multiplication and division.</li> </ul> </li> <li>■ Determining the unknown whole number in a multiplication or division equation relating three whole numbers. For example, determine the unknown number that makes the equation true in each of three equations: <math>8 \times ? = 48</math>, <math>5 = \square \div 3</math>, <math>6 \times 6 = ?</math>. <ul style="list-style-type: none"> <li>▶ Using academic language to reason about unknown products, group size unknown, and number of groups unknown; and describing the relationship between all three.</li> <li>▶ Describing and illustrating connections between and across a variety of problem situations.</li> <li>▶ Reading to understand the problem situation, representing the situation and its quantitative relationships with expressions and equations, and then manipulating that representation if necessary, using properties of operations and/or relationships between operations.</li> <li>▶ Linking equations to concrete materials, drawings, and other representations of problem situations. (Note: These will help students develop an algebraic perspective many years before they will use formal algebraic symbols and methods).</li> </ul> </li> </ul>	



GUIDING STATEMENTS	SPECIFIC EVIDENCE FROM THE TEXT/MATERIALS
<p><b>3.0A.5-6. Materials show explicit connections between the properties of multiplication and the relationship between multiplication and division by:</b></p> <ul style="list-style-type: none"> <li>■ Illustrating how properties of operations are used as strategies to multiply and divide. Examples: <i>if <math>6 \times 4 = 24</math> is known, then <math>4 \times 6 = 24</math> is also known (Commutative property of multiplication). Similarly, <math>3 \times 5 \times 2</math> can be found by <math>3 \times 5 = 15</math> then <math>15 \times 2 = 30</math> or by <math>5 \times 2 = 10</math>, then <math>3 \times 10 = 30</math> (Associative property of multiplication). Knowing that <math>8 \times 5 = 40</math> and <math>8 \times 2 = 16</math>, one can find <math>8 \times 7</math> as <math>8 \times (5 + 2) = (8 \times 5) + (8 \times 2) = 40 + 16 = 56</math> (Distributive property).</i> <ul style="list-style-type: none"> <li>▶ Students need not use formal terms for these properties.</li> <li>▶ Materials explain and exemplify the use of the properties of operations for multiplication and division to: 1) accomplish a purpose in a calculation, and 2) justify a step.</li> </ul> </li> <li>■ Providing illustrations of division as an unknown-factor problem. For example, find <math>32 \div 8</math> by finding the number that makes 32 when multiplied by 8.</li> </ul>	
<p><b>3.0A.5-6. Assignments push students to model and apply the properties of multiplication and the relationship between multiplication and division by requiring them to:</b></p> <ul style="list-style-type: none"> <li>■ Apply properties of operations as strategies to multiply and divide. Examples: <i>if <math>6 \times 4 = 24</math> is known, then <math>4 \times 6 = 24</math> is also known (Commutative property of multiplication). Similarly, if <math>3 \times 5 \times 2</math> can be found by <math>3 \times 5 = 15</math> then <math>15 \times 2 = 30</math> or by <math>5 \times 2 = 10</math>, then <math>3 \times 10 = 30</math> (Associative property of multiplication). Knowing that <math>8 \times 5 = 40</math> and <math>8 \times 2 = 16</math>, one can find <math>8 \times 7</math> as <math>8 \times (5 + 2) = (8 \times 5) + (8 \times 2) = 40 + 16 = 56</math> (Distributive property).</i> Students need not use formal terms for these properties but are required to: <ul style="list-style-type: none"> <li>▶ Model, apply, and justify a calculation using the properties of operations for multiplication and division.</li> <li>▶ Illustrate with drawings and equations how to apply the properties of operations as strategies to multiply and divide.</li> <li>▶ Make the connection that two of the factors are quotients of the related division problems and that for every product there are two divisions.</li> <li>▶ Relate the product, factors, or quotient to what it means in the context of a problem situation.</li> </ul> </li> </ul>	

GUIDING STATEMENTS	SPECIFIC EVIDENCE FROM THE TEXT/MATERIALS
<p><b>3.0A.7. Materials develop and support students in fluently multiplying and dividing within 100 using strategies such as the relationship between multiplication and division by:</b></p> <ul style="list-style-type: none"> <li>■ Supporting the development of fluency (by the end of grade three, know from memory all products of two one-digit numbers). <ul style="list-style-type: none"> <li>▶ Illustrating and modeling decomposing and composing products that are known to find an unknown product, i.e., <math>7 \times 5</math> can be found by finding <math>5 \times (6 + 1)</math>; since <math>5 \times 6 + 5 \times 1</math> so <math>7 \times 5 = 30 + 5</math> more which is 35.</li> <li>▶ Organizing practice to focus on products that are understood but not yet known with reasonable speed and accuracy.</li> </ul> </li> </ul>	
<p><b>3.0A.7. Assignments require that students fluently multiply and divide within 100 by:</b></p> <ul style="list-style-type: none"> <li>■ Applying strategies such as the relationship between multiplication and division (e.g., by knowing that <math>8 \times 5 = 40</math>, one knows <math>40 \div 5 = 8</math>) or properties of operations). By the end of grade three, know from memory all products of two one-digit numbers. <ul style="list-style-type: none"> <li>▶ Describing relationships within products by modeling decomposing and composing products that are known to find an unknown product, i.e., <math>7 \times 5</math> can be found by finding <math>5 \times (6 + 1)</math>; since <math>5 \times 6 + 5 \times 1</math> so <math>7 \times 5 = 30 + 5</math> more which is 35.</li> <li>▶ Explaining the relationship between area and multiplication and addition, representing the relationship in multiple ways (i.e., pictures, graphs, concrete materials, tables, etc.); and applying this to problems involving multiplication and area.</li> </ul> </li> </ul>	

GUIDING STATEMENTS	SPECIFIC EVIDENCE FROM THE TEXT/MATERIALS
<p><b>3.0A.8-9. Materials show how to solve problems involving the four operations, and identify and explain patterns in arithmetic by:</b></p> <ul style="list-style-type: none"> <li>■ Showing how to solve two-step word problems using the four operations; representing these problems using equations with a letter standing for the unknown quantity; and assessing the reasonableness of answers using mental computation and estimation strategies including rounding.</li> <li>■ Showing and re-focusing attention on arithmetic patterns (including patterns in the addition table or multiplication table), and explaining them using properties of operations. <i>For example, observe that 4 times a number is always even, and explain why 4 times a number can be decomposed into two equal addends.</i></li> </ul>	
<p><b>3.0A.8-9. Assignments require that students solve problems involving the four operations, and identify and explain patterns in arithmetic by:</b></p> <ul style="list-style-type: none"> <li>■ Solving two-step word problems using the four operations, representing these problems using equations with a letter standing for the unknown quantity, and assessing the reasonableness of answers using mental computation and estimation strategies including rounding.</li> <li>■ Describing and illustrating arithmetic patterns (including patterns in the addition table or multiplication table) and explaining them using properties of operations. <i>For example, observe that 4 times a number is always even, and explain why 4 times a numbers can be decomposed into two equal addends.</i> <ul style="list-style-type: none"> <li>▶ Focusing on products that are understood but not yet known with reasonable speed and accuracy.</li> <li>▶ Requiring that students: 1) use extended reasoning and modeling as they apply the four operations in problem situations involving properties, measurement (length and area), and estimation of intervals of time, liquid volumes, or masses of objects, and 2) write explanations with embedded symbols, graphs, etc.</li> </ul> </li> </ul>	

## GUIDING STATEMENTS

## SPECIFIC EVIDENCE FROM THE TEXT/MATERIALS

**3.NF.1-3. Materials develop and support students' understanding of fractions as numbers by:**

- Showing a fraction  $1/b$  as the quantity formed by 1 part when a whole is partitioned into  $b$  equal parts; showing a fraction  $a/b$  as the quantity formed by  $a$  parts of size  $1/b$ .
  - ▶ In grades one and two, students used fraction language to describe partitions of shapes into equal shares. In grade three, students apply the idea of equal shares as they develop the idea of a fraction more formally, building on the idea of partitioning a whole into equal parts. The whole can be a shape such as a circle or rectangle, a line segment, or any one finite entity susceptible to subdivision and measurement.
  - ▶ Grade three students start with a unit fraction formed by partitioning a whole into equal parts and taking one part, e.g., if a whole is partitioned into 4 equal parts then each part is  $1/4$  of the whole, and 4 copies of that part make the whole.
  - ▶ Students begin visualizing unit fractions as the basic building blocks of fractions, in the same sense that the number 1 is the basic building block of whole numbers. Just as every whole number is obtained by combining a sufficient number of ones, every fraction is obtained by combining a sufficient number of unit fractions.
- Showing a fraction as a number on the number line and representing fractions on a number line diagram.
  - Representing a fraction  $1/b$  on a number line diagram by defining the interval from 0 to 1 as the whole and partitioning it into  $b$  equal parts. Showing that each part has size  $1/b$  and that the endpoint of the part based on 0 locates the number  $1/b$  on the number line.
    - ▶ There are two important aspects that link to attending to precision (MP.6 - *Mathematical Practice 6*): specifying the whole and explaining what is meant by equal parts.
  - Representing a fraction  $a/b$  on a number line diagram by marking off  $a$  lengths  $1/b$  from 0. Recognize that the resulting interval has size  $a/b$  and that its endpoint locates the number  $a/b$  on the number line.

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## GUIDING STATEMENTS

## SPECIFIC EVIDENCE FROM THE TEXT/MATERIALS

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- ▶ Materials develop and support student understanding that **fractions are numbers, unit fractions can be the measure of a length** ( $\frac{1}{4}$  inch) just like a whole number (2 inches), **a fraction names a point on the number line**—just like a whole number does, and **fractions, like whole numbers, express the length from zero on the number line.**
- ▶ A common misconception for students is perceiving the unit on a number line diagram. When locating a fraction on a number line diagram, they might use as the unit the entire portion of the number line. *For example, on a number line marked from 0 to 4, they may indicate the number 3 when asked to find  $\frac{3}{4}$ .*
- ▶ Materials alert teachers to common student misconceptions about fractions.
- Showing equivalence of fractions in special cases, and comparing fractions by reasoning about their size.
  - Understanding two fractions as equivalent (equal) if they are the same size, or the same point on a number line.
  - Recognizing and generating simple equivalent fractions, e.g.,  $\frac{1}{2} = \frac{2}{4}$ ,  $\frac{4}{6} = \frac{2}{3}$ . Explaining why the fractions are equivalent, e.g., by using a visual fraction model.
  - Expressing whole numbers as fractions, and recognizing fractions that are equivalent to whole numbers. *Examples: Express 3 in the form  $3 = \frac{3}{1}$ ; recognize that  $\frac{6}{1} = 6$ ; locate  $\frac{4}{4}$  and 1 at the same point of a number line diagram.*
  - Comparing two fractions with the same numerator or the same denominator by reasoning about their size. Recognizing that comparisons are valid only when the two fractions refer to the same whole. Recording the results of comparisons with the symbols  $>$ ,  $=$ , or  $<$ , and justifying the conclusions, e.g., by using a visual fraction model.

## GUIDING STATEMENTS

## SPECIFIC EVIDENCE FROM THE TEXT/MATERIALS

**3.NF.1-3. Assignments require that students show and describe their understanding of fractions as numbers by:**

- Showing a fraction  $1/b$  as the quantity formed by 1 part when a whole is partitioned into  $b$  equal parts; showing a fraction  $a/b$  as the quantity formed by  $a$  parts of size  $1/b$ .
  - ▶ The assignments prompt students to use and produce visual and concrete representations of unit fractions and equivalent fractions with particular emphasis on the number line.
  - ▶ Students use appropriate academic language in describing partitions of shapes and build on the idea of partitioning a whole into equal parts.
  - ▶ Students use various representations to illustrate connections between and among partitioning circles or rectangles, a line segment, or any one finite entity susceptible to subdivision and measurement.
  - ▶ Students illustrate/show unit fractions as the basic building blocks of fractions, in the same sense that the number 1 is the basic building block of whole numbers; and just as every whole number is obtained by combining a sufficient number of ones, every fraction is obtained by combining a sufficient number of unit fractions.
- Showing a fraction as a number on the number line and representing fractions on a number line diagram.
  - Representing a fraction  $1/b$  on a number line diagram by defining the interval from 0 to 1 as the whole and partitioning it into  $b$  equal parts. Showing that each part has size  $1/b$  and that the endpoint of the part based on 0 locates the number  $1/b$  on the number line.
  - Representing a fraction  $a/b$  on a number line diagram by marking off  $a$  lengths  $1/b$  from 0. Recognize that the resulting interval has size  $a/b$  and that its endpoint locates the number  $a/b$  on the number line.
    - ▶ Students use number line diagrams to show that **fractions are numbers, unit fractions can be the measure of a length** ( $1/4$  inch) just like a whole number (2 inches), **a fraction names a point on the number line** just like a whole number does, and **fractions, like whole numbers, express the length from zero.**

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GUIDING STATEMENTS	SPECIFIC EVIDENCE FROM THE TEXT/MATERIALS
<p><i>continued from previous page &gt;</i></p> <ul style="list-style-type: none"> <li>■ Showing equivalence of fractions in special cases, and comparing fractions by reasoning about their size. <ul style="list-style-type: none"> <li>● Understanding two fractions as equivalent (equal) if they are the same size, or the same point on a number line.</li> <li>● Recognizing and generating simple equivalent fractions, e.g., <math>\frac{1}{2} = \frac{2}{4}</math>, <math>\frac{4}{6} = \frac{2}{3}</math>. Explaining why the fractions are equivalent, e.g., by using a visual fraction model.</li> <li>● Expressing whole numbers as fractions, and recognizing fractions that are equivalent to whole numbers. <i>Examples: Express 3 in the form <math>3 = \frac{3}{1}</math>; recognize that <math>\frac{6}{1} = 6</math>; locate <math>\frac{4}{4}</math> and 1 at the same point of a number line diagram.</i></li> <li>● Comparing two fractions with the same numerator or the same denominator by reasoning about their size. Recognizing that comparisons are valid only when the two fractions refer to the same whole. Recording the results of comparisons with the symbols <math>&gt;</math>, <math>=</math>, or <math>&lt;</math>, and justifying the conclusions, e.g., by using a visual fraction model.</li> </ul> </li> </ul>	

GUIDING STATEMENTS	SPECIFIC EVIDENCE FROM THE TEXT/MATERIALS
<p><b>3.MD.1-2. Materials show students how to solve problems involving measurement and estimation of intervals of time, liquid volumes, and masses of objects by:</b></p> <ul style="list-style-type: none"> <li>■ Showing how to tell and write time to the nearest minute and measure time intervals in minutes. Solving word problems involving addition and subtraction of time intervals in minutes, e.g., by representing the problems on a number line diagram.</li> <li>■ Showing how to measure and estimate liquid volumes and masses of objects using standard units of grams (g), kilograms (kg), and liters (l). Adding, subtracting, multiplying, or dividing to solve one-step word problems involving masses or volumes that are given in the same units, e.g., by using diagrams (such as a beaker with a measurement scale) to present the problem. This excludes multiplicative comparison problems (problems involving notions of “times as much”).</li> </ul>	
<p><b>3.MD.1-2. Assignments require students to solve problems involving measurement and estimation of intervals of time, liquid volumes, and masses of objects by:</b></p> <ul style="list-style-type: none"> <li>■ Telling and writing time to the nearest minute and measuring time intervals in minutes. Solving word problems involving addition and subtraction of time intervals in minutes, e.g., by representing the problems on a number line diagram.</li> <li>■ Measuring and estimating liquid volumes and masses of objects using standard units of grams (g), kilograms (kg), and liters (l). Adding, subtracting, multiplying or dividing to solve one-step word problems involving masses or volumes that are given in the same units, e.g., by using diagrams (such as a beaker with a measurement scale) to present the problem. This excludes multiplicative comparison problems (problems involving notions of “times as much”).</li> </ul>	



GUIDING STATEMENTS	SPECIFIC EVIDENCE FROM THE TEXT/MATERIALS
<p><b>3.MD.5-7. Materials illustrate concepts of area and relate area to multiplication and addition by:</b></p> <ul style="list-style-type: none"> <li>■ Showing area as an attribute of plane figures and illustrating concepts of area measurement. <ul style="list-style-type: none"> <li>● A square with side length 1 unit, called “a unit square,” is said to have “one square unit” of area, and can be used to measure area.</li> <li>● A plane figure which can be covered without gaps or overlaps by <math>n</math> unit squares is said to have an area of <math>n</math> square units. <ul style="list-style-type: none"> <li>▶ Materials should help students conceptualize area as the amount of two-dimensional space in a bounded region and to measure it by choosing a unit of area, often a square.</li> </ul> </li> <li>● Showing students how to measure areas by counting unit squares (square cm, square m, square in, square ft, and improvised units).</li> </ul> </li> <li>■ Representing and connecting area to the operations of multiplication and addition. <ul style="list-style-type: none"> <li>● Showing how to find the area of a rectangle with whole-number side lengths by tiling it, and showing that the area is the same as would be found by multiplying the side lengths.</li> <li>● Showing how to multiply side lengths to find areas of rectangles with whole-number side lengths in the context of solving real world and mathematical problems.</li> <li>● Showing how to use tiling to show in a concrete case that the area of a rectangle with whole-number side lengths <math>a</math> and <math>b + c</math> is the sum of <math>a \times b</math> and <math>a \times c</math>.</li> <li>● Showing area as additive by illustrating the area of rectilinear figures by decomposing them into non-overlapping rectangles and adding the areas of the non-overlapping parts, applying this technique to show how to solve real-world problems. <ul style="list-style-type: none"> <li>▶ This includes showing students how to decompose (cutting and/or folding), re-compose, and eventually analyze with area-units by covering each with unit squares (tiles) and clearly distinguishing the attribute of area from other attributes, notably length.</li> <li>▶ Developing the interpretation of the measurement of rectangular regions as a multiplication relationship of the number of square units in a row and the number of rows. This relies on the development of spatial structuring. To build from spatial structuring to understanding the number of area-units as the product of number of units in a row and number of rows, materials ask students to draw rectangular arrays of squares and learn to determine the number of squares in each row with increasingly sophisticated strategies, such as skip-counting the number in each row and eventually multiplying the number in each row by the number of rows.</li> </ul> </li> </ul> </li> </ul>	

GUIDING STATEMENTS	SPECIFIC EVIDENCE FROM THE TEXT/MATERIALS
<p><b>3.MD.5-7. Assignments ask students to illustrate concepts of area and relate area to multiplication and addition by:</b></p> <ul style="list-style-type: none"> <li>■ Applying area as an attribute of plane figures and illustrating concepts of area measurement. <ul style="list-style-type: none"> <li>● A square with side length 1 unit, called “a unit square,” is said to have “one square unit” of area, and can be used to measure area.</li> <li>● A plane figure which can be covered without gaps or overlaps by <math>n</math> unit squares is said to have an area of <math>n</math> square units.</li> </ul> </li> <li>■ Measuring areas by counting unit squares (square cm, square m, square in, square ft, and improvised units).</li> <li>■ Representing and connecting area to the operations of multiplication and addition. <ul style="list-style-type: none"> <li>▶ The assignments push students to explain and connect area to multiplication and addition. Students represent this relationship in multiple ways (i.e., pictures, graphs, concrete materials, tables, etc.) and apply this to problem situations involving multiplication and area.</li> <li>● Finding the area of a rectangle with whole-number side lengths by tiling it, and showing that the area is the same as would be found by multiplying the side lengths.</li> <li>● Multiplying side lengths to find areas of rectangles with whole-number side lengths in the context of solving real-world and mathematical problems.</li> <li>● Tiling to show in a concrete case that the area of a rectangle with whole-number side lengths <math>a</math> and <math>b + c</math> is the sum of <math>a \times b</math> and <math>a \times c</math>.</li> <li>● Illustrating area as additive by finding the area of rectilinear figures by decomposing them into non-overlapping rectangles and adding the areas of the non-overlapping parts, applying this technique to show how to solve real world problems. <ul style="list-style-type: none"> <li>▶ Prompting students to determine the area of rectilinear figures in increasingly sophisticated ways by composing and decomposing them into non-overlapping areas and adding the areas of the non-overlapping parts, applying this technique to solve real-world problems.</li> </ul> </li> </ul> </li> </ul>	

## II. DECISION RECORDING SHEET

Completed by: \_\_\_\_\_

Date: \_\_\_\_\_

*Use the evidence that you collected for grade three to begin judging the overall quality of the program. Begin by answering the overarching question: **How well do the materials reflect and support the rigor of the CCSS-M?** Use the accompanying rubric which describes the criteria for high quality/exciting materials and assignments that engage both students and teachers.*

**Rigor requirement (balance):** A program that emphasizes only fluency is not rigorous. Likewise, a program that only focuses on applications or conceptual understanding is not rigorous. For a program to be rigorous, there must be a balance of all three (conceptual understanding, applications, and fluency) as indicated in the grade level standards. By the end of grade three, there are specific fluency requirements for students (know from memory all products of two one-digit numbers and fluently add and subtract within 1000 using strategies and algorithms based on place value, properties of operations, and/or the relationship between addition and subtraction), and standards addressing procedural skill (procedural skill refers to knowledge of procedures, knowledge of when and how to use them appropriately, and skill in performing procedures flexibly, accurately, and efficiently).

### Criteria for Rigor and Quality in Conceptual Understanding, Applications, and Fluency

#### CONCEPTUAL UNDERSTANDING: CONNECTIONS

##### Materials:

- How well do the materials develop conceptual understanding of operations and algebraic thinking as defined in the CCSS-M and in the *Progression to Algebra (Appendix A)*?
- How well do the materials connect to and extend prior knowledge?
  - The materials present and describe explicit connections to prior knowledge, connections among mathematical ideas, and connections among different mathematical representations, using appropriate academic language.
- How well do the materials develop academic language (including words, phrases, and sentences using symbols, graphs, and diagrams)?

##### Assignments:

- How well do the assignments prompt students to produce explanations and viable arguments?
- The set of assignments challenge students to use their mathematical knowledge, academic language, and skills to solve problems and formulate mathematical models in a variety of contexts.
  - How well do the assignments ask students to make explicit connections to prior knowledge, connections among mathematical ideas, and connections among different mathematical representations?

**CONNECTIONS: CRITERIA FOR MEETING THE RATING OF “HIGH QUALITY/EXCITING”**

	<b>Materials</b> <i>The materials present and describe explicit connections to prior knowledge, connections among mathematical ideas, and connections among different mathematical representations, using appropriate academic language.</i>	<b>Assignments</b> <i>The assignments in the materials encourage and challenge students to use their mathematical knowledge, academic language, and skills to solve problems and formulate mathematical models in a variety of contexts.</i>
Student	<p><i>Using high quality/exciting materials, my students will:</i></p> <ul style="list-style-type: none"> <li>■ comprehend the concepts and connections in the materials.</li> <li>■ make sense of the mathematics.</li> <li>■ be excited to try the problems and learn from working on them.</li> <li>■ want to learn the mathematical concepts and gain confidence that effort to learn will pay off.</li> </ul>	<p><i>Using high quality/exciting assignments, my students will:</i></p> <ul style="list-style-type: none"> <li>■ engage in the challenge of comprehension and discussion.</li> <li>■ make sense of the mathematics.</li> <li>■ be excited to try the problems and learn from working on them.</li> <li>■ want to learn the mathematical concepts and gain confidence that their effort to learn will pay off.</li> </ul>
Teacher	<p><i>Using high quality/exciting materials will help me:</i></p> <ul style="list-style-type: none"> <li>■ see and understand the mathematical goals of the lesson/unit.</li> <li>■ understand better the mathematics that I am teaching, learn more mathematics from the materials, and want to learn more from interacting with students.</li> <li>■ be excited about teaching the lessons and see how students respond to the connections in the lesson/unit.</li> <li>■ focus students' efforts on the mathematical connections and give them feedback on how to do better.</li> <li>■ anticipate typical misconceptions, missing connections, and which struggles will be most productive for students.</li> <li>■ be confident students will be motivated to learn from and connect the mathematics, as well as gain confidence that their efforts to learn will pay off.</li> </ul>	<p><i>Using high quality/exciting assignments will help me:</i></p> <ul style="list-style-type: none"> <li>■ want to learn more from interacting with students, analyzing their work on assignments, and re-engaging them in the concepts related to the assignments.</li> <li>■ use students' responses to focus their efforts on the mathematical connections and give them feedback on how to do better.</li> <li>■ anticipate typical misconceptions, missing connections, and which struggles will be most productive for students.</li> <li>■ know students will be motivated to learn from and connect the mathematics as well as gain confidence that their efforts to learn will pay off.</li> </ul>

**RATING – Compared to the criteria listed above, the materials I have just reviewed would be considered:**

3) High Quality/Exciting

2) Good Quality

1) Minimal Quality

## CONCEPTUAL UNDERSTANDING: EXPLANATIONS

### Materials:

- How well do the materials provide example explanations connecting different representations to show why a statement or steps in an argument or solution is true and under what conditions it is true?
  - The materials provide example explanations, using appropriate concepts and academic language for the grade level, to show how a way of thinking about a problem makes sense using several representations and explicitly identifying correspondences across representations.
- How well do the materials use abstractions and generalizations to communicate the mathematical structure that organizes seemingly scattered individual events or results?

### Assignments:

- How well do the assignments require that student provide explanations using appropriate content and grade-level academic language?
- The set of assignments requires students to use appropriate content and grade-level academic language to explain why reasons and justifications for steps in a solution or an argument are valid and how the mathematical structure represents generalizations about a problem situation (context) mathematically to their peers and the teacher.
- How well do the assignments ask students to use the mathematical structure to organize individual, seemingly scattered statements or results to represent generalizations mathematically to their peers and the teacher?

## EXPLANATIONS: CRITERIA FOR MEETING THE RATING OF “HIGH QUALITY/EXCITING”

	<b>Materials</b>	<b>Assignments</b>
	<i>The materials provide example explanations, using appropriate concepts and academic language for the grade level, to show how a way of thinking about a problem makes sense using several representations and explicitly identifying correspondences across representations.</i>	<i>The assignments require students to use appropriate grade-level concepts and academic language to explain why reasons and justifications for steps in a solution or an argument are valid and how the mathematical structure represents generalizations about a problem situation (context) mathematically to their peers and the teacher.</i>
Student	<p><i>Using high quality/exciting materials, my students will:</i></p> <ul style="list-style-type: none"> <li>■ comprehend the explanations presented in the materials.</li> <li>■ make sense of the mathematics of the lesson/unit.</li> <li>■ be excited to try the problems and learn from working on them.</li> <li>■ want to learn the related mathematical concepts and gain confidence that their effort to learn will pay off.</li> </ul>	<p><i>Using high quality/exciting materials, my students will:</i></p> <ul style="list-style-type: none"> <li>■ engage in the challenge of comprehension and explanation with their peers and with me.</li> <li>■ make sense of the mathematics of the lesson/unit.</li> <li>■ be excited to try the problems and learn from working on them.</li> <li>■ want to learn the related mathematical concepts and gain confidence that their effort to learn will pay off.</li> </ul>

4 University of Arizona Institute of Mathematics, *K-3 Categorical Data; Grades 2-5 Measurement Data*, <http://ime.math.arizona.edu/progressions/>

Teacher	<p><i>Using high quality/exciting materials will help me:</i></p> <ul style="list-style-type: none"> <li>■ see and understand the mathematical goals of the lesson/unit.</li> <li>■ understand better the mathematics that I am teaching, learn more mathematics from the materials, and want to learn more from interacting with students.</li> <li>■ be excited about teaching the lessons and see how students respond to the explanations in the lesson/unit.</li> <li>■ focus students' efforts on the mathematical explanations and give them feedback on how to do better.</li> <li>■ anticipate typical misconceptions, struggles that are most productive for students, and ways to help students to revise their explanation.</li> </ul>	<p><i>Using high quality/exciting materials will help me:</i></p> <ul style="list-style-type: none"> <li>■ want to learn more from interacting with students, analyzing their work on assignments, and re-engaging them on the concepts related to the assignments.</li> <li>■ use students' responses to focus their efforts on the mathematical connections and give them feedback on how to do better.</li> <li>■ anticipate typical misconceptions, struggles that are most productive for students, and ways to help students revise their explanations.</li> <li>■ know students will be motivated to learn from and connect the mathematics as well as gain confidence that their efforts to learn will pay off.</li> <li>■ prompt students to make their mathematical explanations clear in a way that others can understand and critique them.</li> </ul>
<p><b>RATING – Compared to the criteria listed above, the materials I have just reviewed would be considered:</b></p> <p>3) High Quality/Exciting      2) Good Quality      1) Minimal Quality</p>		

## APPLICATIONS

<p><b>Materials</b></p> <p>How well do the materials develop students' expertise in the application of concepts appropriate for this grade level?</p> <ul style="list-style-type: none"> <li>● The materials show how to use mathematics to analyze problem situations, appropriate for the grade level, and provide examples of deploying the Standards for Mathematical Practice to make sense of problems.</li> <li>■ How well do the materials support students' understanding of how to analyze problem situations, showing how to use mathematics to help make sense of problems?</li> </ul>	<p><b>Assignments</b></p> <p>How well do the assignments develop the application of grade-level concepts?</p> <ul style="list-style-type: none"> <li>● The assignments prompt students to use mathematics and the Standards for Mathematical Practice to help them make sense of a variety of problems and formulate mathematical models of real-world phenomena appropriate for this grade level.</li> <li>■ How well do the assignments support students' understanding of how to formulate mathematical models of real-world phenomena, including explaining assumptions and explaining why the model serves its purpose in a reasonable way?</li> </ul>
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**APPLICATIONS: CRITERIA FOR MEETING THE RATING OF “HIGH QUALITY/EXCITING”**

	<p><b>Materials</b></p> <p><i>The materials show how to use mathematics to analyze problem situations appropriate for the grade level and provide examples of deploying the Standards for Mathematical Practice to make sense of problems.</i></p>	<p><b>Assignments</b></p> <p><i>The assignments prompt students to use mathematics and the mathematical practice standards to help them make sense of a variety of problems, appropriate for this grade level, by asking students to formulate mathematical models.</i></p>
Student	<p><i>Using high quality/exciting materials, my students will:</i></p> <ul style="list-style-type: none"> <li>■ apply the concepts and connect them to each other and their different representations.</li> <li>■ make sense of the mathematics of the lesson/unit.</li> <li>■ be excited to try the problems and learn from working on them.</li> <li>■ understand how to formulate and model problem situations mathematically.</li> <li>■ gain confidence that their effort to learn will pay off.</li> </ul>	<p><i>Using high quality/exciting assignments, my students will:</i></p> <ul style="list-style-type: none"> <li>■ be challenged to use their mathematics to comprehend, analyze, and make sense of the problem situation.</li> <li>■ make sense of quantities and their relationship in the math problem.</li> <li>■ represent the problem concretely and pictorially and represent it as an equation and explain how the two representations relate to each other.</li> <li>■ identify important quantities in a practical situation and map their relationships using such tools as concrete models, diagrams, and equations.</li> <li>■ formulate and model problem situations mathematically.</li> <li>■ engage in discussions with their peers and the teacher to make sense of the problem and learn from them.</li> <li>■ be excited to try the problems and learn from working on them.</li> <li>■ gain confidence that their effort to learn will pay off.</li> </ul>
Teacher	<p><i>Using high quality/exciting materials will help me:</i></p> <ul style="list-style-type: none"> <li>■ see and understand the mathematical goal of the lesson/unit.</li> <li>■ understand better the mathematics that I am teaching, learn more mathematics from the materials, and want to learn more from interacting with students.</li> <li>■ be excited about teaching the lessons and see how students respond to the problems/tasks in the lesson/unit.</li> <li>■ be confident I can focus students’ efforts on the mathematical tasks/problems and give them feedback on how to do better.</li> <li>■ anticipate typical misconceptions, missing connections, and which struggles will be most productive for students.</li> <li>■ be confident students will be motivated to learn.</li> </ul>	<p><i>Using high quality/exciting assignments will help me:</i></p> <ul style="list-style-type: none"> <li>■ prompt students to make their mathematical thinking clear in a way that others can understand and critique it.</li> <li>■ want to learn more from interacting with students, analyzing their work on problems/tasks, and re-engaging them on making use of concepts related to them.</li> <li>■ use the student’s responses to focus their efforts on strategic thinking and give them feedback on generalizing to other related applications.</li> <li>■ anticipate typical misconceptions, missing strategies, and which productive struggles will be most beneficial for students.</li> <li>■ gain confidence that their efforts to learn will pay off.</li> </ul>

**RATING – Compared to the criteria listed above, the materials I have just reviewed would be considered:**

- 3) High Quality/Exciting      2) Good Quality      1) Minimal Quality

## FLUENCY

### Materials:

- How well do the materials focus on developing critical procedural skills and fluency (*adding and subtracting within 1000 using strategies and algorithms based on place value, properties of operations, and/or the relationship between addition and subtraction, and knowing from memory all products of two one-digit numbers*) by the end of grade three?
  - *Materials show how procedural skills and the standard for fluency for this grade level (adding and subtract within 1000 using strategies and algorithms based on place value, properties of operations, and/or the relationship between addition and subtraction, and knowing from memory all products of two one-digit numbers) work and provide consistent opportunities for students to practice using the algorithm or procedure.*

### Assignments:

- How well does the set of assignments focus on developing critical procedural skills and fluency?
  - *The set of assignments prompts students to develop and demonstrate fluency for adding and subtracting within 1000 using strategies and algorithms based on place value, properties of operations, and/or the relationship between addition and subtraction, and knowing from memory all products of two one-digit numbers by the end of grade three.*

## FLUENCY: CRITERIA FOR MEETING THE RATING OF “HIGH QUALITY/EXCITING”

### Materials

*Materials show how the standard for fluency, adding and subtracting within 1000 using strategies and algorithms based on place value, properties of operations, and/or the relationship between addition and subtraction, and knowing from memory all products of two one-digit numbers, works and provide opportunities for students to practice using the algorithm, procedure or formula.*

### Assignments

*The set of assignments prompts students to develop and demonstrate fluency when adding and subtracting within 1000 using strategies and algorithms based on place value, properties of operations, and/or the relationship between addition and subtraction, and knowing from memory all products of two one-digit numbers.*

Student

*Using high quality/exciting materials, my students will:*

- *have a variety of different ways to practice using an algorithm, procedure, or formula to develop fluency.*
- *self-assess areas of weakness and strengths in adding and subtracting within 1000 using strategies and algorithms based on place value, properties of operations, and/or the relationship between addition and subtraction, and knowing from memory all products of two one-digit numbers and receive feedback on which area(s) to improve.*

*Using high quality/exciting assignments, my students will:*

- *build skills in adding and subtracting within 1000 using strategies and algorithms based on place value, properties of operations, and/or the relationship between addition and subtraction, and knowing from memory all products of two one-digit numbers flexibly, accurately, efficiently, and appropriately.*
- *gain confidence that their efforts to learn will pay off.*



Teacher	<p><i>Using high quality/exciting materials will help me:</i></p> <ul style="list-style-type: none"> <li>■ see and understand how the work on procedural fluency supports the mathematical goal of the lesson/unit.</li> <li>■ be confident that I can focus students' efforts on building fluency, help students understand and correct their mistakes.</li> <li>■ be confident students will be motivated to learn.</li> </ul>	<p><i>Using high quality/exciting assignments will help me:</i></p> <ul style="list-style-type: none"> <li>■ want to learn more from interacting with students.</li> <li>■ use students' responses to focus their efforts on building fluency and give them feedback on how to do better.</li> <li>■ see how to help students understand and correct their mistakes.</li> <li>■ be confident students will be motivated to learn.</li> </ul>
<p><b>RATING – Compared to the criteria listed above, the materials I have just reviewed would be considered:</b></p> <p>3) High Quality/Exciting      2) Good Quality      1) Minimal Quality</p>		

### III. ADOPTION COMMITTEE RECOMMENDATION FORM

Based on the substantial evidence collected, please rank all the grade three materials you reviewed in the order in which you would recommend them for adoption. The program or materials with your highest recommendation should be listed as number one below. Please provide any comments you deem pertinent. Include answers to the following questions based on the evidence cited in your materials review:

- What are the top three strengths of this text?
- What areas need improvement?
- What additional supports would be needed to implement the textbook series or digital materials?

RECOMMENDED	
PROGRAM NAME/EDITION:	COMMENTS:
1	
2	
3	

*continued >*

**NOT RECOMMENDED**

	PROGRAM NAME/EDITION:	COMMENTS:
1		
2		
3		

Completed by: \_\_\_\_\_

Date: \_\_\_\_\_

# IV. APPENDIX A: PROGRESS TO ALGEBRA IN GRADES K–8

	K	1	2	3	4	5	6	7	8
Know number names and the count sequence		Represent and solve problems involving addition and subtraction	Understand and apply properties of operations and the relationship between addition and subtraction	Represent and solve problems involving multiplication and division	Understand properties of multiplication and the relationship between multiplication and division	Use the four operations with whole numbers to solve problems	Understand the place value system	Apply and extend previous understandings of multiplication and division to divide fractions by fractions	Work with radical and integer exponents
Count to tell the number of objects		Add and subtract within 20	Represent and solve problems involving addition and subtraction	Multiply & divide within 100	Generalize place value understanding for multi-digit whole numbers	Perform operations with multi-digit whole numbers and decimals to hundredths	Use equivalent fractions as a strategy to add and subtract fractions	Apply and extend previous understanding of operations with fractions to add, subtract, multiply, and divide rational numbers	Understand the connections between proportional relationships, lines, and linear equations
Compare numbers		Work with addition and subtraction equations	Add and subtract within 20	Solve problems involving the four operations, and identify & explain patterns in arithmetic	Use place value understanding and properties of operations to perform multi-digit arithmetic	Use equivalent fractions as a strategy to add and subtract fractions	Apply and extend previous understandings of multiplication and division to multiply and divide fractions	Analyze proportional relationships and use them to solve real-world and mathematical problems	Analyze and solve linear equations and pairs of simultaneous linear equations
Understand addition as putting together and adding to, and understand subtraction as taking apart and taking from		Extend the counting sequence	Understand place value	Develop understanding of fractions as numbers	Extend understanding of fraction equivalence and ordering	Apply and extend previous understandings of multiplication and division to multiply and divide fractions	Understand ratio concepts and use ratio reasoning to solve problems	Use properties of operations to generate equivalent expressions	Define, evaluate, and compare functions
Work with numbers 11-19 to gain foundations for place value		Understand place value	Use place value understanding and properties of operations to add and subtract	Solve problems involving measurement and estimation of intervals of time, liquid volumes, & masses of objects	Build fractions from unit fractions by applying and extending previous understandings of operations	Geometric measurement: understand concepts of volume and relate volume to multiplication and to addition	Apply and extend previous understandings of arithmetic to algebraic expressions	Solve real-life and mathematical problems using numerical and algebraic expressions and equations	Use functions to model relationships between quantities*
		Measure lengths indirectly and by iterating length units	Relate addition and subtraction to length	Geometric measurement: understand concepts of area and relate area to multiplication and to addition	Understand decimal notation for fractions, and compare decimal fractions	Graph points in the coordinate plane to solve real-world and mathematical problems*	Reason about and solve one-variable equations and inequalities	Represent and analyze quantitative relationships between dependent and independent variables	

From the K, Counting and Cardinality; K–5, Operations and Algebraic Thinking Progression p. 9

## APPENDIX B: COMMON MULTIPLICATION AND DIVISION SITUATIONS<sup>1</sup>

	UNKNOWN PRODUCT	GROUP SIZE UNKNOWN ("HOW MANY IN EACH GROUP?" DIVISION)	NUMBER OF GROUPS UNKNOWN ("HOW MANY GROUPS?" DIVISION)
	$3 \times 6 = ?$	$3 \times ? = 18$ , and $18 \div 3 = ?$	$? \times 6 = 18$ , and $18 \div 6 = ?$
<b>EQUAL GROUPS</b>	There are 3 bags with 6 plums in each bag. How many plums are there in all? <i>Measurement example.</i> You need 3 lengths of string, each 6 inches long. How much string will you need altogether?	If 18 plums are shared equally into 3 bags, then how many plums will be in each bag? <i>Measurement example.</i> You have 18 inches of string, which you will cut into 3 equal pieces. How long will each piece of string be?	If 18 plums are to be packed 6 to a bag, then how many bags are needed? <i>Measurement example.</i> You have 18 inches of string, which you will cut into pieces that are 6 inches long. How many pieces of string will you have?
<b>ARRAYS<sup>2</sup>, AREA<sup>3</sup></b>	There are 3 rows of apples with 6 apples in each row. How many apples are there? <i>Area example.</i> What is the area of a 3 cm by 6 cm rectangle?	If 18 apples are arranged into 3 equal rows, how many apples will be in each row? <i>Area example.</i> A rectangle has area 18 square centimeters. If one side is 3 cm long, how long is a side next to it?	If 18 apples are arranged into equal rows of 6 apples, how many rows will there be? <i>Area example.</i> A rectangle has area 18 square centimeters. If one side is 6 cm long, how long is a side next to it?
<b>COMPARE</b>	A blue hat costs \$6. A red hat costs 3 times as much as the blue hat. How much does the red hat cost? <i>Measurement example.</i> A rubber band is 6 cm long. How long will the rubber band be when it is stretched to be 3 times as long?	A red hat costs \$18 and that is 3 times as much as a blue hat costs. How much does a blue hat cost? <i>Measurement example.</i> A rubber band is stretched to be 18 cm long and that is 3 times as long as it was at first. How long was the rubber band at first?	A red hat costs \$18 and a blue hat costs \$6. How many times as much does the red hat cost as the blue hat? <i>Measurement example.</i> A rubber band was 6 cm long at first. Now it is stretched to be 18 cm long. How many times as long is the rubber band now as it was at first?
<b>GENERAL</b>	$a \times b = ?$	$a \times ? = p$ and $p \div a = ?$	$? \times b = p$ , and $p \div b = ?$

Source: <http://www.corestandards.org/Math/Content/mathematics-glossary/Table-2/>

1 The language in the array examples shows the easiest form of array problems. A harder form is to use the terms rows and columns: The apples in the grocery window are in 3 rows and 6 columns. How many apples are in there? Both forms are valuable.

2 Area involves arrays of squares that have been pushed together so that there are no gaps or overlaps, so array problems include these especially important measurement situations.

3 The first examples in each cell are examples of discrete things. These are easier for students and should be given before the measurement examples.

## **Proposed Development: High School Mathematics Grade Level Instructional Materials Evaluation Tool—Quality Review**

Textbooks and their digital counterparts are vital classroom tools but also a major expense, and it is worth taking time to find the best quality materials for students and teachers. While there is no perfect set of materials or textbooks, Grade-Level Instructional Materials Evaluation Tool-Quality Review (GIMET-QR) rubrics are designed for use by professionals as a framework for evaluating the quality of instructional materials and choosing materials that are best suited to provide a coherent learning experience for students.

The Council of the Great City Schools has developed and published the GIMET-QR for grades K-8, highlighting the progression to algebra. High school mathematics presents particular challenges. The Common Core State Standards-Mathematics (CCSS-M) is written in conceptual categories of Number and Quantity; Algebra; Functions; Modeling; Geometry; and Statistics and Probability. This neither favors traditional courses nor integrated mathematics courses. Thus, the Council has a unique opportunity to support its members in providing guidance for selecting new instructional materials.

The HS: GIMET-QR focuses on both the quality of the *content* and the instructional *design* of materials—with a specific focus on evaluating whether materials contain a balance of the three components of rigor (conceptual understanding, applications, and fluency) called for in CCSS-M. Unlike many tools that evaluate the presence or absence of required content, the GIMET-QR prompts reviewers to ask, “How *well* do the materials and assignments reflect and support the rigor of the CCSS-M?”

One of the roles of the CCSS-M is to provide a coherent learning experience for students. For high school, we intend to build from the progression to algebra from kindergarten through grade eight while expanding a concept/idea to show how the mathematics high school concepts are related across all of the domains. We created the theme, “patterns, relationships, and functions,” as a first step to illustrate how the various domains may be connected.

Similarly, one could create other organizing themes that would consist of standards across the domains, further illustrating the interconnections of high school mathematics. Each theme would have its own set of precursor concepts, skills, and abilities that we define as “structure.” For instance, another organizing theme could be “transformational geometry” that would include standards across the domains and have its own structure as a foundation. Next steps would include developing a high school rubric with these standards that would further show the learning progressions across the standards similar to the K-8 GIMET-QR.

### **Organizing Theme: Patterns, Relationships, Functions**

Patterns, relations, and functions are used to represent and analyze change in various contexts, make predictions, and generalizations, and provide models and explanations for real-world phenomena. It consists of four parts: 1) compare and describe relationships, 2)

represent and analyze change in various contexts, 3) model relationships between quantities or describe various contexts, and 4) make predictions and generalizations. Attaining this organizing theme starts with some foundational understanding of concepts, skills, and applications, which we define as **Patterns, Relations, Functions Structure**.

### **Patterns Relations Functions Structure**

Patterns Relations Functions include the foundational concepts, skills, and applications, students need to successfully meet the expectations of the standards within the organizing theme. Patterns Relations Functions Structure consists of five dimensions of building this knowledge that collectively build to Patterns, Relations, Functions. These include: 1) definitions, 2) concepts, 3) apply rules, 4) translate, and 5) solve. The concepts/ideas described by the standards connect to and depend on more than one dimension. Each dimension is described below, and includes the related standards.

- Definition: the exact meaning of a word
  - A-SSE.1a
- Concepts: specify and explain definitions or relationships between facts, terms, properties, or operations
  - N-RN.1, A-SSE.1b, F-IF.1, 3, F.LE.1a, F-TF. 6, S-ID.9, S-IC.1, 3, S-CP.3, 5
- Apply rules: direct application of a rule to a situation, development of fluency
  - N-RN.2, N-Q.2-3, A-SSE.2, A-APR.6, A-CED.4, F-BF.1b-1c, 4a, F.LE-4, F-TF.5,9, G-SRT.7, 10, G-GPE.5, S-ID.2, S-MD.2
- Translate: flexibility to see and use relationships among graphs, tables, words, pictorial representations, and symbolic notation
  - A-CED.2, F-IF.5, 6, 9, F-BF.1a, 4c, F.LE.2, G-MG.1, S-ID.6, S-MD.1
- Solve: combined use of concepts and applying rules to solve a given situation/problem
  - N-Q.1, A-SSE.3, A-APR.1-3, 7, A-CED.1, F-BF.4b, d, 5, G-GMD.3, G-MG.2-3, S-ID.4, S-CP.1-2, 9, S-MD.4, 5a

### **Organizing Theme: Patterns, Relationships, Functions**

- Compare and describe relationships
  - N-RN.3, F-IF.4, F-LE.1b-1c, 3, S-ID.5, 7, 8, S-CP.6-8
- Represent and analyze change in various contexts
  - F-BF.3, F-LE.5, S-ID.3
- Model relationships between quantities or to describe various contexts
  - A-CED.3, F-IF.2, F-BF.2, F-TF.7, S-IC.4-5, S-CP.4
- Make predictions and generalizations
  - S-IC.2, 6, S-MD.5b, 6, 7

**ACADEMIC KEY PERFORMANCE INDICATORS**



# **ACADEMIC KEY PERFORMANCE INDICATORS IN AMERICA'S GREAT CITY SCHOOLS**

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**PROJECT UPDATE  
THE BILL & MELINDA GATES FOUNDATION**

2015  
Council of the Great City Schools

## Project Objectives and Overview

- Design and field test a set of instructional metrics for benchmarking and predicting academic performance in the nation's large urban school systems.
- Design and field test a set of metrics for capturing instructionally related costs at the activity level in the nation's large urban school systems.
- Design and field test indicators that have both an academic performance and activity cost dimension.
- Develop and test the viability of determining cost effectiveness in district academic activities.

# Methodology

- Reviewed work of other organizations to identify previous efforts to benchmark performance and costs
- Reviewed research literature to see what factors were predictive of positive student outcomes and what other groups suggested measuring.
- Established three core academic teams in general education, special education, and bilingual education with district CFO support.
- Convened district teams in each area multiple times to determine what could be measured and how.

## Methodology (continued)

- Identified an initial set of over 200 key performance indicators across all three performance areas.
- Reviewed all potential indicators for their predictive value and ability to capture cost data
- Reviewed all potential indicators for viability, data burden, and ability to disaggregate.
- Narrowed the list of potential indicators to approximately 100.

## Methodology (continued)

- Prepared Metric Data Worksheets for each potential KPI with—
  - Statement of purpose
  - Variables that made up the KPIs and definitions
  - Metrics for each variable and formulas for calculating each indicator
  - Description of external factors likely to influence the results—not all measurable
  - Defined preliminary steps in analysis
- Further narrowed potential KPIs to 58

# Current KPIs

## General Education (Performance)

- Percent of students advancing from pre-k to k\*
- Percent of 3<sup>rd</sup> graders proficient in reading\*
- Algebra I completion rate for credit by grade 9\*
- Ninth grade course failure rate—one core course\*
- Ninth graders with B average (GPA) or better\*
- Absentee rate by grade level\*
- Suspension rate\*
- Instructional days missed per student due to suspensions\*
- ELP acquisition rate for ELLs by initial ELP level, grade, and time in program

## continued

- Credit recovery success rate for high school summer school\*
- Pass rate for high school summer school\*
- Credit recovery success rate in virtual courses\*
- Pass rate in virtual courses\*
- Credit recovery success rates through reenrollment\*
- AP participation rate\*
- AP-equivalent participation rate\*
- AP exam pass rate\*
- Early college enrollment\*
- Four-year graduation rate\*
- Five-year graduation rate\*

# Current KPIs (continued)

## General Education (Costs)

- Early childhood education costs per pupil
- Class size reduction costs per pupil (grades 1-3)
- New teacher induction program costs per participant
- Cost per student for high school summer school credit recovery
- Cost of summer school per high school student
- Cost per student of virtual courses for credit recovery
- AP course costs per passing AP score
- Early college costs per participant

## continued

- Cost of extended learning time initiatives as percent of district budget
- Cost of intervention programs as a percent of district budget
- Cost of instructional coaches as a percent of district budget
- Cost of supplemental education services as a percent of district budget
- Cost of supplemental education services per student served
- Cost of supplemental education services per student served (district operated)

## Current KPIs (continued)

### (continued)

- Cost of supplemental education services per student served (contractor operated)
- Cost of substitute teachers as a percent of district budget
- ELL central office cost per ELL student
- ELL professional development costs for central office staff per ELL student

### Special Education (Performance)

- Percent of students placed in each general educational setting by percent of time
- Percent of students with disabilities placed in private or separate settings
- Percent of referrals that result in evaluations
- Percent of evaluations that result in eligibility
- Percent of referrals of ELLs that result in evaluations
- Percent of evaluations of ELLs that result in eligibility



# Current KPIs (continued)

## Special Education (Costs)

- SPED budget—cost per student with IEP
- SPED budget—percent of district expenditures
- Professional development costs as percent of SPED budget
- Private or separate setting placement costs as a percent of SPED budget
- Private or separate setting placement costs per student
- Average cost per initial evaluation
- Cost of initial evaluations per new IEP

## continued

- Cost of reevaluations as a percent of SPED budget
- Average cost per SPED reevaluation
- Average cost for IEP meetings as percent of SPEDE budget
- Average cost per IEP meeting
- Total litigation/due process costs as percent of SPED budget
- Litigation/due process administrative costs as percent of SPED budget
- Litigation/due process awards, concessions & settlement costs as percent of SPED budget

## Piloting of Indicators

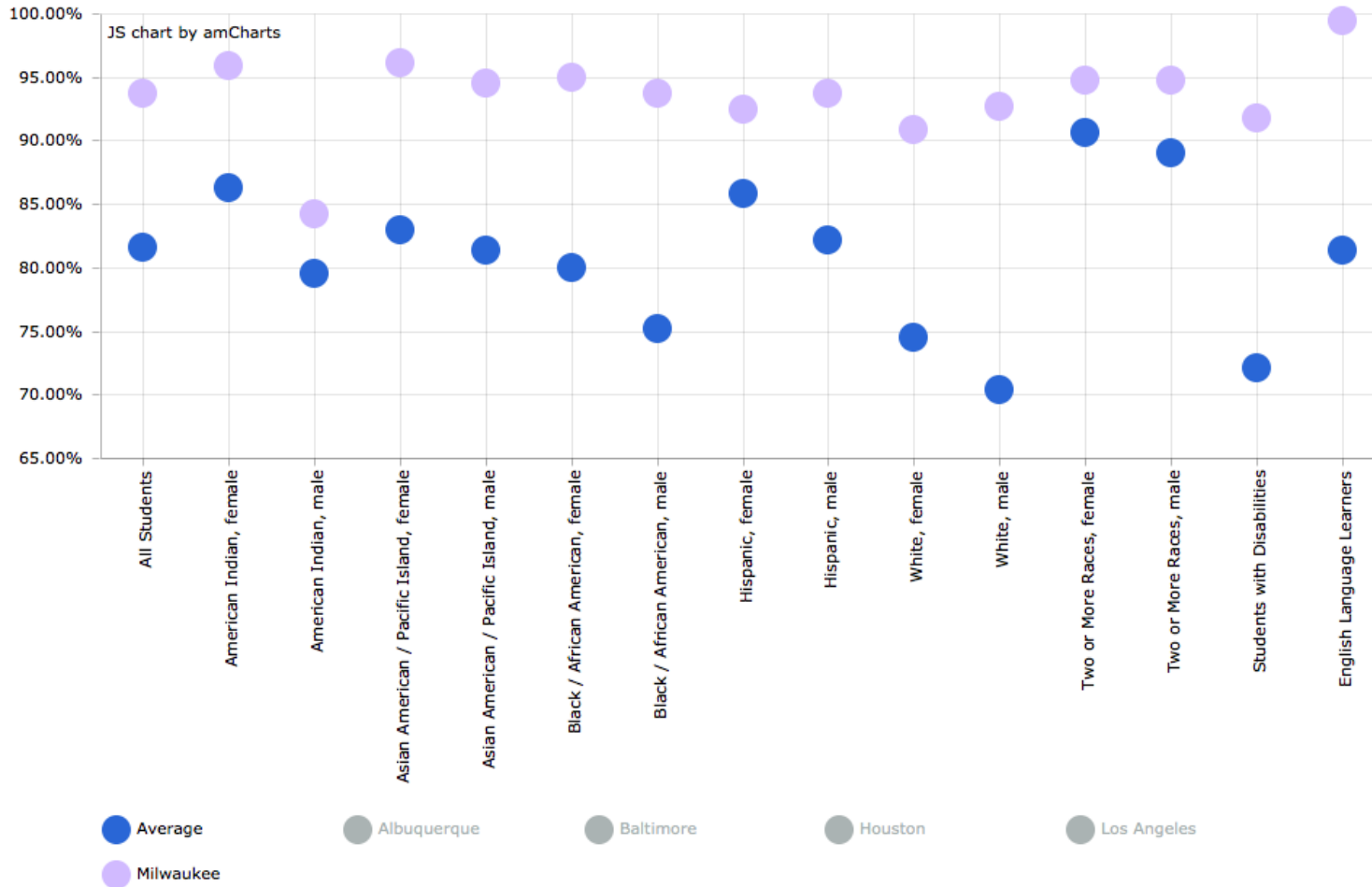
- Conducted visualizations of potential data and mock data analysis and graphing of indicators
- Requested variables on student subgroups placed into spreadsheets for data collection from pilot districts.
- Requested performance and cost variables placed into online survey
- Pilot districts—Albuquerque, Atlanta, Austin, Baltimore, Houston, and Los Angeles. Kansas City and Milwaukee data due early May.

## Piloting (continued)

- Placed pilot data into database system
- Developed software for browsing, pivoting and filtering data—still in process
- Continue to recruit additional districts to pilot data
- Exploring additional ways to link performance (or predictive) measures with cost data
- Exploring activities and costs of high-performing and low-performing districts to provide face validity.

# Sample Results from Performance Measures

**Percent of Pre-K Students Advanced to K, by Subgroups**  
 - Survey Year: 2014 -



# Sample Performance Measures (continued)

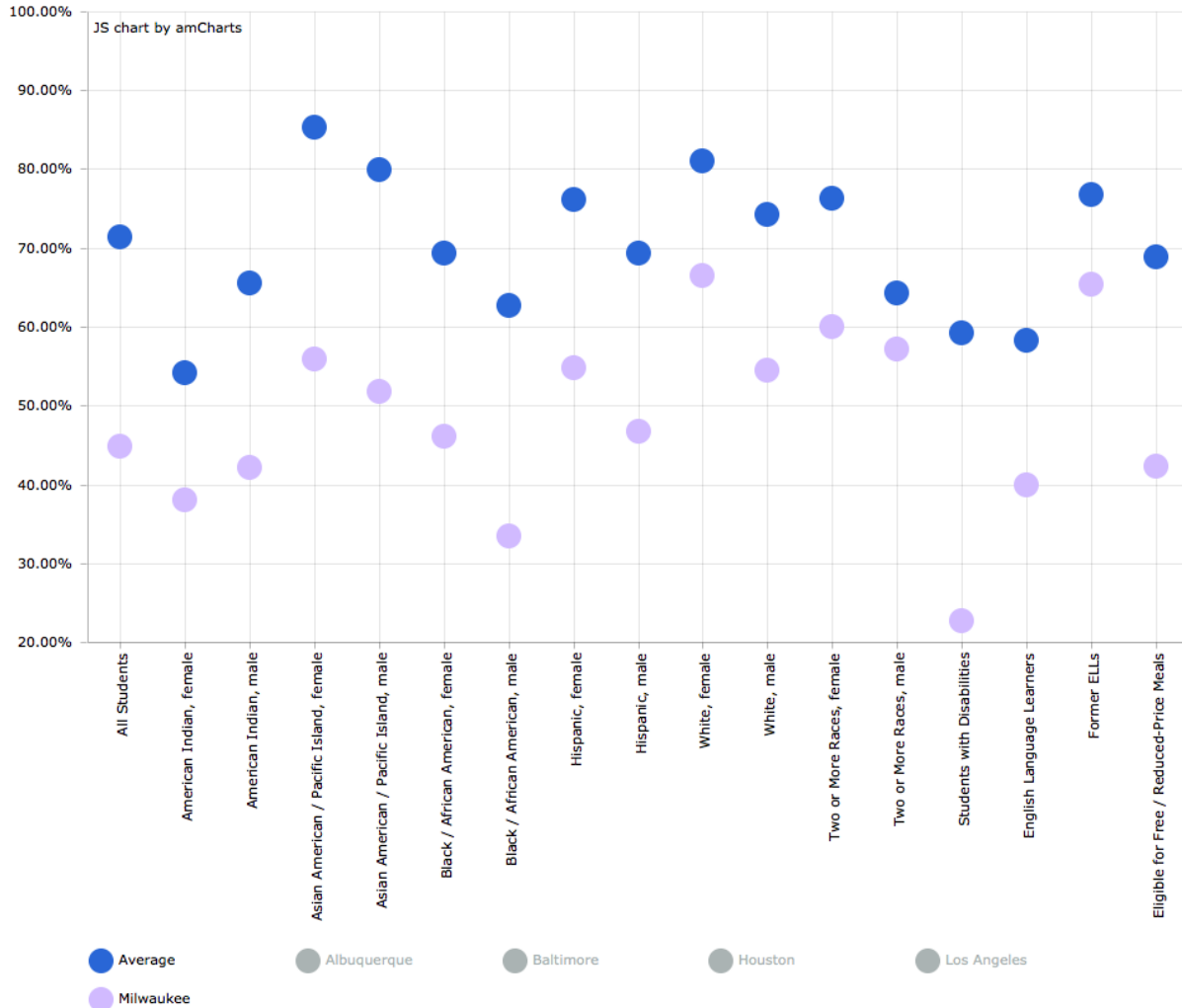
**Percent of 3rd Graders Proficient in Reading, by Subgroup**  
 - Survey Year: 2014 -



# Sample Performance Measures (continued)

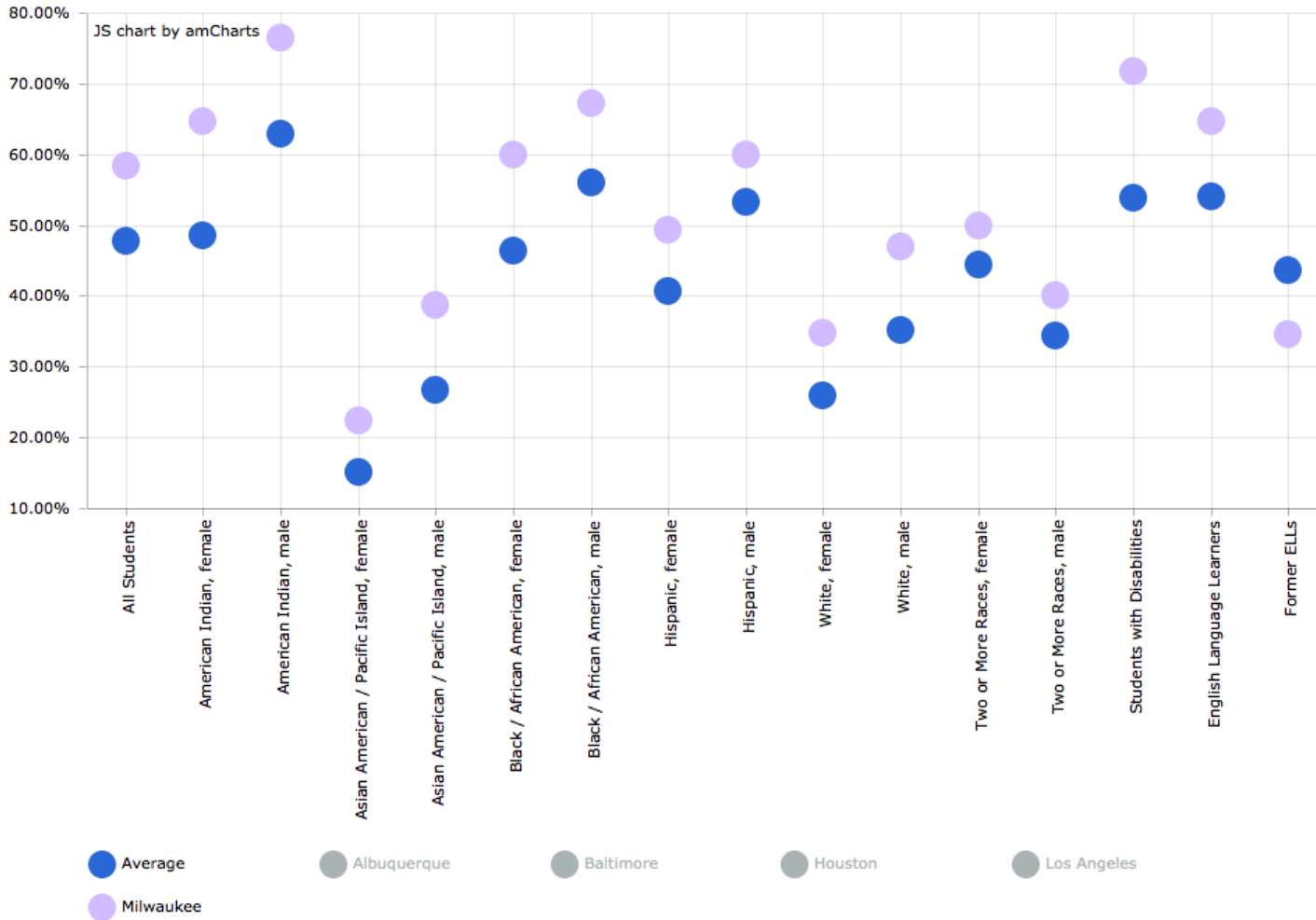
Overall Algebra Completion Rate by Grade 9, by Subgroup

- Survey Year: 2014 -



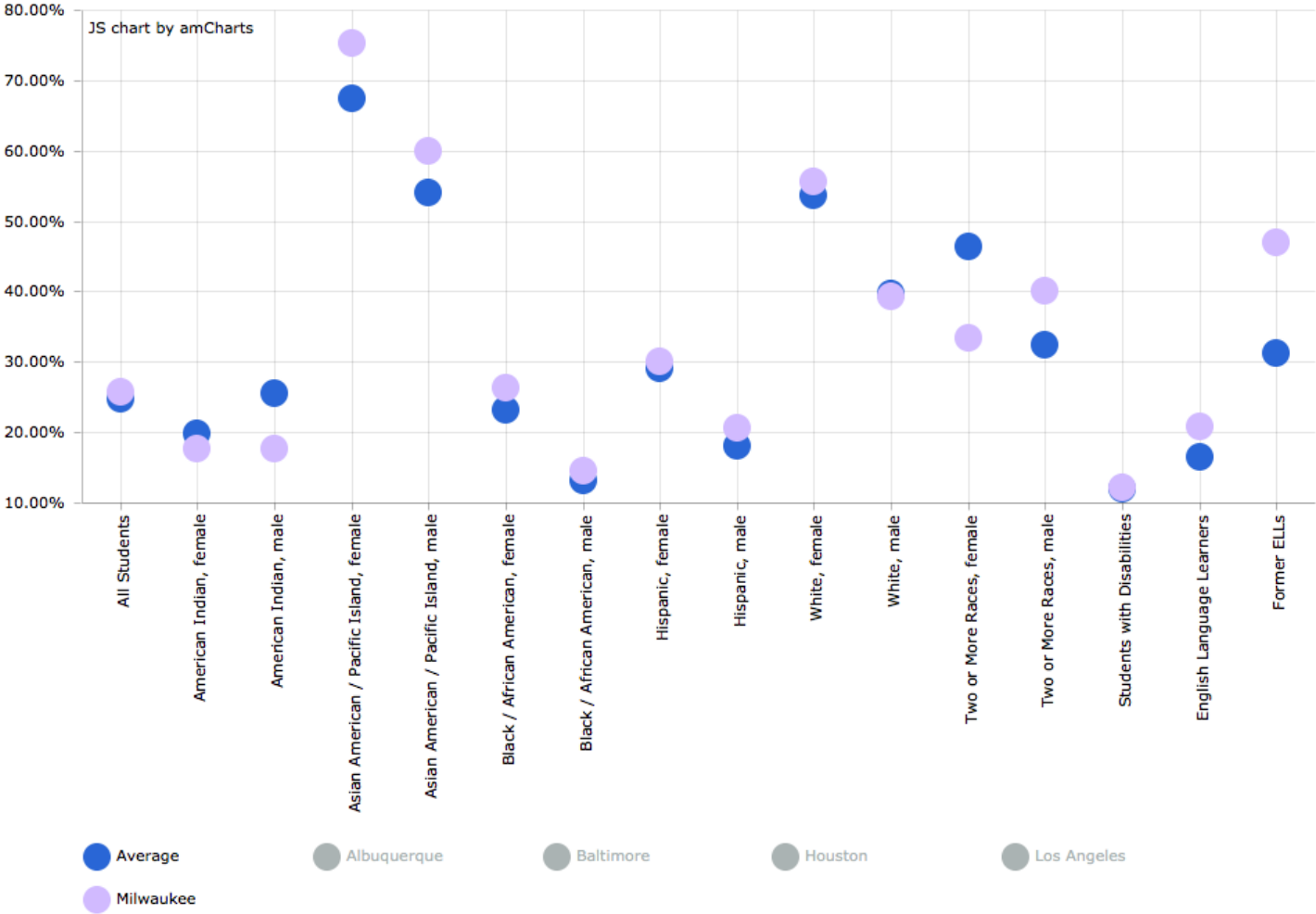
# Sample Performance Measures (continued)

**Percent of Ninth Grade Students Failed One or More Core Course, by Subgroup**  
 - Survey Year: 2014 -



# Sample Performance Measures (Continued)

**Percent of Ninth Grade Students with a B Average GPA or Higher, by Subgroup**  
 - Survey Year: 2014 -

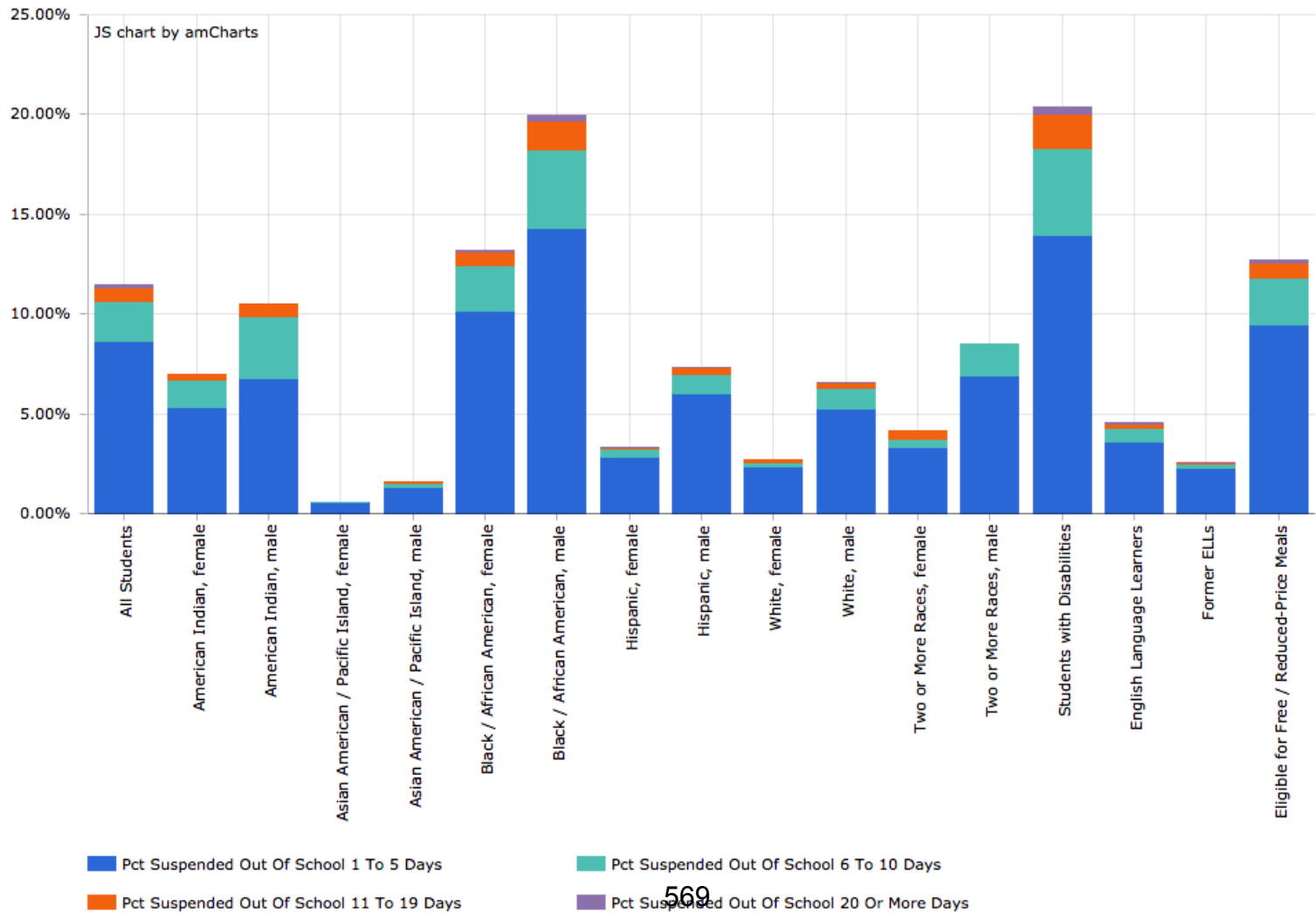




# Sample Performance Measures (continued)

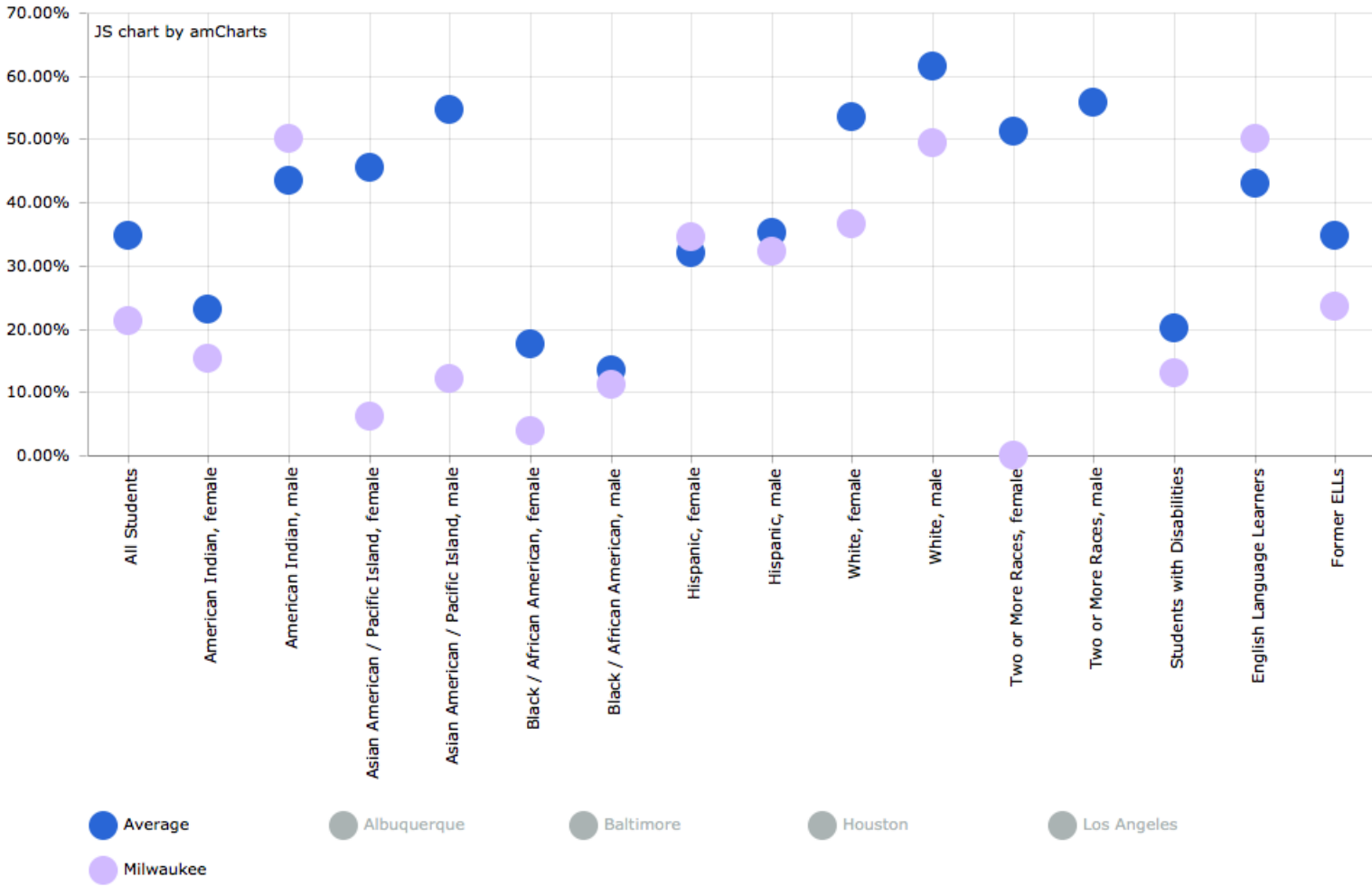
**Out-of-School Suspensions, by Subgroup**

- District Id: Milwaukee - Survey Year: 2014 -



# Sample Performance Measures (Continued)

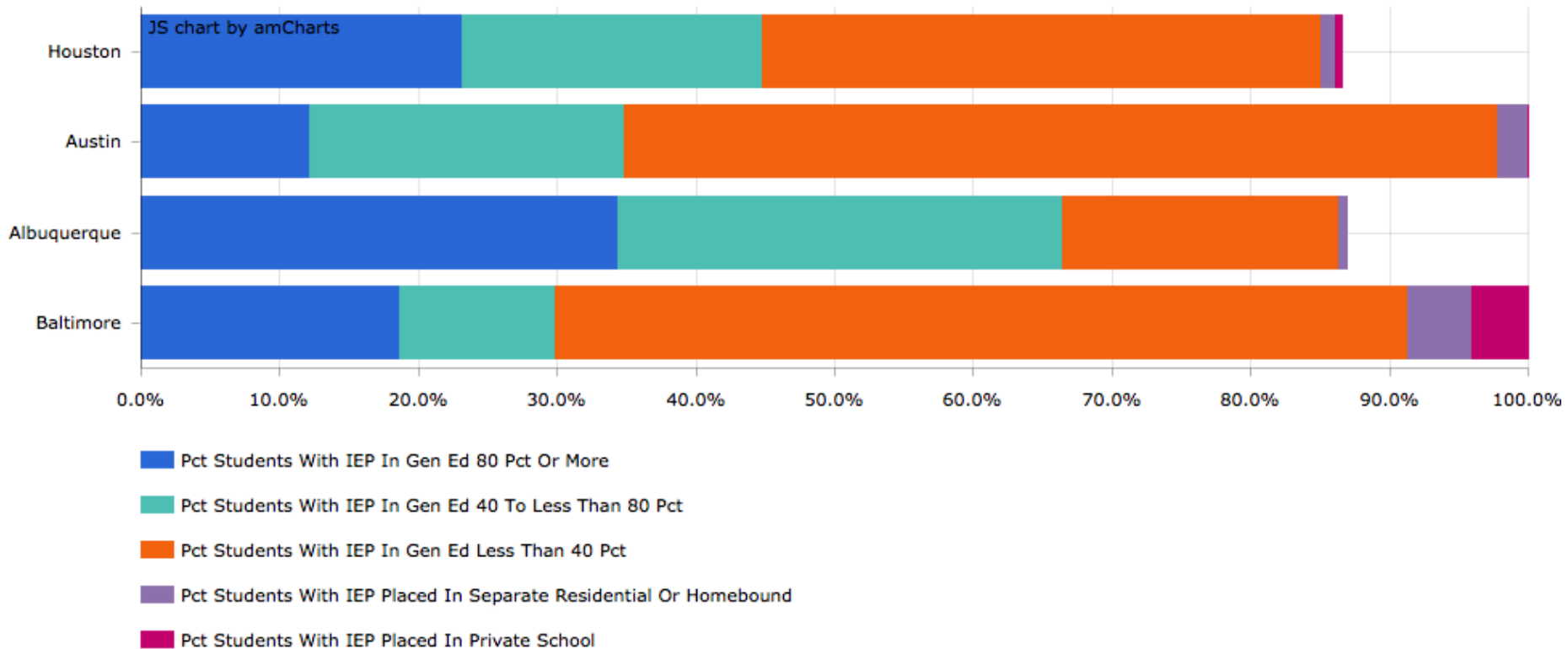
**AP Exam Pass Rate, by Subgroup**  
 - Survey Year: 2014 -



# Sample Performance Measures (continued)

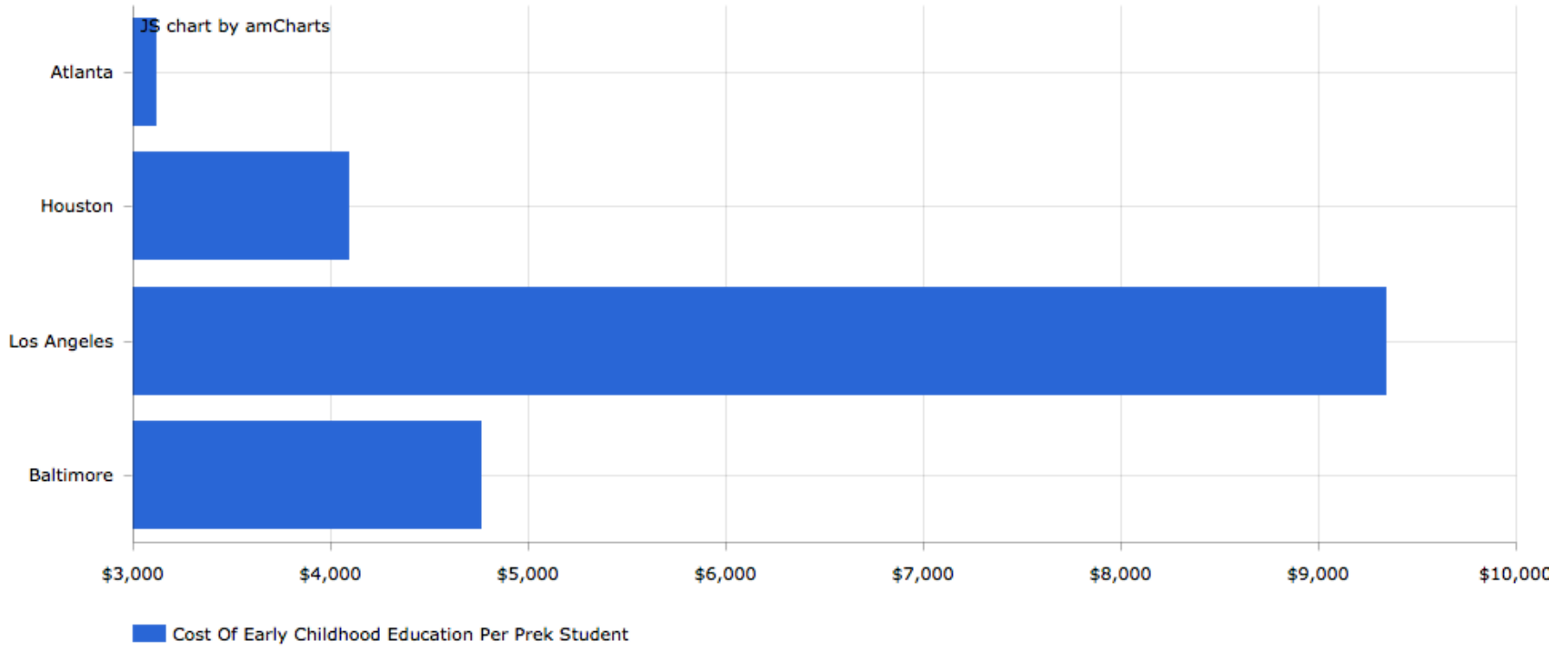
## SPED Placements

- Survey Year: 2014 -



# Sample Cost Measures

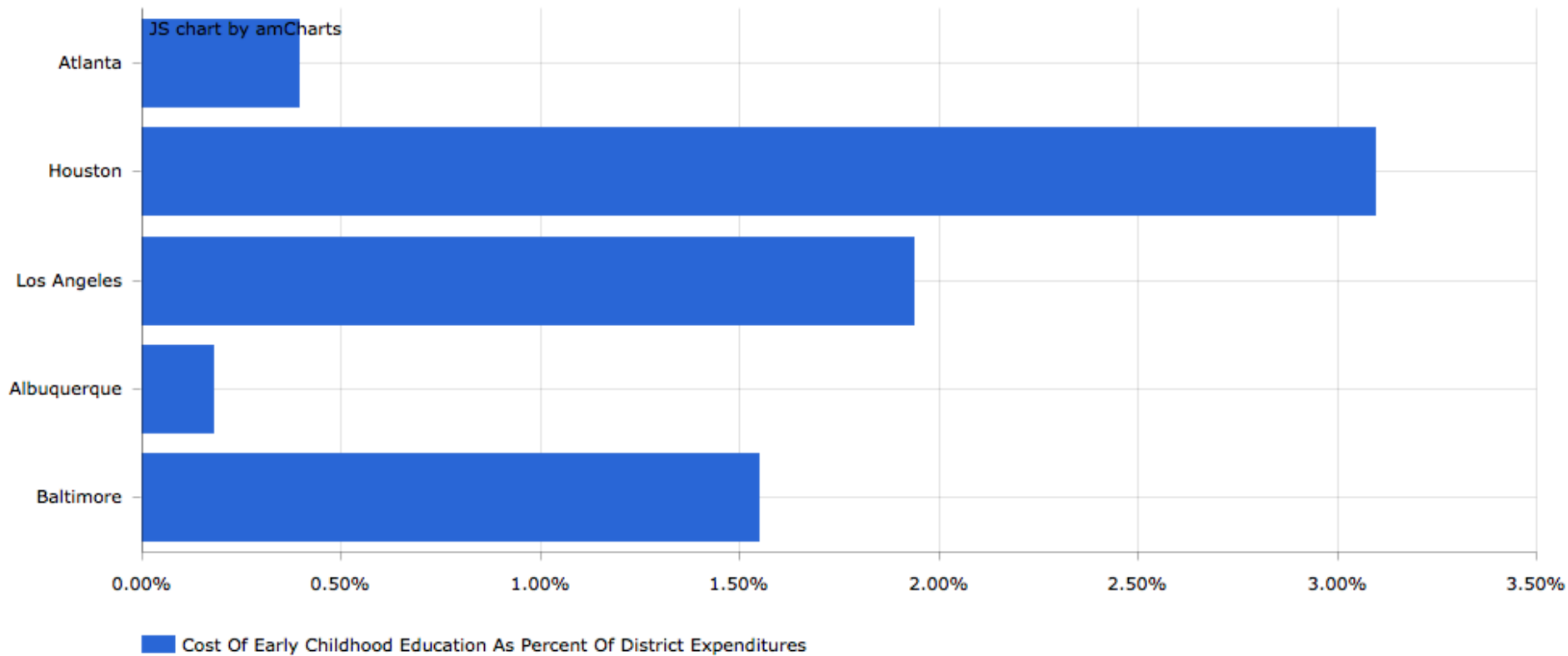
**Early Childhood Education Cost per Pre-K Student**  
- Survey Year: 2014 -



# Sample Cost Measures (continued)

**Early Childhood Education Costs as Percent of District Expenditures**

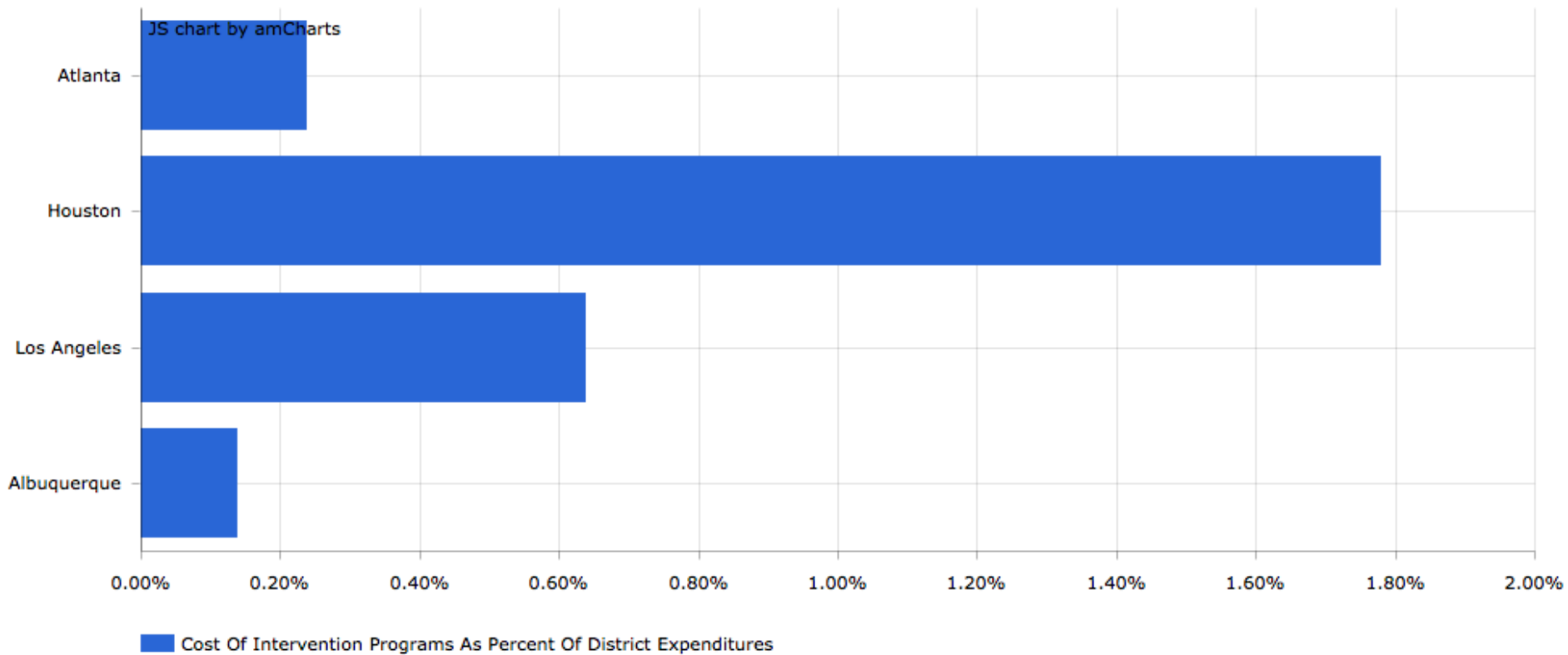
- Survey Year: 2014 -



# Sample Cost Measures (continued)

**Cost of Intervention Programs as Percent of District Expenditures**

- Survey Year: 2014 -



# Sample Cost Measures (continued)

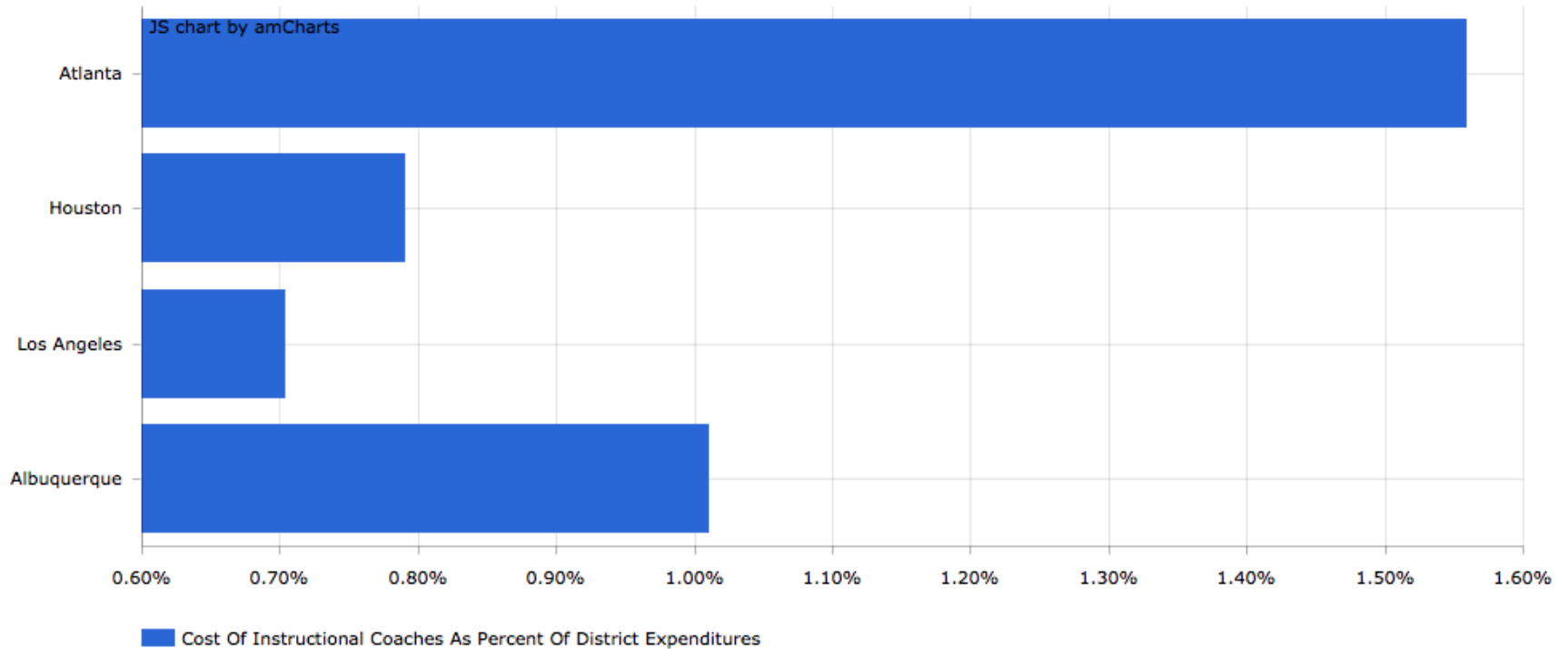
**Cost of Instructional Coaches per Student**  
- Survey Year: 2014 -



# Sample Cost Measures (continued)

**Cost of Instructional Coaches as Percent of District Expenditures**

- Survey Year: 2014 -

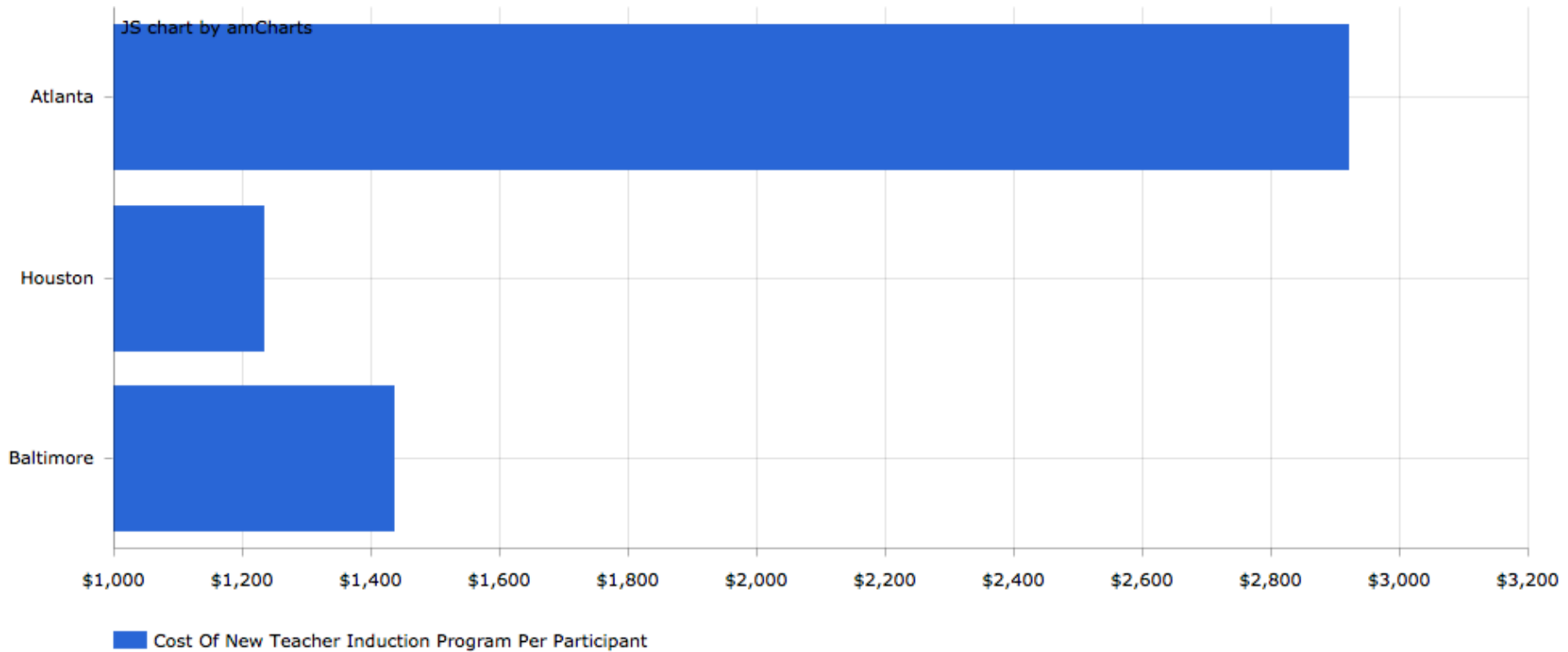




# Sample Cost Measures (continued)

**Cost of New Teacher Induction Program per Participant**

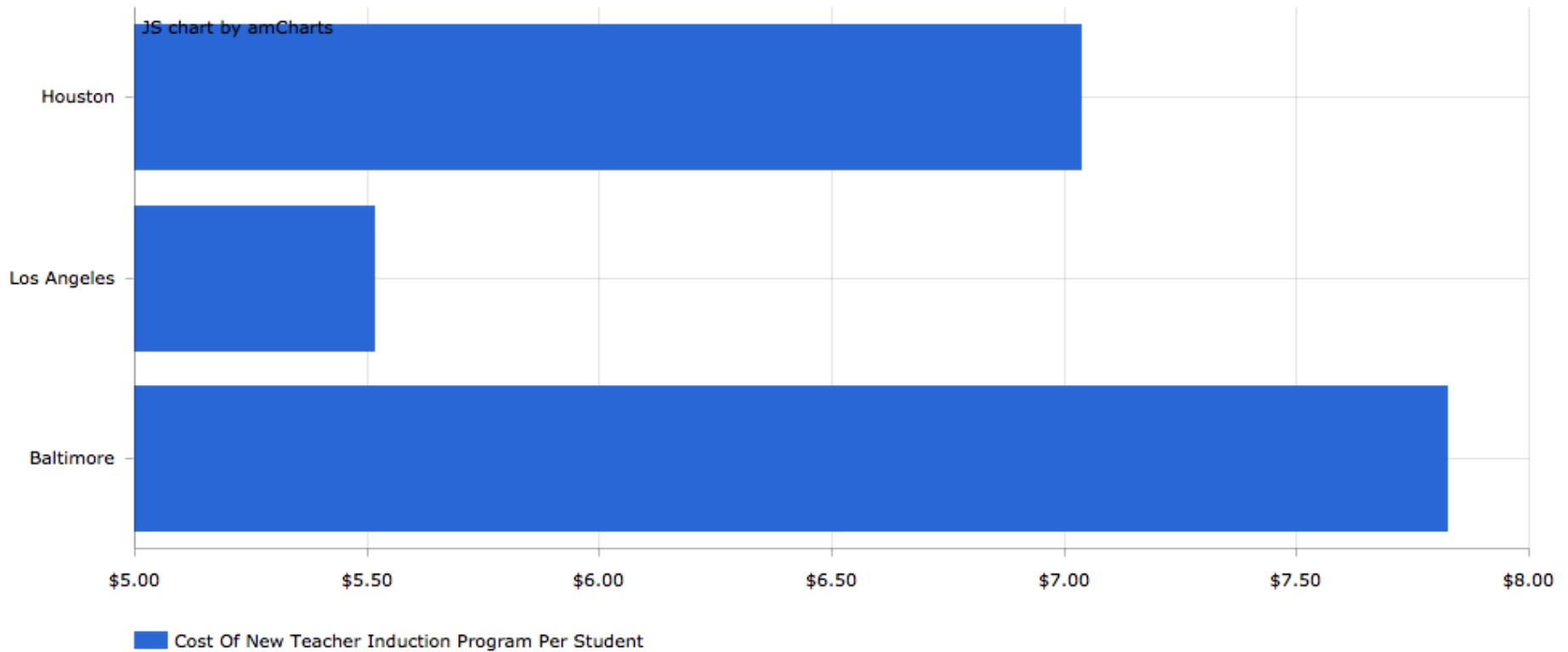
- Survey Year: 2014 -



# Sample Cost Measures (continued)

**Cost of New Teacher Induction Program per Student**

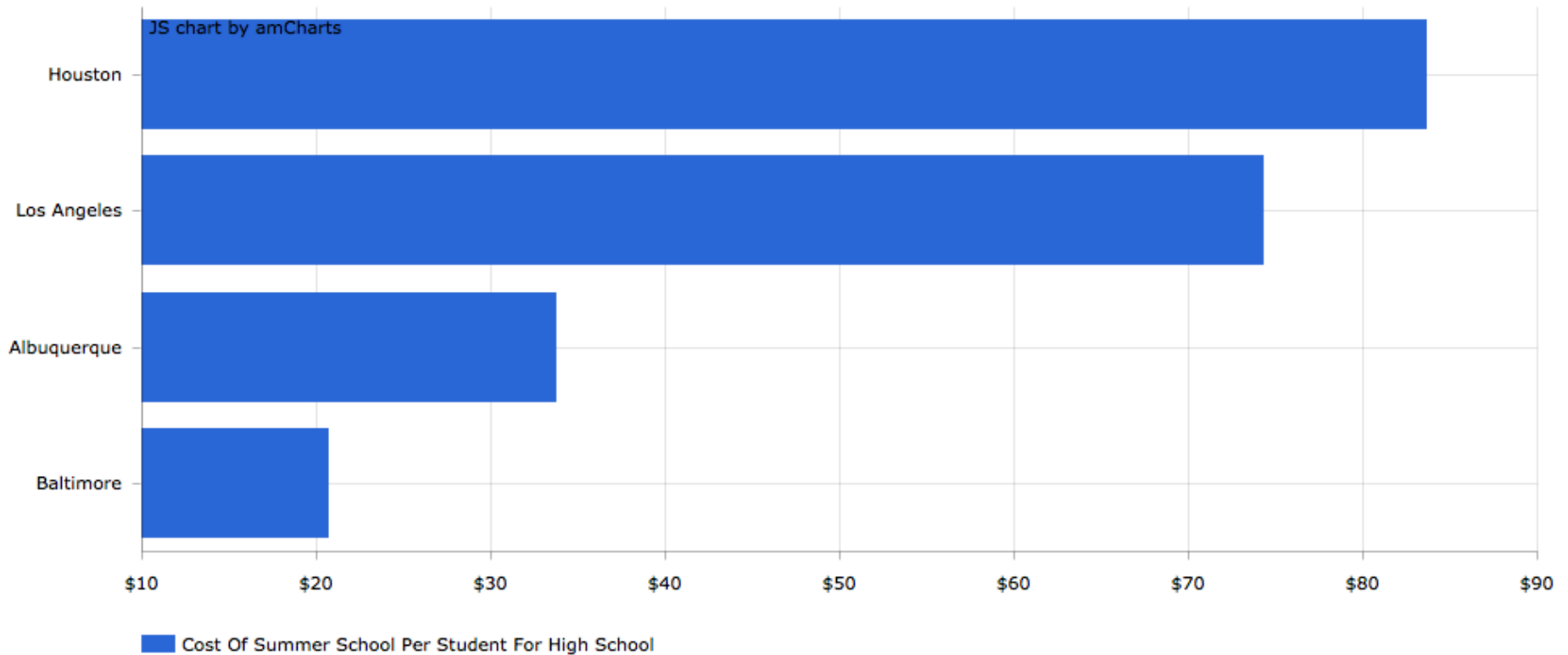
- Survey Year: 2014 -



# Sample Cost Measures (continued)

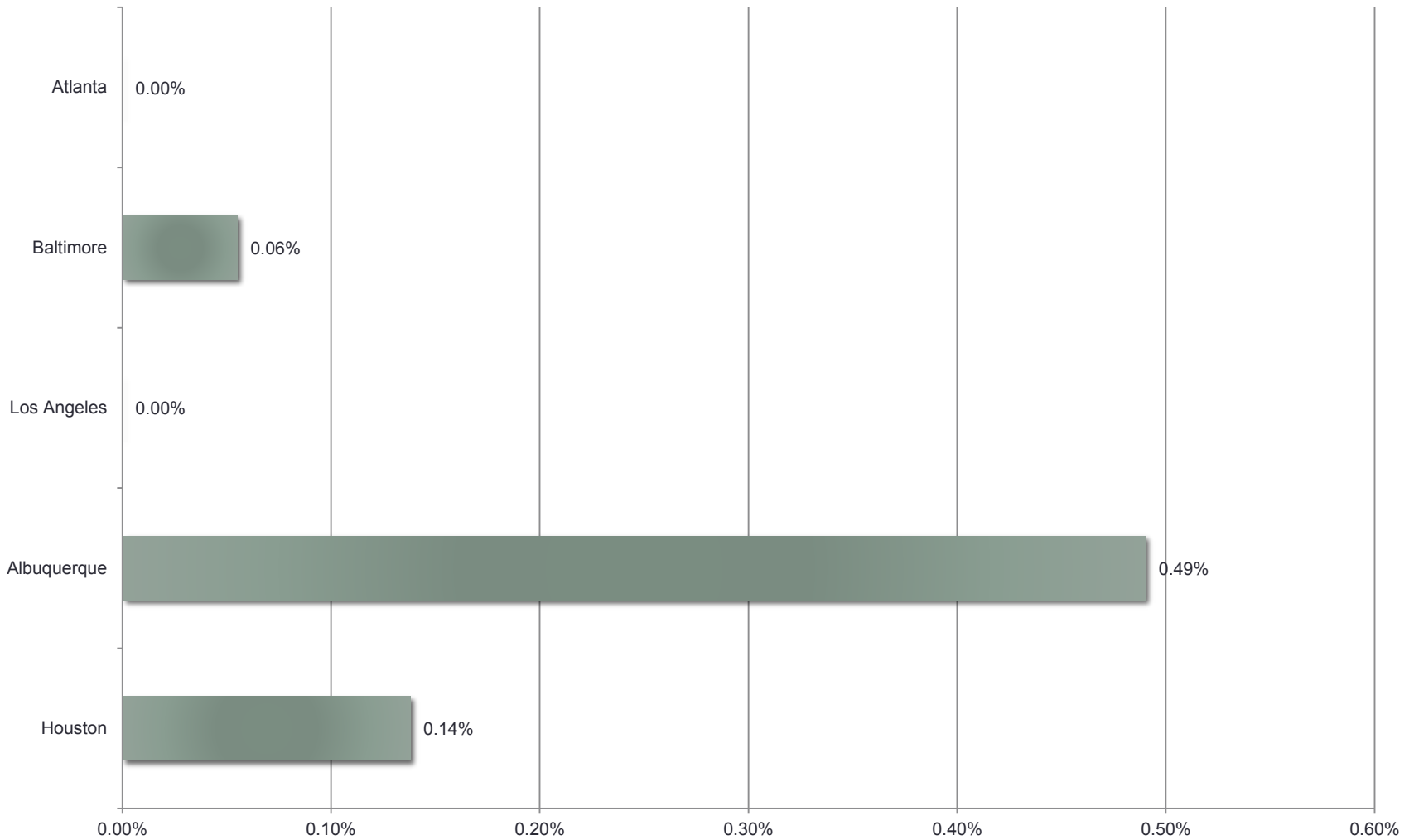
## Cost of Summer School per Student for High School

- Survey Year: 2014 -



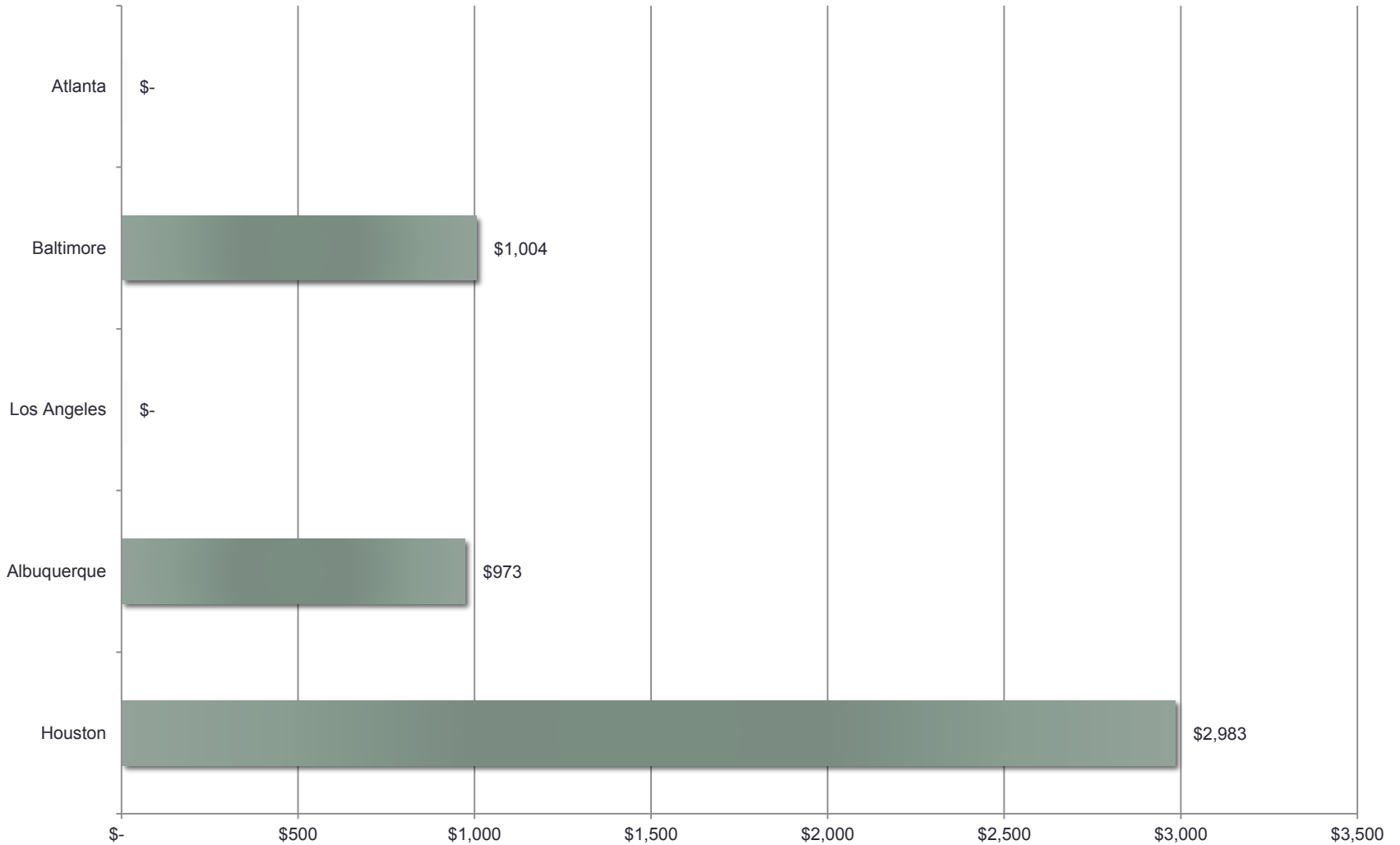
# Sample Cost Measures (continued)

ELL Support Personnel Costs as Percent of District Budget



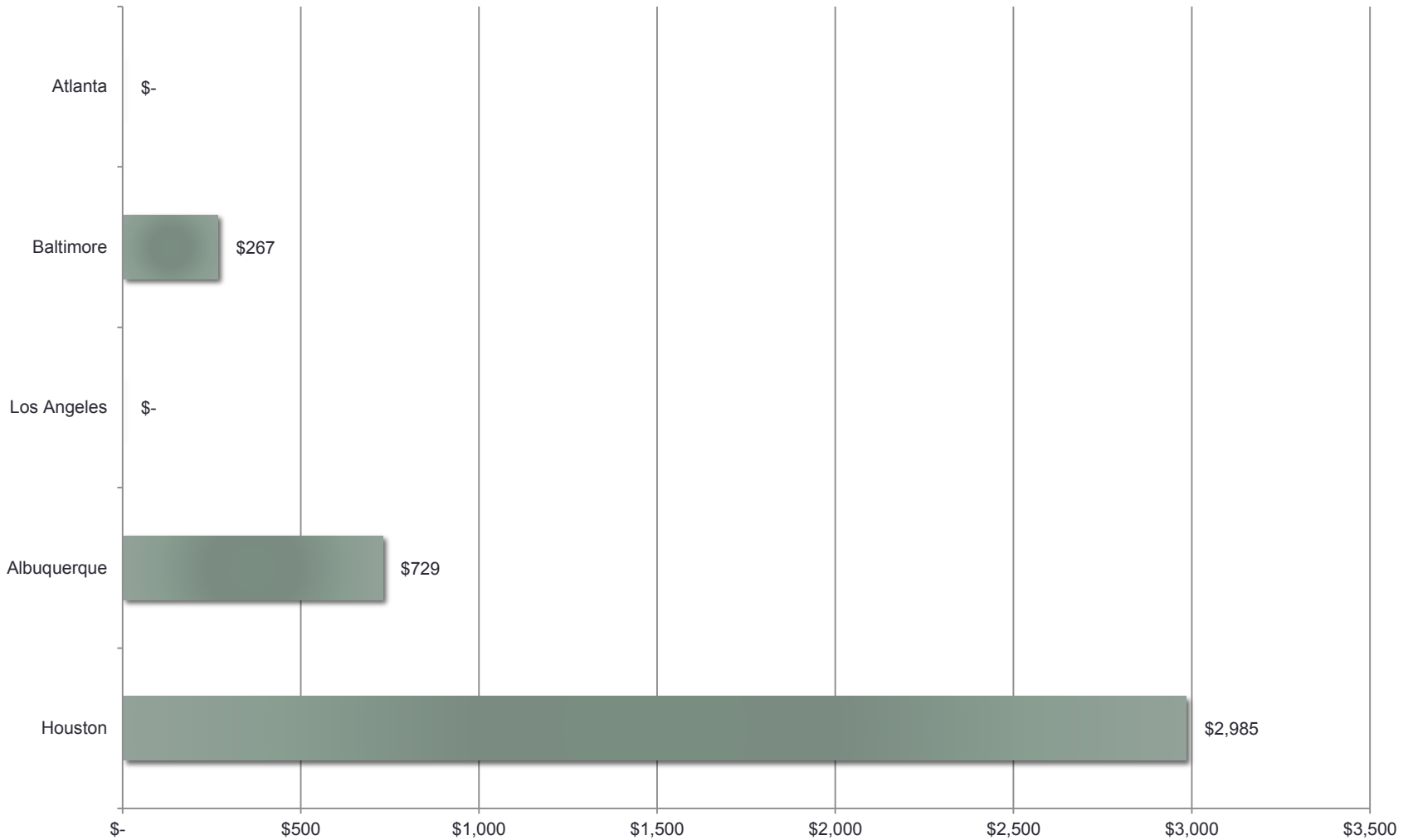
# Sample Cost Measures (continued)

SPED Evaluations - Average Cost per Initial Evaluation



# Sample Cost Measures (continued)

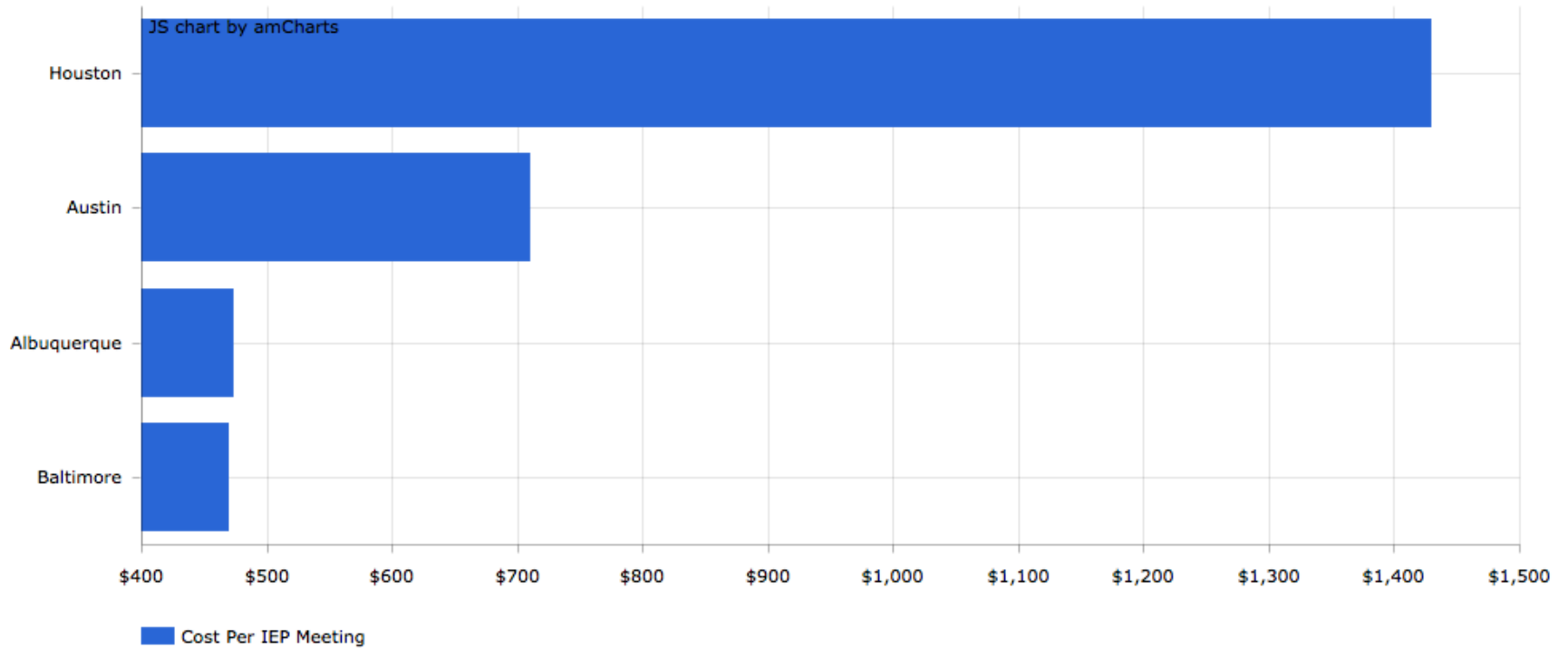
SPED Reevaluations - Average Cost per SPED Reevaluation



# Sample Cost Measures (continued)

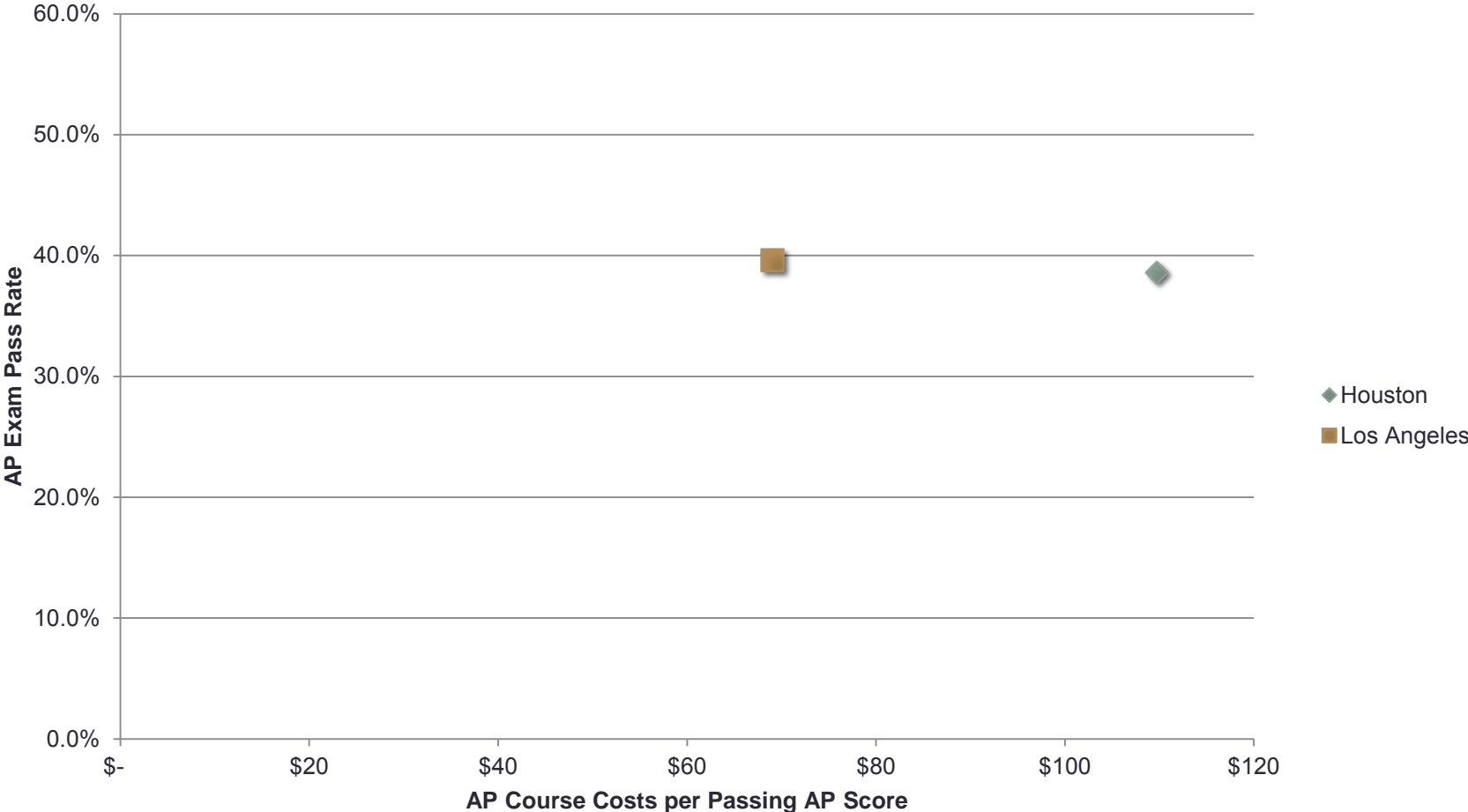
## Cost per IEP Meeting

- Survey Year: 2014 -



# Sample Pairing of Indicators

## AP Course Costs per Passing AP Score vs. AP Exam Pass Rate





## Sample Return on Investment— Real Data on Atlanta

	Instructional Coaches	Class Size	Early Childhood
Cost per child	\$78.16	\$439.98	\$3,111
Effect size in reading	0.06	0.18	0.17
Cost to move one student by one percentile point	\$32.57	\$61.11	\$441.18
Effect in percentile point gain of \$1,000 investment	30.70	16.36	2.27

## Next Steps

- Increase numbers of pilot districts providing sample data
- Finish data analysis
- Review indicators to see which ones need revisions, which ones can be kept, and which ones should be rejected
- Make determinations about which indicators should be kept but will require coding changes at the district level
- Present work to the organization's executive committee and chief financial officers to get additional buy-in for moving forward
- Further develop analysis tools and software
- Begin regular collection and use of data across membership

**ELA TEXT SET PROJECT**



# Text Set Project Conferences

Co-Sponsors:

Council of the Great City Schools &  
Student Achievement Partners

**Text Set Project (TSP)  
Conference  
March 30-31, 2015  
Milwaukee, WI**

**Text Set Project (TSP)  
Conference  
June 24-25, 2015  
Portland, OR**

The Text Set Project is a professional learning opportunity that will involve:

- ❖ learning the research base underlying the critical role knowledge-building plays in reading success.
- ❖ coaching and support in selecting the books and articles that could form a solid text set, learning how to sequence the set effectively, and how to support students in building knowledge about the world, words and language structure as they read the texts for themselves.
- ❖ extending beyond the in-person training, to include expert reviewers working with each production team remotely to review the materials and coach the team until the Text Sets are ready to be published.

Teams will consist of librarians and teachers working together: Librarians have the training to select and sequence texts well. They are critical partners in students' reading success. Because of this, the Text Set Project requires participants to register as teams. There must be at least one librarian to every two educators as the work will be divided between selecting texts and writing questions and activities to ensure students learn from their reading. Together, they will produce the annotated bibliography that will become the Text Set.

The text sets will be comprised of annotated bibliographies and suggested sequencing of texts to provide a coherent learning experience for students. This is accompanied by teacher instructions and supports, as well as a variety of suggested tasks for ensuring students have learned from what they have read.

Visit [www.commoncoreworks.org](http://www.commoncoreworks.org) for registration and hotel information.

**DES MOINES SPECIAL EDUCATION REPORT**

**IMPROVING  
SPECIAL EDUCATION SERVICES  
IN THE  
DES MOINES PUBLIC SCHOOLS**

**Submitted to the  
Des Moines Public Schools  
by the  
Strategic Support Team  
of the  
Council of the Great City Schools**



**May 2015**

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**Improving Special Education Services in the Des Moines Public Schools**

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**ASSISTANT PRINCIPALS REPORT**

# Assistant Principals and Teacher Leaders in America's Great City Schools

Council of the Great City Schools

April 2015



# Purpose of Survey

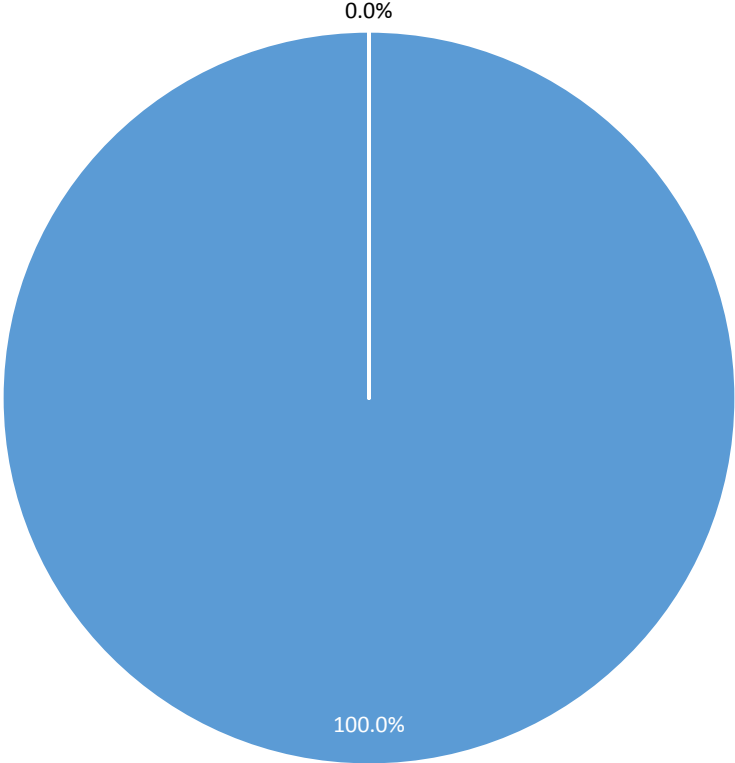
- Determine the extent to which major city school systems have assistant principals in their schools
- Ascertain the criteria major city school districts use to hire and deploy assistant principals in their schools
- Establish what types of professional development and supports assistant principals receive in major city school districts
- Determine the extent to which major city school districts use assistant principals as a pipeline to the principalship
- Determine the use of and supports for teacher leaders in major city school districts

# Methodology

- Conducted an on-line survey of members of the Council of the Great City Schools
- Analyzed statistical results of the survey
- Conducted follow up interviews
- Convened focus group of assistant principals

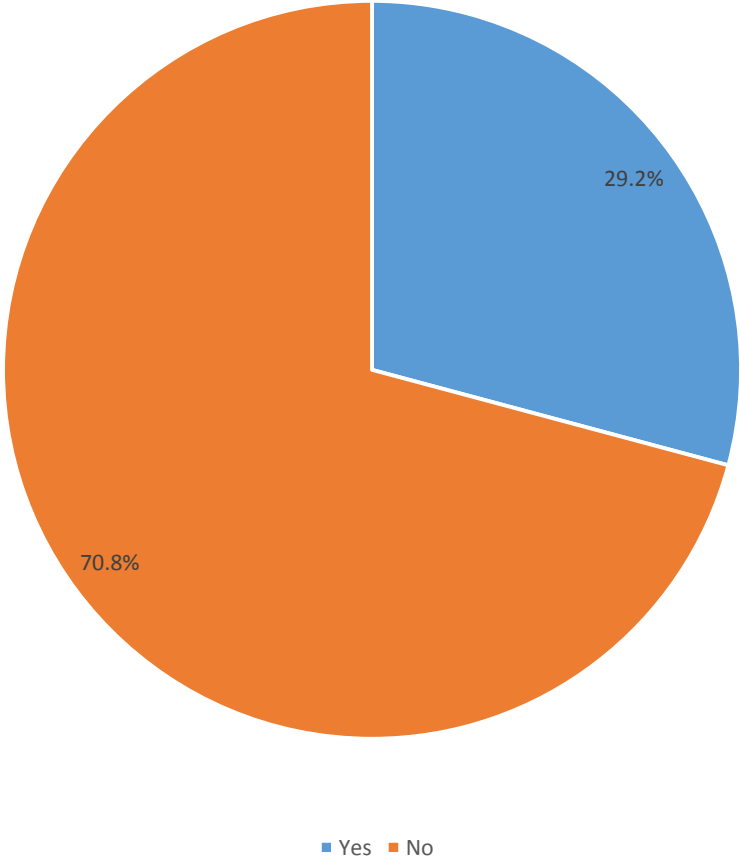
# Results: Assistant Principals

Does your district have an assistant principal position or equivalent who reports directly to their principal?

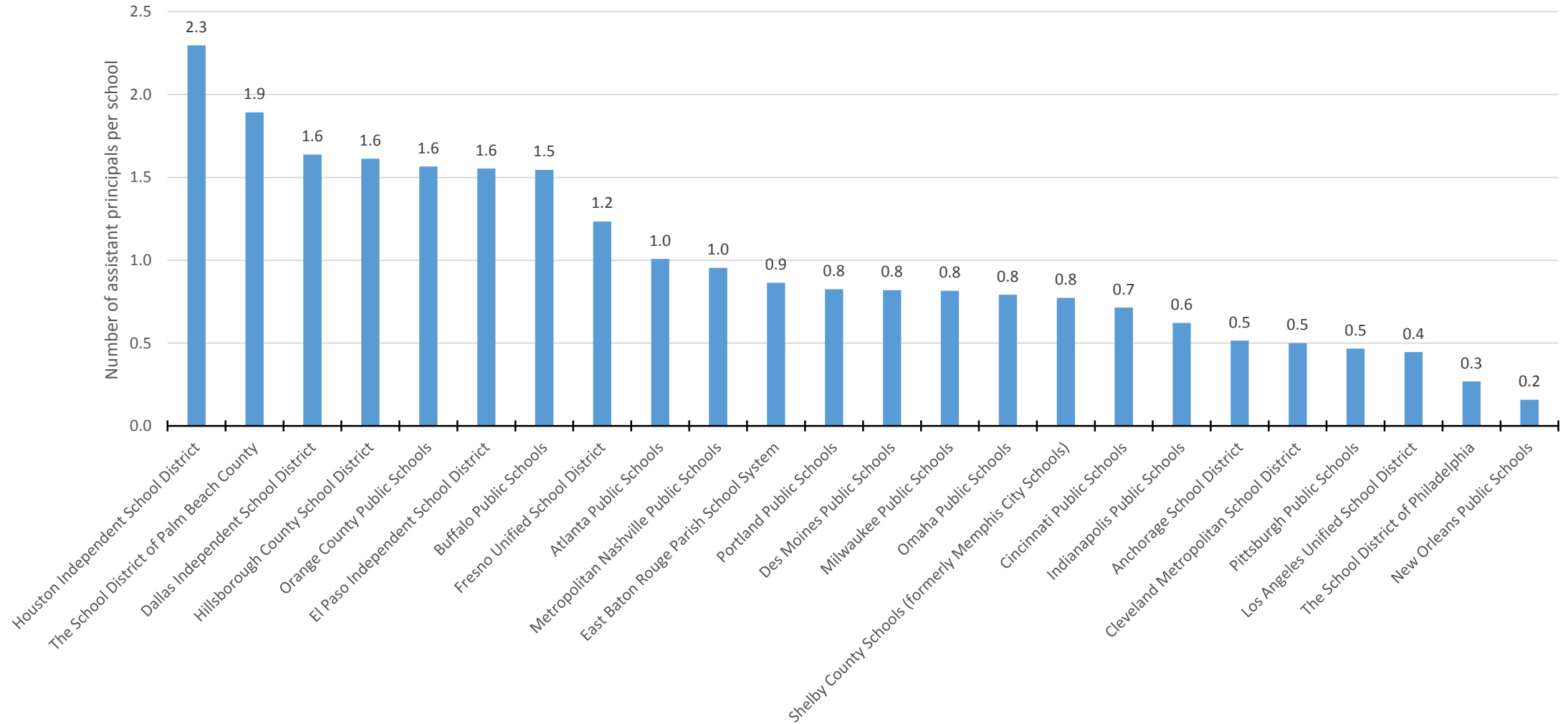


■ Yes ■ No

# Percentage of districts that indicated that every school has at least one assistant principal or equivalent

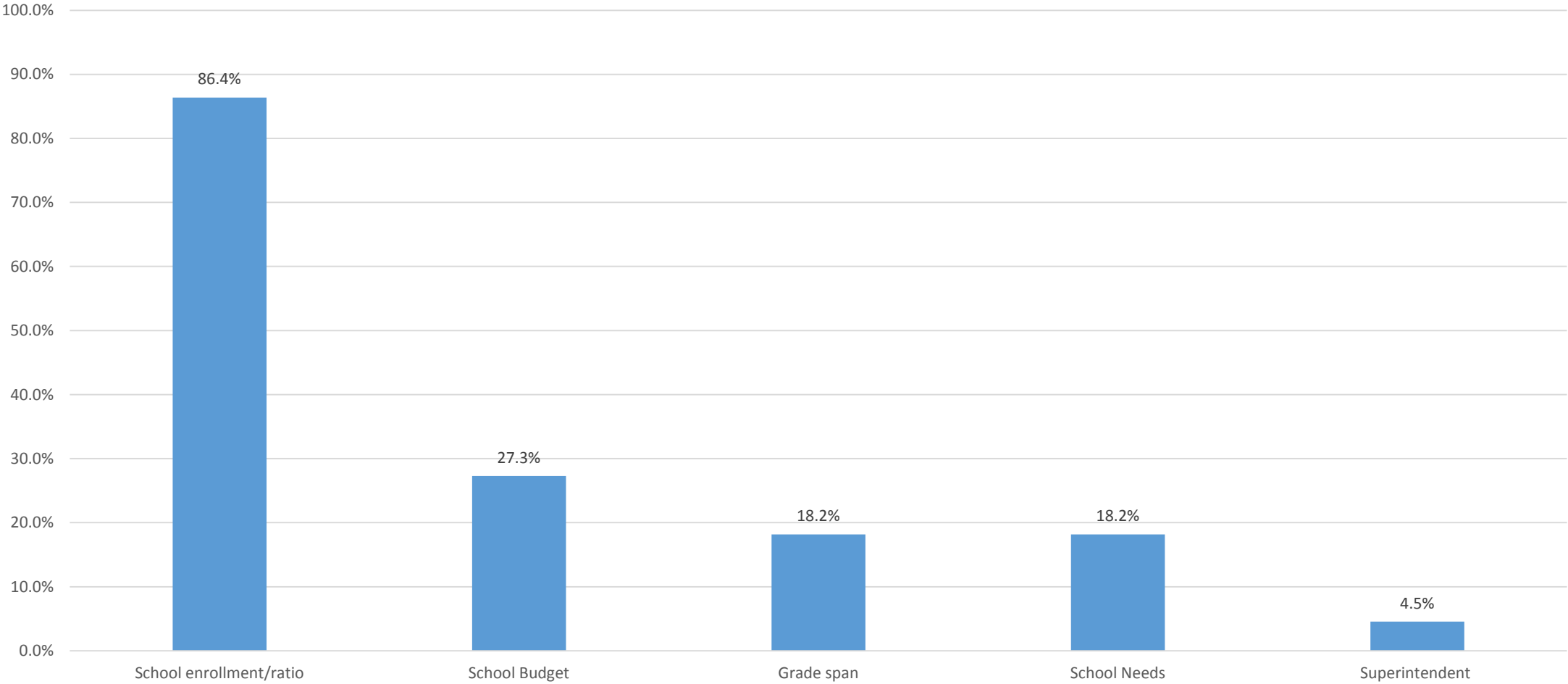


# Average number of assistant principals or equivalents per school

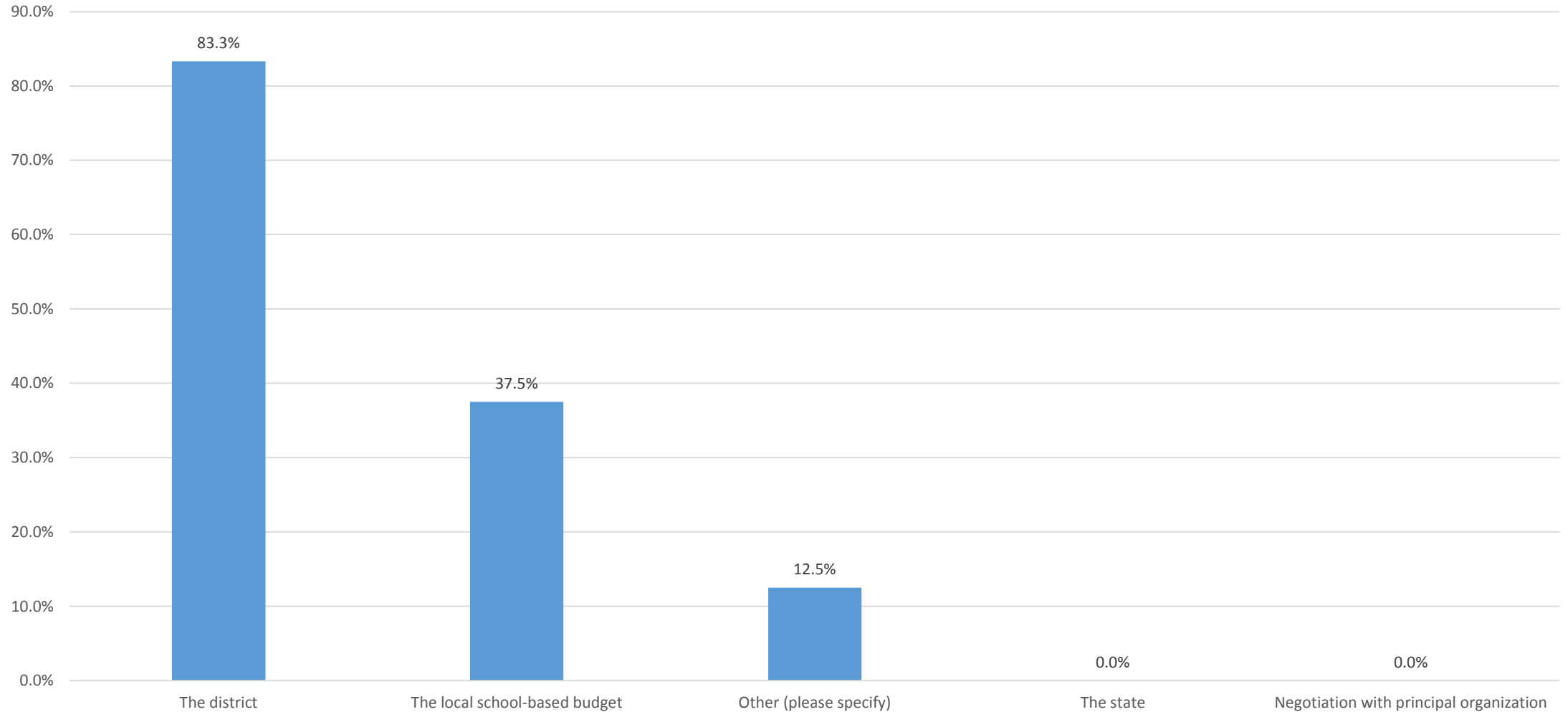




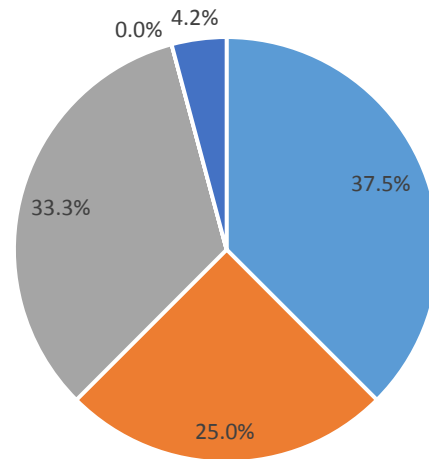
# Factors that determine which schools get assistant principals and how many per school



# Entity that determines the assistant principal allocation system

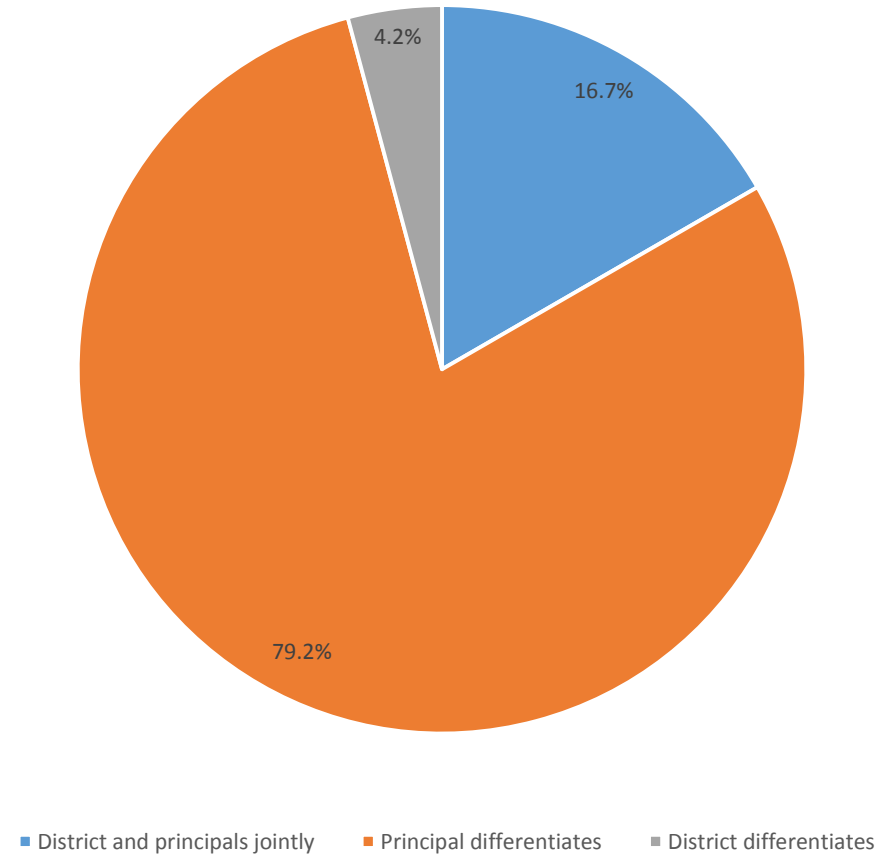


# Entity that makes the final decision to fill an assistant principal position

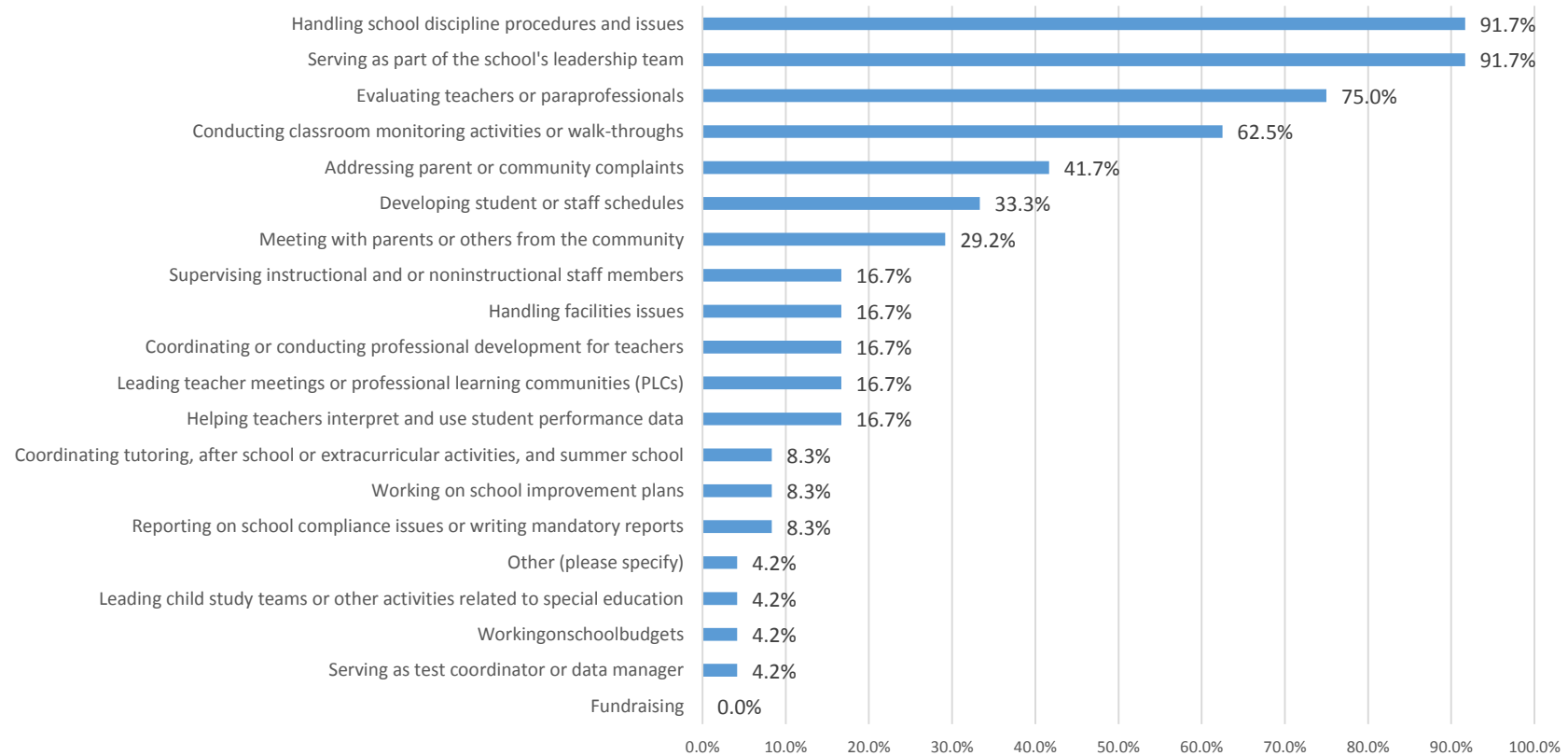


■ Central office (including superintendent) ■ Principal of school ■ Screened by central office but hired by the principal of the school ■ Parental advisory council of the school ■ Other

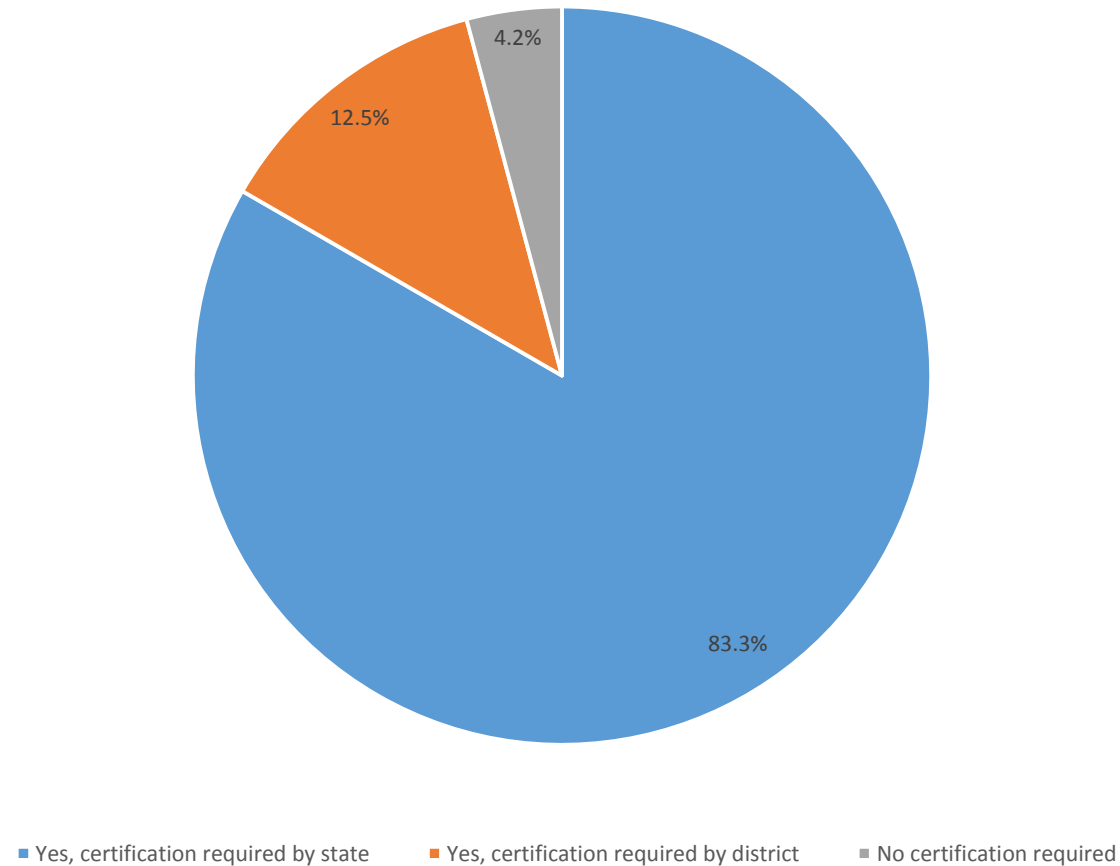
If you have more than one assistant principal in a school, who differentiates their roles at the school level?



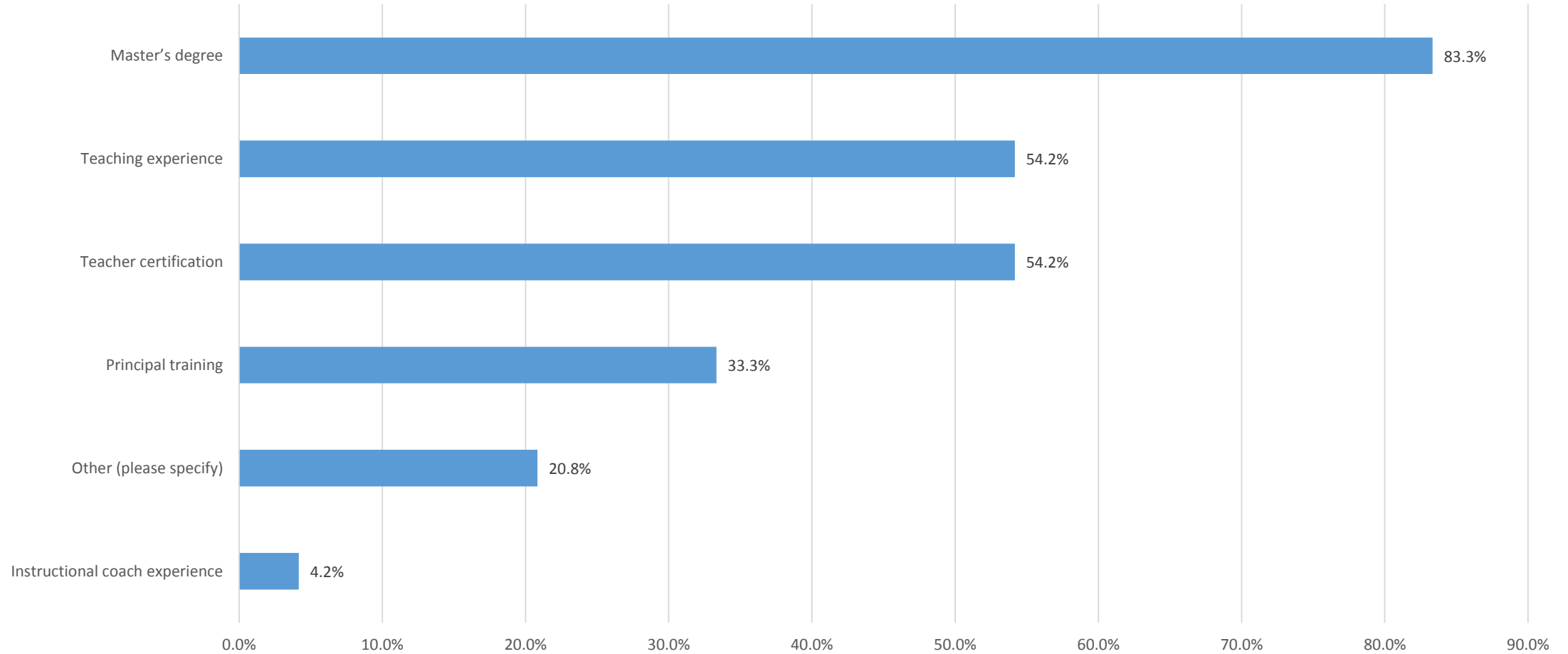
# Top five functions or activities (in terms of time) of the average assistant principal



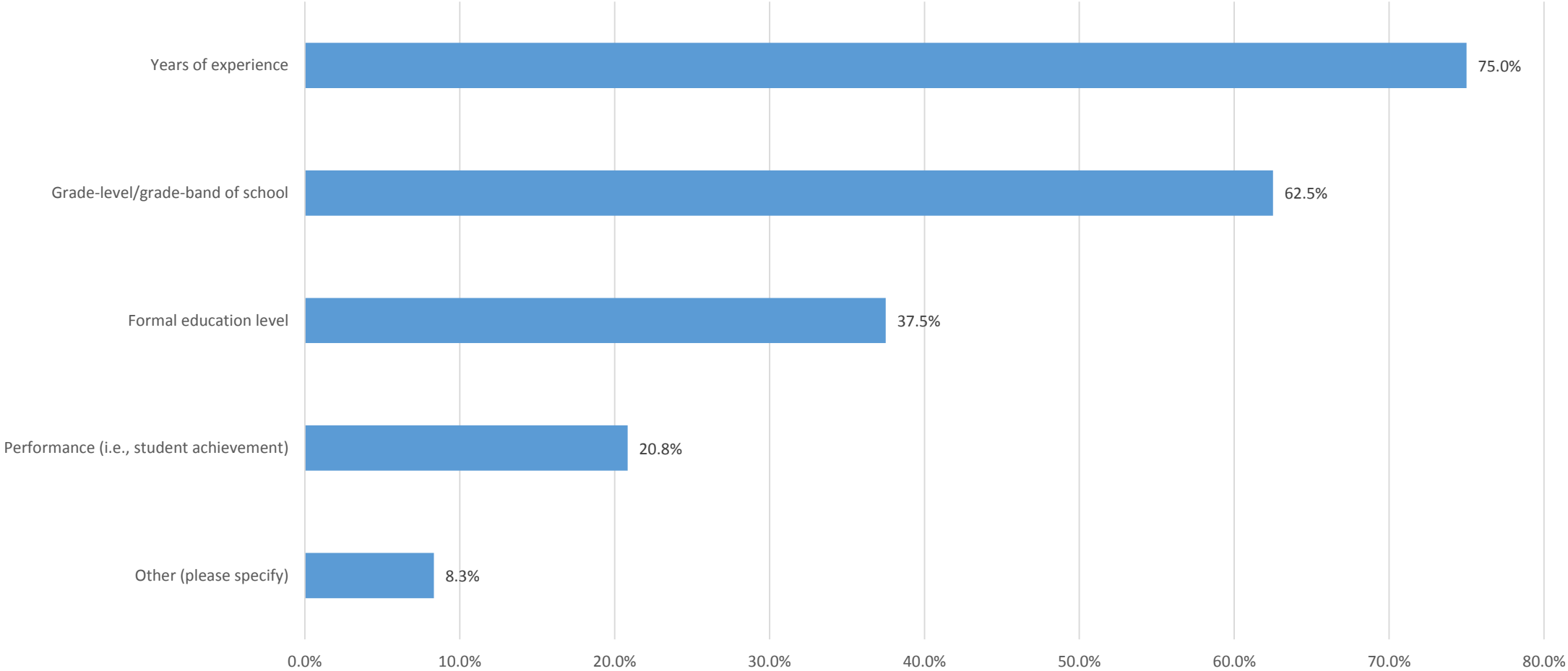
# Are assistant principals required to have some sort of certification beyond teacher certification or licensure?



# Minimum requirements used by districts to hire and place someone into an assistant principal position

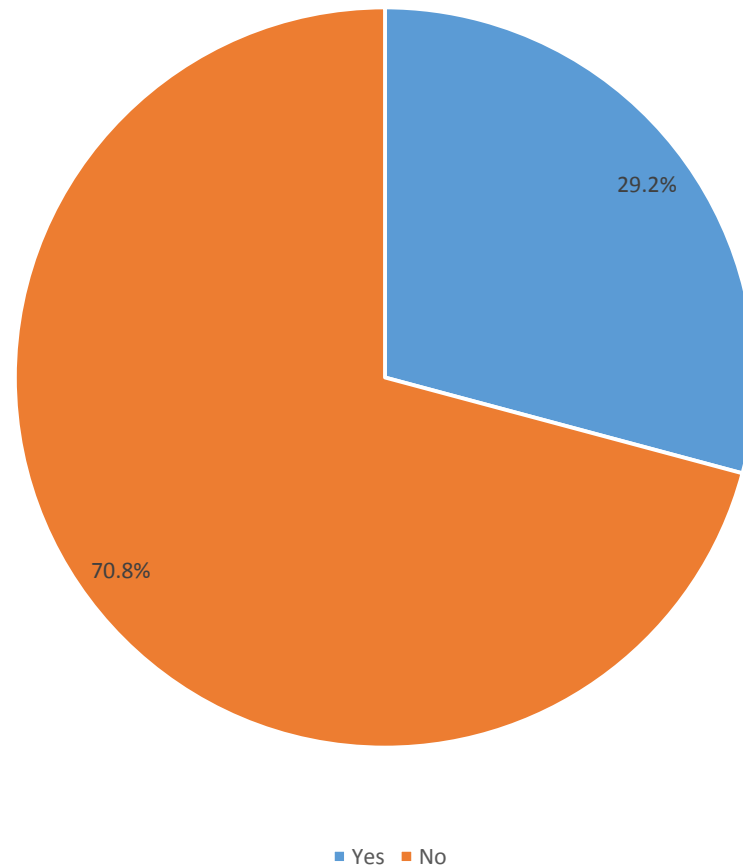


# Are the salaries of assistant principals in your district differentiated by any of the following?

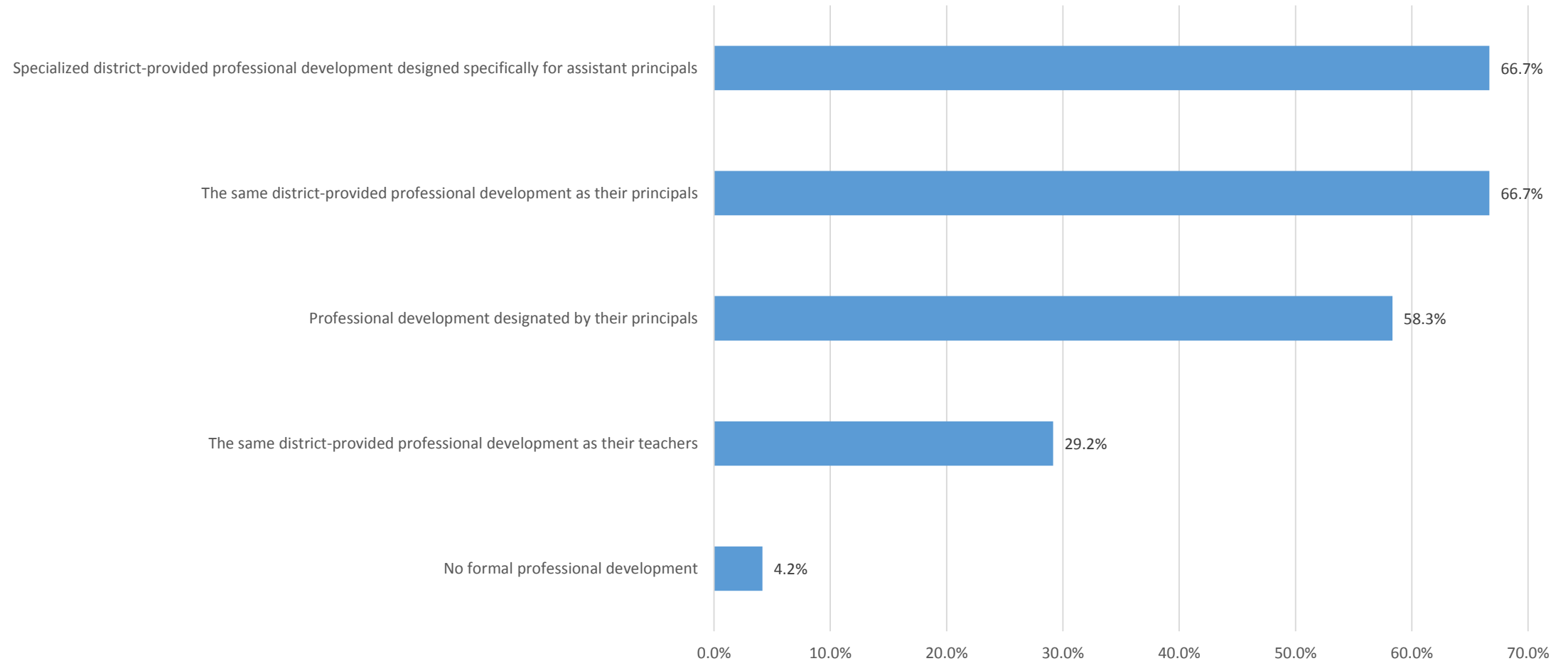




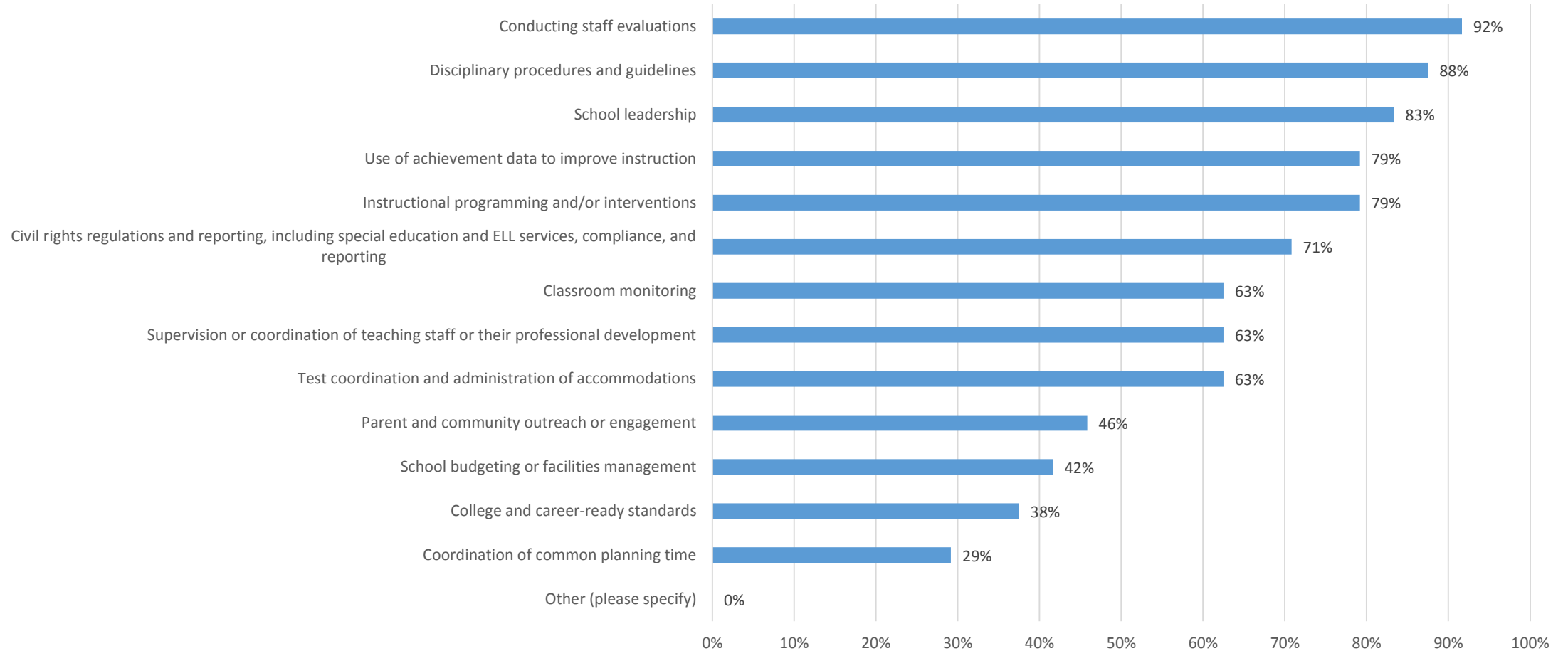
# Do your principals receive professional development on how to supervise and mentor their assistant principals?



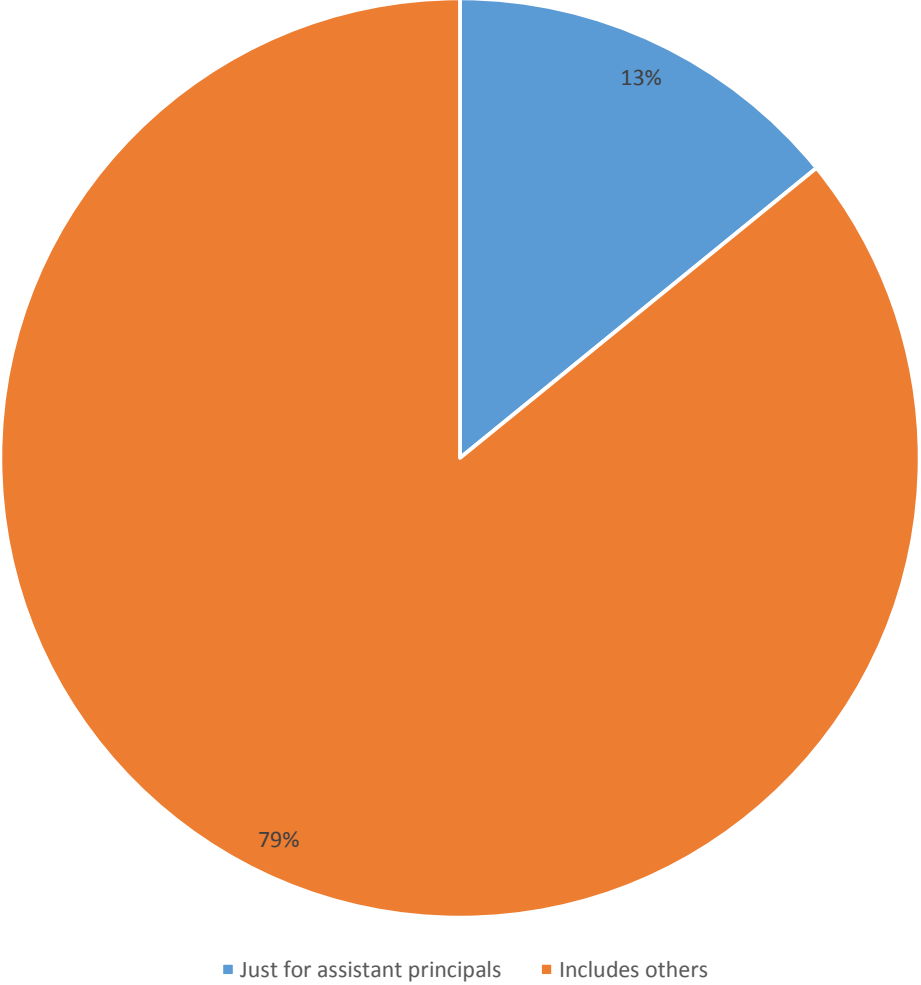
# What types of professional development do assistant principals receive?



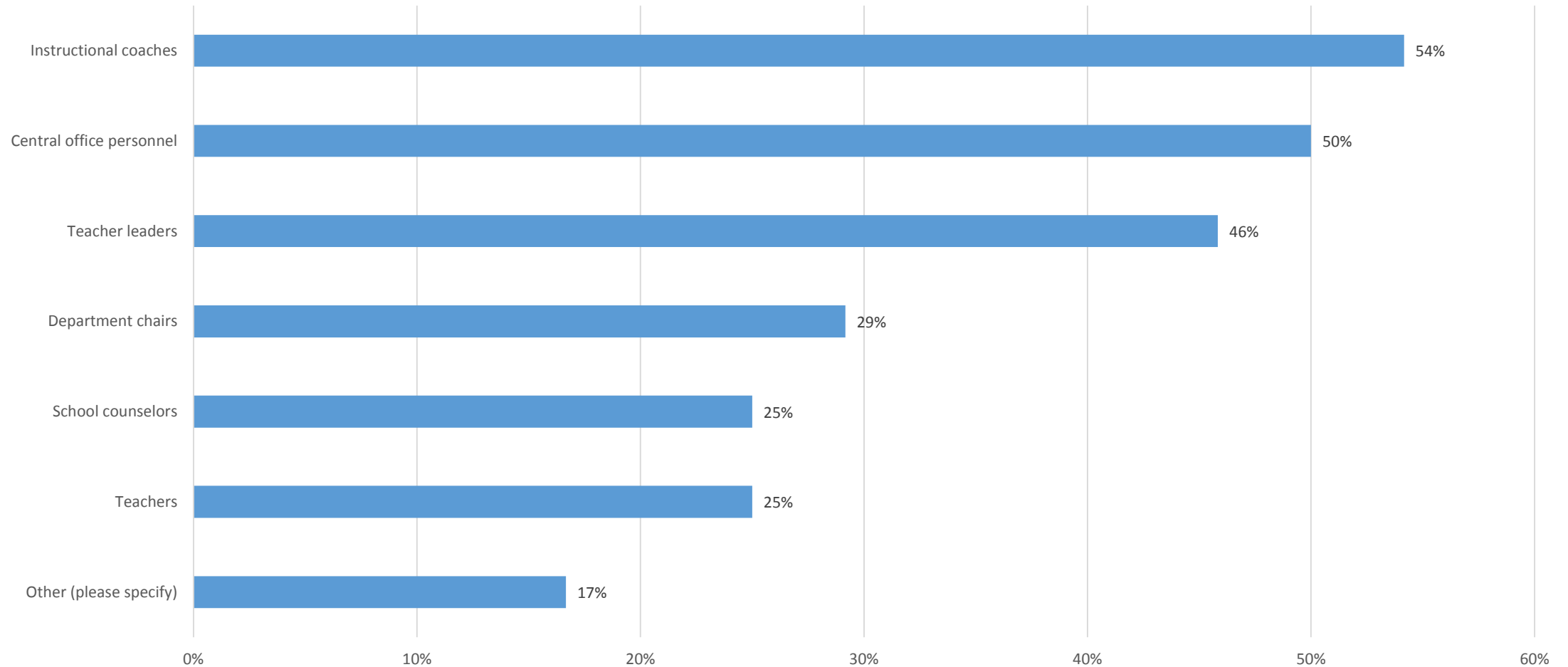
# Percentage of districts that provide professional development in specified areas to their assistant principals



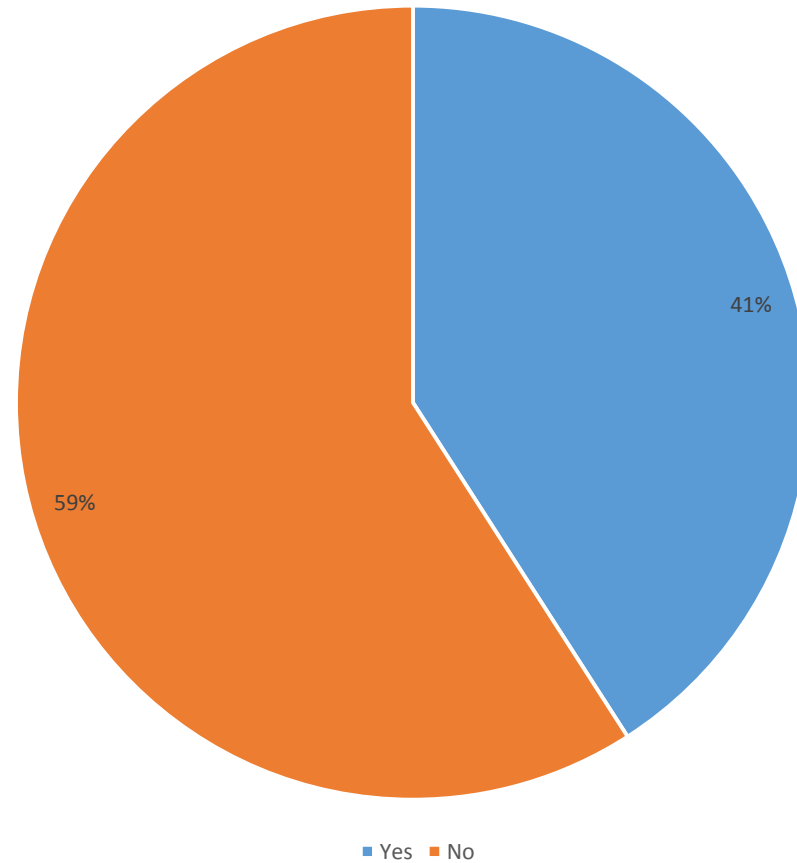
# Percentage of districts indicating that their aspiring-principal programs focus solely on assistant principals or include others



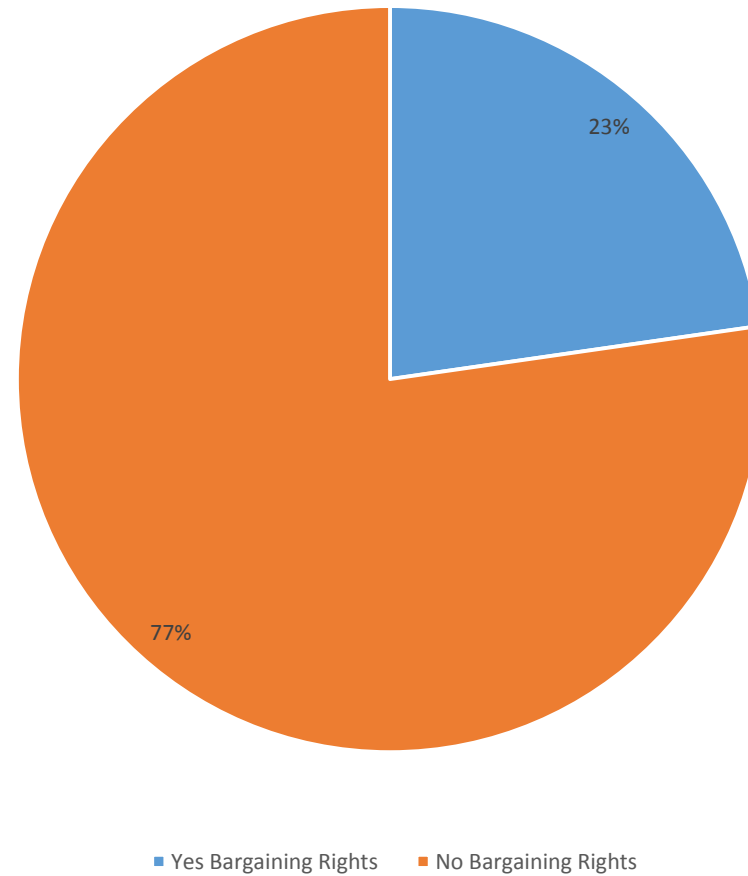
# Percentage of districts that report using other positions as part of their direct pipelines to the principalship



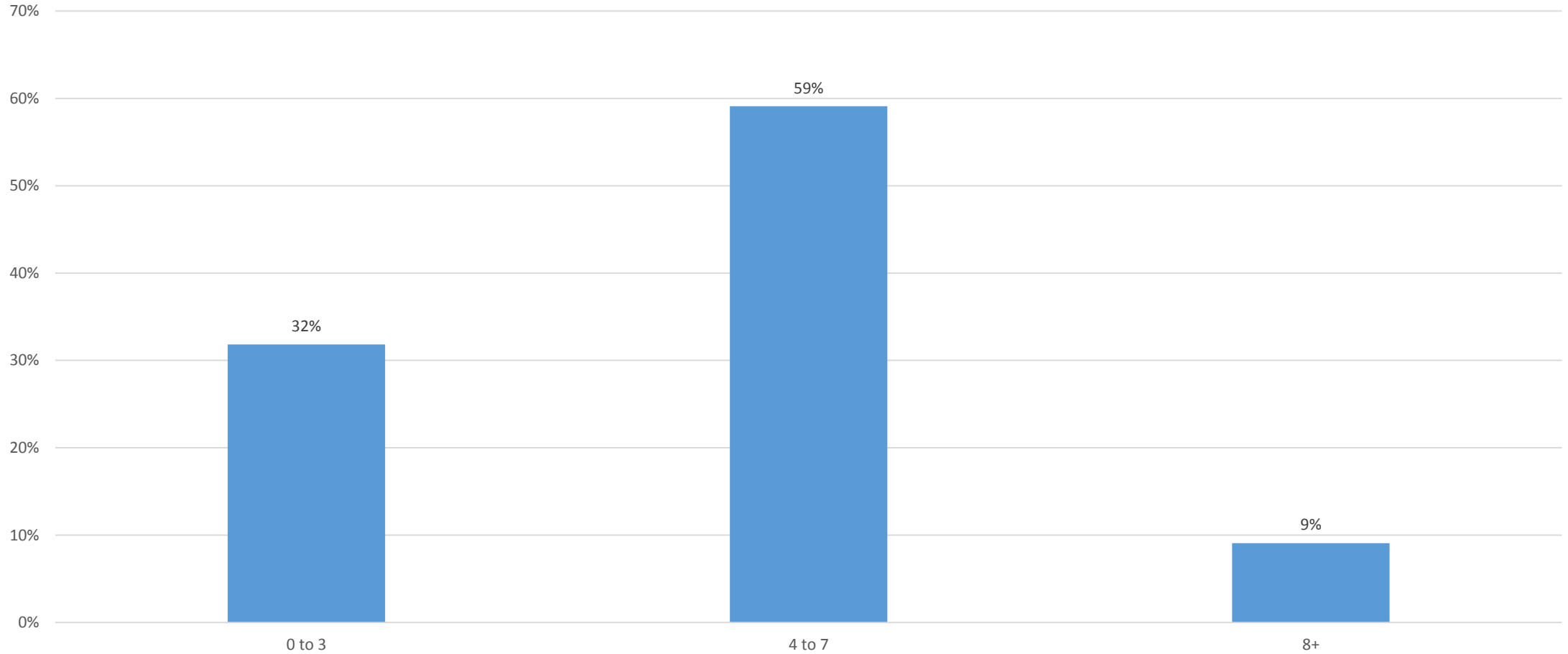
Does your district provide coaches or mentors for assistant principals other than the coaching they may receive from their own principals?



# Do your assistant principals have collective bargaining rights?



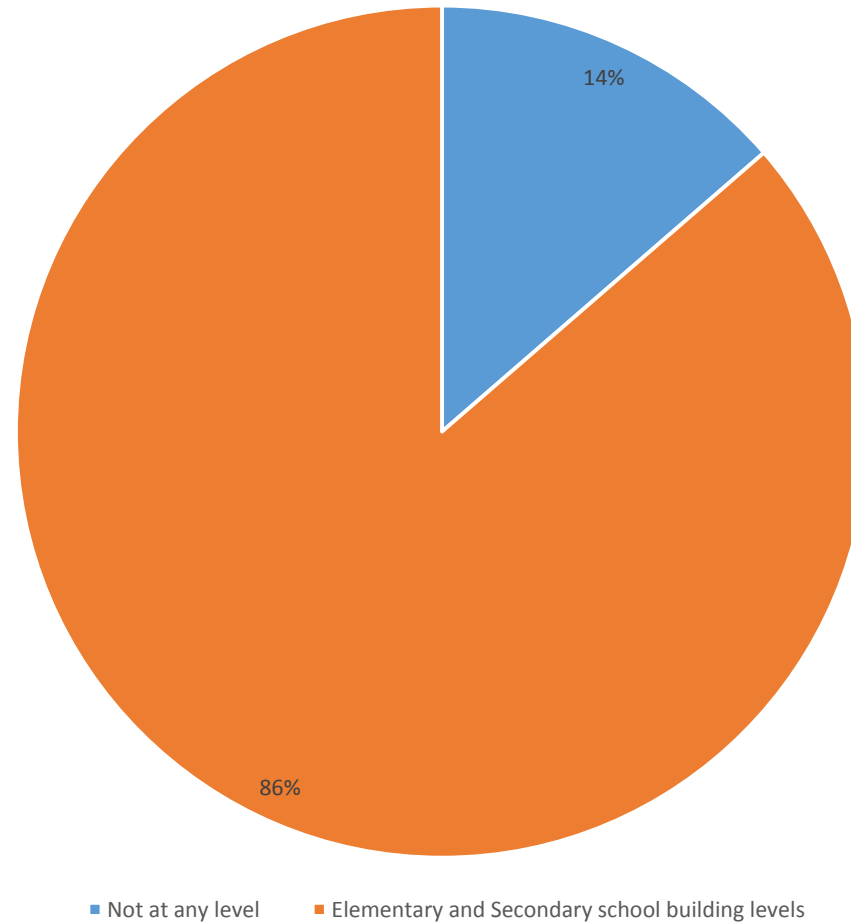
# Average length of time (in years) the average assistant principal has been in their current roles in their current schools



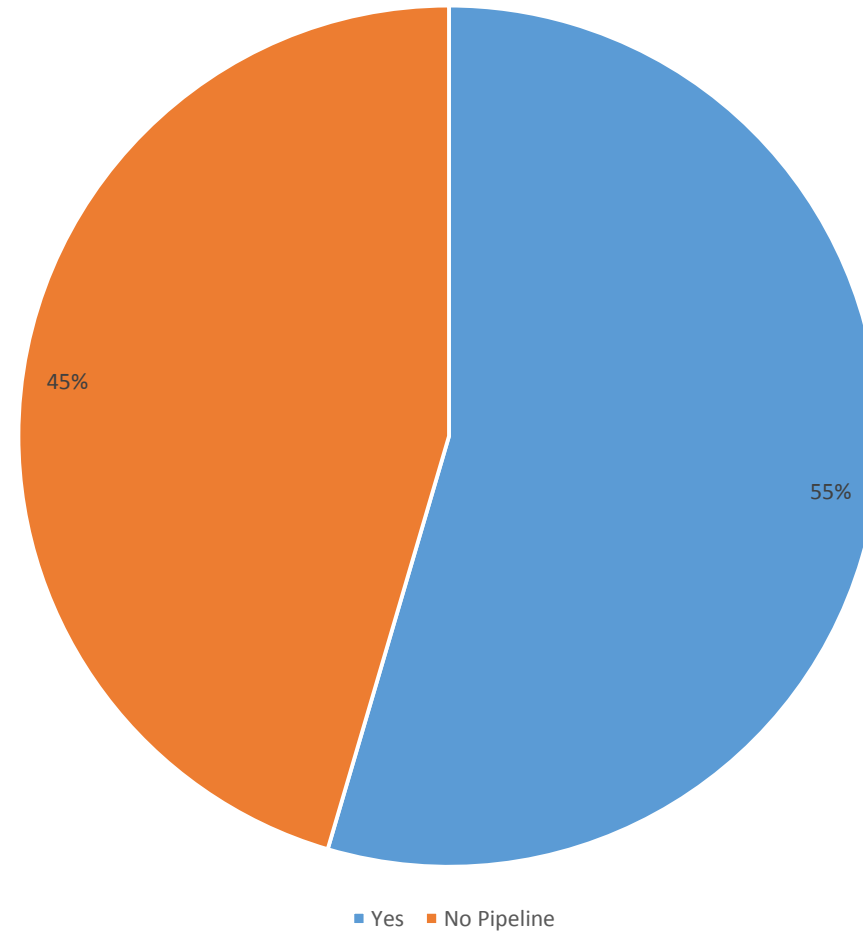


# Results: Teacher Leaders

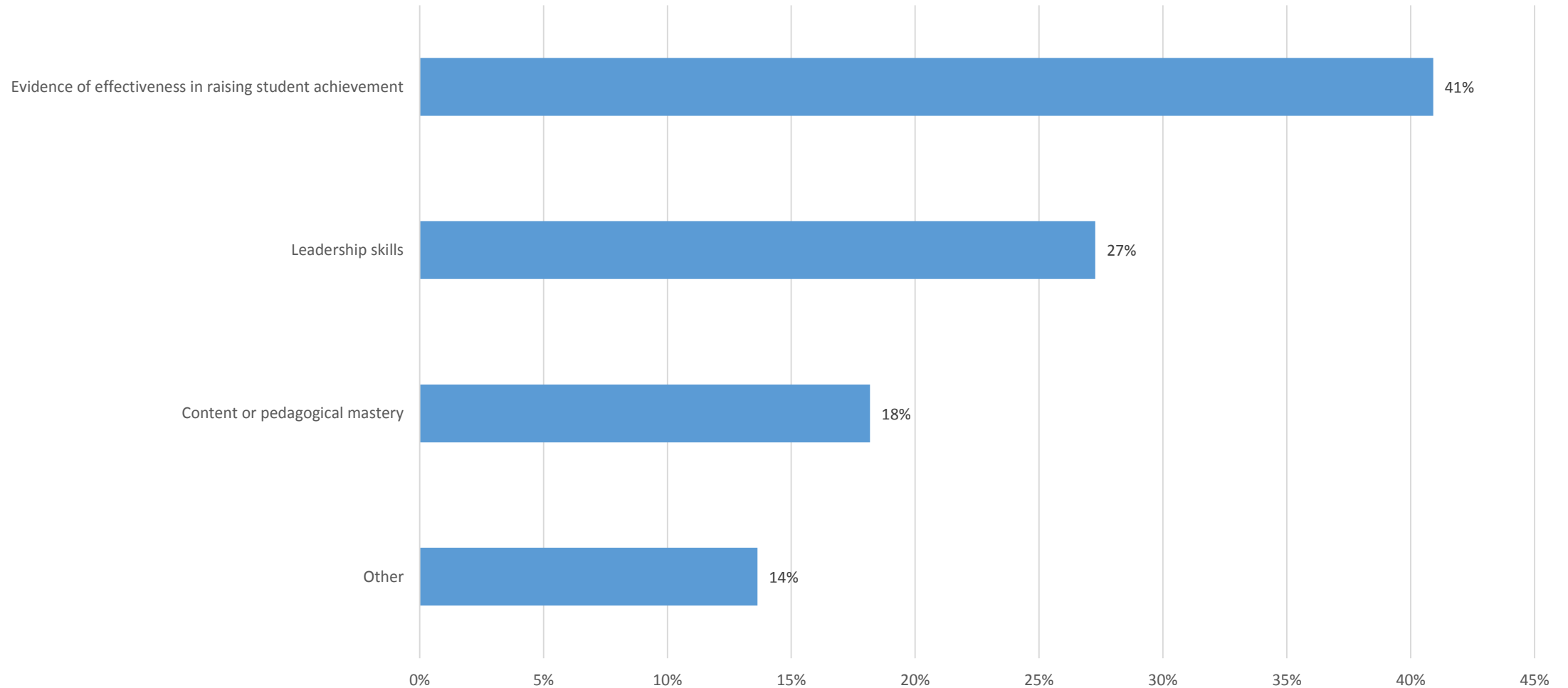
# Percentage of districts with a formal teacher leader or equivalent position at the school building level



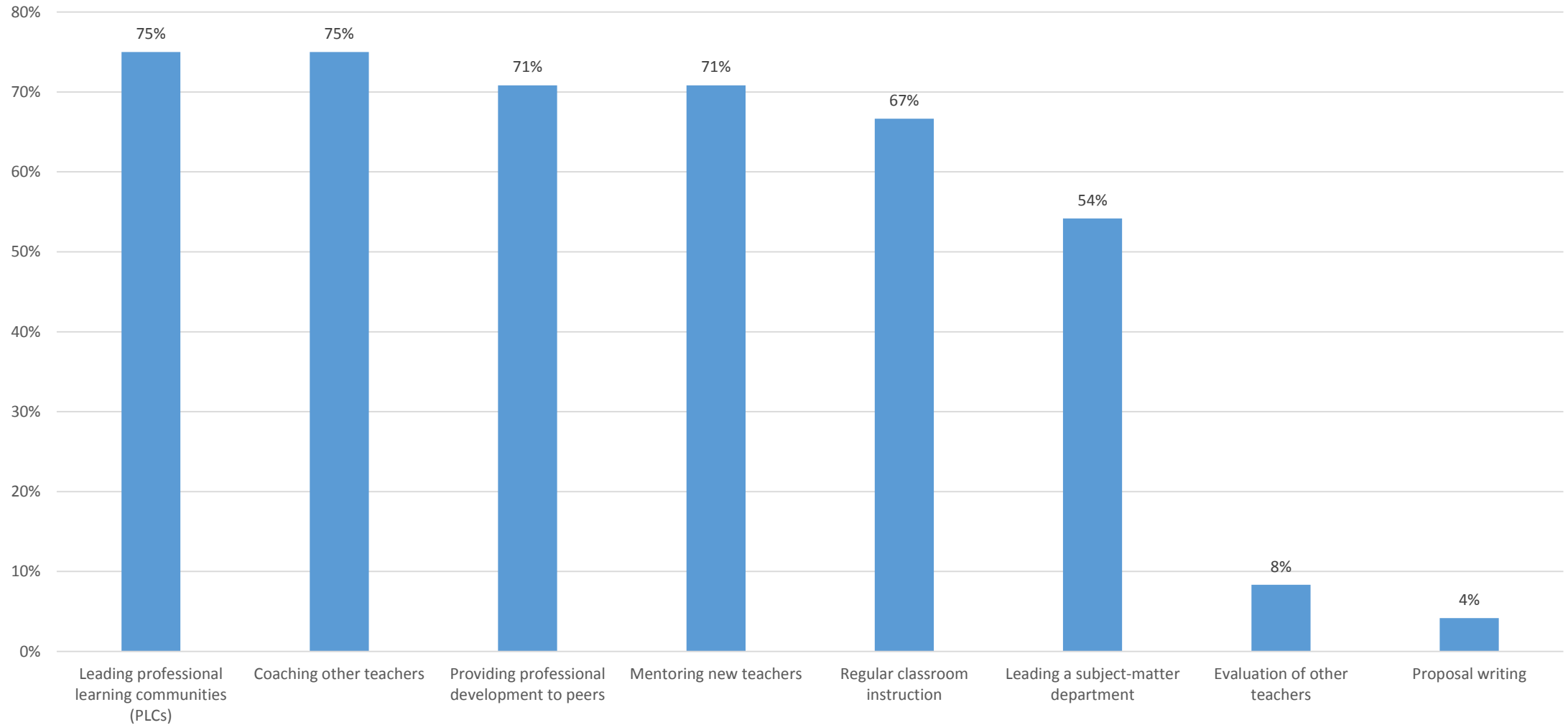
# Percentage of districts with a formal pipeline program to identify and develop teacher leaders



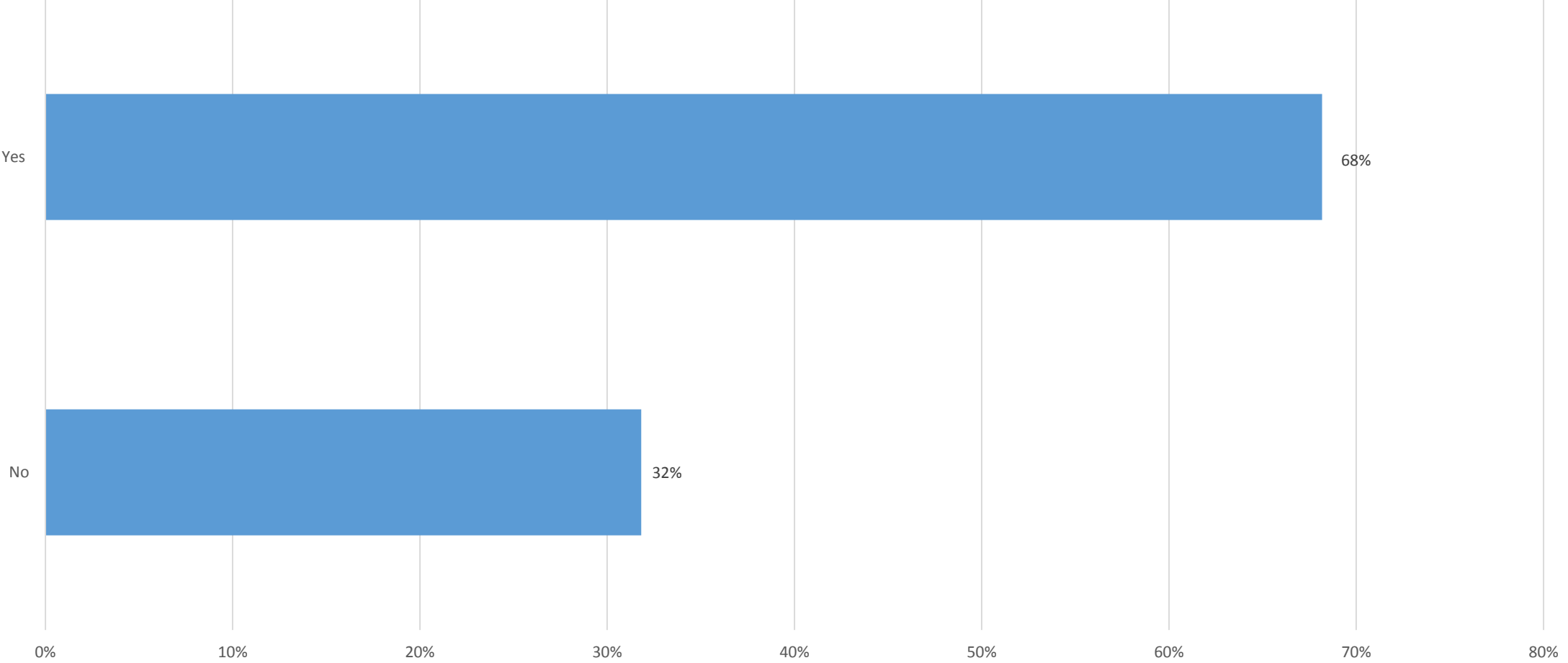
# Qualities Used When Selecting Teacher Leaders



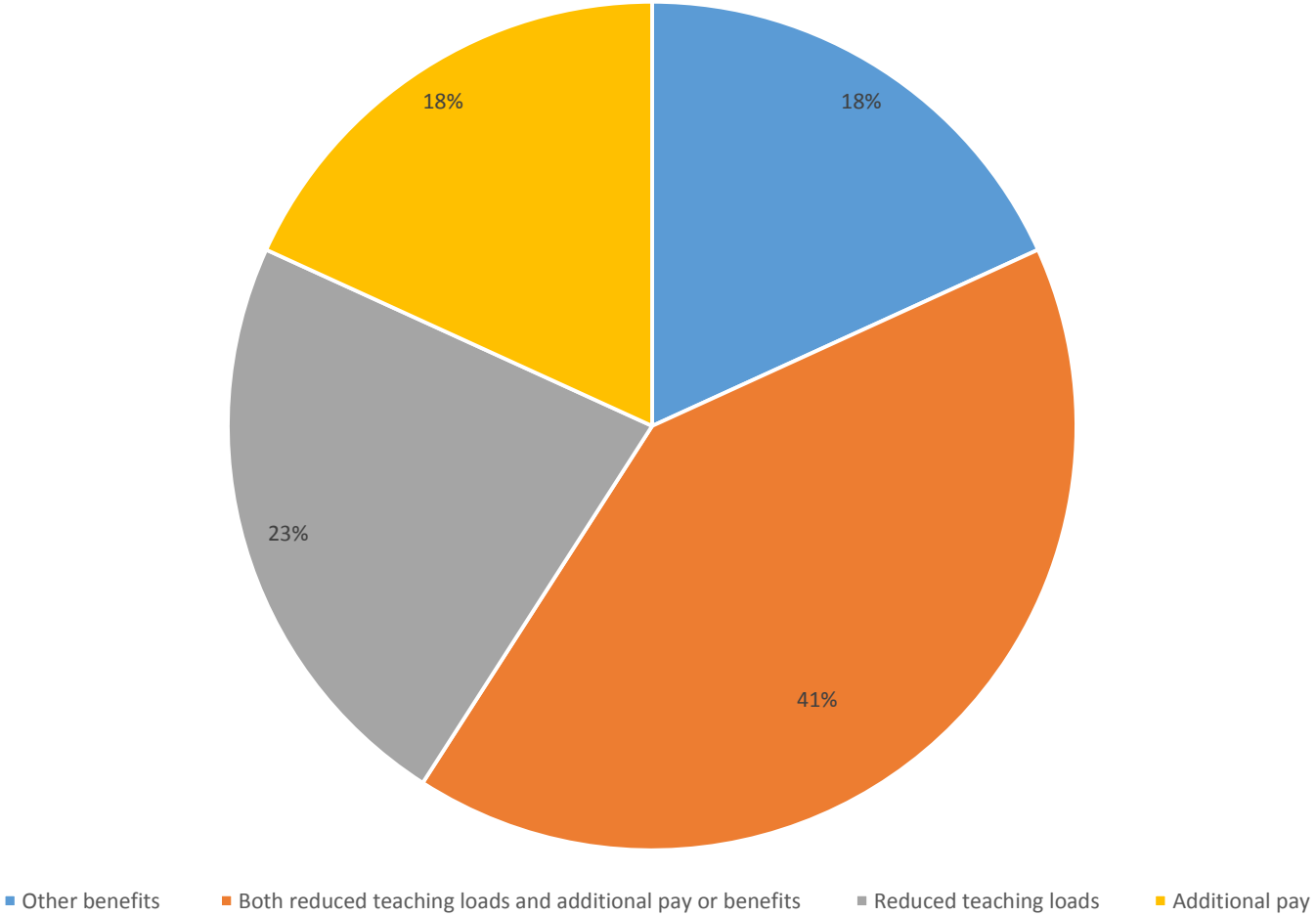
# General responsibilities of teacher leaders



# Percent of districts that offer specialized or differentiated professional development for teacher leaders



# Percentage of districts that reduce teaching loads and/or provide additional compensation for teacher leaders



## Sample Questions and Implications

- Is there reason to redefine the work of assistant principals around instruction, and how is that done without neglecting operational and reporting responsibilities at the building level?
- Would emphasizing and supporting the work of teacher leaders be more effective in improving outcomes for students than redefining the work of principals or assistant principals around instruction?
- Should principal training programs be expanded to include skills on how to mentor and support assistant principals?
- What kind of mentoring and professional development might be most effective with assistant principals?
- What kind of professional development do assistant principals most need to be effective in their position? Is this different for longer term assistant principals?



- What would better succession planning look like for principals, assistant principals, and teacher leaders? Do principals have a role in determining who their successors are?
- How should the site-based orientation of a school district affect what skills a principal and assistant principal need to have? How are these skills different from those in a more centralized system?
- Where do most assistant principals go after leaving their positions and is there a clear career trajectory for them?
- What would better support and professional development look like for teacher leaders and what other incentives might be put into place to attract high-performing teachers?
- What are the most appropriate roles for teacher leaders and what should those roles not include?

**CURRICULUM AND RESEARCH DIRECTORS  
MEETING**

# CHICAGO 2015



## 12<sup>th</sup> Annual Curriculum & Research Directors' Meeting July 15-18, 2015

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### REGISTRATION FEES

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- ❖ Sponsor WAIVED (dependent on level of sponsorship)  
MUST BE A SPONSOR COMPANY
- ❖ \$575 Additional Attendee from Sponsor Company (3 maximum)
- ❖ \$50 Late Fee if registering after June 22, 2015

### REFUND & CANCELLATION POLICY

All cancellations and substitution requests must be made in writing and emailed to Johanna Lim at [jlim@cgcs.org](mailto:jlim@cgcs.org). Registrations canceled on or before June 22, 2015 will receive a full refund. Cancellations received from June 22-June 30 will receive a 50% refund of the registration fee. Cancellations made after **July 1st and no-shows on July 15th will not receive a refund** and will be billed the full amount. Purchase orders will not be accepted on-site. An additional \$50 late registration fee will be added for registrations received after June 22, 2015. **Companies are not allowed to attend if you are not sponsoring.**

### HOTEL RESERVATION INFORMATION

Call the Allegro Hotel directly to book your room at 312-236-0123. Ask for the CGCS or Council of the Great City Schools meeting rate.

Room rates are \$219 per night, single or double, plus 16.39% tax. The cut-off date for the group rate is Tuesday, June 23, 2015. You may also make reservations online by clicking: [Council of the Great City Schools Allegro Hotel Registration.](#)



Photo courtesy of Choose Chicago

**CHICAGO  
RIVERWALK**

Solutions to the student achievement issues we face today are too complex for any single department or division to address alone. While it is tempting to appropriate a model that was successful elsewhere, or seize on a proposal that will shake up the status quo, we often find that these solutions do not work and often generate extraordinary push back because they fail to consider the needs and priorities of the people throughout the system and aren't supported by cross-departmental collaboration. Given the interrelated nature of the many systems that impact achievement, the Council of the Great City Schools invites teams of senior school district leaders in curriculum, research, school supervision, and innovation to come together at the annual Curriculum and Research Directors' Meeting to work and collaboratively plan to advance student achievement in their districts.

## AGENDA

### **Pre-Conference, Wednesday, July 15, 2015 – (9:00 a.m. – 12:00pm)**

#### **Looking at Rigor Through the Lens of Writing: Making Thinking Visible Across the Curriculum**

Participants will experience an instructional approach that builds student knowledge using sets of texts and questioning strategies that provide students with the vocabulary, language and content to enable them to achieve proficiency in writing arguments and justifications of answers to rigorous questions and tasks.

### **Wednesday, July 15, 2015 – (1:00pm – 7:00pm)**

Opening Session

Keynote Speaker

Welcome Reception

### **Thursday, July 16, 2015 – (7:00am – 6:00pm)**

Plenary Session I – **Listening with the Intent to Understand: Building Effective Communication Across Departments and Schools**

Plenary Session II – **Building a Shared Vision that Undergirds the Work of Improving Tier 1 Instruction and Student Achievement**

Lunch with Publishers/Assessment Roundtables

Panel Discussion – Considering Role Perspectives in the Planning Process

Curriculum, Research, and Principal Supervisor Role-alike Breakout Sessions -

Plenary Session III – **Report Out and Discussion**

Reception – Publishers Tabletop

### **Friday, July 17, 2015 – (7:00am – 6:00pm)**

Plenary Session IV – **Operationalizing the Vision: Getting the Right Data and Using it Effectively**

Panel discussion: Lessons from the Field

Plenary Session V – **Understanding Systemic Impacts Throughout the Organization**

Curriculum, Research, and Principal Supervisor Role-alike Breakout Sessions

Plenary Session VI – **Sustainability – Embedding the Work in the District Culture**

Reception

### **Saturday, July 18, 2015 – (7:30am – 12:00pm)**

Round Table Discussion – Innovative Instructional Practices and Individualized Learning

Legislative Update

Research and Curriculum Product and Project Updates

Discussion and Wrap-up

Adjourn



**MALES OF COLOR INITIATIVE**



**MALES**  
**of COLOR**  
Council of the Great City Schools

**COUNCIL PLEDGE ON MALES OF COLOR**



### A Pledge by America's Great City Schools

- Whereas, some 32 percent of the nation's African American males and some 39 percent of the nation's Hispanic males attend school each day in one of the Great City School systems; and
- Whereas, the academic achievement of Males of Color in the nation's urban school systems and nationally is well below what it needs to be for these young people to be successful in college and careers; and
- Whereas, disproportionate numbers of Males of Color drop out of urban schools and often have low attendance rates; and
- Whereas, Males of Color disproportionately attend under-resourced schools and are taught by the least-effective teachers; and
- Whereas, the nation's Great City Schools have an obligation to teach all students under their aegis to the highest academic standards and prepare them for successful participation in our nation:
- Be It Therefore Resolved that, the Great City Schools pledge to ensure that its pre-school efforts better serve Males of Color and their academic and social development, and
- That the Great City Schools will adopt and implement elementary and middle school efforts to increase the pipeline of Males of Color who are succeeding academically and socially in our urban schools and who are on track to succeed in high school, and
- That the Great City Schools will keep data and establish protocols that will allow it to monitor the progress of Males of Color and other students in our schools and appropriately intervene at the earliest warning signs; and
- That the Great City Schools will adopt and implement promising and proven approaches to reducing absenteeism, especially chronic absenteeism, among Males of Color, and
- That the Great City Schools will develop initiatives and regularly report on progress in retaining Males of Color in school and reducing disproportionate suspension and expulsion rates, and
- That the Great City Schools will develop initiatives and regularly report on progress in increasing the numbers of our Males of Color and other students participating in advanced placement and honors courses and gifted and talented programs, and
- That the Great City Schools will strongly encourage colleges of education to adopt curriculum that addresses the academic, cultural, and social needs of Males of Color, and that the district will maintain data on how these teachers do with our Males of Color, and
- That the Great City Schools will develop initiatives and regularly report on progress in increasing the numbers of Males of Color and other students who complete the FAFSA, and
- That the Great City Schools will work to reduce as appropriate the disproportionate numbers of Males of Color in special education courses, and



- That the Great City Schools will work to transform high schools with persistently low graduation rates among Males of Color and others and to provide literacy and engagement initiatives with parents.
- That the Great City Schools will engage in a broader discussion and examination of how issues of race, language, and culture affect the work of our district.

Council of the Great City Schools

Albuquerque Public Schools	Anchorage School District
Atlanta Public Schools	Austin Public Schools
Baltimore City Public Schools	Birmingham Public Schools
Boston Public Schools	Bridgeport Public Schools
Broward County Public Schools	Buffalo Public Schools
Charlotte-Mecklenburg Public Schools	Chicago Public Schools
Cincinnati Public Schools	Clark County (Las Vegas) Public Schools
Cleveland Metropolitan School District	Columbus City School District
Dallas Independent School District	Dayton Public Schools
Denver Public Schools	Des Moines Public Schools
Detroit Public Schools	District of Columbia Public Schools
Duval County (Jacksonville) Public Schools	East Baton Rouge Parish School System
El Paso Independent School District	Fort Worth Independent School District
Fresno Unified School District	Guilford County (Greensboro) Public Schools
Hillsborough County (Tampa) Public Schools	Houston Independent School District
Indianapolis Public Schools	Jackson Public Schools
Jefferson County (Louisville) Public Schools	Kansas City (MO) Public Schools
Long Beach Unified School District	Los Angeles Unified School District
Miami-Dade County Public Schools	Milwaukee Public Schools
Minneapolis Public Schools	Nashville Public Schools
Newark Public Schools	New York City Department of Education

Norfolk Public Schools	Oakland Unified School District
Oklahoma City Public Schools	Omaha Public Schools
Orange County (Orlando) Public Schools	Palm Beach School District
Philadelphia School District	Pittsburgh Public Schools
Portland Public Schools	Providence Public Schools
Richmond Public Schools	Rochester City School District
Sacramento City Unified School District	Saint Paul Public Schools
San Diego Unified School District	San Francisco Public Schools
Seattle Public Schools	Shelby County (Memphis) Public Schools
Toledo Public Schools	

**DISTRICT IMPLEMENTATION PLANS**

## Districts Submitting Males of Color Implementation Plans

1. Atlanta
2. Austin
3. Baltimore
4. Cleveland
5. Columbus
6. Dayton
7. Denver
8. District of Columbia
9. Duval County
10. Fort Worth
11. Hillsborough County
12. Jackson
13. Jefferson County
14. Kansas City
15. Long Beach
16. Los Angeles
17. Miami-Dade County
18. Milwaukee
19. Minneapolis
20. Nashville
21. Orange County
22. Philadelphia
23. Portland
24. Providence
25. Rochester
26. San Francisco
27. Toledo

## Males of Color Initiatives in the Great City Schools

City School System	Developed Strategic Plan and/or Hired Staff	Held Citywide Summit and/or Coordinating with City Hall or other partners	Launched or Expanded Pre-k (1)	Bolster Elementary and Middle School Pipeline of Academically Successful Students (2)	Developed Data Systems for Tracking (3)
Albuquerque		Convened “My Brother’s Keeper Community Challenge Student Summit in January 2015 with over student students to assess needs, set priorities, and define goals.			
Atlanta			Use state early learning standards to address social and emotional needs of pre-k students—and plan lessons around them.	Develop and implement a district SEL initiative with common standards, culture, assessments, interventions, and curriculum.  Enhance the district’s multi-tiered systems of supports (RTI), including RTI specialists, interventions, training, and supports.	Ensure dashboards include data on attendance, test scores, behavior, grades, and course completion—and disaggregate by race and gender.

City School System	Developed Strategic Plan and/or Hired Staff	Held Citywide Summit and/or Coordinating with City Hall or other partners	Launched or Expanded Pre-k (1)	Bolster Elementary and Middle School Pipeline of Academically Successful Students (2)	Developed Data Systems for Tracking (3)
				Review the district’s wrap-around services and enhance where needed.	
Austin	<p>Created the districtwide “No Place for Hate” initiative.</p> <p>Established principals’ council subcommittee on race and equity</p>	<p>Communicated to all media and meeting opportunities about issues related to Males of Color.</p> <p>Partnering with Greater Calvary Rites of Passage, Inc. to prevent destructive behaviors; the African American Youth Harvest Foundation on culturally relevant family services; University of Texas at Austin on Project Males (Mentoring to Achieve Latino Educational Success; Communities in Schools on leadership development and support; Austin Voices for Education</p>	Expanding birth to 3 partnership with AVANCE, Head Start.	<p>Established the Gus Garcia Young Men’s Leadership Academy, an all-male public school.</p> <p>Increased the number of culturally-sensitive mentors.</p> <p>Share promising practices for working with males of color at expanded monthly cabinet meetings.</p> <p>Develop curricular resources that address needs of Males of Color.</p> <p>Student motivational and inspirational assemblies with Manny Scott, and character-centered leadership</p>	

City School System	Developed Strategic Plan and/or Hired Staff	Held Citywide Summit and/or Coordinating with City Hall or other partners	Launched or Expanded Pre-k (1)	Bolster Elementary and Middle School Pipeline of Academically Successful Students (2)	Developed Data Systems for Tracking (3)
		and Youth on youth empowerment; the Austin Urban League on the Young Men's Leadership Academy; the University of Texas on equity symposia; Prairie View A&M University and justice system on changing counterproductive behaviors.		workshops, and student roundtables.  Establish Males of Color Council.	
Baltimore	Initiated the City Schools MBK Model around readiness to learn, reading on grade level, graduating college and career ready, completing postsecondary education, entering the workforce, and reducing violence.  Has hired a project manager to support the integration of various strategies,			Expose Males of Color to professional men of color, build relations, and receive guidance. (Reading buddies, career day, lunch mentors)  Allow Males of Color to spend time in various setting with professional men of color. (Career day, company visits, job shadowing, professional men of color clubs, hero	

City School System	Developed Strategic Plan and/or Hired Staff	Held Citywide Summit and/or Coordinating with City Hall or other partners	Launched or Expanded Pre-k (1)	Bolster Elementary and Middle School Pipeline of Academically Successful Students (2)	Developed Data Systems for Tracking (3)
	plan activities, conduct a community resource audit, and engage philanthropic groups.			networks, sports figures.)	
Broward County	Developed the Mentoring Tomorrow's Leaders (MTL) program for minority males attending Deerfield Beach High School and Nova High School.			Establishing the "Mentoring Tomorrow's Leaders initiative for Males of Color at two high schools.	
Cleveland			Working to ensure that preschool efforts better serve Males of Color.  Increase number of seats rated 3 stars by adding staff and forming partnerships.	Implementing elementary and middle school efforts to increase pipeline of young Males of Color succeeding academically and socially.  Expand PATRHS—teaching 5 competencies of SEL, CTAO feeder school work, summer literacy program for intensive intervention.	Monitor progress of Males of Color and appropriately intervene at earliest signs.  Use NWEA, RIMPS (grades 1-3), on-track cohorts (grades 9-12), credit recovery, OGT prep, active counseling, blended learning, and intervention courses.



City School System	Developed Strategic Plan and/or Hired Staff	Held Citywide Summit and/or Coordinating with City Hall or other partners	Launched or Expanded Pre-k (1)	Bolster Elementary and Middle School Pipeline of Academically Successful Students (2)	Developed Data Systems for Tracking (3)
Dallas					
Dayton	Board approved district participation in Males of Color initiative.	Participate in the City of Learners initiative and align activities to district goals, metrics, and reporting.  Collaborate with the city on a Males of Color Go Back to School Event.			
Denver			Increase mill levy to expand full day ECE for all 4-year olds, and expand seats for 3-year olds in partnership with community providers targeting underserved areas.  Partner with community to increase quality, establish standards and assessments, and increase resources for summer reading-loss programs, particularly for ELLs	Increase rigor of common core implementation. Increase tutoring.  Expand partnerships, enrichment, and engagement.  Expand social emotional supports, mentoring, pre-collegiate information, CTE offerings, and pilot a personalized learning project.	Conduct opportunity quartile study to identify groups for intervention and targeted investment.

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District of Columbia	<p>Developed a five-point plan called “A Capital Commitment” to increase achievement rates, improve literacy, invest in 40 lowest performing schools, increase attendance and graduation rates, improve student satisfaction, increase AP participation, college admissions, and career preparation, and increase enrollment.</p> <p>Hired Robert Simmons</p>	<p>Announced \$20 million “Empowering Males of Color” initiative with the mayor and partners on January 21, 2015. Built around a three-pronged theory of action: Engage students, family and community; improve and expand implementation of research-based strategies; innovate and challenge approaches to improving achievement.</p> <p>Held fund-raiser lunch for a male academy and follow-up activities.</p>	<p>Established a three-school pilot program with professional development to support school readiness for Males of Color.</p>	<p>Set up “500 for 500: Mentoring through Literacy” program to ensure reading on grade level by grade three.</p> <p>Collaborating with external organizations to decrease summer learning loss.</p> <p>Set up Honor Roll Luncheons to recognize students for success and encourage progress.</p> <p>Revised elementary and middle school promotion/retention policies to rely more on data and less on teacher judgment.</p> <p>Provide two-year grants to schools through the DC Education Fund to support efforts to</p>	<p>Developed Equity Scorecard with measures that all schools will use to compare student performance. Measures include student proficiency, AP enrollment and performance, graduation rates, suspension rates, attendance, and student satisfaction.</p>

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				improve social and emotional well-being of Males of Color, community and family engagement, or academic enrichment.	
Duval County			<p>Introduced Success by Six at two schools.</p> <p>Expanded access to three-year old programs in low-income areas from 800 to 1,450 students</p> <p>Partnered with Head Start in public schools.</p>	<p>Revised elementary and middle school promotion and retention policies to ensure high expectations based on data-driven measures aside from “teacher judgment.”</p> <p>Redesign summer school offerings and regular school schedules based on early warning system to provide ready access to coursework for students at risk of dropping out.</p> <p>Expanding overage schooling for students in grades 5-10 to</p>	<p>Developed modern, integrated early-warning tracking system (Performance Matters) to ensure all students on-track for graduation. Tracks attendance, suspensions, grade, and state test results. Allows teachers to follow students if they change schools.</p>

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				individualize course recovery.	
Fort Worth	<p>Has formed a My Brother's Keeper Task Force to develop action plan.</p> <p>Using a cross-functional team with the annual planning process to identify equity issues.</p> <p>Using district goals and targets to address equity issues.</p>	Held "My Brother's Keeper Summit on February 21, 2015			
Jackson				Considering implementing and providing professional development for teachers and parents on the Legacy of Timbuktu Human Dignity Curriculum that includes teaching African American history, culture, and leadership models to students in after-	

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				school and summer school program.	
Hillsborough County	Hillsborough County Public Schools Males of Color Implementation Plan, 2014-2015		<p>District will monitor observation, assessment and evaluation data on pre-k and Head Start teachers to determine areas of strength and need.</p> <p>Correlate VPK assessment results with Kindergarten Readiness Assessment to determine impact of program.</p> <p>Evaluate effect of new pre-k and Head Start expansion into high-poverty schools.</p> <p>Monitor implementation of pre-k professional development during walk-throughs.</p>	Monitor outcomes of the Extended Reading Time initiative through observations in project schools.	<p>Use early warning system to monitor RTI/MTSS implementation and effects.</p> <p>Provide additional training on the use of the early warning system.</p> <p>Initiate cross-divisional meetings to better monitor outcomes and needed supports in schools.</p>
Kansas City	Males of Color Implementation Plan	Held the “Am I My Brother’s Keeper”		Initiated “Each One, Teach One”	Created data dashboard to monitor

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		<p>conference with 150 high school student.</p> <p>Working with Citywide Gateway Crime Task Force</p> <p>Convened a Student Diversity Leadership Conference: Building An Appetite for Diversity for seniors from four high schools.</p> <p>Held a Multicultural Leadership Symposium with Metropolitan Community College and participated in the Big XII Conference on Black Student Government.</p>		<p>mentoring program for males of color involving high school students mentoring elementary students.</p>	<p>progress of Males of Color on pledge elements and provide support. Metrics include graduation, attendance, college and career readiness, suspensions, expulsions, special education classifications, AP, and G/T</p>
Long Beach		<p>Held “Students of Color Town Hall Meeting” on February 28, 2015</p>		<p>Expand the Long Beach Male Academy.</p>	
Los Angeles	<p>School Board passed a resolution directing the superintendent to</p>				

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	develop a districtwide plan for culturally and linguistically responsive education.				
Louisville			Continue CADRE menu of professional development of professional development geared toward the needs of “at promise” students.	Strengthen after school programs: Men of Quality Street Academy, REACH Program.  Continue Louisville Linked program that provides wraparound services to students.	Establish dashboard to monitor the grades, attendance, behavior, and performance of students of color.  Design interventions to “catch” students that are falling behind.  Present quarterly reports on each element of the pledge on Males of Color
Miami-Dade County			Collaborate with community groups to provide curriculum support, training, and advice to early childhood providers on how to better serve Males of Color.	Implement a mentoring, life skills tutoring, career preparation and academic coaching model for Males of Color to provide successful transition to high school.	Establish a data base to monitor diversity, equity, and access to educational practices for Males of Color.  Monitor performance of Males of Color to identify student needs in the areas of attendance,

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			Leverage the Teenage Parent Program to provide information on pre-school opportunities to better serve Males of Color.	<p>Provide school-site guidance services to help Males of Color transition into high school STEM programs.</p> <p>Provide open houses and vocational fairs to better serve Males of Color.</p> <p>Provide information to stakeholders, businesses, and civic partners to Males of Color receive more mentoring and opportunities.</p> <p>Advertise schools of choice and parental options for Males of Color.</p>	suspensions, and mobility—and provide needed interventions.
Minneapolis	Hired Michael Walker and set up Office of Black Male Student Achievement with start-up budget of \$200,000.			Expanding funds for AVID	



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Orange County	<p>Has developed a comprehensive plan around each element of the pledge called “Building Ladders of Opportunity for Boys and Young Men of Color.”</p> <p>Created the Minority Achievement Office (MAO) to narrow the achievement gap, improve academic outcomes, reduce discipline referrals, and increase graduation rates.</p>		<p>Researched best practices in promoting academic success at pre-k level.</p> <p>Gathered best practices from most successful pre-k teachers.</p> <p>Discuss ways to better serve pre-k males of color</p> <p>Compiled academic and social development strategies and communications plan.</p> <p>Offered enhanced professional development for pre-k teachers.</p> <p>Monitored implementation, and tracked performance of pre-k males of color.</p>	<p>Compiled all data from standardized tests and disaggregated it to show performance of males of color in all grades.</p> <p>Convened a committee to develop a protocol for tracking performance of Males of Color.</p> <p>Solicited input on plan from principals, curriculum, Title I, Multi-lingual, and ESE</p> <p>Set up early warning indicators for intervention.</p> <p>Set up procedure where committee is called if data suggest adjusting the protocol</p>	<p>Collaborated with associate superintendent of accountability, research, and assessment to develop protocol to disseminate data regularly.</p> <p>Gathered team to discuss the data and establish timelines.</p> <p>Meet with principals at all grade levels to establish intervention procedures based on early warning data</p> <p>Implement protocols for monitoring data and intervening with students not on track.</p> <p>Execute appropriate interventions.</p>

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				<p>Shared protocol with area superintendents and all principals.</p> <p>Expanded MTSS system to 21 elementary and 4 middle schools.</p> <p>Established an accelerated reading program at the third grade in 25 elementary schools</p> <p>Monitoring progress of elementary and middle school students</p> <p>Initiated the summer Scholars of Orange County Calculus Project at two middle schools, On the Record Reading at two middle schools, and 5<sup>th</sup> grade math at 10 elementary schools.</p>	

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Philadelphia		Working with the office of the mayor on a citywide strategy		Working with City Year in 11 schools to enhance learning environment and provide tutoring for students with low attendance, multiple suspensions, and low grades	
Providence	<p>School Board approved a Males of Color Pledge Implementation Plan and will develop a policy on institutionalized racial equity.</p> <p>Will conduct a thorough examination of policies and practices to improve outcomes for Males of Color.</p>		<p>Expand the number of pre-k seats for males of color by moving the early childhood program from Gregorian Elementary School to Asa Messer Elementary School.</p> <p>Work with state and city officials to expand the availability of pre-k opportunities.</p>	<p>Infuse greater cultural relevance into the district's academic curriculum and identify content that better responds to and engages Males of Color.</p> <p>Review policies to increase the access of adult male volunteers of color in the schools.</p> <p>Review policies to ensure that district buildings allow for more after-school community programs for Males of Color.</p>	<p>Compile a comprehensive, disaggregated data set on Males of Color to better understand and measure academic status, progress, and social/emotional development.</p> <p>Develop a set of key indicators of student outcomes on academic achievement, graduation rates, dropout rates, AP participation, FAFSA completion, pre-k enrollment, attendance data,</p>

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				<p>Review human resource policies to increase recruitment, hiring, and retention of more educators of color.</p> <p>Identify and enhance initiatives that spur the academic growth and social development of Males of Color, such as the Gilbert Stuart Gentlemen’s Association.</p>	<p>discipline referrals, special education placements, and other.</p> <p>Will establish goals and targets in each area and monitor progress.</p>
Rochester	“We Will Treat Every Child Like One of Our Own: An Action Plan for the Rochester City School District”		District currently offers universal pre-k for every four year old at no cost to families—was mostly half-day programming in previous years.	<p>Move aggressively to ensure that all students are reading by the third grade.</p> <p>Expand summer school opportunities in order to cut summer learning loss, provide interventions, and offer enrichment.</p> <p>Continue Summer of Reading program that supplies students with</p>	

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				<p>backpacks of books and reading lists.</p> <p>Continue increasing the numbers of dedicated reading teachers.</p> <p>Improve literacy content and instruction in multiple subject areas.</p> <p>Increase learning time by eliminating early dismissal of students every Wednesday and increase expanded-day schedules in elementary and secondary schools.</p>	
San Francisco	<p>Developed the African American Achievement and Leadership Plan</p> <p>Hired Landon Dickey as Special Assistant to the Superintendent for African American</p>	<p>Convened My Brother's Keeper Local Action Summit in January, 2015 with the mayor and local foundations.</p>			<p>Convened staff team to evaluate African American student outcomes districtwide</p>

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	Achievement and Leadership				
Toledo			RttT, SIG, Academic Turnaround, EWS, Inclusion, gender-based k-12.	Initiated the Young Men of Excellence mentoring program with 2,000 students  Expanding credit recovery.	EWS, PBIS, Safe schools ordinance, mental health intervention.

## Males of Color Initiatives in the Great City Schools (continued 2)

City School System	Addressed chronic absenteeism (4)	Revised Suspension and Discipline Policies (5)	Expanded AP and gifted/talented programs (6)	Spurring Colleges of Education (7)	Expanding FAFSA (8)	Addressed SPED Over-identification (9)
Atlanta		<p>Have set goal with state department of education to eliminate disproportionate suspensions of African American males by the end of the year.</p> <p>Expand PBIS from 123 schools to 24. Newly formed PBIS committee will review discipline and interventions.</p> <p>Provide weekly discipline updates to associate superintendents and principals to review and make adjustments.</p>	<p>PLCs of AP and IB coordinators are focusing on increasing enrollment, retention, and success of African American males in advanced courses.</p>			<p>Provide more inclusive environments for students with disabilities and provide additional training to lead and regular teachers.</p> <p>District is currently not disproportionate in special education.</p> <p>Using RTI to review and train staff around 504 accommodations.</p> <p>Continue monitoring to ensure that students are placed in LRE.</p>

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Austin		<p>Worked to reduce numbers of Males of Color suspensions and expulsions.</p> <p>Establish partnership with Greater Calvary Rites of Passage and other groups to develop alternatives to out-of-school suspensions.</p>				<p>Hold special education workshops for staff and teachers to build strategies for working with Males of Color during the admission and dismissal processes.</p>
Baltimore						
Broward County		<p>Ended suspensions for non-violent activities, put interventions in place, and initiated the PROMISE (Preventing Recidivism through Opportunities, Mentoring, Interventions, Support and</p>				



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		Education) program				
Chicago		Developed the Suspension and Expulsions Plan to reduce out-of-school suspensions, encourage positive school climate, and peer councils to handle discipline issues.				
Cleveland	Adopt and implement promising and proven approaches to reducing absenteeism.  Expand use of Planning Centers at each school to reduce suspensions with attendance liaisons.	Retain Males of Color in school and reduce disproportionate suspension and expulsion rates.  Expand use of Planning Centers at each school to reduce suspensions with staff trained in de-escalation strategies.	Increase numbers of Males of Color participating in honors, AP, and G&T classes.  Develop new school models open to all.	Adopt curriculum addressing academic, social, and cultural needs of Males of Color in colleges of education.	Increase number of Males of Color who complete the FAFSA.  Expand College Now program.	Reduce disproportionate numbers of Males of Color in special education courses.  Reduce number of ED classes in district by 5% in one year.

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Dallas			<p>Increased numbers of African-American and Hispanic students taking AP exams in math &amp; science and numbers scoring 3 or above. (See graphs)</p> <p>Continue expanding NMSI College Readiness Program.</p>			
Dayton	<p>Monitor attendance and discipline data monthly.</p>	<p>Convene stakeholders to review student code of conduct and recommend changes. Have board approve.</p> <p>Research alternative programs to reduce suspensions.</p>	<p>Increase the numbers of students identified as gifted and provide services.</p>		<p>Create baseline for all students completing FAFSA and disaggregate by gender and ethnicity.</p> <p>Participate in country's first "Signing Day" for college acceptance.</p>	

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		<p>Post discipline data on district website and communicate to stakeholders.</p> <p>Restorative justice now implemented in eight schools.</p>				
Denver	<p>Implement early warning system and target resources for immediate intervention. Expand mentoring</p> <p>Increase advisories that match students with caring adults to support social and emotional growth.</p>	<p>Focus on culturally responsive education.</p> <p>Implement restorative justice practices.</p>	<p>Identify criteria that might qualify students for advanced programs and target recruitment activities in every secondary school.</p> <p>Monitor enrollment by school.</p> <p>Strengthen partnerships with higher education.</p> <p>Increase training and recruitment for</p>	<p>Implement Strategic Plan for Equity and Inclusion Training and Leadership Development in all schools.</p> <p>Incorporate culturally responsive practices into LEAP teacher professional development and evaluation program.</p>	<p>Strengthen partnerships with higher education and pre-collegiate mentoring providers. Establish accountability for FAFSA and post-secondary applications.</p> <p>Start identifying middle-school students.</p>	<p>Implement intentional strategies to focus on culturally responsive teaching and assessment practices.</p>

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			teachers with advanced certification.			
District of Columbia			Working to ensure that AP courses and SAT prep opportunities are equitable and available throughout the district.	Expanding the teacher residency partnership to attract more Males of Color to teach and lead in the district.		
Duval County	<p>Built the Performance Matters data base with an early warning system that includes attendance needs. Attendance plan and policies will identify students with excessive absences for early intervention.</p> <p>Shifting all truancy officers</p>	<p>Revised student code of conduct to incorporate restorative justice, in-school suspensions, parent conferences, and teacher PD</p> <p>Implementing mental health, positive behavior support, and classroom management training for all</p>	<p>Redesigned the eligibility protocol to gifted programs to expand minority participation.</p> <p>Expanded accelerated courses in every district high school—including AP, IB, AICE, dual enrollment, and industry certification.</p> <p>Saw participation by</p>	<p>Meeting with local colleges of education on academic, cultural, and social needs of Males of Color</p> <p>Beginning to collect data on effectiveness of teacher college graduates with Males of Color.</p> <p>Expanding “Call Me Mister” program to recruit Black males into teaching.</p>	<p>Will begin collecting quarterly data on numbers of Males of Color who have completed FAFSA form.</p> <p>Set goals to have District School Counseling Office to increase attendance at Financial Aid Nights at each high school as well as College Goal Sunday held each spring.</p>	<p>Implementing the GRASP Academy for dyslexic students</p> <p>Implementing Tier III reading and math intervention programs in all elementary schools.</p> <p>Electronic data system will allow tracking of academic and behavioral interventions even</p>

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	<p>from the district office to school sites to work directly with students and parents.</p> <p>Provide quarterly reports to the board on attendance and annual reports on achievement gaps.</p>	<p>teachers and administrators.</p> <p>Early warning system will highlight discipline needs related to suspensions and expulsions, and identify when interventions are needed.</p>	<p>Black students in accelerated courses increase 42%.</p>	<p>Implementing the Jacksonville Teacher Residency Program to recruit high-performing Males of Color to teach math and science in urban schools.</p>		<p>if they change schools.</p> <p>Will continue gathering data and conducting analysis of data by race on ESE students.</p>
Fort Worth						
Jackson						
Hillsborough County	<p>Continue implementing and monitoring the Student Success Program in all targeted middle and high schools with focus on reducing achievement gap, lowering suspensions, increasing</p>	<p>Initiate and implement Project Prevent grant that will assist 21 high poverty schools break the cycle of violence.</p> <p>Continue and evaluate Project Promise for Title I schools to purchase or support</p>	<p>Continue successful effort to use PSAT and other data to encourage eligible student of color to participate in AP courses.</p> <p>Expand and monitor the use of AVID with ELLs in grade 6</p>	<p>Continue the partnership with the University of South Florida Urban Residency Program to place and support intern teachers, monitor their impact on student outcomes, and compare their results with other new hires.</p>	<p>Continue the partnership with the Florida HBCU Alliance to increase numbers of students of color who enroll in college.</p> <p>Promote and increase participation in the Black/Brown College Bound program in</p>	<p>Support MTSS implementation in all schools K-12.</p> <p>Implement and monitor new Project AWARE grant to provide mental health services.</p> <p>Implement new School Climate Transformation grant to improve behavior and</p>

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	attendance, and reducing dropouts.	programs to improve discipline and attendance.	to prepare them for AP and honors placement.  Continue to use MTSS framework to identify gifted and talented students of color.	Continue the collaboration with area colleges and universities to provide leadership development and “think tanks” around diversity and cultural awareness.	partnership with Hillsborough Community College.  Strengthen marketing to all high schools and CTE schools of College Goal Sunday, a student and parent workshop geared to increase FAFSA completion rates.	climate in 25 Title I schools.
Kansas City	Have set up truancy intervention efforts to reduce absenteeism with Males of Color, e.g., SEL support, Knock-N-Talk, Attendance Ambassadors, Truancy Court, Success Court, letters to parents	Began “No Out of School Suspension Absences” initiative.  Eliminating “willful defiance” and insubordination” as grounds for suspension.  PBIS and Behavior Intervention Support Teams				

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		<p>Shifting all truant officers into the schools from central office.</p> <p>Regularly report on progress on reducing suspensions and expulsions.</p>				
Long Beach	Continue efforts to encourage and incentive attendance and meeting attendance goals. Currently attendance is 97% districtwide.	Continue and strengthen district efforts to use conflict resolution, early intervention, training in appropriate behaviors, and alternatives to suspensions. Suspensions have dropped over 30%.	<p>District will pay for all but \$5 of AP exam costs in grades 8-12, expand AP test-prep, summer bridge classes, and pre-AP workshops. AP participation increased 20% over last year and 154% over 20 years.</p> <p>Continue Claremont College Long Beach Math Initiative by allowing high school students</p>			

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			<p>in a summer residential math program. Under-represented students are paired with mentors.</p>			
Los Angeles		<p>Eliminated “willful defiance” as grounds for suspensions.</p> <p>Approved policy to require the use of alternative disciplinary practices such as restorative justice.</p> <p>Continued implementation of PBIS.</p>				
Louisville	<p>Strengthen Equity Institutes to address disengaged students and teachers. These</p>	<p>Institute districtwide restorative justice training.</p>	<p>Enhance the Advance Program Institute designed to address the non-</p>	<p>CARDS Program.</p> <p>Partner with University of Louisville and Kentucky State University to</p>	<p>Design new dashboard that charts participation in scholarships and FAFSA</p>	<p>Advance Program Sustaining and Improving Initiative</p>



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	<p>institutes are led by school officials and local and national experts.</p>	<p>Make modifications in the Code of Conduct.</p> <p>Develop equity scorecards</p> <p>Conduct school-level data dives and reports.</p>	<p>traditional gifted student. Next cohort is set to be all Males of Color from high-poverty schools</p>	<p>design curriculum that focuses on diversity, equity, and inclusion.</p>		
Miami-Dade County	<p>Provide hourly case workers to follow up on the truancy referral process with the attendance office for Males of Color.</p>	<p>Implementing the Alternative to Suspension program to reduce suspension and expulsion rates for Males of Color.</p>	<p>Provide data and strategies on programs to increase participation of Males of Color in AP, dual enrollment, AICE, gifted and talented, CTE, and other programs.</p> <p>Provide information to Males of Color on magnet school opportunities.</p>	<p>Partner with local universities to establish curricula, financial aid assistance, and admissions guidance to Males of Color.</p> <p>Monitor teacher effectiveness with Males of Color using value-added scores.</p>	<p>Create opportunities for universities and colleges to present information on college readiness, financial aid applications, FAFSA completion, and admissions requirements to Males of Color.</p> <p>Require 12<sup>th</sup> grade Males of Color to complete FAFSA forms at school computer labs.</p> <p>Meet monthly with school-level</p>	<p>Implement a tracking system with multiple levels of review to monitor the placement of Males of Color in special education courses.</p>

City School System	Addressed chronic absenteeism (4)	Revised Suspension and Discipline Policies (5)	Expanded AP and gifted/talented programs (6)	Spurring Colleges of Education (7)	Expanding FAFSA (8)	Addressed SPED Over-identification (9)
					student services staff to monitor FAFSA submissions.	
Minneapolis		Revamping discipline policies based on suspension data with new emphasis on interventions, restorative justice, and SEL.				Conducting a program audit to determine over-identification in SPED.
Orange County	<p>Convened a committee to study attendance of students who were chronically absent.</p> <p>Established monitoring procedures to routinely evaluate student attendance and intervene before students become</p>	<p>Researched the suspension rates of all students and determined schools with most racially disproportionate suspensions and expulsions.</p> <p>Held meetings with administrators from these schools along with area administrators.</p>	<p>Prepared a breakdown by race and gender of all honors and AP courses.</p> <p>Convened a high-level staff meeting to develop stronger procedures for reporting participation in advanced courses by Males of Color. Involved</p>	<p>Initiated a relationship among three local colleges of education around the Males of Color initiative.</p> <p>Set up discussions about strengthening pipeline of minority teacher candidates. Exploring the development of a local “Call Me Mister” program.</p>	<p>Work with guidance offices and directors to develop a protocol to report on progress of Males of Color who complete the FAFSA process.</p> <p>Meet with parent groups on the importance of the FAFSA forms. Schedule annual meetings for parents of students</p>	<p>Review data on the percentages of Males of Color and other subgroups identified in ESE programs.</p> <p>Meet with senior leadership team to discuss disproportionality and assign personnel to monitor and coordinate efforts.</p>

City School System	Addressed chronic absenteeism (4)	Revised Suspension and Discipline Policies (5)	Expanded AP and gifted/talented programs (6)	Spurring Colleges of Education (7)	Expanding FAFSA (8)	Addressed SPED Over-identification (9)
	<p>chronically absent.</p> <p>Create a multi-pronged prevention and intervention system to decrease absenteeism</p> <p>Establish incentives for good or perfect attendance.</p> <p>Meet with teams of social workers to establish individualized intervention systems for students whose attendance does not improve.</p> <p>Monitor and evaluate intervention systems for effectiveness.</p>	<p>Meet with selected schools on a monthly basis to review data, refine discipline procedures with students of color, and share effective strategies.</p> <p>Provide training to all administrators on how to analyze disaggregated data, use best practices, and motivate good behavior.</p> <p>Set up a Behavior Leaders Consortia in 11 high schools and 17 middle schools</p>	<p>principals in the discussions.</p> <p>Continue the second-grade universal screening process designed to capture more students of color.</p> <p>Presented plans to area superintendents and principals.</p> <p>Monitoring progress of efforts.</p>	<p>Exploring the development of a curriculum at local colleges of education that addresses the academic, cultural, and social needs of Males of Color.</p> <p>Meet with local colleges of education to develop a data monitoring system on how teachers perform with Males of Color.</p> <p>Monitor program progress.</p>	<p>who are in junior class.</p> <p>Meet with sponsors of the Minority Leadership Scholars to increase the numbers of Males of Color who complete FAFSA.</p> <p>Monitor effects of the effort and make adjustments.</p>	<p>Review cases of students who may have been improperly identified.</p> <p>Assign staff to monitor efforts to reduce disproportionality.</p> <p>Track progress of efforts.</p>

City School System	Addressed chronic absenteeism (4)	Revised Suspension and Discipline Policies (5)	Expanded AP and gifted/talented programs (6)	Spurring Colleges of Education (7)	Expanding FAFSA (8)	Addressed SPED Over-identification (9)
	Monitor students who are chronically absent.					
Philadelphia	<p>Analyzed data on the link between attendance and dropping out, state test scores, and graduation</p> <p>Created attendance awareness campaign focused on the 50% of students who miss the most days.</p> <p>Target communications to parents and guardians about importance of school attendance.</p>	<p>Develop a structure to support climate transformation.</p> <p>Promote fair and effective disciplinary practices.</p> <p>Develop multi-tiered behavior framework in 14 existing schools and 28 new schools.</p> <p>Collaborate with state and national partners to promote a system of change and improvement.</p>				
Providence	Improve data collection on student attendance.	Conduct a thorough examination of the Student Discipline and	Set targets and goals for increased participation of			

City School System	Addressed chronic absenteeism (4)	Revised Suspension and Discipline Policies (5)	Expanded AP and gifted/talented programs (6)	Spurring Colleges of Education (7)	Expanding FAFSA (8)	Addressed SPED Over-identification (9)
	<p>Target attendance strategies first on students in grades k to 3.</p> <p>Enlist community partners like city and county government, the United Way, and others to make home visits to residences of chronically absent students.</p> <p>Focus the work of parent liaisons at each school on attendance.</p> <p>Continue community impact campaign linking attendance and poor achievement.</p>	<p>Code of Conduct to ensure that policies are fair and equitable.</p> <p>Begin phasing in more restorative justice practices rather than out-of-school suspensions.</p> <p>Work with the Providence Police on the role and authority of School Resource Officers to curtail student involvement with law enforcement.</p> <p>Provide professional development on applying restorative justice and</p>	<p>Males of Color in AP courses</p> <p>Expand the number of middle school students the district works with to prepare them for AP in high school.</p>			

City School System	Addressed chronic absenteeism (4)	Revised Suspension and Discipline Policies (5)	Expanded AP and gifted/talented programs (6)	Spurring Colleges of Education (7)	Expanding FAFSA (8)	Addressed SPED Over-identification (9)
		conflict resolution.				
Rochester		<p>Developed a community task force on student behavior that was convened by the Rochester Area Community Foundation and is focused revamping the district's code of conduct and will track progress.</p>				<p>Continue expanding the continuum of services for students with disabilities to reduce over-classifications and improve LRE placements.</p> <p>Expand use of consulting teachers in general education classes.</p> <p>Expand language enrichment and intervention efforts with young students to reduce inappropriate placements in speech and language impairment.</p> <p>Expand use of IDEA funding for reading</p>

City School System	Addressed chronic absenteeism (4)	Revised Suspension and Discipline Policies (5)	Expanded AP and gifted/talented programs (6)	Spurring Colleges of Education (7)	Expanding FAFSA (8)	Addressed SPED Over-identification (9)
						intervention programs.
San Francisco						
Toledo	Started the Truancy Prevention Program  PBIS  Pathways to Success.	Initiating PBIS and SEL programs	Expanding AVID, gifted and talented, & AP courses  EHSO		Naviance  Graduation coaches	EHS

Males of Color Initiatives in the Great City Schools (continued 3)

City School System	Transform Low-performing high schools and spur graduation rates (10a)	Started Parent Training and Engagement (10b)	Discussions about Race (11)			
Albuquerque						
Atlanta	<p>Create at-risk indicators for dropping out that would be used to determine student case-loads for graduation coaches.</p> <p>BEST Academy is used for a supportive single-gender environment serving mostly African American males.</p> <p>Currently developing an African American male support</p>					



City School System	Transform Low-performing high schools and spur graduation rates (10a)	Started Parent Training and Engagement (10b)	Discussions about Race (11)			
	<p>initiative for high schools</p> <p>Continue partnerships with Brothers Building Up Brothers, Dukes Foundation, 100 Black Men.</p>					
Austin	<p>Worked to reduce the number of male drop outs.</p> <p>Altered approach to discretionary removals at each campus.</p> <p>Plan Students with a Graduation Goal (SWAGG) Conference— with male component.</p>	<p>Re-established programs that give books to families.</p> <p>Held Vertical Team Parent Focus Groups with African American parents.</p> <p>African American Parent Engagement Conference in April 2015</p>	<p>Providing cultural sensitivity training and training on differing learning styles for all staff.</p> <p>Partner with University of Texas Department of Diversity and Community Engagement.</p> <p>Speaker series for administrators on reaching</p>			

City School System	Transform Low-performing high schools and spur graduation rates (10a)	Started Parent Training and Engagement (10b)	Discussions about Race (11)			
			Males of Color; book studies; on-line professional development with Jawanza Kunjufu and Robin Jackson.  Power of One Institutes			
Baltimore	Engage students in activities that will define their future selves while receiving supports. (Mentor match, college visits, college planning, SAT prep.)		Will hold a conversation about race, Black male identity development and support on MLK birthday. Expand into monthly discussions			
Broward County	Started the “Mentoring Tomorrow’s Leaders” peer-to-peer program					

City School System	Transform Low-performing high schools and spur graduation rates (10a)	Started Parent Training and Engagement (10b)	Discussions about Race (11)			
	<p>for minority males in two high schools in partnership with Broward College.</p> <p>Provide peer mentoring, leadership support, and dropout prevention efforts to help students transition to college or workforce.</p>					
Cleveland	<p>Transform high schools with low graduation rates. (100 mentors matched with 100 mentees)</p>	<p>Provide literacy and engagement initiatives with parents.</p> <p>Expand use of parent/teacher conference days, Father's Walks, Parent University,</p>	<p>Engage in broader discussion and examination of how issues of race, language, and culture affect the work of the district.</p>			

City School System	Transform Low-performing high schools and spur graduation rates (10a)	Started Parent Training and Engagement (10b)	Discussions about Race (11)			
		and Student Advisory Councils.  Improve cultural proficiency of IEP teams.				
Dallas						
Dayton	Monitor grade distribution in grades 7-12.  Monitor course enrollment in AP, IB, 8 <sup>th</sup> grade algebra, special education, CTE courses each semester and annually.  Monitor graduation rates.					
Denver	Increase multiple pathways to graduation.	Prepare materials and outreach strategies to help families	Implement Strategic Plan for Equity and Inclusion Training and			

City School System	Transform Low-performing high schools and spur graduation rates (10a)	Started Parent Training and Engagement (10b)	Discussions about Race (11)			
	<p>Promote innovations in competency-based credit and credit-recovery programs.</p> <p>Increase CTE offerings.</p> <p>Monitor students not on track at every grade level from 4<sup>th</sup> through high school</p> <p>Increase student voice in policy program implementation.</p>	<p>understand trajectories to college and careers—and what students need to be ready.</p> <p>Conduct outreach to families on common core, and career readiness opportunities.</p> <p>Expand teacher home visits.</p> <p>Connect school performance framework with family practices. Expand birth to three initiative to</p>	<p>Leadership Development in all schools, including student voice.</p> <p>Increase leadership opportunities, particularly for students not typically engaged.</p> <p>Implement Black Male Achievement Initiative (BMAI)</p>			

City School System	Transform Low-performing high schools and spur graduation rates (10a)	Started Parent Training and Engagement (10b)	Discussions about Race (11)			
		more school clusters.  Partner with community to increase family supports.				
District of Columbia	Establishing an Urban Prep Academy DC to spur academic success of Males of Color.  Establishing “Championing Academic Success” modeled after college football signing day to celebrate each graduate’s next steps toward college or career training.	.				
Duval County	Have placed graduation coaches in all	Are implementing Parent	Are requiring all district and school-based			

City School System	Transform Low-performing high schools and spur graduation rates (10a)	Started Parent Training and Engagement (10b)	Discussions about Race (11)			
	Title I schools and now require all counselors in schools without graduation coaches to attend regular meetings on how to ensure that all students graduate.	Academy Courses promoting literacy and parent engagement for families of color	administrators to participate in cultural sensitivity training.			
Fort Worth						
Jackson						
Hillsborough County	Launch the Gear-up Grant to increase the performance of secondary and post-secondary students, increase graduation rates, and improve family knowledge of post-secondary opportunities.	Host and monitor Parent University, a districtwide initiative held four times a year to better engage parents, provide health information, and conduct workshops.				

City School System	Transform Low-performing high schools and spur graduation rates (10a)	Started Parent Training and Engagement (10b)	Discussions about Race (11)			
		Expand district parent nights for Hispanic families to inform parents about the educational and post-secondary process. Nine planned this year.				
Kansas City						
Long Beach	Continue high school reforms and improvements that have led to overall graduation rates of 80.6 districtwide, including 79.1% for African American students and 76.6% for					



City School System	Transform Low-performing high schools and spur graduation rates (10a)	Started Parent Training and Engagement (10b)	Discussions about Race (11)			
	<p>Hispanic students.</p> <p>Working to replicate the California Academy of Math and Science, a nationally ranked “beating the odds” school.</p> <p>Expand the district’s high school summer school initiative that included 7,000 students last year.</p> <p>Focuses on math prep, bridge classes, credit recovery, and other efforts.</p>					
Los Angeles						
Louisville	Ensure that Equity		Student voices and interviews			

City School System	Transform Low-performing high schools and spur graduation rates (10a)	Started Parent Training and Engagement (10b)	Discussions about Race (11)			
	<p>Scorecards itemize college and career readiness rates for all groups in every school.</p> <p>ACT boot camps for Males of Color.</p>		<p>with a cohort of Males of Color.</p> <p>Community conversations using district studios.</p> <p>Districtwide book studies centered on race, culture, bias, and males of Color.</p> <p>Develop Equity Council.</p>			
Miami-Dade County	<p>Place graduation coaches in high schools with persistently low rates of graduation among Males of Color.</p>		<p>Initiate meetings with community groups, universities and colleges, municipalities, advisory groups, civil service organizations,</p>			

City School System	Transform Low-performing high schools and spur graduation rates (10a)	Started Parent Training and Engagement (10b)	Discussions about Race (11)			
			agencies, and others to examine ways to provide greater equity, access, and diversity in educational opportunities for Males of Color.			
Minneapolis						
Orange County	<p>Review district data on graduation rates among Males of Color.</p> <p>Devise a plan for addressing findings from data review with area superintendents and guidance staff.</p> <p>Meet with staff of schools where Males of</p>	<p>Meet with sponsors of Minority Leadership Scholars and discuss roles they can play with parents.</p> <p>Meet with parents in high schools where graduation rates are not high to encourage</p>	<p>Research professional development that is effective in raising awareness of issues.</p> <p>Met with consultant to determine appropriate culturally responsive training for teachers who contribute to</p>			

City School System	Transform Low-performing high schools and spur graduation rates (10a)	Started Parent Training and Engagement (10b)	Discussions about Race (11)			
	<p>Color are not graduating and plan parent meetings.</p> <p>Monitor course passage rates among Males of Color in schools with low graduation rates.</p> <p>Monitor school efforts and actions when informed of data.</p> <p>Established an acceleration initiative in Algebra I in 19 high schools.</p> <p>Setting up the Minority Leadership Scholars program and the Ethnic Minority</p>	<p>student achievement.</p>	<p>high suspension rates.</p> <p>Determined which teachers needed training and began the Behavioral Leaders Consortium.</p> <p>Begin training on Culturally Responsive Instruction for administrators, principals, deans, counselors and selected teachers.</p> <p>Monitor effects and progress.</p>			

City School System	Transform Low-performing high schools and spur graduation rates (10a)	Started Parent Training and Engagement (10b)	Discussions about Race (11)			
	Enrichment in Research and Graduate Education.					
Philadelphia	<p>Work with City Year in high-needs high schools on individualized English and math tutoring, attendance, and behavior.</p> <p>Focusing on students with attendance below 90%, more than one out-of-school suspension, and an F grade in math or English.</p>					
Providence	Continue expanding CTE opportunities to district middle and high schools.		Engage a broad community discussion and examination of how issues			

City School System	Transform Low-performing high schools and spur graduation rates (10a)	Started Parent Training and Engagement (10b)	Discussions about Race (11)			
			<p>of race, language, and culture affect the work of the district. Will use town hall forums and public hearings.</p> <p>Name a working group of adult men of color to serve as an advisory group to the district.</p>			
Rochester	<p>Continue expanding sports programs to better engage Males of Color.</p> <p>Increase the number of offerings in art, music, band, physical education, and other extra-</p>					

City School System	Transform Low-performing high schools and spur graduation rates (10a)	Started Parent Training and Engagement (10b)	Discussions about Race (11)			
	<p>curricular activities.</p> <p>Continue the district’s Latin America Literature elective along with the current African American program.</p> <p>Considering a “Males in Mind” science fiction course in English to engage Males of Color.</p> <p>Expand credit recovery.</p> <p>Expand paying CTE costs for students in cooperative educational service course.</p>					

City School System	Transform Low-performing high schools and spur graduation rates (10a)	Started Parent Training and Engagement (10b)	Discussions about Race (11)			
	<p>Expand the P-TECH Rochester program preparing students for computer technology jobs along with providing mentors, work experience, and college credit.</p> <p>Continue the Leadership Academy for Young Men, a single-gender high school with grades 7-12 that focuses on discipline, respect, and academics.</p> <p>Continue All City High, which provides alternative paths to</p>					

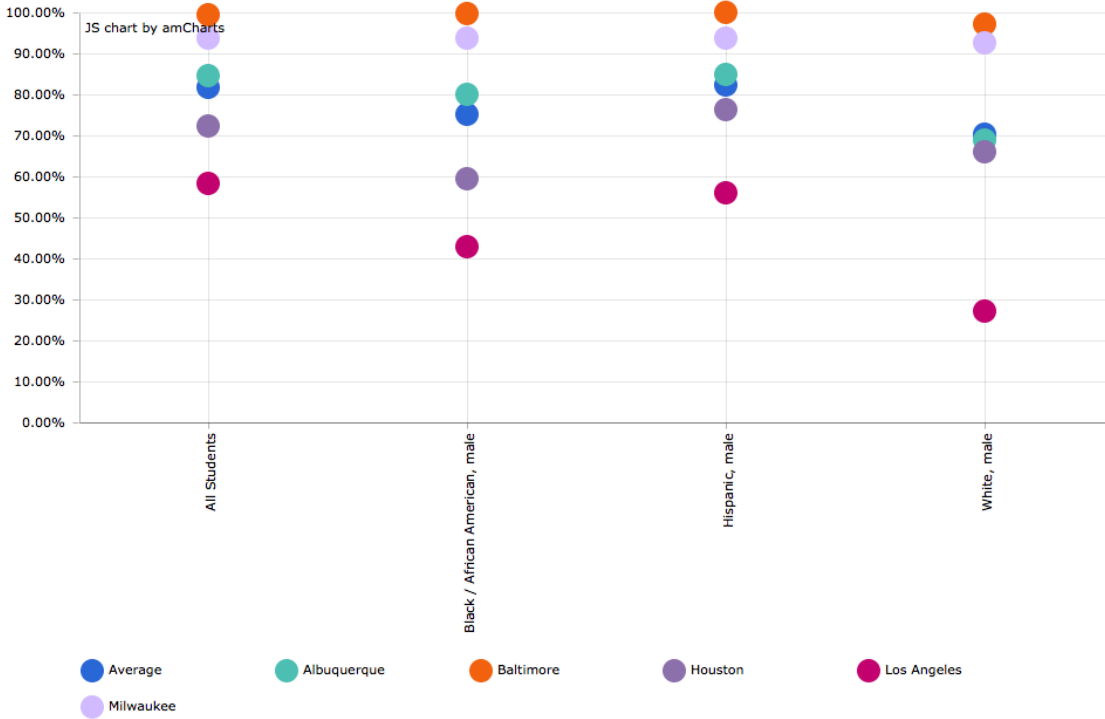


City School System	Transform Low-performing high schools and spur graduation rates (10a)	Started Parent Training and Engagement (10b)	Discussions about Race (11)			
	graduation in a non-traditional setting.					
San Francisco						
Toledo	Turnarounds, RttT, and SIG		Bridges out of Poverty  Forums on Racism			

**MALES OF COLOR KEY PERFORMANCE  
INDICATORS**

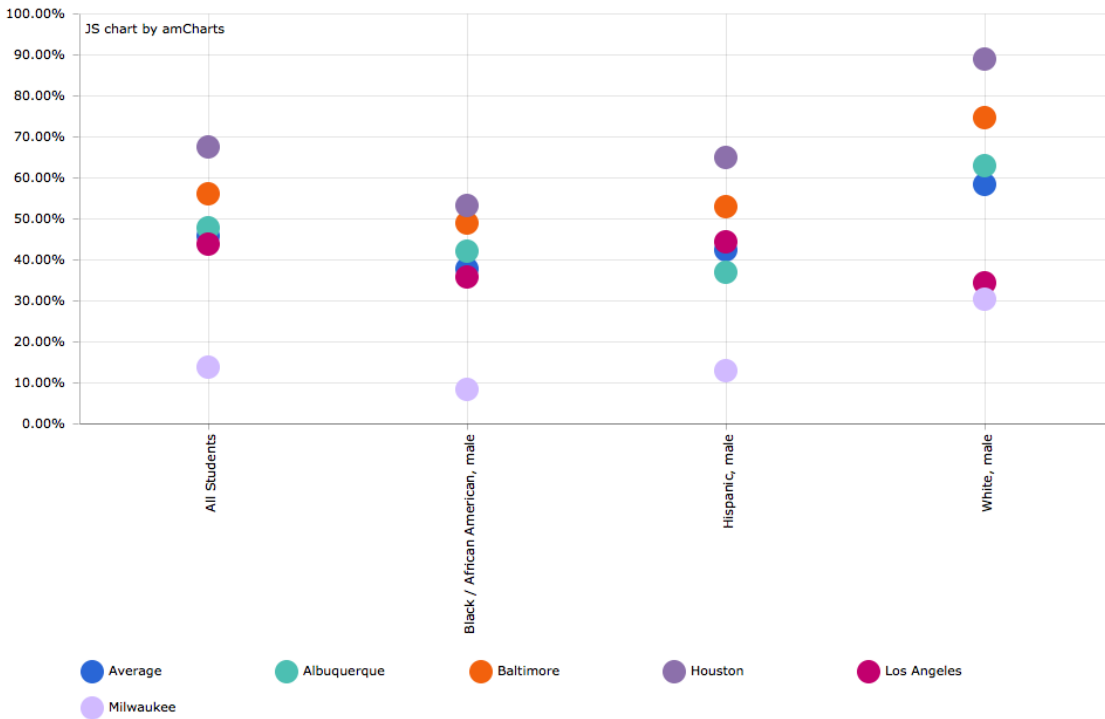
**MBK: Percent of Pre-K Students Advanced to K, by Subgroup**

- Survey Year: 2014 -

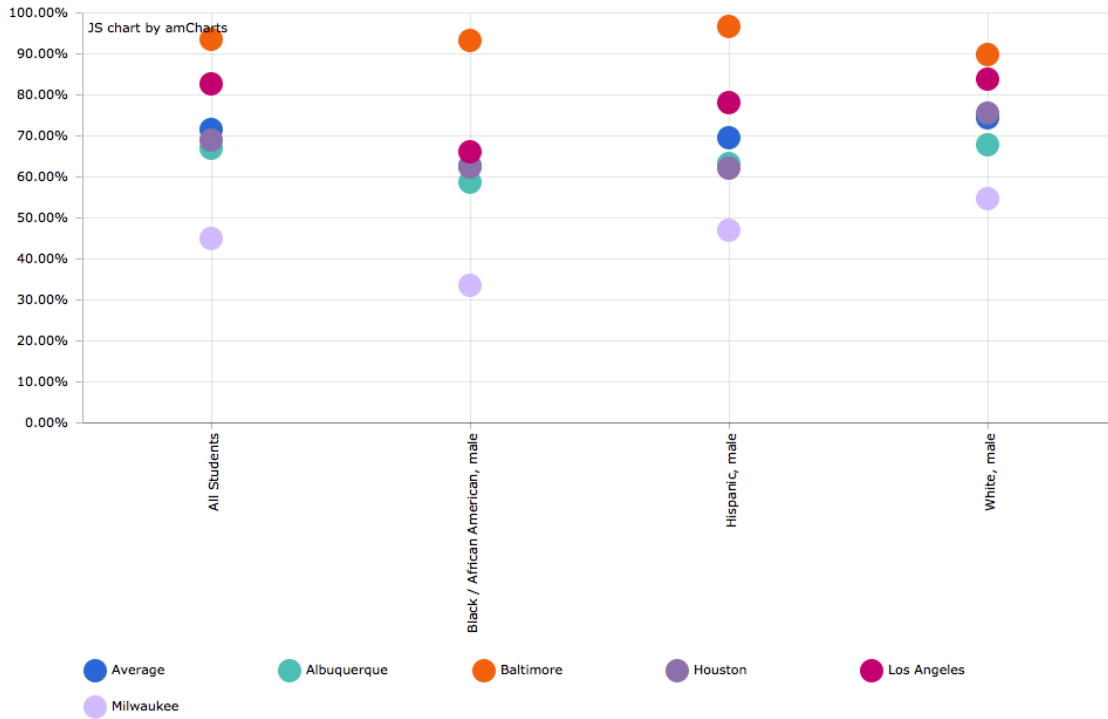


**MBK: 3rd Grade Reading Proficiency, by Subgroup**

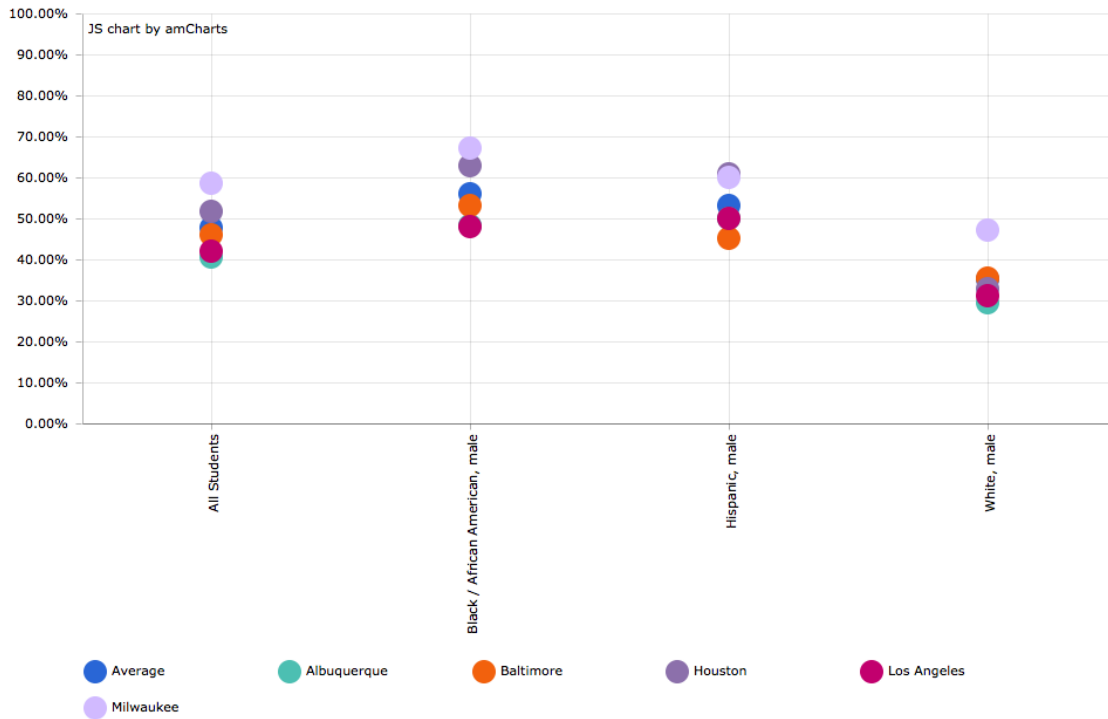
- Survey Year: 2014 -



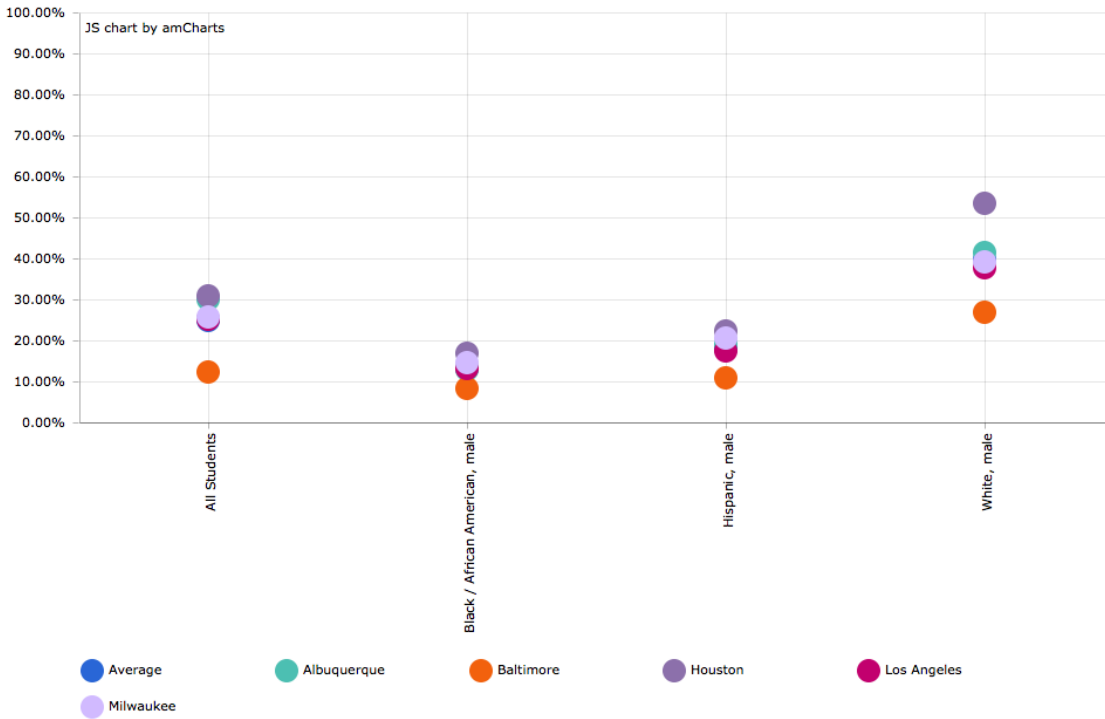
**MBK: 9th Grade Algebra Completion, by Subgroup**  
 - Survey Year: 2014 -



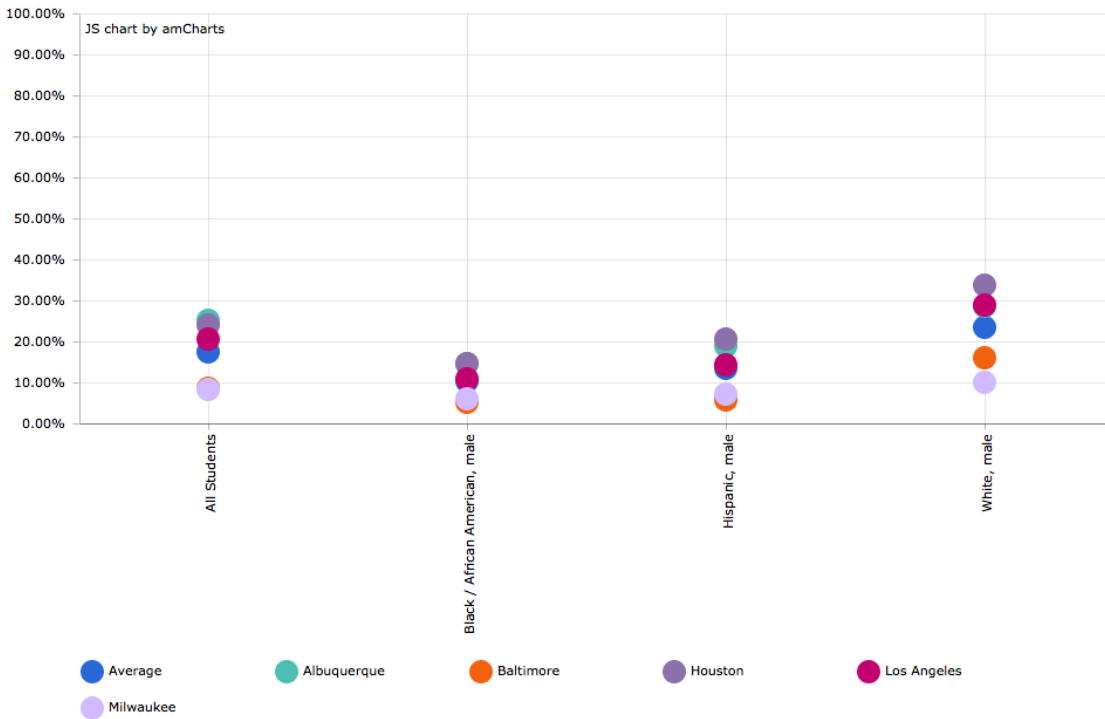
**MBK: 9th Graders Failed One or More Core Courses, by Subgroup**  
 - Survey Year: 2014 -



**MBK: 9th Graders with a B Average GPA or Better, by Subgroup**  
 - Survey Year: 2014 -

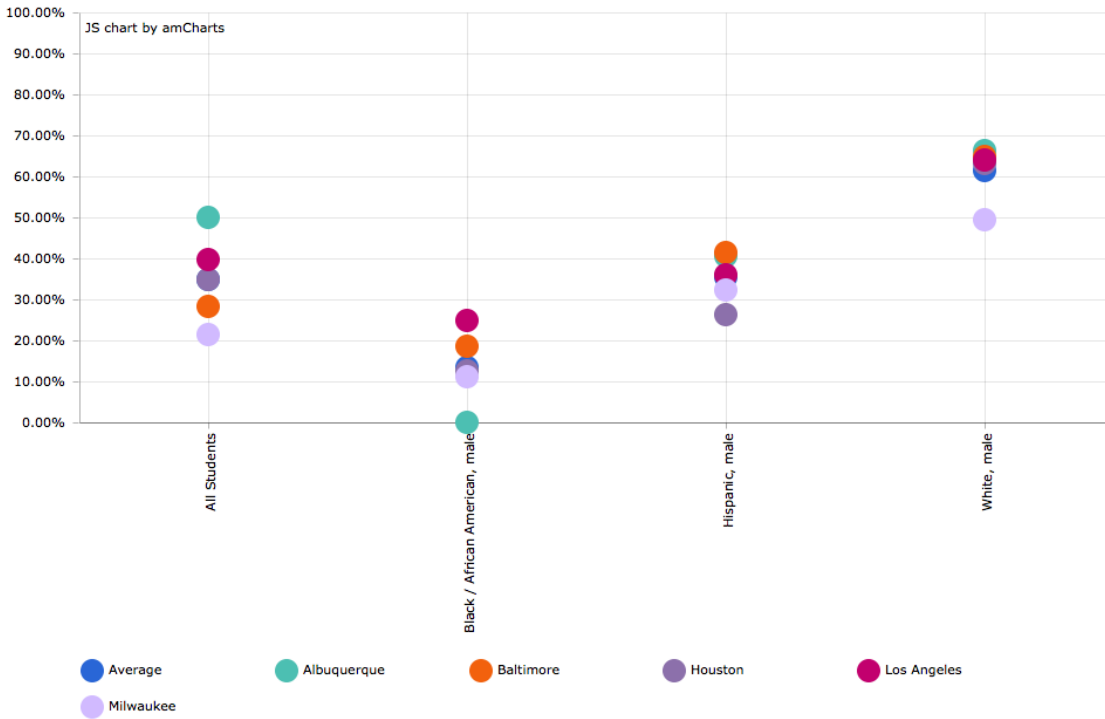


**MBK: High School Students Enrolled in AP Courses, by Subgroup**  
 - Survey Year: 2014 -



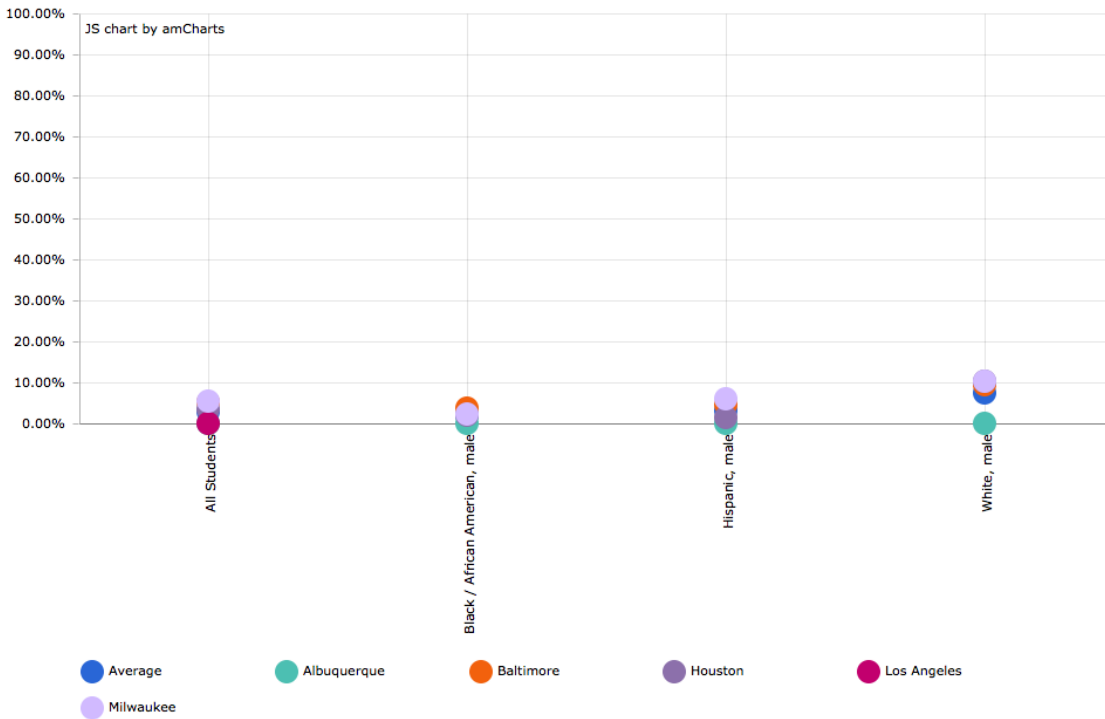
### MBK: AP Exam Scores 3 or Higher, by Subgroup

- Survey Year: 2014 -

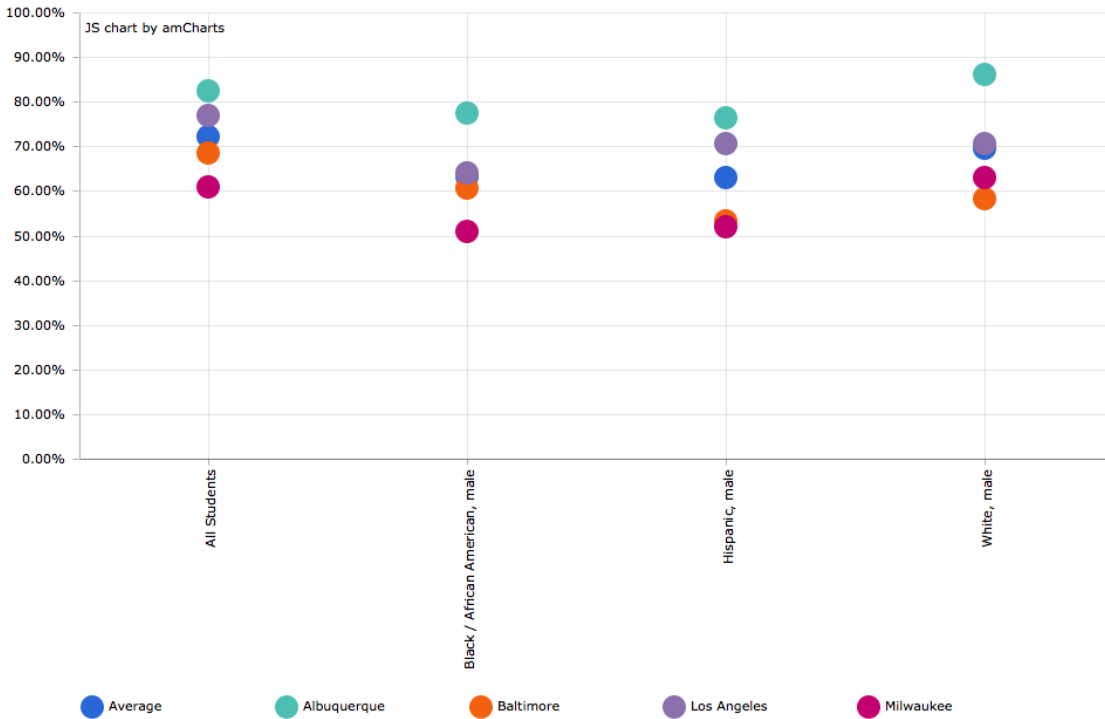


### MBK: High School Students Enrolled in AP-Equivalent Courses, by Subgroup

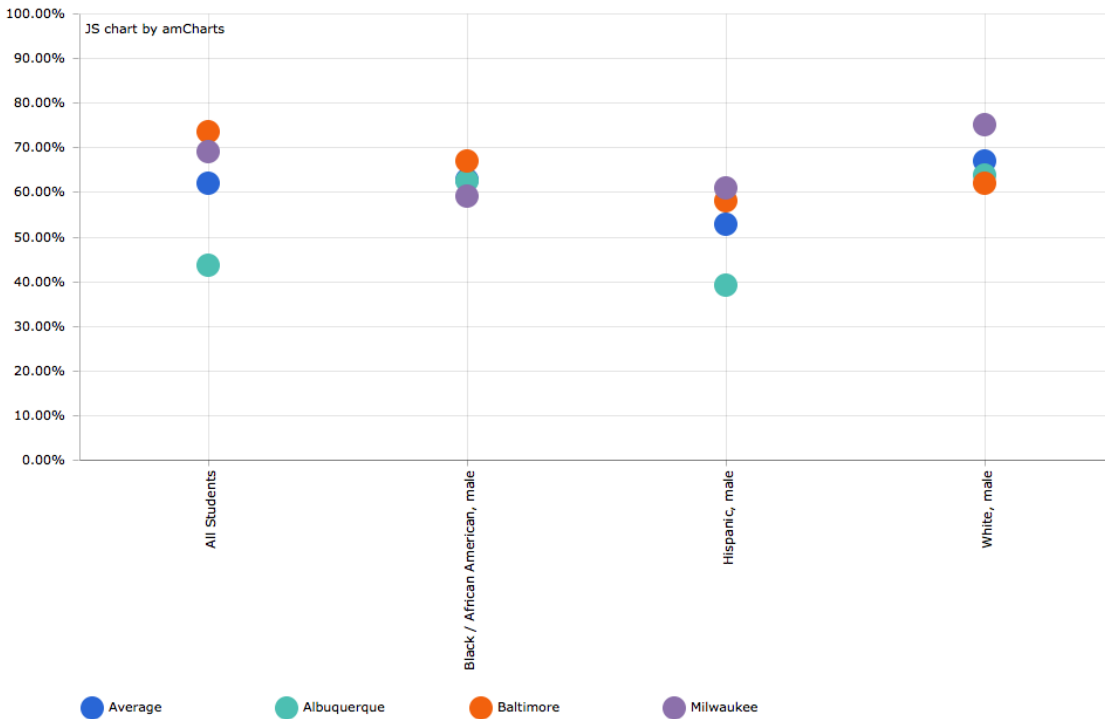
- Survey Year: 2014 -



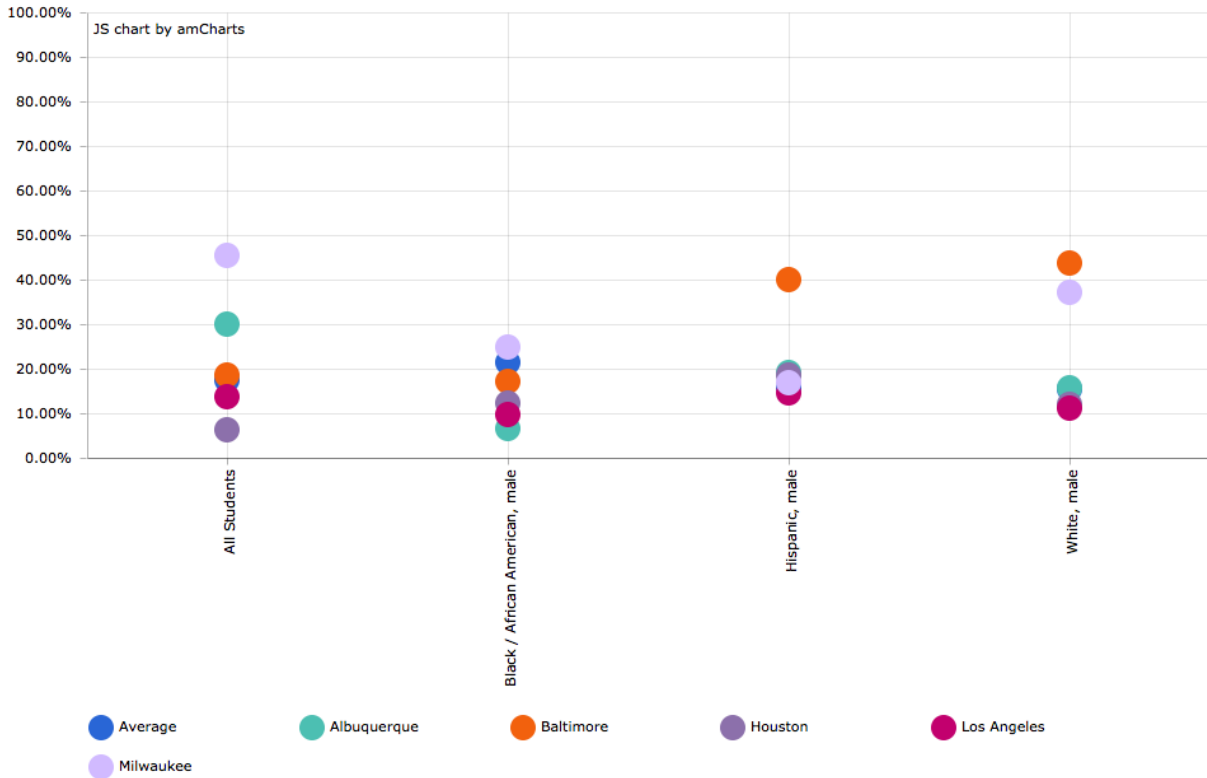
**MBK: Four-Year Graduation Rate, by Subgroup**  
 - Survey Year: 2014 -



**MBK: Five-Year Graduation Rate, by Subgroup**  
 - Survey Year: 2014 -



**MBK: Percent of Students with 20+ Annual Absence Days, by Subgroup**  
 - Survey Year: 2014 -



**MBK: Days Missed per Student Due to Suspensions, by Subgroup**  
 - Survey Year: 2014 -





**PACIFIC EDUCATIONAL GROUP PROPOSAL**

The Council of the Great City Schools  
Systemic Racial Equity Transformation  
Strategic Alignment and Proposed Programming Budget

Prepared by  
Pacific Educational Group

*“Race matters. Race matters in part because of the long history of racial minorities being denied access...Race also matters because of the persistent racial inequality in society—inequality that cannot be ignored and that has produced stark disparities...This refusal to accept the stark reality that race matters is regrettable...The only way to stop discrimination based on race is to talk openly and candidly on the subject of race...We ought not just sit back and wish away, rather than confront, the racial inequality that exists in our society.”*

- Supreme Court Justice Sonia Sotomayor

**Courageous Conversation© and Courageous Leadership Strategic Alignment**

The Courageous Conversation© *Protocol* fits within a larger framework aimed at total system, school, and classroom improvement. The strategic alignment of the organizational leadership development with the Council, the specific actions outlined in the Pledge, and the collaboration proposed by Pacific Educational Group are demonstrated through our *Systemic Racial Equity Transformation Framework©*.

Placing and keeping the racialized experience of “Students at the Center” is the core of our *Framework*. There are three primary overlapping domains, Community, Leadership, and Learning and Teaching, in which the Protocol **strategically** guides the dialogue. Additionally, there are the strategic content and process realms--- Critical Race Theory Tenets, Systems Thinking Tools and Adaptive Leadership Principles---in which school leaders must also develop personal and professional proficiency to guide their practices through each of the domains. Council leaders must consider the following questions and vet each implementation plan through the conclusions to which they arrive:

- What must system leaders know and be able to do to eliminate the racial disparities between males of color and their White counterparts?
- How do system leaders know when they are experiencing success toward eliminating racial disparities?
- What do system leaders do when they discover what they don’t yet know and are not yet able to do to eliminate racial disparities?

PEG’s strategic support to the Council will help ensure that its strategies are embedded in a systemic approach that does not render them to “random acts of equity,” and that they are addressed in the race-specific context that produces the challenges. Adopting the *Framework* and *Protocol* enables the Council to strategically address the context, content and process of the Pledge at the personal, professional and organizational levels. Doing so is also strategically

(Not for Distribution)

aligned with the Council's commitment to not reflect the racial disparities but to eliminate them by acknowledging the problem, examining cause, and co-constructing and implementing solutions.

Pacific Educational Group brings expertise in educational policy and the specific realms addressed in our *Framework*. We also emphasize that we are not proposing to do the work of systemic racial equity transformation for the Council and its member systems. It is our hope and intent that the take away from this proposal is that the work of systemic racial equity transformation is the Council's and its member school systems' – individually and collectively. We welcome the opportunity to join with and lead the Council of the Great City Schools in making real its Pledge to the White House's My Brother's Keeper initiative and improve outcomes for the nation's young men of color.

### ***I. Organizational Leadership Development Alignment***

Planning and implementing the Pledge by the Council of the Great City Schools to intensify the support and development of Males of Color is strategically aligned with PEG's Aspects of Work. The Council has been actively involved in efforts to document, understand and take action to address the issues plaguing the performance and experience of this group of students. PEG will strategically support the Council in developing the organizational capacity to lead and support its member district now and beyond the executive life of the My Brother's Keeper initiative. We will also work to develop models of practice led by pacesetter or "Beacon" districts that are able to accelerate, deepen and broaden their systemic racial equity transformation efforts.

#### ***A. Executive Coaching and Structural Support***

In order to carry out the eleven specific actions in its resolution titled as, "A Pledge by America's Great City Schools", the leadership of the Council and its member school systems will have to develop the will, skill, knowledge and capacity to dramatically change the course that has and continues to yield the outcomes so widely evidenced in study after study.

To strategically support this effort Pacific Educational Group will work initially with the Council leadership to position the organization to be able to guide, facilitate and support its membership in the work of systemic racial equity transformation. PEG will provide training, coaching and structural support to the executive leadership of the Council to support and build upon member systems' efforts, and facilitate capacity building with CGCS executive leadership in guiding an organization committed to racial equity. This entails consultation and facilitation with the executive director and organizational leadership in documenting and articulating the progress of systemic racial equity transformation in meeting the commitments of the Pledge.

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### B. Systemic Racial Equity Transformation

Systemic racial equity transformation in education is a top-down process. It demands that boards of education, superintendents, and school leadership executives in their communities take the lead in the design, development, implementation and evaluation of transformation processes that are *systemic, adaptive, critical* and most of all *courageous*. Anything short of this, experience has shown, leads to “random acts of equity” that result in pockets of excellence rather than systemwide change.

PEG, in collaboration with the Council leadership, will identify, select and provide support to seven CGSC member systems to commit to and participate in an action-research and development initiative to accelerate, broaden and deepen racial equity transformation outcomes. Leveraging CGCS member systems that are deeply engaged in systemic racial equity transformation using our *Framework* in existing partnership with PEG as mentor systems, this “community of practice” will provide advanced racial equity insight and leadership for all CGCS member systems.

### C. Developing Support for Males of Color

The design, development and implementation of plans to execute the commitments pledged by Council member school systems require a compelling and comprehensive model that can lead educators away from engaging in random acts of equity that are currently, in large measure, the primary response to racial disparities in schools and school systems. PEG’s *Framework* demonstrates how important it is for the nation’s schools to challenge racism in a way that is systemic, consistent, and coherent--in every classroom, every day, and all the time. It also underscores the importance for public school educators to develop the critical competencies necessary to engage their colleagues in communities and families as partners in their efforts toward racial equity.

PEG will customize programming to facilitate Council member school system leaders in a thoughtful, critical examination of the personal, professional and organizational racial beliefs, behaviors and outcomes of policies, structures, programs, procedures, practices, climate and culture. A central objective of this tailoring is to support the development of a “lens” of racial equity through which school system leaders can review, examine and transform these major aspects of schooling for males of color and all students.

The scope and sequence of the professional learning will lead school systems from an introduction to Courageous Conversation®, through the engagement, stages, and processes of systemic racial equity transformation, tailored to the specific contexts of each member district.

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#### *D. Dynamic Implications for Black and Brown Males*

As America's Great City Schools steps up to meet the challenge to intensify the support and development of Males of Color, it is critical that Council and member system leaders are able to understand and navigate the areas of overlap and distinction relevant to Black and Brown males, respectively. The racial, cultural and linguistic dynamics that characterize these groups of young men and their experiences in schools are significant and key to the planning and implementation efforts.

Similar to how we are engaging currently with several Council systems, PEG will engage school leaders through regional training and development opportunities that bring promising and effective racial equity leadership voices, practices and results together to be examined and disseminated more broadly across the US and abroad. We will convene seminars as a part of annual pre-conference activities for member systems to engage as communities of practice that provide opportunities to exhibit successful development in the domains of leadership, learning and teaching, and family/community empowerment highlighting students, especially with Black and Brown males, at the center.

### ***II. A Pledge by America's Great City Schools Alignment***

Pacific Educational Group's strategic support to the Council of the Great City Schools is also aligned with the specific strategies committed to in "A Pledge By America's Great City Schools". A central question in the alignment of the strategies of Courageous Conversation© and the Pledge is:

*To what extent does the Council of the Great City Schools, that is, both its leadership bodies and its member school systems, have the will, skill, knowledge and capacity to understand and address the issues of race as they relate to the existing racial disparities for males of color?*

Will, skill, knowledge and capacity are requisite for the effective accomplishment of the eleven strategies in the Pledge, individually and collectively. Below, these requisites are explicated followed by examples of Pledges aligned with each, and what Council and member system leadership will know and be able to do through engagement and proficiency with the Courageous Conversation© Protocol and Systemic Racial Equity Transformation Framework©.

To achieve the vision for racial equity expressed in the Pledge, Council leadership and member school system leaders must follow a radically different course than that of the generations of great minds who have come before us. Finding this path is not easy, nor is it necessarily a safe course to take, personally or professionally. It calls for **will** and **will** appeals to courage. ***The leaders must authorize and embrace the certain discomfort that comes with avoiding quick fixes.*** Changing the course of school systems so that they understand and meet the needs of Males

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of Color requires those who have the authority to actually lead the transformation and to inspire the educators in their systems to take ownership of their parts of the challenge and participate with the leaders in finding solutions.

A. Will

Will is the personal and professional belief and action to interrupt educational systems that produce racially predictable and disproportionate outcomes in the performance and experience of Males of Color.

Pledge Alignment

Pledge 1. Ensure that its pre-school efforts better serve Males of Color and their academic and social development.

- *Educators will know the racial disparities in the pre-school social and academic development of Males of Color in their school systems and be able to interrupt and eliminate the same.*

Pledge 7. Strongly encourage colleges of education to adopt curriculum that addresses the academic, cultural, and social needs of Males of Color, and that the district will maintain data on how these teachers do with our Males of Color.

- *Educators will understand the urgency of the efficacy and evidence of success in meeting the needs of Males of Color in the identification, recruitment, hiring and upward mobility of teachers and administrators and be able to place these criteria at the highest priority in these areas.*

Pledge 10. Work to transform high schools with persistently low graduation rates among Males of Color and others and to provide literacy and engagement initiatives with parents.

- *Educators will understand how racial disparities for males of color in schools, especially high schools, are designed preparation for the more blatant disparities evident for them in college and careers. Educators will be able to eliminate the disparities in schools and thus, interrupt those in colleges and careers.*

~~~~~

To exercise leadership to interrupt and eliminate systemic racial disparities experienced by Males of Color, leaders must learn how to talk about race. This requires **skill**. The leadership process begins with Council and system leaders addressing their own beliefs or mental models. The Courageous Conversation© Protocol teaches leaders the skills necessary to engage, sustain and deepen interracial dialogues about race and provides them with a way of understanding and organizing racial meaning that is theoretical as well as practical.

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B. Skill

Skill is the ability in practice, to engage, sustain and deepen intra-racial and interracial dialogue about race, racial identity and institutional racism as an essential foundation for examining schooling and improving student achievement.

Pledge Alignment

Pledge 3. Keep data and establish protocols that will allow it to monitor the progress of Males of Color and other students in our schools and appropriately intervene at the earliest warning signs.

- *Educators will understand the intersection of race and data and be able to analyze the same through that knowledge to identify and assess culturally proficient interventions.*

Pledge 8. Develop initiatives and regularly report on progress in increasing the numbers of Males of Color and other students who complete the FAFSA.

- *Educators will know in what ways social and institutional beliefs are manifested in the outcomes for high school completion and matriculation for Males of Color and be able to transform those beliefs personally, professionally and organizationally.*

Pledge 11. Engage in a broader discussion and examination of how issues of race, language, and culture affect the work of our district.

- *Educators will know what the personal, professional and organizational adaptive challenges and technical problems that impact their will to change the course of racial disparity for Males of Color in schools are, and be able to engage, sustain and deepen the dialogue about the same in their systems and with the broader communities that nurture and support males of color.*

~~~~~

School leaders need to be able to make sense of and discover truths about the complexities of race and racism where it intersects with schooling. Such **knowledge** allows for examining education systems through the prism of race and helps educators not only address racial issues in schools but also explain and perhaps predict how, why, and when such issues arise. Having a schema for organizing racial information helps Council and system leaders to gain a deeper understanding of how to engage the actions in the Pledge and establish race-conscious, equity centered policies, programs and practices.

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C. Knowledge

Knowledge is the mastery and use of the intersection of race and property as an analytic tool through which social (and, consequently, school) inequity can be understood.

Pledge Alignment

Pledge 2. Adopt and implement elementary and middle school efforts to increase the pipeline of Males of Color who are succeeding academically and socially in our urban schools and who are on track to succeed in high school.

- *Educators will know the historical and contemporary context of racial subordination connected to the disengagement and disparity in the academic and social development of Males of Color from primary to high school and take personal and professional action to transform the culture and climate of schools reflective of that context.*

Pledge 4. Adopt and implement promising and proven approaches to reducing absenteeism, especially chronic absenteeism, among Males of Color.

- *Educators will know the historical and contemporary context of racial subordination connected to absenteeism and identify, assess, adopt, and implement culturally proficient approaches to interrupting the disproportionality among Males of Color.*

Pledge 6. Develop initiatives and regularly report on progress in increasing the numbers of our Males of Color and other students participating in advanced placement and honors courses and gifted and talented programs.

- *Educators will know what it means to develop their systems' policies, structures, programs, procedures, and practices from an interdisciplinary, multiracial perspective and be able to do so.*

~~~~~

School systems, like the plight of Males of Color, must be viewed in their entirety, rather than in parts or components. To achieve the lasting change aimed for in the Pledge, the Council must develop **capacity** to view all parts of the system of schooling as contributing to the condition of our Males of Color, and as critical elements in ensuring the successes envisioned. Tools are needed to understand that systems are rarely if ever broken and that they do exactly what they were designed to do. Given that our schools were designed originally to offer instruction exclusively to White males, we must conclude that they continue to work reasonably well and in accordance with the original design.



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#### D. Capacity

Capacity is the cultural and climatic space (personal, professional and organizational) in which systemic racial equity transformation can be propagated, germinated and realized and the ability to accelerate, deepen and broaden that transformation.

#### Pledge Alignment

Pledge 5. Develop initiatives and regularly report on progress in retaining Males of Color in school and reducing disproportionate suspension and expulsion rates.

- *Educators will understand the role of race in the predictable and disproportionate suspension and expulsion rates of Males of Color and be able to place race at the center of analysis in the examination and re-visiting of school policies, structures, programs, procedures, practices, climate and culture.*

Pledge 9. Work to reduce as appropriate the disproportionate numbers of Males of Color in special education courses.

- *Educators will know why which student groups placed in the upper and lower ends of special education (advanced placement, talented/gifted, emotional behavioral disability) are racially predictable and disproportionate, especially for Males of Color and be able to eliminate the generative beliefs, behaviors and outcomes.*

~~~~~

To fulfill its Pledge to intensify the support and development of Males of Color, the Council of the Great City Schools and its school system members must become proficient and effective in identifying, questioning and transforming the racial context of public education systems throughout the country. This cannot be done without engaging in, sustaining and deepening interracial dialogue about race in order to examine schooling and improve student achievement. Through these dialogues and the resultant efforts to transform school systems into socially just racially conscious environments that nurture the infinite potential of Males of Color, the Council will be able to implement and adapt its Pledge to, indeed, define the culture of schooling in America's Great Cities.

Pacific Educational Group is honored to be considered to partner with the Council of the Great City Schools as it moves forward to fulfill its Pledge to back the White House's My Brother's Keeper initiative and improve outcomes for the nation's young men of color.

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**PROGRAMMING BUDGET**  
**The Council of the Great City Schools (Proposed)**

<b>Strand One: CGCS Executive Leadership</b>			
<i>Year 1</i>			
Executive Director and Executive Committee	Beyond Diversity	2 Days @ \$7,000 per	\$14,000
	Leadership Coaching	4 Days @ \$7,000 per	\$28,000
	Beyond Diversity II	2 Days @ \$7,000 per	\$14,000
Courageous Conversations About Race, Second Edition (25 copies)	\$42.00 (\$36.95 plus tax, shipping & handling)		\$1,050
<b>Strand One Total</b>			<b>\$57,050</b>
<b>Strand Two: CGCS Beacon School Districts</b>			
<i>Year 1</i>			
*Seven Beacon School Districts	Beyond Diversity	2 Days @ \$7,000 per	\$14,000
	DELT/LEADS Series	8 Days @ \$7,000 per	\$56,000
DELT Coaching, assistance in writing Transformation Plan by Anchor Supt.		2 Days @ \$2,500 per	\$5,000
DELT	1/mo. Virtual sessions= 2 hours each (3 days)	\$400/session x 9 months	\$7,200
Courageous Conversations About Race, Second Edition (100 copies)	\$42.00 (\$36.95 plus tax, shipping & handling)		\$4,200
<b>Subtotal for Year 1</b>			<b>\$86,400</b>
<i>Year 2</i>			
20 Beacon Schools, 100 participants	E-TEAMS Series	4 Days @ \$7,000 per	\$28,000
	Beyond Diversity I	2 Days @ \$7,000 per	\$14,000
*	Beyond Diversity II	2 Days @ \$12,000 per	\$24,000
Courageous Conversations About Race, Second Edition (100 copies)	\$42.00 (\$36.95 plus tax, shipping & handling)		\$4,200
DELT	1/mo. Virtual sessions= 2 hours each (3 days)	\$400/session x 9 months	\$7,200
Equity Walk/Planning via MBK Rubric		7 Days @ \$7,000 per	\$49,000
Affiliate Development & Certification	10 Leaders	\$3,500/Affiliate	\$35,000
<b>Support by Anchor District Leadership for Strand 2 Beacon Project</b>			
On-Site DELT Coaching by anchor school systems	Anchor DELT/DELTA Coaching Support	\$2,500x2 days x 2 visits	\$10,000
Anchor Superintendent Coaching	Anchor Supt. Coaching	3 days X \$2,500	\$7,500
<b>Subtotal for Year 2</b>			<b>\$178,900</b>
<i>Year 3</i>			
20 Beacon Schools or 100 participants	CARE/PASS Series	4 Days @ \$10,000 per	\$40,000
	Beyond Diversity I	2 Days @ \$7,000 per	\$14,000
	Beyond Diversity II	2 Days @ \$10,000 per	\$20,000
	1/mo. Virtual sessions= 2 hours each (3 days)	\$400/session x 9 months	\$7,200
Courageous Conversations About Race, Second Edition (100 copies)	\$42.00 (\$36.95 plus tax, shipping & handling)		\$4,200
Affiliate Institutional License	Schedule H (3001+ teachers)		\$22,000
<b>Subtotal for Year 3</b>			<b>\$107,400</b>
<b>Strand Two Total</b>			<b>\$372,700</b>

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<b>Strand Three: Open to All CGCS Member Districts – Courageous Conversations</b>			
Council Districts: 67 Districts Possible Each District select up to 80 Leader participants:			
Beyond Diversity training (up to 80 leaders) DO+ site administrators reps+ community (DELT/DELTA)	2 days Beyond Diversity Training	\$14,000 per district	\$14,000
2-Hour Monthly Virtual Equity Seminars for Leaders	Introduction to Racial Equity Transformation Framework & MBK Pledge	\$5,000 per district	\$5,000
CCAR Online training for remaining racial equity extended learning community (No cap)	100% of all new hires or 150 teachers minimum (goal)	\$315 x 150 Teachers	\$47,250
Affiliate Development & Certification	10 Leaders	\$3,500/Affiliate	\$35,000
Affiliate Institutional License	Schedule H (3001+ teachers)		\$22,000
<b>Strand Three Total</b>			<b>\$123,250</b>

**Strand One: “Courageous Racial Equity Executive Leadership”**

Pacific Educational Group will work initially with the Executive Director and the Executive Committee to build the capacity of the organization to guide and lead racial equity transformation efforts by its member systems. This leadership group will begin in Year 1 with Beyond Diversity, our introduction to Courageous Conversation®, to establish a foundation necessary for deinstitutionalizing racism and eliminating racial achievement disparities. The Executive Director and Executive Committee will also be guided and supported on the dynamic processes associated with systemic change at the personal, professional and organizational levels. As leaders develop proficiency at each of these levels they will be guided through Beyond Diversity II, the curriculum specifically designed to facilitate the thoughtful consideration of problems of practice through the lens of race, in order to be able to move Courageous Conversation® from theory into practice at each of those levels.

**Strand Two: “The Beacon Project”**

The second strand of the strategic support to be provided entails engaging, utilizing and building upon the tremendous resource of the member systems that are currently blazing their paths toward systemic racial equity transformation in partnership with PEG. The system leaders from Portland, St. Paul, Pittsburgh, Broward and Boston Public Schools, respectively, are at various stages of guiding the racial equity transformation process in their districts in real time. PEG and the Council leadership will work together to identify seven additional school systems to participate in the “Beacon Project” to accelerate, broaden and deepen their systemic transformation efforts using the process, learning and development of the above named systems as anchors. Given theirs’ is some of the most innovative, transformative and successful work in this arena, it makes little sense for the other Council systems to not purposefully engage with these “Anchor Districts” and not only learn from their numerous successes; but also give attention and insight to their very specific areas of challenge.

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The participating Beacon Districts will follow a three-year trajectory to guide systemic racial equity transformation from the level of governance to building leadership to classrooms to families and communities. During each year the leaders in the participating Beacon Districts will be supported and provided coaching from the leaders in the five Anchor Districts. The planning and coordination of the logistics of this corps of support will be determined in collaboration with the Beacon and Anchor districts, PEG, and the Council leadership driven by the context, process and progress of the Beacon districts.

Starting in *Year 1* with the District Executive Leadership Team (DELT) and the Lead Educational Administrators, Directors and Supervisors (LEADS), Beacon School District programming will begin with *Beyond Diversity* followed by a leadership curriculum series of customized seminars targeting the roles and functions of these cabinet- and system-level leaders in systemic equity transformation.

*Year 2* of the trajectory follows the leadership flow from cabinet- and system-level leaders into school-site building transformation. This level of work in Strand Two is focused on school-level Equity Teams (E-Teams), led by the Principal, that will engage in a series of similarly customized seminars focused on the development of building level leaders to design and implement a plan and strategy, including professional learning and development, for school-wide systemic racial equity transformation.

*Year 3* of the trajectory for Strand Two dives deeper at the school-site building level to specifically focus on classroom culture and practice. Expanded E-Teams will target grade-level and/or content-area cohorts for Collaborative Action Research for Equity (CARE) Teams. CARE Teams will be guided through professional learning in culturally relevant pedagogy, culturally proficient learning, teaching and assessment through a process of reflective practice and feedback. The emphasis is on teachers becoming their own action researchers identifying and refining effective practices in instruction and assessment, especially for Males of Color, and facilitating the replication of the same school-wide.

*Year 3* trajectory is also aimed toward identifying, reviewing and refining effective Partnerships for Academically Successful Students (PASS). District and building level leaders are guided through approaches and evidence-based practices to insist upon, surface and utilize the experiential knowledge of students, especially Males of Color, and their parents and communities in formulating the success of their performance and experience in schools.

During *Year 3* Beacon District schools will participate in Equity Walks. A group of building and district administrators (6-8) joined by Council leadership and guided by PEG facilitators will visit and observe selected participating schools using a rubric designed specifically around components of the My Brother's Keeper initiative and A Pledge by America's Great City Schools. The focus will be upon areas of the equity transformation targeted and identified by the host school leadership team.

The Superintendent and DELT in each Beacon District will also receive coaching and assistance in the development and writing of the systemic racial equity transformation plan from colleagues that have been providing support all along from the five anchor

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school systems. The Council leadership in collaboration with each participating Beacon School District and anchor system will determine the coordination and logistics of this support.

### **Strand Three: “Courageous Systems Moving Forward”**

In this strand of the proposed aspects of work, PEG and the Council invites and offers to each of its member school systems differentiated points of entry to Courageous Conversation©. In addition to all district leaders having access to PEG’s foundational introduction to Courageous Conversation©, Beyond Diversity, we offer the access to on-line resources. These assets include Courageous Conversation On-Line (CCAR On Line©) provided for the remainder of each local system’s racial equity extended learning community. This provision would also include as a minimum goal, required participation for 100% of leadership and instructional new hires into the district.

Additionally, in *Year 3* member systems will be provided monthly development and implementation support specifically related to efforts and actions in the Pledge and support of the My Brother’s Keeper initiative. This will be accomplished using web-conferencing platforms facilitated by PEG Equity Transformation Specialists, as will be for the racial equity learning teams in each district. PEG will also provide strategic support in building the capacity of the participating member school systems with the identification of select district leaders to engage in training and development to become certified PEG Affiliate trainers. This aspect of our work together recognizes the on-going need for in-system resource to meet the on-going development needs of member systems to support newcomers to its central essential work of systemic racial equity transformation.

### **III. Conclusion**

The mission of the Council of the Great City Schools, to educate the nation’s most diverse student body to the highest academic standards and prepare them to contribute to our democracy and the global community, finds its greatest opportunity in its effort to intensify the support and development of America’s Males of Color. Pacific Educational Group understands that the effort to seize this opportunity requires a systemic, multi-year approach centered on transformation for racial equity, as evidenced by the work undertaken by Council member school systems with whom we are currently partnered. This thoughtful, rigorous path to transforming educational systems into racially conscious and socially just environments that nurture the spirit and infinite potential of all learners, especially students of color, American Indian students and their families, is at the heart of urban public schools successfully teaching our children and building our communities with cities at the center of a strong and equitable nation.

**PROFESSIONAL DEVELOPMENT TASK FORCE**

# **COUNCIL OF THE GREAT CITY SCHOOLS**

## **Task Force on Professional Development**

**2015-2016**

### ***Task Force Goal***

To improve the quality of professional development for teachers and principals in urban public education.

To alleviate the shortage of certified teachers and principals in urban schools.

To improve the recruitment and skills of urban school principals.

### ***Task Force Chairs***

Darienne Driver, Milwaukee Superintendent  
Felton Williams, Long Beach School Board  
Deborah Shanley, Brooklyn College CUNY

**DEANS FOR IMPACT**





DEANS FOR IMPACT

# Deans for Impact

**Overview**

**May 2015**

# The Problem in the U.S.



Programs that prepare educators lack a coherent understanding of what new teachers need to know and be able to do

Many early career teachers are unprepared to teach and do not fully understand how students learn

- Student learning suffers
- Education profession suffers from low prestige
- Applications to colleges of education are plummeting

# Concerns regarding the US educator-preparation system are not new

- 1860**     *“Q: Do you think you can make our big youngsters mind?  
A: Yes, I think I can.  
Q: Well, I am satisfied. I guess you will do for our school, I will send over [your teaching] certificate tomorrow.” (Entirety of interview)*
- 1963**     *“Coursework in education [school] deserves its ill-repute. It is most often puerile, repetitious, dull, and ambiguous – incontestably.”*
- 1983**     *“Never before in the nation’s history has the caliber of those entering the teaching profession been as low as it is today.”*
- 2006**     *“Chronic status problems have clearly been the historical norm for the American ed school.”*

# The Solution: Deans for Impact

**Deans for Impact is a new organization committed to improving student-learning outcomes by stewarding the transformation of educator preparation.**

**The members of Deans for Impact are leaders of colleges of education and other programs who will collectively promote a programmatic and policy agenda focused on preparing educators to teach and lead in ways that demonstrably improve student learning.**

# Guiding Principles



## Data-Driven

Member deans are committed to collecting, sharing and using data to drive change within their programs and across the field of educator preparation.



## Outcomes Focused

Member deans are committed to using common metrics and assessments that tightly align the activities of their programs with demonstrable impact on student achievement and other common outcomes measures.



## Empirically Tested

Member deans are committed to using the tools of research to identify the features of educator-preparation programs that improve student learning.



## Transparent and Accountable

Member deans are committed to elevating expectations for educator-preparation accountability and making program outcomes transparent to all.

# Theory of Change

## Key Activities

Create a collective vision as to what educators should know and be able to after completing their preparation

Advocate for policies that generate common outcomes data

Build the research engine to test our hypotheses

Actively lead efforts to disseminate this knowledge to the field of educator preparation



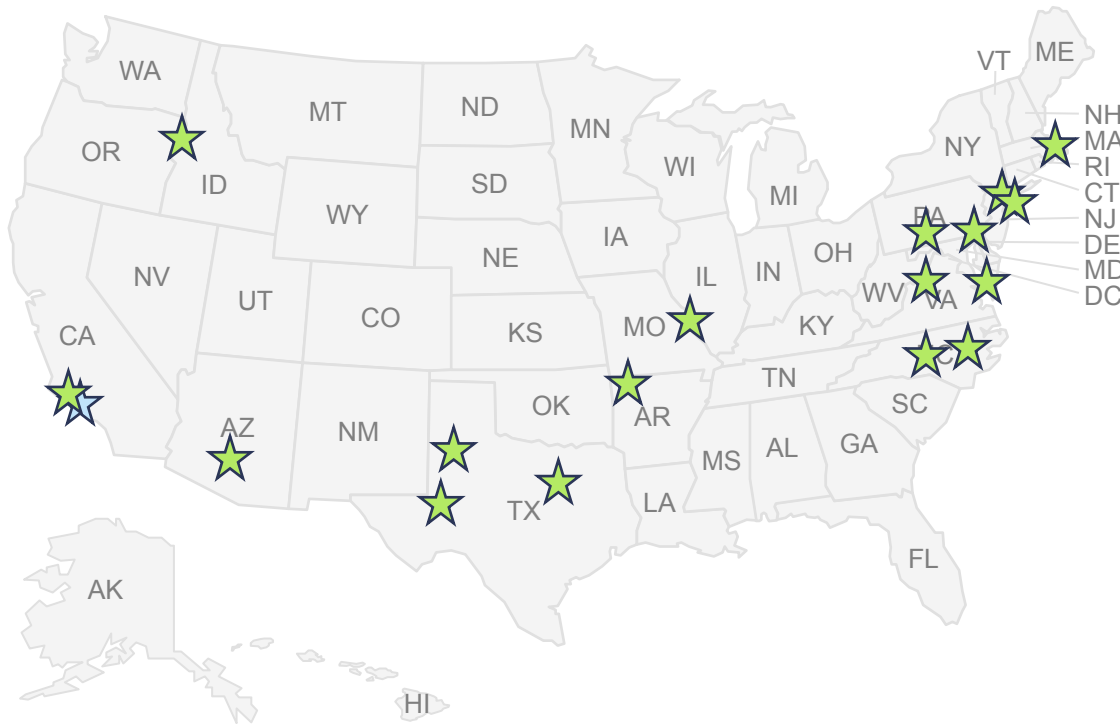
## Outcomes

Profession coheres around a **critical knowledge base** that all newly trained educators are expected to possess

Educators prepared to employ **scientifically rigorous practices** in the classroom

**Every teacher steps into the classroom with the preparation he or she needs to be effective**

# Deans for Impact is a national organization of leaders in educator preparation



★ Founding members

Plan to expand to ~25 members by end of 2015

## Founding members

- Gregory Anderson, *Temple University*
- David Andrews, *Johns Hopkins University*
- Carole Basile, *U Missouri, St. Louis*
- David Chard, *Southern Methodist University*
- Jack Gillette, *Lesley University*
- Frank Hernandez, *U. Texas-Permian Basin*
- Mayme Hostetter, *Relay GSE*
- Mari Koerner, *Arizona State University*
- Cori Mantle-Bromley, *University of Idaho*
- Shane Martin, *Loyola Marymount | LA*
- Bill McDiarmid, *UNC - Chapel Hill*
- Linda Patriarca, *East Carolina University*
- Bob Pianta, *Univ. of Virginia*
- Scott Ridley, *Texas Tech University*
- Tom E. C. Smith, *Univ. of Arkansas*
- Jesse Solomon, *Boston Plan for Excellence*
- David Steiner, *Hunter College – CUNY*
- Karen Symms Gallagher, *Rossier USC*

# The diversity of our founding deans is a great strength



**Gregory Anderson,**  
Temple University



**David Andrews,**  
Johns Hopkins University



**Carole Basile,**  
U Missouri, St. Louis



**Jack Gillette,**  
Lesley University



**David Chard,**  
Southern Methodist University



**Frank Hernandez,**  
U. of Texas-Permian Basin



**Mayme Hostetter,**  
Relay GSE



**Cori Mantle-Bromley,**  
Univ. of Idaho



**Shane Martin,**  
Loyola Marymount



**Bill McDiarmid,**  
UNC - Chapel Hill



**Linda Patriarca,**  
East Carolina University



**Scott Ridley,**  
Texas Tech University



**Tom E. C. Smith,**  
Univ. of Arkansas



**Jesse Solomon,**  
Boston Plan for Excellence



**David Steiner,**  
Hunter College - CUNY



**Bob Pianta,**  
Univ. of Virginia



**Karen Symms Gallagher,**  
Rossier USC

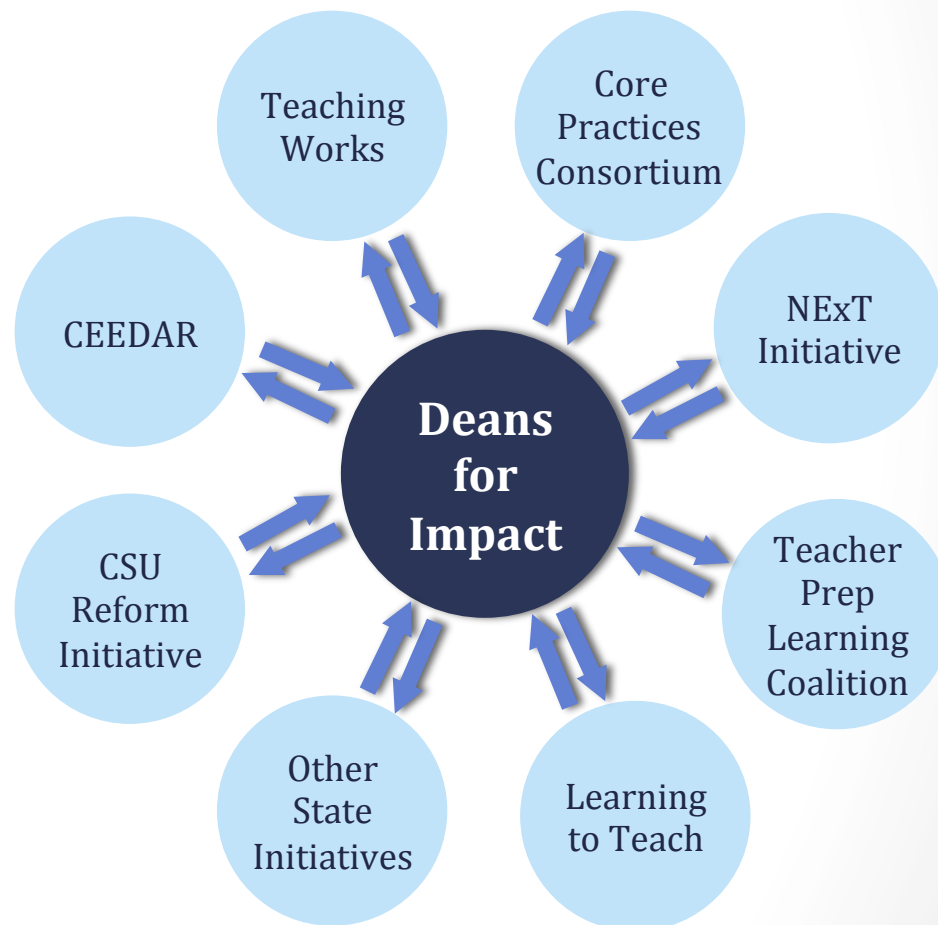


**Mari Koerner,**  
Arizona State University

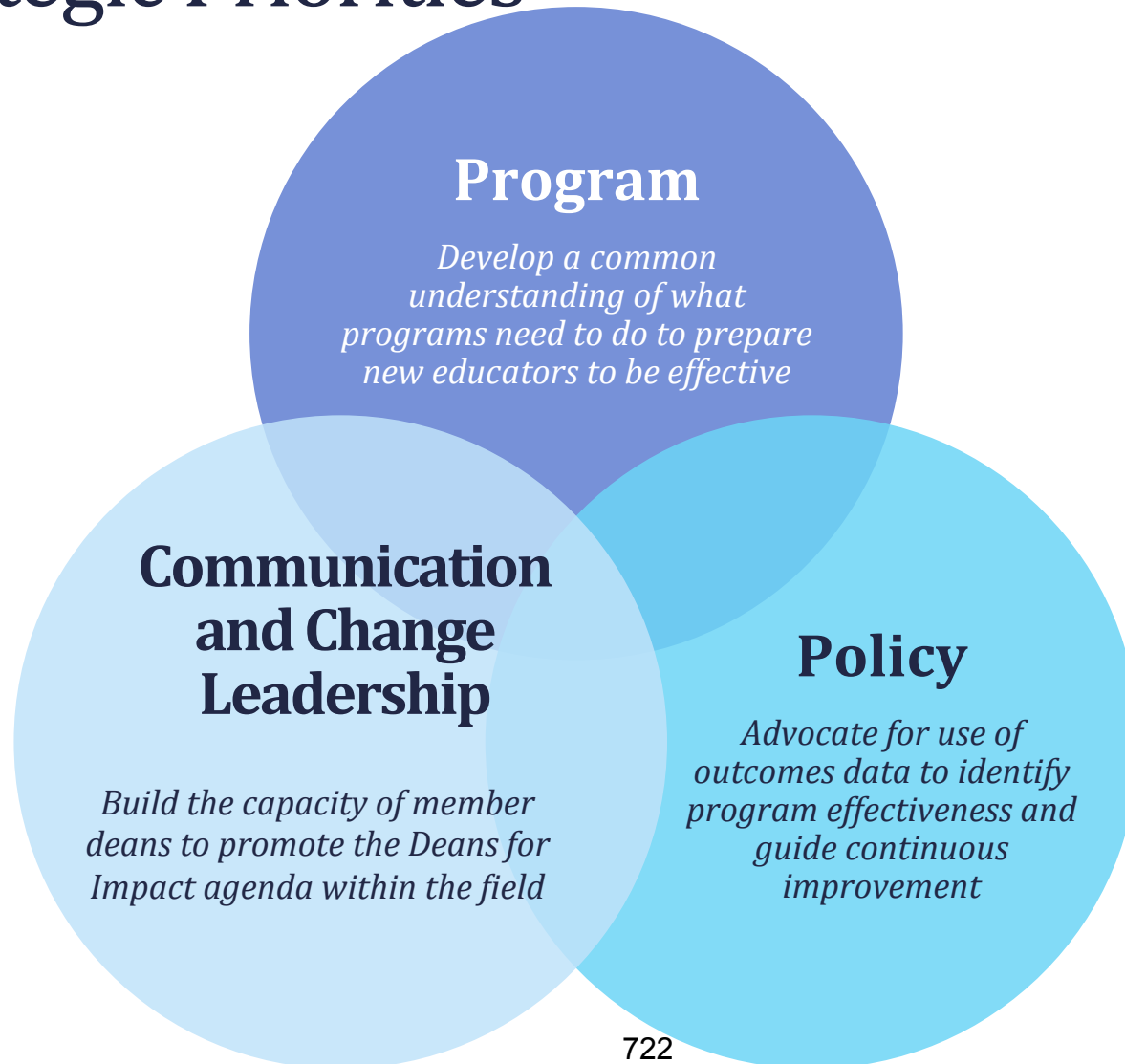


# Deans for Impact aims to connect multiple efforts to transform the field

- Numerous efforts are underway to redesign educator preparation
- Deans for Impact aspires to be the connecting tissue between many of these initiatives
- Deans for Impact will both learn from and share information across a national network



# Strategic Priorities



# Program Agenda

**The members of Deans for Impact will develop a collective vision of what new educators need to know and be able to do in order to be effective. Deans for Impact as an organization will help implement, validate and refine this vision.**

- Identify and develop a set of design principles for educator preparation, with input from numerous stakeholders
- Map or build assessments that align to the guiding principles
- Use outcomes data generated by assessments to empirically validate the effectiveness of the guiding principles in preparing educators to be effective
- Continually revise and improve guiding principles based on evidence

# Policy Agenda

**Deans for Impact will speak in a collective voice on behalf of deans who embrace the use of transparent student-achievement and other outcomes data to evaluate program effectiveness.**

**Near  
term**

- Prove out effectiveness by advocating for better and transparent data collection at each point in the pipeline (induction, preparation, graduation, placement and value-added metrics)
- Influence federal and state policy to be outcomes driven



**Longer  
term**

- Lay foundation for recognizing effective programs that demonstrate impact in objective and empirical ways
- Concentrate and target public funding for educator preparation on those programs that have been identified as effective

# In Jan 2015, we publicly responded to proposed teacher-preparation regulations



DEANS FOR IMPACT

Docket ID: ED-2014-OPE-0057

Deans for Impact  
1500 Newton St  
Austin, TX 78704

January 26, 2015

Honorable Arne Duncan  
Secretary of Education  
U.S. Department of Education  
Washington, D.C. 20201

**Re:** Comments on the Department of Education's proposed regulations  
II of the Higher Education Act

Dear Secretary Duncan:

*Deans for Impact* - a new national organization composed of  
education and other teacher-preparation leaders  
collectively train more than 15,000 teachers  
Department of Education

*"Because we believe that each of [our guiding] principles is reflected in the proposed Title II regulations, we support both the regulations and the broader policy shift that animates them. The new regulations support our goal of helping faculty and leadership across the 1,400 or so colleges of education in this country shift their practices."*

The letter was signed by all 18 founding deans

# Communication and Change Leadership

**Deans for Impact will help to change the conversation around teacher preparation and build the capacity of member deans and their institutions to drive the Deans for Impact agenda.**

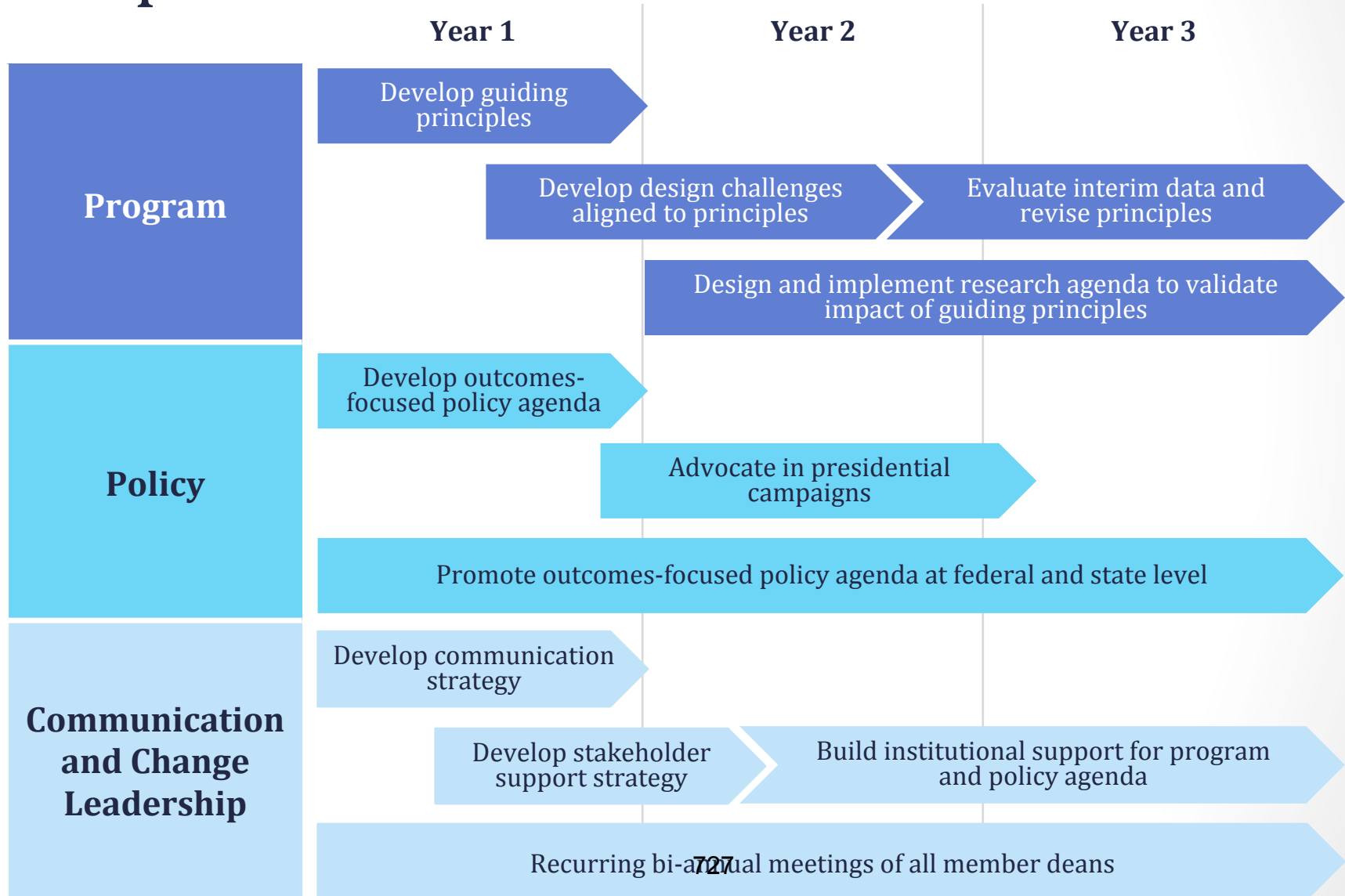
## Communication

- **Reshape the conversation** around teacher preparation by proposing ideas and engaging with stakeholders
- **Emphasize the positive** and our orientation to help rather than judge
- **Make transparent** the good work taking place inside many colleges of educator

## Change Leadership

- **Create a community of practice** for deans to identify “points of light” and address common challenges
- **Institutionalize our work by offering faculty fellowships** that elevate the role of practice-focused teacher education
- **Develop strategies** appropriate to leading transformation within the academy

# Implementation Timeline



# Impact and Outcomes

## Short term

- Establish Deans for Impact as a credible, national organization advocating for policies that support greater accountability and transparency in the field of educator preparation
- Form partnerships with key stakeholder groups aligned with Deans for Impact's guiding principles and who will support its policy and program agenda

## Intermediate term

- Design and implement research agenda to validate impact of guiding principles on program and teacher effectiveness
- Advocate successfully for policy changes to support outcomes-driven accountability and funding for programs and program authorizers at the federal and/or state level

## Ultimate goal

- Elevated national perception of the teaching profession and teacher training
- Programs consistently prepare every single educator to be good on day one, and great over time
- The US is the preeminent international leader in preparing effective educators



# Organizational Philosophy

- Steward the work of innovative deans
  - Deans for Impact will support the leaders of educator-preparation programs that embrace our guiding principles
- Be flexible and nimble
  - Membership will be limited to remain flexible and fast acting
- Continually test and revisit hypotheses
  - The need for empirical validation will be built into DNA of the organization
- Diversity is a strength
  - Founding members include large public and private research universities, regional state universities, and new innovative programs

# Conclusion

**The tectonic plates of the US education system are shifting. The members of Deans for Impact are determined to seize the moment, transform the ways in which we prepare educators in this country, and help elevate the education profession.**

***If Deans for Impact succeeds in this mission, its impact will be extraordinary.***



DEANS FOR IMPACT

## June 2015 Meeting Summary

Below is a summary of takeaways from our June convening:

### Program

- Collection and sharing of program data. Overwhelmingly, we heard your strong desire to collect and share common data across programs – with the data environment in North Carolina being a leading example of the type of work we might be able to do among the programs you lead. Toward that end, we're going to survey you this summer to find out what measures you track – and would like to track – to produce a comprehensive data overview across our membership.
- Science of Learning. At both the convening and in subsequent feedback, we heard strong overall support for incorporating Science of Learning principles into teacher-candidate training and employing them to help faculty connect theory to practice. We will soon embark on pilot work in at least three programs led by member deans to gather data and insight into how best to do this, with the hope of eventually scaling across our membership. We will be sharing the Science of Learning document with outside groups and asking for their support for spreading these scientific principles across the profession.

### Policy

- Policy priorities. We heard broad agreement that Deans for Impact should prioritize pushing for robust, multi-state data collection systems that enable programs to track outcomes of graduates and to use data for both accountability and continuous improvement purposes. This is consistent with our guiding principles and previous discussions and affirmed again here given our expanded membership. We plan to look at outcomes-data related to clinical practice (and related practical training) given the strong interest we heard on this aspect of the preparation experience in particular.
- Signature policy initiative. Steve will be working with our policy subcommittee over the coming months to develop Deans for Impact's signature policy initiative – an effort to translate the above priority into a specific policy effort. Our goal is to have fully developed and defined this signature policy initiative by our next convening. We plan to connect with organizations that have signaled their interest in working with us to advance efforts to transform teacher preparation, including the Council of Great City Schools, CCSSO, and CAP.

**LEADERSHIP FOR AMERICA'S URBAN SCHOOLS:  
A PROPOSAL BY CAROL JOHNSON**

**LEADERSHIP FOR AMERICA'S URBAN SCHOOLS: Submitted by Carol Johnson,  
Harvard Advanced Leadership Fellow**

**BACKGROUND:**

Urban school districts serve the most economically, racially and linguistically diverse populations in our nation. The Council of Great City Schools, an organization founded in 1956, to bring together the nation's urban public school systems in a coalition dedicated to improving the educational opportunities for students in urban communities, reported in 2014 that, overall the students in these 60 plus school districts are 70% black and Latino, 68% eligible for free or reduced priced lunch and serve a disproportionate number of students in their states that are English Language Learners and receive special education services. Despite some progress across the nation and in these districts (as evidenced by NAEP scores, proficiency, graduation rate increases and reductions in the number of students dropping out of high school), significant achievement and performance gaps persist. These districts are disproportionately impacted by high mobility, homeless families and new arrivals to this country, as well as frequent turnover in district leadership.

It is true that too many of the students in these communities enter school without the prerequisite early learning experiences that middle income and affluent families routinely offer their children, skill development that leads to early reading success; too many are the first in their family, in some cases to complete high school and enter and complete post-secondary and too often these same families are ill-equipped to navigate the educational system's bureaucracy or provide the advocacy necessary to ensure their child's opportunity to learn. But it is also true, that time and time again, public education has proven its' capacity to overcome the conditions of poverty and family circumstance, to bring students who would otherwise have no future, a pathway to college, careers and the fulfillment of the American dream. Nothing is more important to our overall wellbeing, our democratic form of government, our economic prosperity and community safety than eliminating the barriers that stand in the way of our children's access to a great education.

Recent reform efforts have focused on a combination of structural and instructional changes; school size (small high schools), more tests, higher standards (Common Core & PARCC/Smarter Balance), effective teaching (MET study), added time (extended learning and summer learning loss), competition/governance and autonomy (charters, mayoral control) and universal design (inclusion, two way bilingual). Indeed, there is evidence across the country that some and combinations of these interventions have made a difference and shifted the conversation to a more intentional and deliberate focus on outcome and not just inputs. We are more attentive to who is and isn't learning, from curriculum to rigorous content, from what is actually taught to how students are able to use and apply knowledge in more integrated ways. We have better data and know more than ever before about why some schools fail while others succeed, how to observe and document good teaching, how to more effectively design schools for the diverse learners who arrive, and how to create alternative

and blended learning opportunities through technology. We are also growing in our knowledge and understanding of the connections between learning and the development of the brain through neuroscience.

This work, the most important undertaking in America's history, to educate all at high levels, requires a sustained and focused effort. The local demand and the international competition require school districts, particularly our urban districts, serving the most vulnerable of our students, to make rapid and significant academic improvements, build strong coalitions with non-profit partners, politicians, corporate leaders, and philanthropists, and be accessible and responsive to a community filled with competing interests. Byrk, et al (Chicago,2010) delineated 5 key elements to successful schooling that include leadership, professional capacity, instructional guidance/ curriculum, student-centered climate, and strong parent and community support/ties. In reviewing hundreds of schools, this research found that schools that have strong indicator reports of these elements were up to (10) times more likely to improve students' reading and mathematics performance than schools where (3) or more of these indicators were weak. Similarly another analysis (Chenoweth, 2007) of disparate schools nationwide, serving many poor, students of color with unexpectedly high student achievement found that those schools shared similar characteristics.

While these elements seem to make common sense, creating the necessary sustained and concentrated drive to produce these conditions and put the elements in place, requires persistent, prepared and focused leadership and even then, any number of contextual changes can make success difficult. Urban school communities are flush with a myriad of intermediate distractions, including constant public and media scrutiny, diminishing resources, and changing governance structures and leaders. Realistically our urban school communities will always be dynamic and filled with distractions and the value we place on our public institutions will continue to demand elected representation, opportunities for community-wide input from a diverse stakeholder base, and resolving alignment disputes and conflicts between state, federal and local policies and policy makers.

What we are more likely to control in an immediate and consequential way, is to ensure that we develop, recruit, support and sustain the district leadership, prepared to effectively lead a complex academic enterprise, where the outcomes for the most important customers (our students) are as consequential to both them as individuals now and to us as a nation in the future.

Numerous research studies document the importance of district leadership, (Alsbury, 2008, Waters & Marzano, 2009, Ansingh, 2012). A more recent study (TBN) failed to create a direct correlation between the role of school district superintendents and student achievement. Despite the study's conclusions, most educational research concludes that while no individual variable improves performance alone, leadership is always included in the list of variables that when combined with other elements produces results, and effective leadership is absolutely required to coordinate and facilitate the other elements.

## **CURRENT APPROACH:**

Data from the Council of Great City Schools (2014) suggests that less than 25% of urban school superintendents remain in their leadership roles for more than five years. In fact, the average tenure dropped in 2014 from a high over the last decade of 3.6 years to 3.2 years. Few superintendent leadership programs are designed for the urban context, and what is more typical is a series of courses offered by local higher education institutions that upon completion provide the “Superintendent’s Licensure,” and endorsement usually required by the state for leaders to serve in the position. Most of the approximately 15,000 school superintendents across the nation (exception, elected superintendents, in some states) self-select to acquire this endorsement and maybe placed without any prerequisite “induction” or preparation process similar to what we would normally even require for teachers (student teaching). Many may have served in district level assistant superintendent or director level positions prior to their appointment, others come to the position through non-traditional routes, superintendent preparation or doctoral/ leadership programs (i.e. the former Harvard Urban Superintendents’ program, Vanderbilt and Columbia Universities). Current efforts like the Broad Institute, the Aspen Leadership Group have provided targeted support, particularly to recruit non-traditional leaders, and in the case of the latter, support to superintendents after being selected. The impact has only been for a small select group of districts.

Over the last decade, the Harvard Business School and the Graduate School of Education have partnered to host seminars “PELP” to develop urban district leadership teams and work on problems of practice identified by the district. Funders like the Bill & Melinda Gates Foundation, Wallace Foundation, Annenberg and Carnegie have brought together district leaders based on project specific efforts, small schools, extended learning, arts, organizational improvement, etc., and indeed these have created learning opportunities and strengthened teams of district leaders. But these efforts rely heavily on selected district partnerships versus a comprehensive strategy for transforming the overall leadership landscape. The American Association of School Administrators and their local affiliates, as well as NWEA, Proact/Superintendents’ Academy offer leadership development opportunities, but they are often general rather than specific or one-time meetings versus over an extended period of time. Statewide efforts tend to be more generally aligned to the states reform efforts but are not intentionally designed for urban districts. While these examples are all noteworthy, they have limited capacity to impact in a more intentional way the “constant churn” of leadership in urban districts, and the real time entry level support that is so critically needed in the first one to three years in the position.

What is required is a new and different structure to support newly appointed urban school superintendents early in their career trajectory. Superintendents need access to a network of experienced mentors from a broad array of fields who are able to assist them as they navigate the academic, the fiscal, community and political dynamics of the position. We have accepted as intractable and normal the notion that urban district leadership will always be mobile and have the “constant churn”. Without a doubt there are clearly political and mismatch realities

that may limit a more lengthy tenure. But we have too often attributed these frequent transitions to ineffective board leadership, elected governance structures and not always to how we better recruit, prepare, develop, and support those with potential to lead this critically important and consequential work. This assumption is not meant to underestimate the formidable challenges of competing interests like those we have most recently witnessed in cities like Los Angeles, Birmingham or Albuquerque, nor to dismiss or ignore that some governance structures maybe more or less effective. Rather, it affirms the need to have effective and strong representative governance, and also affirms that there are specific and highly complex leadership skills and “know-how” associated with staying long enough to effectuate meaningful changes and implementation of a reform agenda that will ensure educational opportunity for all.

Newly appointed school superintendents (first one to three years) face many challenges. Without the support necessary to promote a sustained focus on academic achievement, build productive community collaborations and create a leadership team to help navigate the tumultuous and ever changing context of labor relations, legislative priorities, competition and deal with the financial constraints of operating efficiently, these leaders will be poorly positioned to demonstrate their competence or effectiveness. Constant changes in urban school district leadership work against improvements in academic performance and a sustained focus on closing achievement gaps. Without new and different support, progress will be extremely difficult, if not impossible.

### **WHY IS THIS IMPORTANT?**

Over the last decade (2000-2010), the United States population grew from approximately 281 to 308 people and as of May, 2014, the census reports that there are 318 million Americans. America is growing and the face of America is projected to become more diverse by 2050. Eighty-two percent of the United States’ population live in cities and surrounding metropolitan communities, and urban communities have the greatest density of the population. Between 2000-2010, the overall population of the United States grew by slightly less than 10%, but the Hispanic and Asian growth was 43% each, and the Black and White populations were 12% and 5% respectively. Today, approximately 25-30% of Americans are children, but the majority of children under age one are children of color. By 2020 more than 50% of all students in the United States will be students of color and 20% of the nation’s population under age 5 come from households where another language other than English is spoken at home. In many urban school districts across the nation, like Boston (45%) that rate is double. The United States Census projects that by 2050 the share of the United States population by 2050 will shift from a majority white population of 64% to 46%, while the Hispanic/Latino population currently at 16% will almost double. These facts have particular significance since a large share of these growing populations are in urban cities and many of these students have been under-represented in the positive outcomes of graduation rates, college entrance and completion rates and over-represented in the negative outcomes of drop outs, youth unemployment, and corrections/incarcerations.



Ensuring a robust and sustainable economy is only possible, if we as a nation maximize the human talent represented by all, not just some, of our students. Analysis by the Center for American Progress suggests that by closing racial gaps, we would raise overall incomes by eight percent and increase GDP by 1.2 trillion. They further suggests that “equity, inclusion, and fairness are no longer moral imperatives, they are also economic ones. America needs a new growth model that is driven by the twin goals of both equity and excellence.” Developing the next generation of leaders to move a bold and more aggressive agenda for educating well a more diverse student population, (that has been traditionally under served in our schools) is critical.

The growing and more diverse population of the United States does not mirror the population of our current education workforce. In 1990, the majority of US teachers were 71% female and 29% male. Data from 2011 reports that the teaching workforce is 84% female and 16% male. In 1990, the teaching workforce nationally was 92% White, 5% Black, 2% Hispanic and 1% other. By 2011, teachers were 84% White, 7% Black, 6% Hispanic and 4% other (includes Asian, Native American). There has been a shift from traditional teacher education programs, to alternative routes to teaching, but 2/3 of teachers are still prepared in traditional higher education programs. Of those becoming teachers through alternative routes, 53% Hispanic, 39% Black, and 18% White. There are also significant disparities in the representation of superintendent leaders in the United States by gender and race. As of 2011, while over 84% of all teachers in America were women, in the approximately 14,000 school districts in this country, the percent of female superintendents has hovered between 15-20%. Even in the sixty largest urban districts where women have moved more quickly into leadership positions, 72% are male and 28% female. There is currently only one Hispanic female among the sixty largest urban superintendents and less than 2% of urban superintendents are Hispanic and Asian. Superintendents in the Council of Great City Schools are more racially diverse, 47% White, 41% Black, 15% Hispanic, but gender gaps persists and given the student demographic shifts, Hispanic, Native Americans and Asians will still be under-represented. The tenure of Black superintendents is much lower than it is for their White superintendent peers.

This effort will undertake a strategy for developing and diversifying the leadership pool of superintendents and providing the networking opportunities that prepare them to be successful in roles where they have been traditionally under-represented. The potential pool of candidates most likely will come from many of the district level leaders in the urban districts with the greatest racial and gender diversity, but more has to be done to identify and nurture this untapped and under-developed talent. As the student population becomes more diverse, the need to recruit, develop and retain diverse leaders will increase.

## **ACADEMIC CHALLENGES**

The Common Core Standards (CCSS) initiative was launched in 2009 by the National Governors Association (NGA) and the Council of Chief State School Officers (CCSSO). Its purpose is to establish consistent educational standards across states in Grades K-12 and to

ensure that students graduate from high school prepared to enter credit-bearing courses in post-secondary institutions or to enter the workforce. The team charged with developing the standards has as its stated purpose to “...provide a consistent, clear understanding of what students are expected to learn, so that teachers and parents know what they need to do to help them.” Additionally, “...the standards are designed to be robust and relevant to the real world, reflecting the knowledge and skills that our young people need for success in college and careers” (NGA Center for Best Practices, 2010), thereby, enabling American students to compete in a global economic.

In an effort to align assessments with the new standards, two consortia were established to develop CCSS assessments. Partnership for Assessment of Readiness for College and Careers (PARCC) and Smarter Balanced Assessment Consortium (Smarter Balanced) have designed and tested assessments that will not only provide a more accurate measure of students’ knowledge and skills in English Language Arts and Mathematics, but also facilitate comparisons of achievement data across students, schools, districts and states.

The introduction of CCSS and the related assessments have resulted in the most substantive changes in teaching and learning in decades and will transform classrooms across the nation. The research and evidence based standards have altered both the content (what is taught) and the strategies (how content is taught). In ELA, for example, the standards focus on the use of critical types of content – classic myths and stories, historical documents, and seminal works – to introduce increasingly complex text, academic vocabulary, and from which students cite evidence to demonstrate their understanding and apply their knowledge of the content. The mathematics standards provide a deeper focus on fewer topics at each grade level and stronger coherence of topics across grade levels. In addition, the standards require that the instruction focus equally on conceptual understanding; procedural skills and fluency; and application. In addition, the use of technology, both in instruction and assessment, has created a need for enhanced teacher development, improved infrastructure, and additional resources.

The Council of the Great City Schools embarked upon a multi-year initiative to support its member districts in implementing CCSS and a CGCS Survey (August 2013), curriculum directors indicated the following:

- Approximately 90% respondents stated that their districts planned to fully implement CCSS during last school year (2013-14);
- The majority of those responding indicated that their district’s progress in implementing CCSS as either good or excellent; and
- The areas that were most likely to be rated “poor” included addressing the needs of special populations (39.6%); adopting computer-based and computer-adaptive assessments (37.8%), and integrating technology into the classroom (34.2%).

Neither the programs for preparing superintendents, nor the current models of teacher training have kept pace with the seismic shifts in what educators must know and be able to do to meet the demands that are required to effectively implement the more rigorous standards. The capacity of school district leaders to understand the contextual implications of the standards reform and the ability to manage the shifts in policy, curriculum, instruction, and resource allocation are critical to ensuring both the effectiveness of the CCSS implementation, but more importantly, the success of all students.

**PROPOSED PROJECT:**

If urban school district leaders were provided early mentoring support and guidance, and assisted to build leadership teams and supportive networks focused on developing human capital and creating schools of excellence and equity, they will be able to provide concentrated and sustained leadership, thereby resulting in improved student performance and the closing of achievement gaps.

**ASSUMPTION:**

Few superintendent leadership development programs provide sufficient preparation in real-time entry level support to ensure that urban district leaders are able to successfully lead and navigate the academic, community, fiscal and political demands of the position. This lack of preparedness results in high turnover, constantly changing priorities, personnel changes, and an inability to create a sustained focus on academic achievement. The proposal assumes a shift from a reactive mode of support to one that identifies and provides planning, coaching and technical assistance in the predictable areas that create challenges for newly appointed urban superintendents and limits their long-term tenure and success in student achievement and threatens any chance of school improvement.

**STRATEGY:**

Target Audience: Urban school district superintendents, cabinet level leaders or non-traditional leaders in the nation's largest urban school districts who are newly appointed are in their positions for less than three years.

**PURPOSE:**

To provide a network of pre-and entry-level support and technical assistance to newly appointed school superintendents, to ensure early assessments and actions that build on the assets of the existing context, maximize the leaders' talents, and assist the leadership team to move forward an aggressive and productive academic agenda, while building a collaborative environment for district progress and leadership stability.

To support school districts in developing talent and assembling a team of leaders to build internal coherence and alignment, and professional capacity to transform systems and structures for academic success.

To assist school leaders in developing and executing a theory of action that increases the likelihood that students' academic performance will improve and achievement gaps will close.

To offer newly appointed superintendents access to an ongoing cadre and network of experienced leaders who serve as advisers, critical friends and mentors and offer feedback and counsel to newly appointed leaders in urban districts.

These networks will provide a confidential and safe space to problem solve, think out loud, innovate and experiment with new ideas, address problems of practice and exchange successful strategies.

### **IMPLEMENTATION STRUCTURE:**

The Council of Great City Schools brings together the nation's largest urban school systems in a coalition dedicated to the improvement of education for children in the largest city communities. The organization does its work through advocacy, legislation, communications, research and technical assistance. It also helps to build capacity in urban educational programs, to boost academic performance and narrow achievement gaps, improve professional development, district leadership governance and management. The Council accomplishes its mission by connecting urban school district leaders across the country and upon request, from districts also conducting strategic reviews in particular areas of work including curriculum and instruction, operations, fiscal and operational areas, and services to special populations of students (i.e., special-education English language learners). The Council's Board of Directors is composed of the Superintendent and one member of the Board of Education from each member district, making the Council the only national educational organization so constituted and the only one comprised of district leaders and policymakers.

The Council of Great City Schools is recognized as a leader in urban education and has a long and distinguished history of working effectively with superintendents, elected and appointed school board members from the nation's largest districts. The organization has provided strategic reviews related to district challenges, hosted annual job-alike seminars in topical areas such as teacher effectiveness and benchmarking district operations, and provided leadership federal initiatives (CCSS, RTTT, My Brother's Keeper). Because of the Council's established relationships and strategic work with urban districts and its willingness to question and confront the status quo, the organization is uniquely positioned to create the host infrastructure to identify potential leaders who would most likely benefit from this support.

## **FORMAT:**

The format for the project includes a blended model of webinars and face-to face network meetings and 1:1 on site and virtual coaching. The districts will have access to relevant research; participate in contextual assessments and strategic reviews; receive technical assistance and resources to address their specific needs. Through its existing K-12 educator network and the College of Education Deans, the CGCS has the capacity and experience to customize services and match the needs of district leaders and selected facilitators and resources.

## **SERVICES PROVIDED:**

Districts participating in the program will receive the following services:

1. Mentoring support from leaders with urban superintendent or executive level personnel with experience in leading and developing complex organizations.
2. Coaching, technical assistance and support from retired leaders from education, business, legislative or other related fields.
3. Participate in job-alike opportunities, bi-annual meetings, and networking hosted by Council of Great City Schools.
4. Research support from Council of Great City Schools Urban Dean's Advisory group and selected case studies of district leadership Challenges (Harvard/PELP)
5. Develop a network of support for increasing the pool of under-represented leaders (race, gender, etc.).

## **LEADING AMERICA CONTENT /COACHING MANUAL**

Over the next year, a set of modules and a coaching manual which represent key leadership components for this program will be developed. Among the topics to be included are the following:

### **INTERNALLY FOCUSED:**

- Team Building: Entry Planning and Assembling a Diverse Team
- Human Capital and Executive Level Leadership
- Vision and Direction: Communication Within the District
- Operations and Infrastructure: The Nuts and Bolts of Facilities, Nutritional Services, and Transportation
- Labor Relations: Getting to Win
- Management Development- Principals and Middle Management Professional Growth
- Equity and Academic Excellence for All
- Fiscal management, equitable funding models, federal funds, fund raising
- Creating a Culture of Innovation and Reform

- Academic Focus and Rigor: Standards, Curriculum, Instruction and Assessment
- Activating Teachers' Voices
- Authentic Parent and Community Engagement – Creating Meaningful Opportunities to Involve Parents and Community in Educating Students

#### **EXTERNALLY FOCUSED:**

- Maximizing Organizational Resources – Council of Great City Schools, AASA, NSBA, NPTA, CUBE, Local and Regional Organizations
- Partnering with the Community – Developing and Sustaining Partnerships Focused on District Priorities
- Working with Policymakers: Legislative, Legal and Public Policy Issues
- Media Relations and Communications – Telling the District's Story
- Competition: Learning from Charters, Private Schools and Schools that Work
- Governance: School Board Development, Conflicts of Interest and Ethical Dilemmas
- Creating a Customer Oriented and Family Focused Organization
- Accountability for Performance – Superintendent's Evaluation and Public Confidence.

#### **STAKEHOLDERS AND CONSTITUENT ANALYSIS:**

The target audiences for these services are newly appointed superintendents and their leadership teams. School boards (elected and appointed) seek competent and consistent leadership and they will see the benefit of these leaders receiving ongoing coaching support and technical assistance from experienced leaders as they successfully direct and guide high-performance district teams.

The entire community shares the responsibility of educating its children. The economic well-being and vitality of the city depend on a well-educated workforce. Families often make housing decisions based on the perceived quality of the schools and the confidence they have in teachers and school leaders. The entire community becomes a stakeholder in the success of the schools and the confidence the community places in district leaders. It is difficult for the business community, civic leaders, families and educators to have confidence in the school community with the constant turnover in district leadership. The investments, new initiatives and relationship building necessary to create high-performing schools in our most vulnerable urban communities in particular, are less likely to be fully developed with frequent leadership changes. This project will need to engage:

1. Urban school district leaders;
2. School Board members and policy makers;
3. Philanthropy/foundations;
4. Education organizations

## **RESISTANCE AND FORCES OF INERTIA:**

The major resistance will be the tendency to believe “that’s just the way it is and there’s nothing we can do to alter the current state”. This can be a huge hurdle since many school board members and superintendents when confronted with conflicts or political issues view the necessity for frequent changes as a simple mismatch between the superintendent and the local school board and not the result of a lack of more carefully developed strategies on both sides for problem solving in a more collaborative way. Overcoming the resistance requires a careful examination of the data given the current environment. A key strategy will be to examine the school district leaders that have served for over a decade and have had a proven track record and evidence of success. Examples might include: Long Beach, CA, Hillsborough/Tampa, FL, and Omaha Nebraska

## **PILOT-PROOF OF CONCEPT AND SCALING**

Discussions are underway and two (2) pilot sites are being explored.

1. State specific – Tennessee
2. National – urban districts Council of Great City Schools

## **STATE:**

The eight (8) largest districts in the state of Tennessee represent over 50% of the students in the state. The largest populations reside in these four (4) districts: Memphis, Nashville, Knoxville and Chattanooga. For the entire state to improve, these four districts representing the greatest diversity in the state must make substantial and sustained progress. The Tennessee Department of Education has recently created a new division, specifically designed to reach out and support the district leaders and schools in these districts.

## **NATIONAL:**

The average tenure of current school superintendents in the nation’s largest urban school districts dipped again in 2014 from three point six to three point two. Urban districts with changes expected in the next six months include: Albuquerque, Birmingham, Boston, Charlotte, Nashville and Los Angeles. A preliminary project plan has been submitted to the Council of Great City Schools for further discussion and review.

## **MEASURES AND INDICATORS:**

While creating greater stability and a sustained academic agenda can be measured by longevity in the superintendents’ position, and appear to be worthy goals, the ultimate goal is not just about how long the Superintendent serves, but also ensuring that the stability and continuity of leadership will lead to improvements in the academic performance of students and closing of the access and opportunity gaps that result in some students achieving and succeeding, while others fail. The following data points will contribute to our understanding and strategy:

1. This project will use district level data to identify experienced mentors and coaches most likely to add value in supporting the superintendents and their leadership teams as they work on school and student performance.
2. This project will collect data when possible on the reasons for the short tenure and assess what contributes or works against superintendents' short or long term tenure in urban school districts.
3. This project will annually collect data on the superintendent turnover in the largest urban districts and determine if the school districts with greater leadership longevity produce better and more sustained academic results.

## **120 DAY TIMELINE:**

### **September-December, 2014:**

Develop and submit to ALI project proposal;  
Solicit feedback from select individuals regarding the viability of proposed strategy;  
Develop fiscal proposal for initial startup;  
Make initial contact with key state and national stakeholders;

### **January 2015 to March 2015**

Develop an advisory committee to further develop and support the project;  
Work with the Tennessee Department of Education to identify key support strategies for largest urban districts;  
Review results and key characteristics/elements in place in districts with decade-long leadership stability;  
Develop curriculum modules for leadership professional development;  
Submit proposal to the Council of Great City Schools executive board for consideration;  
Develop initial list of prospective mentors and coaches;  
Gather feedback from key stakeholders, current Superintendents and recent retirees;

### **April 2015 to June 2015**

Revise and finalize complete proposal including fiscal plan and implementation timeline;  
Develop and begin contacting a list of prospective funders;  
Convene first official advisory committee;  
Secure funding and identify staff and operational resource needs to commence the project.

## **EXECUTIVE SUMMARY:**

Public schools have been the primary vehicle for educating America's students, closing achievement gaps and ensuring access to educational opportunity for all. Urban schools are disproportionately challenged to educate the most economically, racially and linguistically diverse student populations. Less than 25% of urban school superintendents remain in their leadership roles more than 5 years. The result has been frequent turnover and sometimes unnecessary turmoil in the very district school communities with the greatest need for stability, forward thinking and sustained leadership.



Few superintendent preparation programs are specifically designed for urban school leaders, and few newly appointed urban superintendents have access to a network of experienced leaders who can provide the ongoing support and technical assistance to increase the likelihood that they will remain in place long enough to develop and execute a theory of action for sustainable improvement. “Leadership for America’s Urban Schools” is designed to connect newly appointed school district leaders to experienced leaders, to provide direct and contextualized entry-support and avoid the predictable traps that often derail and shorten the tenure of urban school superintendents.

Every new leader redefines priorities, assembles a new district team, and schools and teachers are left with incomplete or fragmented initiatives, conflicting messages, and confusion about the districts’ direction. The many starts and stops associated with leadership changes leave people within the organization wondering if they should trust the new direction. External partners and potential business investors outside of the organization are less willing to step up and make needed commitments when leadership stability seems uncertain and the direction seems to shift every couple of years. In meeting the needs of a more diverse student population, we must also recruit and develop a more diverse pool of leaders (and teachers) to address growing disparities and gender and race under-representation in our educator workforce.

“Leadership for America’s Urban Schools” will assist district leaders to focus on their academic agenda and to navigate and better understand the community and political context, as well as the fiscal challenges they face through a system of guided support and networking opportunities. If urban school district leaders were provided early mentoring support and guidance, and assisted to build leadership teams and supportive networks focused on developing human capital and creating schools of excellence and equity, they will be able to provide concentrated and sustained leadership, thereby resulting in improved student performance and the closing of achievement gaps.

In the Wallace Foundation’s Leadership Perspectives research report, “Guiding Schools to Better Teaching and Learning”, five key practices were identified in fostering, developing and supporting school leaders. While this report was designed to focus on the role of principals there are parallels to superintendent’s leadership.

- Shaping a vision of academic success for all students,
- Creating a climate hospitable to education,
- Cultivating leadership in others,
- Improving instruction, and
- Managing people, data and process to foster school improvement.

Embedded in this list are crucial elements for fostering the conditions for school district success and a guiding principle of this project is that school district leaders through personalized coaching, shared network experiences, and real time authentic entry supports

will be better prepared to effectively lead our most challenging school districts to be accountable places where academic progress is sustained overtime and all students succeed.

There is no more important work in America today than the education of its children. The school-age population is growing and becoming more diverse and we as a nation must provide competent, caring and stable leadership equipped with the tools to ensure that all, not just some, of our citizens are educated well and succeed in life. This is ultimately about “Saving America”.

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**ENGLISH LANGUAGE LEARNERS AND BILINGUAL  
EDUCATION TASK FORCE**

# **COUNCIL OF THE GREAT CITY SCHOOLS**

## **Task Force on English Language Learners and Bilingual Education**

**2015-2016**

### ***Task Force Goal***

To assist urban public school systems nationally in improving the quality of instruction  
for  
English Language Learners and immigrant children.

### ***Task Force Chairs***

Keith Oliveira, Providence School Board  
Valeria Silva, St. Paul Superintendent

**ELL INSTRUCTIONAL MATERIALS PROJECT**

## **Spurring Improvement of Instructional Materials for ELLs** **Post-pilot Data: Preliminary Analysis and Findings on Selected Items**

A link to an online post-pilot survey was distributed to 44 pilot teachers and coordinators in seven urban districts across the country. We received 44 responses for a 100 percent participation rate. Following are some preliminary findings based upon an initial review of survey responses in selected areas.

***Survey Question: Relative to the ELD materials you used this year, would you agree that the pilot materials were more effective in providing: (% of participants who strongly agree/agree)***

1. Grade-level core content: 86.37%
2. (3 way tie) Use of interesting text, Use of rich text, Rigor: 86.36%
3. Opportunities for academic conversation: 84.04%
4. Use of complex text: 84.08%
5. Contextual vocabulary instruction: 81.82%
6. (2 way tie) Balance of language input/output, Development of academic language: 79.55%
7. Scaffolding for diverse learners: 77.28%
8. Balance of fiction/non-fiction: 75.00%
9. Contextual grammar instruction: 72.73%
10. Cultural responsiveness: 68.19%

***Survey Question: Compared to the English language arts/English language development (ELA/ELD) materials you were using before, the pilot materials helped your students learn at a faster rate in: (% of participants who strongly agree/agree)***

1. knowledge: 79.54%
2. listening: 75.00%
3. speaking: 70.46%
4. reading: 68.19%
5. writing: 43.18%

These high level, aggregate results suggests that the pilot materials have substantially evolved in critical areas identified by member districts and experts, and that users—in general—perceive materials to be significantly more rigorous. Further analysis of responses disaggregated by school district and specific publisher materials show divergent opinions that signal additional issues that will be examined in our subsequent analysis:

- There is some resistance by teachers to this increased rigor; there are fears that grade-level, rigorous materials are “too hard,” especially for students at low levels of language proficiency. This points to a strong need for professional development.
- In districts that do not have a strong curriculum and/or instructional model, respondents showed a strong preference for teacher-created curricula, which brings its own set of issues and challenges.
- In terms of logistics, the timing of the pilot (not around spring testing) and the assignment of pilot coordinators (who are onboard and invested in the pilot process) were critical elements of its success. In addition, we learned that it is critical to complete all district-required research and/or participation approval well before initiation of the pilot.

**PROJECT UPDATE: Spurring Improvement of Instructional Materials for ELLs  
Funded by The Bill & Melinda Gates Foundation and Televisa Foundation**

Through this project, the Council is leveraging the aggregate demand of its member districts, which collectively enroll over one-quarter of the nation's English Language Learners, to incentivize the development a new generation of ELL instructional materials that meet the demands of the Common Core and provide supports for ELLs *without compromising the rigor or content* of the materials. The ultimate goal is to spur publishers to improve instructional materials for ELLs.

The collaboration between urban districts and educational publishers required by this project has resulted in important exchanges between practitioners from 15 Council-member districts, ELL experts and thought leaders, and editorial staff from four educational publishers. The project has had a discernible impact on how these four publishers were developing ELL materials and what the quality of those materials were. The project has created a robust, new model for how to co-develop a new generation of ELL instructional materials—and other materials as well—and how to pilot them in urban school districts.

**Developments**

***Publisher and district participation.*** The materials selection committee initially reviewed **13 proposals** and chose **five** publishers to participate in the project: Amplify, Benchmark Education, Houghton Mifflin Harcourt, Imagine Learning, and National Geographic Learning. **Four** of these publishers participated in three collaborative meetings. Imagine Learning chose to withdraw from the project before the first meeting. Districts participating in the review and discussions included Albuquerque, Boston, Buffalo, Chicago, Dallas, Denver, District of Columbia, El Paso, Fresno, Los Angeles, New York City, Oakland, Palm Beach, San Diego, San Francisco, and Seattle. Of these participating publishers, **three** (Benchmark, Houghton Mifflin Harcourt, and National Geographic Learning) attended and presented at the BIRE conference, and moved forward to the pilot stage. Amplify did not present at BIRE, nor did they participate in the pilot phase. **Seven districts** piloted the new materials from the three publishers: Boston, Buffalo, Denver, El Paso, Los Angeles, Oakland, and Palm Beach.

***Piloting materials.*** Member districts are currently wrapping up pilot-testing of the new instructional materials for English Language Arts/English Language Development for ELLs, implementing them in urban classrooms across the country. This pilot was designed to garner concrete feedback on how well the new materials met the needs of ELL students and their teachers in meeting the rigors of Common Core/College and Career-ready standards.

As the pilots have unfolded, we have encountered challenges that were unanticipated even by district staff with whom we worked with over the year, e.g., widely varied district timelines, requirements, and protocols related to piloting instructional materials. We were able to successfully navigate most of the challenges to ensure that the pilots unfolded smoothly.

Below are observations and outcomes related to the **pilot**:

- Pilot teachers and coordinators indicated that they saw significant positive changes in the instructional approaches and resources presented in the new materials.



- Some participating districts delayed purchase of materials until the conclusion of the pilots, in hopes that instructional materials more suitable for English Learners will become available.
- One district had to withdraw its participation, as they were currently in a statewide adoption cycle and, thus, they were prohibited from piloting instructional materials. This is not uncommon; pilots often cannot play a role in formal/statewide adoptions.
- Council staff had to push back the completion date for several districts who had difficulties because of their district schedules and their research-approval processes.
- Gathering pilot data from districts was challenging in several instances, requiring Council to send several requests and reminders to pilot coordinators to gather the requested pilot data (pre/post scores, student work samples, post-pilot surveys) for each piloting district.

### **Project impact**

The project has had impact beyond the four publishers in bringing about improvements in the nature, rigor, and features of ELL instructional materials.

- Additional publishers are seeking assistance from Council staff in reviewing materials and in participating in new iterations of the project.
- We had a record number of publishers registered as sponsors at the annual meeting of ELL Program Directors (BIRE)—and the project generated an unprecedented level of interest in serving ELLs. This was no small feat, given the fragmented market and the fact that ELLs represent only 10 percent of the total enrollment in US public schools. Publishers showed a heightened interest in developing ELL materials that met the demands of districts.
- School districts have become more assertive and clear in demanding high-quality materials from publishers.
- The Council is becoming increasingly known for quality, groundbreaking work regarding improving education and achievement for ELLs. Publishers and districts, alike, have confidence in the Council's protocols and processes that respect and understand both the publishers' world as well as the school districts'.

### **Next Steps**

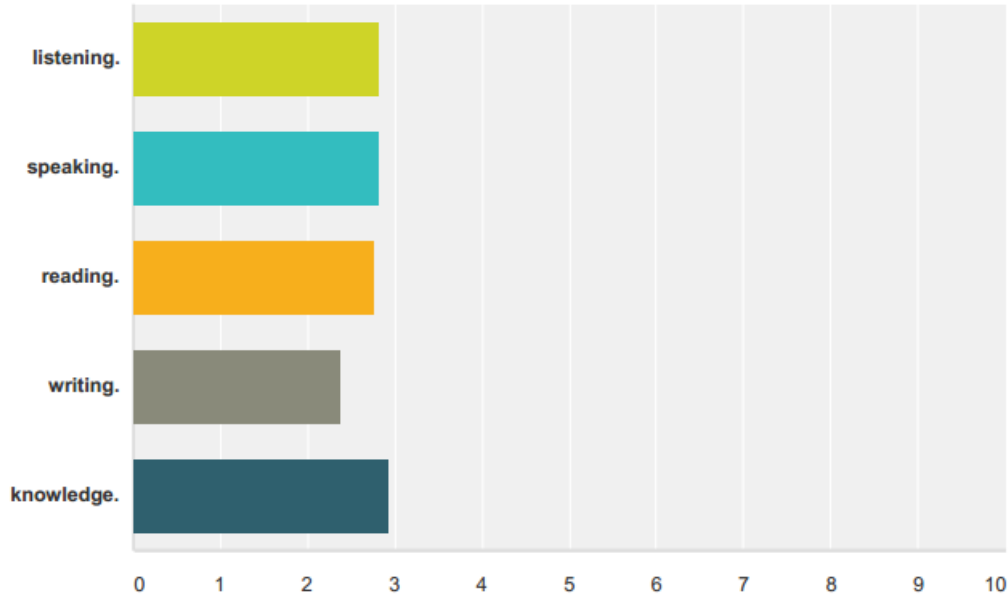
***Pilot results analysis.*** We currently have pre and post-pilot student work samples and assessment scores from 5 of the 7 pilot districts; we expect to receive the remaining two sets by mid-July. A total of 44 post-pilot surveys have been submitted via Survey Monkey; this represents a 100 percent survey response rate from pilot teachers and coordinators. The Council's research and ELL teams will be analyzing the data through the summer, and will share outcomes and lessons learned with internal and external stakeholders by the end of August. [See sample results on next page.]

***Criteria for selection of Mathematics materials.*** The Council is looking to initiate the next phase of this work, by beginning on the selection of ELL instructional materials for ELLs. Publishers continue to express interest in another round of the process for which the Council is exploring funding sources.

Below we provide responses to two of the pilot survey questions as a sample of the information being collected and analyzed:

**Q8 Compared to the English language arts/English language development (ELA/ELD) materials you were using before, the pilot materials helped your students learn at a faster rate in:**

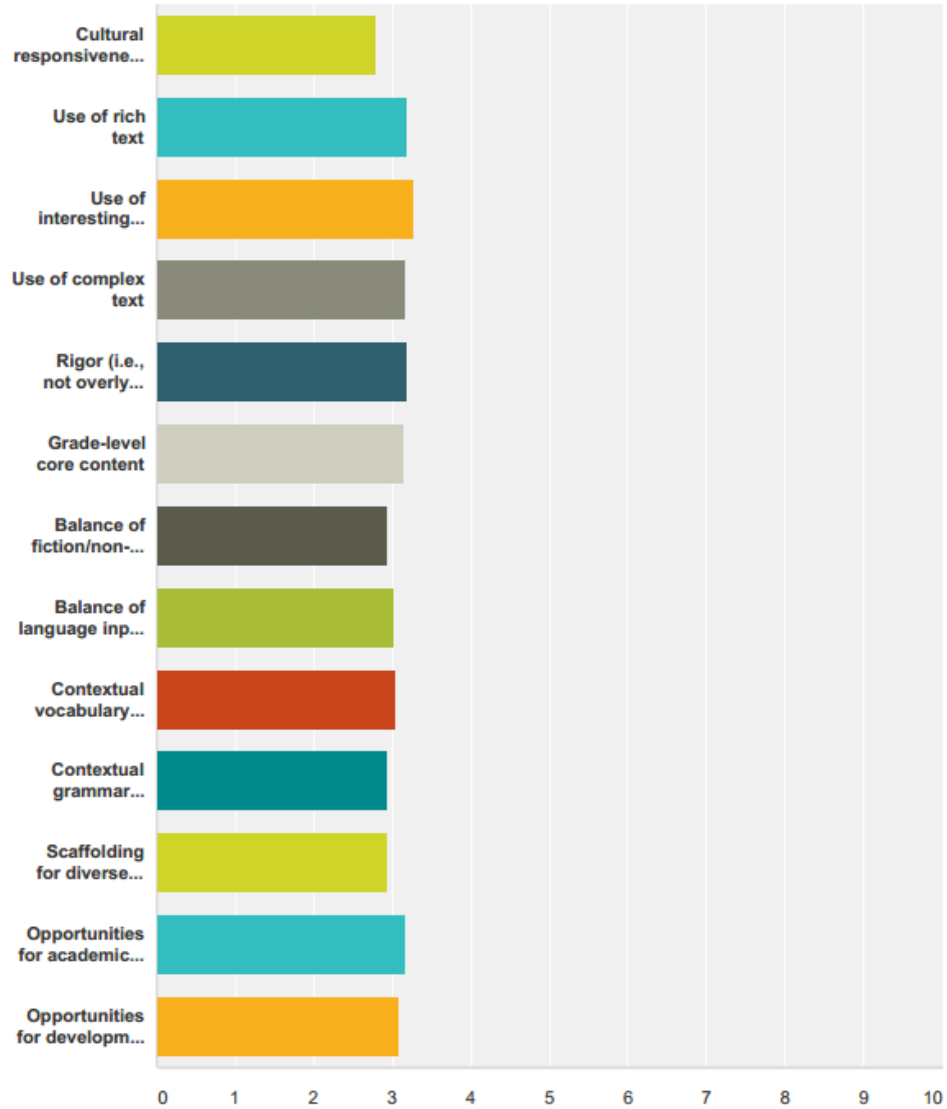
Answered: 44 Skipped: 0



	Strongly agree	Agree	Disagree	Strongly disagree	Total	Weighted Average
listening.	11.36% 5	63.64% 28	20.45% 9	4.55% 2	44	2.82
speaking.	15.91% 7	54.55% 24	25.00% 11	4.55% 2	44	2.82
reading.	13.64% 6	54.55% 24	27.27% 12	4.55% 2	44	2.77
writing.	2.27% 1	40.91% 18	50.00% 22	6.82% 3	44	2.39
knowledge.	18.18% 8	61.36% 27	18.18% 8	2.27% 1	44	2.95

**Q11 Relative to the ELD materials you used this year, would you agree that the pilot materials were more effective in providing:**

Answered: 44 Skipped: 0



	Strongly agree	Agree	Disagree	Strongly disagree	Total	Weighted Average
Cultural responsiveness (i.e., inclusive and respectful)	13.64% 6	54.55% 24	29.55% 13	2.27% 1	44	2.80
Use of rich text	36.36% 16	50.00% 22	11.36% 5	2.27% 1	44	3.20
Use of interesting text	43.18% 19	43.18% 19	11.36% 5	2.27% 1	44	3.27
Use of complex text	36.36% 16	47.73% 21	13.64% 6	2.27% 1	44	3.18
Rigor (i.e., not overly simplified or watered down)	36.36% 16	50.00% 22	11.36% 5	2.27% 1	44	3.20
Grade-level core content	31.82% 14	54.55% 24	11.36% 5	2.27% 1	44	3.16
Balance of fiction/non-fiction texts	22.73% 10	52.27% 23	22.73% 10	2.27% 1	44	2.95
Balance of language input (listening, reading) and output (speaking, writing)	22.73% 10	56.82% 25	20.45% 9	0.00% 0	44	3.02
Contextual vocabulary instruction (as opposed to vocabulary in isolation)	27.27% 12	54.55% 24	13.64% 6	4.55% 2	44	3.05
Contextual grammar instruction (as opposed to grammar in isolation)	25.00% 11	47.73% 21	25.00% 11	2.27% 1	44	2.95
Scaffolding for diverse English proficiency levels	22.73% 10	54.55% 24	18.18% 8	4.55% 2	44	2.95
Opportunities for academic conversations	34.09% 15	50.00% 22	15.91% 7	0.00% 0	44	3.18
Opportunities for development of academic language	31.82% 14	47.73% 21	18.18% 8	2.27% 1	44	3.09

**HELMSLEY PROJECT**

## Creating Cyber-enabled, Reflective Professional Development for Teachers: Meeting the Needs of English Language Learners, Students Performing Below Grade Level, and Economically Disadvantaged Students

This document describes the development of a cyber-enabled professional development tool, and proposes grant activities and milestones related to the **first year** of project implementation and a brief overview for **year two**.

**Our goal** is to create an open-source professional development platform that will help teachers support high-needs students in the complex forms of communications and thinking required by the Common Core State Standards. Through this project, we will *identify a viable platform, design and create critical content*, and develop all required elements to *launch a cyber-enabled professional development tool* that districts can use with teachers in face-to-face sessions, online study groups, or professional learning communities.

### Year One Activities - Beginning June 2015

#### Activity One: Build Staffing and Operations Capacity of the Council

**Milestone One: Recruit a Technology Consultant for the initial phase of work.**

- Must know the wide array of web-based platforms and capabilities of various components to build the professional development experiences the Council has designed.<sup>1</sup>
- Will focus efforts on two important steps:
  1. Designing/issuing an RFP to relevant players.
  2. Assisting the Council in assessing technology staffing needs to support the project during its development phase as well as its ongoing operation.

**Milestone Two: Recruit a Systems Consultant for the duration of the project.** (This individual could be the technology consultant or another individual.)

- Must have a strong background in information technology, systems operations, and the design, creation & execution of web-based platforms, preferably with experience in the education & professional development space. The *Systems Operations (SysOps) Consultant* will be focused completely on this project, leading day-to-day operations to keep the project on track and on schedule with guidance from the project director.

#### Activity Two: Craft a “Request for Proposals” (RFP)

**Milestone One: articulate the technical, design, staffing, timeline, and other requirements** to inform the selection of a viable candidate for successful platform execution.

**Milestone Two: Publish/Disseminate the RFP**

- All potential platform providers will be required to respond to an RFP in order to be considered.
- Clear criteria will be developed for the review and final selection of the platform provider and/or developer. Relevant team members will be brought together (some virtually) to review the proposals and make recommendations for selection.

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<sup>1</sup> HCT staff have offered to assist our recruitment efforts by sharing job descriptions for those in similar roles, and by informally consulting as we search for the ideal candidate

### **Activity Three: Begin Building Out Platform and Content**

#### ***Milestone One: Identify viable platform provider***

- Finalize decision regarding platform provider/developer
- Convene initial meeting to discuss desired architecture, functionality, timeline, and other elements critical to beginning development of platform

#### ***Milestone Two: Identify practitioners and experts (content and technical) to support development of the first professional development module (“Foundations”)***

- Assemble Content Team; team to include a content expert advisor, two content practitioners (elementary and secondary), and a CGCS staff coordinator/liaison

### **Activity Four: Begin Developing Fund-raising, Economic Model, and Sustainability Plans**

#### ***Milestone One: Approach additional funders to support ongoing project development***

#### ***Milestone Two: Research potential economic models (e.g., subscriptions, upgrades)***

#### ***Milestone Three: Develop sustainability plan to support ongoing operation and development of additional content modules***

## **Year Two Overview**

### **Major activities in Year Two will include:**

1. Ongoing development and maintenance of platform
2. Ongoing publicity/marketing of professional development offering to Council member (and non-member) districts
3. Initial launch of Professional Development Platform and Foundations module
4. Development and data collection for ongoing evaluation plan
5. Research economic models to develop long-range sustainability plan (possible contingency funding from CHT for Year 3 as match funding to funding generated by economic model.)

**UNACCOMPANIED MINORS**



## Unaccompanied Minors in the Great City Schools

### Background

The surge of unaccompanied minors seen in the fall of 2013 represented only a fraction of the increased enrollment of immigrant children over the past few years in many Council member districts. In fact, the estimated 60,000 unaccompanied minors who entered the country in 2014-15 represented only about 7 percent of the estimated 840,000 immigrant children and youth in schools. (Source: U.S. Department of Education.)

In the majority of cases, the newly arriving children are not recorded as ‘unaccompanied minors’ (UM) since school districts must refrain from asking about immigration status. It is most likely that these students fall under the category of ‘immigrant children and youth’ under Title III Part C of *No Child Left Behind Act*.

The lack of a definition for ‘unaccompanied minors’ and school districts’ obligation under *Plyer* to serve all students regardless of status, pose significant challenges in accurately estimating the numbers of such students, let alone making reliable projections for the upcoming school year. Nonetheless, we encourage districts to make efforts to track their numbers of enrolled students who fall under the ESEA definition of immigrant children and youth as they could impact Title III funding.

### Federal 2015 Appropriations and 2016 Proposed Federal Budget

The 2015 appropriations bill included a \$14 million appropriation for UM, to be allocated to states under Title III provisions related to immigrant children and youth. Council-member districts provided substantial information on the enrollment of immigrant children and examples of services provided to them. This information was invaluable to securing the appropriations. The President’s Budget for FY 2016 included the \$14 million in the Title III budget and requested an additional \$36 million in Title III funds.

### Enrollment and projections of immigrant children and youth in CGCS member districts

Based on the Council’s 2014 survey to which 34 districts responded, we found that—

- Over 60 percent of districts experienced a noticeable increase in the enrollment of immigrant children and youth in 2013-14. Some districts saw increases of up to 1,000 additional students. These children and youth included both those who might be classified as UM and those young children who are arriving only with their mothers.
- For more than seven districts, the increase occurred predominantly in the second half of the school year (Jan-May 2014).
- About half of the responding districts reported that immigrant students were coming from Guatemala, El Salvador, and Honduras.
- Over 81 percent of responding districts anticipated an increase in enrollment in the fall 2014-15.

### Enrollment estimates of unaccompanied minors at the national level—First quarter 2015 update.

The increased enrollment of immigrant children and youth coming from Guatemala, El Salvador, and Honduras likely includes unaccompanied minors. These district-reported trends are consistent with U.S. Customs and Border Protection data that show the number of UM from El Salvador, Guatemala, Honduras, and Mexico crossing the southwest border has increased by 270 percent, from 18,200 in FY 2009 to 67,300 in FY2014. (See Table I. below.) In the first quarter of FY2015, a total of 18,637 had crossed the southwest border.

Table I. Arrival of Unaccompanied Minors in Fiscal Years 2009-2014 and First Quarter of Fiscal Year 2015 (Oct.1 '14-April 30 '15). (Source: U.S. Customs and Border Protection)

Country	FY 2009	FY 2010	FY 2011	FY 2012	FY 2013	FY 2014	1 <sup>st</sup> Quarter— FY2105
<b>El Salvador</b>	1,221	1,910	1,394	3,314	5,990	16,404	3,514
<b>Guatemala</b>	1,115	1,517	1,565	3,835	8,068	17,057	6,607
<b>Honduras</b>	968	1,017	974	2,997	6,747	18,244	1,997
<b>Mexico</b>	16,114	13,724	11,768	13,974	17,240	15,634	6,519
<b>Total</b>	<b>18,197</b>	<b>18,168</b>	<b>15,701</b>	<b>24,120</b>	<b>38,045</b>	<b>67,339</b>	<b>18,637</b>

State and county level data of UM placed with sponsors

In response to the Council’s efforts, the Office of Refugee and Resettlement disclosed state and county-level numbers of UM who had been placed with a sponsor. Specifically, over FY14 (October 2013-September 2014) and the first quarter of FY15 (October 2104-March 2015), some 63,739 UM had been placed with a sponsor. Based on county-level data, 49,731 UM had been placed in 163 counties with 50 or more UACs. Forty-five of these counties are served by Council-member districts; and these counties have seen about 60 percent of 47,067 UMs. (See CGCS Table of UM in CGCS Districts.)

Family units apprehended

In addition to UM, there are other children and youth who have been apprehended by Border Protection with a family member--these are designated as a ‘Family Unit.’ The U.S. Customs and Border Protection indicates that 68,445 Family Units were apprehended at the Southwest Border in FY2014. An additional 20,850 were apprehended in FY2015 (Oct. 1, 2014- June 1, 2015). The majority of these Family Units apprehended in 2015 were from Honduras (5,337), El Salvador (5,054), Guatemala (6,914), and Mexico (2,882).

**School District Challenges**

Council-member districts have shared a myriad of challenges involving these newly arriving students. Challenges include—

- School districts are not given much advanced notice of when and how many UM will be enrolling in their schools, thus making program planning and staffing very difficult.
- The 2015 federal appropriations included \$14 million to help districts meet the needs of UM, but states are not making much effort to ensure that funds reach school districts where UMs have enrolled.
- Accurate identification and data tracking of UM enrolled in schools is difficult because of the need to keep immigration status-information private, and schools’ data systems often lack designated data-fields and terms for newcomers, SIFE, and refugee students.
- Local, state, federal agencies rarely work with school districts to address the needs of immigrant students.
- Meeting the social, emotional, and academic needs of newcomers, SIFE, and refugee students, including professional development for school administrators, teachers, and staff is complex and staff intensive, adding further demands to scarce funding levels.
- State and federal school accountability systems, policies, and practices fail to include measures that are valid and meaningful with respect to academic progress of immigrant students, e.g.,

indicators such as attendance and graduation rates do not take into account the unique circumstances of refugee and immigrant students.

### **Additional Sources of Information**

The Council has compiled a list of information sources about UMs, specifically information about immigration and refugee services and supports.

The Office of Refugee Resettlement (ORR) has compiled a list of links to resources for UMs and their providers. Please visit:

<http://www.acf.hhs.gov/programs/orr/resource/unaccompanied-childrens-services>

<http://www.acf.hhs.gov/programs/orr/resource/in-country-refugee-parole-processing-for-minors-in-honduras-el-salvador-and-guatemala-central-american-minors-cam>

The Central American Minors Refugee/Parole Program by the Department of State allows certain parents lawfully present in the U.S. to request access to the U.S. Refugee Admissions Program for their children in El Salvador, Guatemala and Honduras. Please visit:

<http://www.uscis.gov/tools/multilingual-resource-center>

U.S. Department of Education website:

<http://www2.ed.gov/policy/rights/guid/unaccompanied-children.html>

U.S. Health and Human Services website:

<http://www.acf.hhs.gov/programs/orr/programs/ucs/about>

The Center for Health and Health Care in Schools website:

[www.healthinschools.org/en/School-Based-Mental-Health/Immigrant%20Children%20and%20Unaccompanied%20Minors.aspx](http://www.healthinschools.org/en/School-Based-Mental-Health/Immigrant%20Children%20and%20Unaccompanied%20Minors.aspx)

U.S. Citizenship and Immigration Services' Multilingual Resource Page offers information on immigration benefits and humanitarian benefits. Please visit:

<http://www.uscis.gov/tools/multilingual-resource-center>

### **Deferred Action for Childhood Arrivals (DACA) & Deferred Action for Parents of Americans and Lawful Residents (DAPA) Sources of Information**

On November 20, 2014 President Obama announced the creation of DAPA, a program that would grant certain undocumented parents of U.S. citizens and parents of lawful permanent residents temporary permission to remain in the U.S. The President also announced the expansion of DACA. Currently the U.S. Citizenship and Immigration Services is not accepting applications for the expanded DACA or DAPA because a federal district court in Texas issued an order temporarily blocking the implementation of either program. Even though individuals will not be able to apply for the expanded DACA or DAPA until the court issues allowing the initiatives to go forward, the Council is providing you a list of sources where you can find information on the current status of the expanded DACA and DAPA programs, and information on how to apply for DACA under criteria announced in June 2012.

In addition, the Televisa Foundation—Think About It or Piénsalo is an initiative funded by the Televisa Foundation that highlights success stories of DACA recipients in addition to providing resources for DACA eligible individuals. The website is available in English and Spanish.

English: <http://thinkaboutit.us/>

Spanish: <http://thinkaboutit.us/esp.php>

The National Immigration Law Center has compiled a list of links to resources on DACA & DAPA requirements, eligibility, benefits, risks, expansion and myths:

<http://www.nilc.org/dapa&daca.html>

We Own The Dream

<http://www.weownthedream.org/deferred-action/>

Cooperative Latino Credit Union

<http://latinoccu.org/dreamer/>

**Updated: June 11, 2015**

### UAC Placed with Sponsors by State and County Levels

The data in the following table below shows the total number of unaccompanied minors placed with sponsors by state, by counties where 50 or more children have been placed with a sponsor, and by counties with CGCS member districts.

	UACs Placed with Sponsors in FY 2014 (Oct. '13 - Sept. '14)	UACs Placed with Sponsors in FY 2015 (Oct. '14-Mar. '15)	UACs Placed with Sponsors FY '14 & FY '15
<b>UAC Placed by State-Level</b>	53,518	10,221	63,739
<b>UAC Placed by County-Level</b>	44,361	5,370	49,731
<b>UAC Placed in Counties with CGCS Member Districts</b>	21,950	3,191	25,141

	FY 2014	FY 2015	FY '14 & FY '15
<b>CGCS as % of UAC State total</b>	41.0%	31.2%	39.4%
<b>CGCS as % of UAC County total</b>	49.5%	59.4%	50.6%

As of March 31, 2015, state-level data of UACs indicates that 31 percent have been placed with sponsors living in a Council member district. Close to 60 percent of UACs placed in Counties with 50 or more UAC, are in a CGCS member area.

### UAC Placed in Counties Served by CGCS Member Districts

Out of the total 163 reported counties in which 50 or more UAC have been placed with sponsors in FY 2014 and FY 2015, 45 are counties are served by a Council member district. These 45 counties represent 28 percent of the counties but have welcomed over half of all UACs placed in one of the 163 counties.

	State	District	County Name and State	UACs Placed in FY 2014 (Oct.'13-Sept.'14)	UACs Placed in FY 2015 (Oct.'14-Mar.'15)	UACs Placed by County FY 14 & FY 15
1	AL	BIRMINGHAM CITY SCHOOLS	JEFFERSON COUNTY, AL	114	-	114
2	CA	FRESNO UNIFIED SCHOOL DISTRICT	FRESNO COUNTY, CA	133	-	133
3		LONG BEACH UNIFIED SCHOOL DISTRICT	LOS ANGELES COUNTY, CA	2,949	614	3,563
4		LOS ANGELES UNIFIED SCHOOL DISTRICT				
5		OAKLAND UNIFIED SCHOOL DISTRICT	ALAMEDA COUNTY, CA	367	108	475
6		SAN DIEGO UNIFIED SCHOOL DISTRICT	SAN DIEGO COUNTY, CA	130	64	194
7		SAN FRANCISCO UNIFIED SCHOOL DISTRICT	SAN FRANCISCO COUNTY, CA	261	53	314
8		SANTA ANA UNIFIED SCHOOL DISTRICT	ORANGE COUNTY, CA	284	61	345
9	CO	DENVER PUBLIC SCHOOLS	DENVER COUNTY, CO	76	-	76
10	CT	BRIDGEPORT SCHOOL DISTRICT	FAIRFIELD COUNTY, CT	344	-	344
11	FL	BROWARD COUNTY PUBLICS SCHOOLS	BROWARD COUNTY, FL	513	64	577
12		DUVAL COUNTY PUBLIC SCHOOLS	DUVAL COUNTY, FL	192	-	192
13		HILLSBOROUGH COUNTY SCHOOL DISTRICT	HILLSBOROUGH COUNTY, FL	230	-	230

14		MIAMI-DADE COUNTY PUBLIC SCHOOLS	MIAMI-DADE COUNTY, FL	1,492	260	1,752
15		ORANGE COUNTY PUBLIC SCHOOLS	ORANGE COUNTY, FL	309	-	309
16		DISTRICT OF PALM BEACH COUNTY	PALM BEACH COUNTY, FL	1,170	249	1,419
17	GA	ATLANTA PUBLIC SCHOOLS	FULTON COUNTY, GA	100	-	100
18	IL	CHICAGO PUBLIC SCHOOLS	COOK COUNTY, IL	273	-	273
19	IN	INDIANAPOLIS PUBLIC SCHOOLS	MARION COUNTY, IN	188	-	188
20	KY	JEFFERSON COUNTY PUBLIC SCHOOLS	JEFFERSON COUNTY, KY	120	-	120
21	LA	EAST BATON ROUGE PARISH	E. BATON ROUGE PARISH, LA	233	-	233
22		NEW ORLEANS PUBLIC SCHOOLS	ORLEANS PARISH, LA	317	-	317
23	MD	BALTIMORE CITY PUBLIC SCHOOLS	BALTIMORE CITY, MD	379	-	379
24	MA	BOSTON PUBLIC SCHOOLS	SUFFOLK COUNTY, MA	508	102	610
25	NE	OMAHA PUBLIC SCHOOLS	DOUGLAS COUNTY, NE	122	-	122
26	NV	CLARK COUNTY SCHOOL DISTRICT	CLARK COUNTY, NV	212	52	264
27	NJ	NEWARK PUBLIC SCHOOLS	ESSEX COUNTY, NJ	344	57	401
28	NY	NEW YORK CITY GEOGRAPHIC DISTRICT # 7	BRONX COUNTY	495	86	581
		NEW YORK CITY GEOGRAPHIC DISTRICT # 8				
		NEW YORK CITY GEOGRAPHIC DISTRICT # 9				
		NEW YORK CITY GEOGRAPHIC DISTRICT #10				
		NEW YORK CITY GEOGRAPHIC DISTRICT #11				
		NEW YORK CITY GEOGRAPHIC DISTRICT #12				
29		NEW YORK CITY GEOGRAPHIC DISTRICT #13	KINGS COUNTY	535	128	663
		NEW YORK CITY GEOGRAPHIC DISTRICT #14				
		NEW YORK CITY GEOGRAPHIC DISTRICT #15				
		NEW YORK CITY GEOGRAPHIC DISTRICT #16				
		NEW YORK CITY GEOGRAPHIC DISTRICT #17				
		NEW YORK CITY GEOGRAPHIC DISTRICT #18				
		NEW YORK CITY GEOGRAPHIC DISTRICT #19				
		NEW YORK CITY GEOGRAPHIC DISTRICT #20				
		NEW YORK CITY GEOGRAPHIC DISTRICT #21				
		NEW YORK CITY GEOGRAPHIC DISTRICT #22				
		NEW YORK CITY GEOGRAPHIC DISTRICT #23				
	NEW YORK CITY GEOGRAPHIC DISTRICT #32					
30		NEW YORK CITY GEOGRAPHIC DISTRICT # 1	NEW YORK COUNTY	77	-	77
		NEW YORK CITY GEOGRAPHIC DISTRICT # 2				
		NEW YORK CITY GEOGRAPHIC DISTRICT # 3				
		NEW YORK CITY GEOGRAPHIC DISTRICT # 4				
		NEW YORK CITY GEOGRAPHIC DISTRICT # 5				
		NEW YORK CITY GEOGRAPHIC DISTRICT # 6				
31		NEW YORK CITY GEOGRAPHIC DISTRICT #24	QUEENS COUNTY	902	188	1,090
		NEW YORK CITY GEOGRAPHIC DISTRICT #25				
		NEW YORK CITY GEOGRAPHIC DISTRICT #26				
		NEW YORK CITY GEOGRAPHIC DISTRICT #27				
		NEW YORK CITY GEOGRAPHIC DISTRICT #28				

		NEW YORK CITY GEOGRAPHIC DISTRICT #29				
		NEW YORK CITY GEOGRAPHIC DISTRICT #30				
<b>NY Total</b>				<b>2,009</b>	<b>402</b>	<b>2,411</b>
<b>32</b>	<b>NC</b>	CHARLOTTE-MECKLENBURG SCHOOLS	MECKLENBURG COUNTY, NC	683	72	755
<b>33</b>	<b>OH</b>	CINCINNATI PUBLIC SCHOOL	HAMILTON COUNTY, OH	205	65	270
<b>34</b>		COLUMBUS CITY SCHOOLS	FRANKLIN COUNTY, OH	164	-	164
<b>35</b>	<b>OK</b>	OKLAHOMA CITY PUBLIC SCHOOLS	OKLAHOMA COUNTY, OK	140	-	140
<b>36</b>	<b>PA</b>	THE SCHOOL DISTRICT OF PHILADELPHIA	PHILADELPHIA COUNTY, PA	207	-	207
<b>37</b>	<b>RI</b>	PROVIDENCE PUBLIC SCHOOL DISTRICT	PROVIDENCE COUNTY, RI	174	73	247
<b>38</b>	<b>TN</b>	METRO-NASHVILLE PUBLIC SCHOOLS	DAVIDSON COUNTY, TN	353	65	418
<b>39</b>		SHELBY COUNTY SCHOOLS	SHELBY COUNTY, TN	285	-	285
<b>40</b>	<b>TX</b>	AUSTIN ISD	TRAVIS COUNTY, TX	477	63	540
<b>41</b>		DALLAS ISD	DALLAS COUNTY, TX	1,196	157	1,353
<b>42</b>		FORT WORTH ISD	TARRANT COUNT, TX	282	-	282
<b>43</b>		HOUSTON ISD	HARRIS COUNTY, TX	4,028	610	4,638
<b>44</b>	<b>VA</b>	NORFOLK PUBLIC SCHOOLS	NORFOLK CITY, VA	75	-	75
<b>45</b>		RICHMOND CITY SCHOOLS	RICHMOND CITY, VA	159	-	159
<b>46</b>	<b>WA</b>	SEATTLE PUBLIC SCHOOLS	KING COUNTY, WA	153	-	153
<b>Total UAC Placed in Counties Served by CGCS Member District</b>				<b>21,950</b>	<b>3,191</b>	<b>25,141</b>

**Source:** Unaccompanied Children Release Data, Office of Refugee Resettlement. Accessed 3/10/15. Data by county: [www.acf.hhs.gov/programs/orr/unaccompanied-children-released-to-sponsors-by-county](http://www.acf.hhs.gov/programs/orr/unaccompanied-children-released-to-sponsors-by-county). Data by State: [www.acf.hhs.gov/programs/orr/programs/ucs/state-by-state-uc-placed-sponsors](http://www.acf.hhs.gov/programs/orr/programs/ucs/state-by-state-uc-placed-sponsors)

**Note:** Italicized counties appear more than once.

Updated: 4/2/2015

**CHICAGO ELL REPORT**



# Raising the Achievement of Latino Students and English Language Learners in the Chicago Public Schools

A REPORT OF THE STRATEGIC SUPPORT TEAM OF THE COUNCIL OF  
THE GREAT CITY SCHOOLS

## ACKNOWLEDGEMENTS

The Council of the Great City Schools thanks the many individuals who contributed to this project to improve the academic achievement of English language learners and Latino students in the Chicago Public Schools. The efforts of these individuals were critical to our ability to present the district with the best possible proposals.

First, we thank CEO Barbara Byrd-Bennett for requesting the review, and we thank school board member and current interim CEO Jesse Ruiz for supporting it. It is not easy to ask for or support an analysis like the one the Council of the Great City Schools has done. It takes courage, openness, and uncompromising commitment to the city's children. Thank you.

Second, we thank the staff members of the Chicago Public Schools, who provided all the time, documents, and data that the Council needed in order to do its work. Their openness and enthusiasm were critical to our understanding of the challenges the school system faces in educating English language learners and Latino students.

Third, we thank all of the schools that we visited and the teachers whose classrooms we observed. Thank you for your patience as we were working to understand what you do and how you do it.

Fourth, we thank the many individuals, groups, organizations, and associations with which we met. Our only regret is that we were unable to meet with everyone who we know had something valuable to contribute.

Fifth, the Council thanks the city school districts and states that contributed staff to this effort: New York State, San Diego, Minneapolis, Seattle, Oakland, and Houston. Everyone contributed his or her time *pro bono* to help the Chicago school district improve. The enthusiasm and generosity of these districts serve as further example of how the nation's urban public school systems are working together to help each other improve and reform.

Finally, I thank Council staff members Gabriela Uro, Carol Aguirre, and Debra Hopkins, who led the project and drafted this report. Thank you Ray Hart and Moses Palacios for all the time you devoted to analyzing data, and to Amanda Corcoran who helped edit the report. Their skills were critical to the success of this effort. Thank you.

Michael Casserly  
Executive Director  
Council of the Great City Schools

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**Raising the Achievement of Latino Students and English  
Language Learners in the Chicago Public Schools:  
Report of the Strategic Support Team  
of the  
Council of the Great City Schools**

**I. Purposes and Origins of the Project**

**Introduction**

Historically, the Chicago Public Schools have been known as one of the more innovative major urban school districts in the country. It has experimented with the country's first mayoral-controlled governance systems; it took the lead in site-based decision making and school site councils; and it introduced scores of experimental instructional programs over the years.

Over the last five or six years, however, the school system has struggled. It has seen extensive turn-over at the top of the system and major staff turn-over throughout the central office; it has changed its theory of action and direction of its reforms several times in succession; it has experienced teacher strikes and needed to close dozens of its schools; and it has suffered substantial financial problems that threaten the long term health of the system.

Along the way, the district has undergone substantial demographic changes as it worked to stabilize itself and implement new academic standards. But it was the need to improve the academic performance of the city's children, particularly its English language learners and Latino students whose numbers have burgeoned over the years, that prompted the leadership of the school district to ask for this review.

The subject of this report is raising academic achievement among English language learners (ELL) and Latino students in the Chicago Public Schools. The challenges facing ELLs and Latino students have been studied before in the district, but it is not clear that the district has moved aggressively on previous reviews. We hope this time will be different.

Still, the broader instructional reforms in the district appear to be having some effects on student achievement. And the question at hand is whether the improvements have accrued to the benefit of the growing number of ELLs in the district and what might be done to spur that progress. Hence, CEO Barbara Byrd-Bennett contacted the Council about having the group analyze the district's instructional program and its impact on ELLs

and Latino students. She also requested the organization's best recommendations for boosting outcomes for these critical students. This report is the result of that request.

## **Overview of the Project**

The chief executive officer of the Chicago Public Schools, Barbara Byrd-Bennett, initially asked the Council of the Great City Schools to conduct a review of the instructional programming for Latino students and English language learners in the late fall of 2013. The Council, a coalition of the nation's largest urban school systems, has extensive experience with instructional reforms and English language programming in the nation's major cities. The group has conducted over 250 instructional, management, and operational reviews in more than 50 big-city school systems across the nation over the last 15 years.

The Council, in turn, began assembling a Strategic Support Team of senior instructional and bilingual education leaders from other large urban school systems with a strong track record of raising student achievement among English language learners and Latino students in their own communities. These individuals, along with staff from the Council, paid several visits to Chicago, interviewed scores of individuals both inside and outside the school system, reviewed relevant documents, analyzed performance data, visited schools and classrooms, and compiled this report.

## **PROJECT GOALS**

Barbara Byrd-Bennett and the board of education of the Chicago Public Schools asked the Council of the Great City Schools to review the school district's programs for English Language and Latino students to determine why students were achieving at the levels they were and to make recommendations and proposals for improving the academic performance of these and other students in the school district. The CEO asked the Council and its team to pay special attention to the school district's overall strategy for improving achievement with Latino students and ELLs; central office guidance to networks and schools around the academic performance of these students; how well defined and integrated the instructional programming for ELLs and other students was across the district; and what reforms and changes might be considered as the district worked to improve achievement among Latino students and English language learners.

## **WORK OF THE STRATEGIC SUPPORT TEAM**

The Council's team made its first visit to Chicago on December 9, 2013. During that visit, the team interviewed senior school system staff and members of the board of education to get a high-level view of the school system and the issues it faced with English language learners and Latino students. This initial team was composed of Council staff members Michael Casserly, Gabriela Uro, and Ray Hart along with Jana Hilleren-Bassett of the Minneapolis Public Schools. (A list of team members is shown in the table below and brief

biographical sketches are found in Appendix K.)

The second site visit to Chicago was made on January 27-30, 2014. This site visit team was composed of Council staff members Michael Casserly, Gabriela Uro, Ray Hart, and Moses Palacios. Joining the Council staff were staff members from the New York state department of education, the Minneapolis public schools, the Seattle public schools, the Houston independent school district, and the Oakland unified school district. The purpose of this visit was to conduct interviews with a broader range of senior school system staff, including staff members from the teaching and learning department, the Office of Language and Cultural Education (OLCE), the office of innovation, professional development, English language arts and math staff, the teachers union, sample teachers, network staff, research and assessment, sample principals, instructional coaches, early childhood education staff, and many others. We also interviewed members of the school board and members of the external Latino advisory committee.

The third site visit to Chicago was made on April 27-29, 2014. The purpose of this visit was to conduct school and classroom visits and to interview additional teachers and staff at the building level. The team visited some 22 schools, observed over 100 classrooms in those schools, and held focus groups of teachers and staff. (A list of schools visited is presented in Appendix L.) The schools were selected at random based on ELL and Latino enrollments, the academic performance of ELLs and Latino students, the overall performance of the schools, and the types of instructional programs being used with ELLs.

Classroom visits included general education classes, English-as-a-second-language classes, dual language classes, and other settings. Each classroom visit was short and may not have reflected a typical day. Still, the team felt it was seeing a representative sample of instruction for English language learners. Members of this team included Council staff members Gabriela Uro, Ray Hart, Moses Palacios, and Debra Hopkins along with staff members from the Minneapolis and Oakland school systems.

A fourth site visit was made to Chicago on September 11, 2014 by Council staff members Gabriela Uro and Ray Hart. This visit was devoted to interviewing the new director of OLCE and to seeking more detailed assessment data from the district's research department.

Finally, numerous phone calls were made to district staff over the intervening months to collect additional information and to clarify points for this report.

The exhibit below lists all members of the Council’s Strategic Support Team

**Exhibit 1. Members of the Council’s Strategic Support Team**

Michael Casserly Executive Director Council of the Great City Schools	Gabriela Uro Director of Language Programs and Policy Council of the Great City Schools
Ray Hart Director of Research Council of the Great City Schools	Angelica Infante Associate Commissioner for Bilingual Education and Foreign Language Services New York State Department of Education
Jana Hilleren-Bassett Executive Director of Multilingual Services Minneapolis Public Schools	Veronica Gallardo Director of English Language Learner and International Programs
Matilda Orozco School Support Officer Houston Independent School District	Nicole Knight Executive Director of English Language Learner and Multilingual Achievement Oakland Unified School District
Debra Hopkins English Language Learner Project Coordinator Council of the Great City Schools	Moses Palacios Research Specialist Council of the Great City Schools

The Council team conducted numerous interviews with central-office staff members, school board members, principals, teachers, and representatives of outside organizations, parents, and others.<sup>1</sup> A list of those interviewed individually or in groups is found in Appendix N.

Moreover, the team reviewed numerous documents and reports and analyzed data on student performance. A list of the materials, reports, and documents that the Council team reviewed is included in Appendix M.

Finally, the team examined the district’s broad instructional strategies, materials, core reading and math programs, assessment programs, and professional development efforts. It also examined the district’s strategic plan, instructional priorities, and analyzed how the district’s broad reforms and programs supported achievement among English

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<sup>1</sup> The Council’s peer reviews are based on interviews of staff and others, a review of documents provided by the district, observations of operations, and our professional judgment. The team conducting the interviews relies on the willingness of those interviewed to be truthful and forthcoming, and makes every effort to provide an objective assessment of district functions, but the team cannot always judge the accuracy of statements made by all interviewees.

language learners and Latino students. The team also looked for evidence that the district was pursuing systemic and integrated instructional approaches for ELLs, and it looked for evidence of differentiated instruction, assignment of appropriate work, student engagement, English-language development strategies, high expectations and instructional rigor in general education classrooms where ELLs were present, and evidence of practice that spurred academic-language acquisition and vocabulary development. In addition, the team looked for evidence that management, principals, and teachers were using data to inform and monitor instruction—and to gauge program effectiveness.

The reader should note that this project did not examine the entire school system or every aspect of the district’s instructional program. Instead, we devoted our efforts to looking strictly at initiatives affecting the academic attainment of English language learners and Latino students. We did not try to inventory or count all those instructional efforts or examine non-instructional issues that might affect the academic attainment of English language learners. This report is not an audit or an attempt to determine the district’s degree of compliance with various state and federal bilingual requirements. That responsibility belongs to state and federal authorities. Rather, we looked at strategies, programs, and other activities that would help explain why the city’s English language learners are learning at the levels they were, and what might be done to improve it.

The approach of using urban education peers to provide technical assistance and advice to school districts is unique to the Council and its members, and it has proved effective over the years for a number of reasons. First, the approach allows the superintendent and staff to work directly with talented, successful practitioners from other urban districts that have a record of accomplishment. Second, the recommendations that these peer teams develop have validity because the individuals who developed them have faced many of the same problems now encountered by the school system requesting the review. These individuals are aware of the challenges that urban schools face, and their strategies have been tested under the most rigorous conditions. Finally, using senior urban school managers from other communities is less expensive than retaining an outside management-consulting firm.

## **CONTENTS OF THIS REPORT**

This report begins with the above overview of the project. Chapter II presents an overview of the Chicago Public Schools and the demographics of the school system. Chapter III presents an analysis of academic achievement of English language learners and Latino students in Chicago. Chapter IV summarizes the Strategic Support Team’s findings and observations regarding the ELL program and the instructional program affecting Latino students in the school district. Chapter V presents the team’s recommendations and proposals for improving the program. Chapter VI presents a brief synopsis of the report and its major themes.



The appendices of this report are extensive and contain additional information that may be of interest to the reader. Appendix A presents National Assessment of Educational Progress Snapshots on the district. Appendix B lists the networks in the Chicago Public Schools with the largest concentrations of English language learners and what languages are most prevalent. Appendix C presents a short discussion of state law and regulations that have a bearing on the ELL programs in Chicago. Appendix D presents NAEP data for Hispanic students and ELLs in Chicago in comparison with other major cities. Appendix E lists a number of schools that the Council included in its enrollment analyses but which were not included on the school system's website. Appendix F lists all the schools in the districts with fewer than 30 ELLs. Appendix G describes relevant background on the Chicago consent decree that shaped how and why ELL services look like they do. Appendix H presents sample high school graduation pathways from schools districts in Dallas, St. Paul, and San Diego. Appendix I summarizes the literacy model for ELLs used in the San Diego Unified School District. Appendix J presents a brief history of linguistic diversity in the city of Chicago. Appendix K presents brief biographical sketches of members of the Council's Strategic Support Team. Appendix L lists all of the schools that the Strategic Support Team visited. Appendix M lists all the materials that the team reviewed as part of this project. Appendix N lists the individuals who were interviewed either personally or as part of a focus group. And Appendix O describes the Council of the Great City Schools and lists the Strategic Support Teams it has mounted over the years.

**BILINGUAL, IMMIGRANT, AND REFUGEE  
EDUCATION DIRECTOR'S MEETING**

**BILINGUAL, IMMIGRANT, AND REFUGEE EDUCATION  
DIRECTORS MEETING 2015**

**AGENDA**

**WEDNESDAY May 13, 2015**

- SCHOOL SITE VISITS - FOR SCHOOL DISTRICTS ONLY**  
**(BREAKFAST ON YOUR OWN)**  
 7:45 am – 3:15 pm Meet in lobby of the Westin Charlotte at 7:45 am.  
 Lunch provided at school sites.
- 5:00 pm – 6:30 pm **CHARLOTTE-MECKLENBURG SCHOOLS VISIT DEBRIEF (HARRIS ROOM, ALL INVITED)**  
 Debrief and light refreshments at the Westin Charlotte Hotel.

**THURSDAY May 14, 2015**

- 7:00 am – 4:00 pm REGISTRATION
- 7:00 am – 8:00 am BUFFET BREAKFAST (**GRAND BALLROOM A**)
- 8:00 am – 8:20 am **WELCOME (GRAND PROMENADE D)**  
*Ann Clark*, Superintendent of Charlotte-Mecklenburg Schools  
*Michael Casserly*, Executive Director of the Council of the Great City Schools
- 8:20 am – 8:30 am INTRODUCTION AND MEETING GOALS  
 Participants will learn about goals and protocols for the 2015 BIRE meeting.  
 Presenter: *Gabriela Uro*, Director of ELL Policy and Research, CGCS
- 8:30 am—9:15 am RAISING RIGOR FOR ELLS  
 During this session, participants will learn the importance of raising instructional rigor for ELLs. *What does rigor look like for early level ELLs? How do we bring all ELLs up to grade-level, rigorous content & standards?* **Lily Wong Fillmore** will be joined by **Maria Maldonado** from Fresno; together they will share concrete examples of their collaborative work to raise instructional rigor in Fresno Unified School District.  
 Panelists: *Lily Wong-Fillmore*, Professor Emerita, University of California, Berkeley  
*Maria Maldonado*, Assistant Superintendent of EL Services, Fresno Unified School District
- 9:15 am—10:00 am AN UPDATE FROM THE SCAFFOLDING TEAM  
 Scaffolding for ELLs is a complex issue. What is the difference between scaffolding and good instruction? How do you know when to scaffold, how, and for whom? When is struggle “productive”? The Scaffolding Team has been exploring these issues, and will share their work-in-progress. Then, participants will have an opportunity to reflect on their own ideas around scaffolding, and to offer suggestions for moving the work forward.  
 Panelists: *Angienette Estonina*, Elementary Supervisor Multilingual Department, San Francisco Unified School District  
*Terry Walter*, Director of Special Instructional Projects, Leadership and Learning Division, San Diego Unified School District  
 Moderator: *Debra Hopkins*, ELL Project Coordinator, CGCS
- 10:00 am – 10:45 am MAXIMIZING RESULTS: USING DATA EFFECTIVELY  
 In this session, participants will get a brief update on the Council’s KPI project, particularly focused on the lessons learned related to high leverage ELL indicators. The presenter will also offer recommendations regarding protocols & procedures for collecting, analyzing, and effectively using ELL data: How do you get the data and what does it tell you? With whom do you share it?  
 Presenter: *Ray Hart*, Director of Research, CGCS  
 Moderator: *Gabriela Uro*, Director of ELL Policy and Research, CGCS

Coffee Service 9:30 am – 11:00 am
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10:45 am – 11:00 am	<b>BREAK</b>
11:00 am – 12:30 pm	<p><b>IMPLEMENTING A FRAMEWORK THAT RAISES EXPECTATIONS FOR ELLS: STORIES FROM THE FIELD</b>  <b>Olivine Roberts and Vanessa Girard</b> will discuss their experiences implementing a framework designed to raise expectations for ELLs in Sacramento, sharing how they broke down systemic silos and encouraged all staff to embrace responsibility for ELL achievement. Olivine will offer a Chief Academic Officer’s perspective on the importance of raising expectations for ELLs system-wide, discussing how ELL directors and CAOs can work together to accelerate achievement. <b>Allison Still and Janicka Newbill</b> will share their experiences implementing the Council’s ELD 2.0 Framework in Philadelphia, addressing how the framework helped them evolve their own instructional model and improve processes for the evaluation of instructional materials.</p> <p>Participants will then engage in a work session, identifying key stakeholders and next steps for breaking down silos and implementing higher expectations and increased rigor for ELLs in your own districts.</p> <p>Panelists: <i>Olivine Roberts</i>, Chief Academic Officer, Sacramento Unified School District  <i>Vanessa Girard</i>, Director of Multilingual Literacy, Sacramento Unified School District  <i>Janicka Newbill</i>, Staff Development Specialist, The School District of Philadelphia  <i>Allison W. Still</i>, Director of Multilingual Programs, The School District of Philadelphia</p> <p>Moderator: <i>Debra Hopkins</i>, ELL Project Coordinator, CGCS</p>
12:30 pm – 1:30 pm	<b>LUNCH (GRAND BALLROOM A)</b>
1:30pm – 2:30 pm	<p><b>REFUGEES AND UNACCOMPANIED MINORS: INNOVATIVE MODELS AND RESOURCES</b>  In this session, participants will hear powerful examples of data-driven services and instructional programs designed to maximize achievement for refugees and unaccompanied minors. <b>Nicole Knight</b> will share the innovative work being done in Oakland Unified, and <b>Jennifer Pearsall</b> will share effective initiatives in place in Charlotte-Mecklenburg. <b>Carol Aguirre</b> will share an update on numbers, funding, and resources available to support these students.</p> <p>Panelists: <i>Nicole Knight</i>, Executive Director of ELL and Multilingual Achievement Office, Oakland Unified School District  <i>Jennifer Pearsall</i>, Executive Director of ELL Services, Charlotte-Mecklenburg Schools</p> <p>Moderator: <i>Carol Aguirre</i>, ELL Policy Specialist, CGCS</p>
2:30 pm – 3:30 pm	<p><b>AN UPDATE FROM THE OFFICE OF ENGLISH LANGUAGE ACQUISITION</b>  During this session, participants will get an update from <b>Libia Gil</b>, Assistant Deputy Secretary and Director of OELA, regarding the latest developments in the Department of Education related to ELLs. Topics will include the Toolkit to accompany the OCR guidance for ELLs, and other key areas of interest.</p> <p>Presenter: <i>Libia Gil</i>, Assistant Deputy Secretary and Director, Office of English Language Acquisition, U.S. Department of Education</p> <p>Moderator: <i>Gabriela Uro</i>, Director of ELL Policy and Research, CGCS</p>
3:30 pm – 3:45 pm	<b>BREAK</b>
3:45 pm – 4:30 pm	<p><b>AN UPDATE FROM THE CGCS CURRICULUM TEAM</b>  Participants will learn about a number of important projects that the Curriculum Team has underway, including the latest on the <b>GIMET</b>, as well as Student Achievement Partners’ new Instructional Materials Toolkit. The team will also share findings on the Wallace-funded work around principals and principal supervisors, and will seek feedback from participants on issues that have emerged from this work.</p> <p>Panelists: <i>Ricki Price-Baugh</i>, Director of Academic Achievement, CGCS  <i>Denise Walston</i>, Director of Mathematics, CGCS  <i>Robin Hall</i>, Director of Language Arts and Literacy, CGCS</p>
4:30 pm – 4:45 pm	<b>BREAK</b>

4:45 pm – 5:30 pm **BREAK-OUT SESSIONS—THREE CONCURRENT SESSIONS**

**Break-out 1** ELA/ELD FRAMEWORK FOR CALIFORNIA DISTRICTS (**TYRON ROOM**)

In this session, **Dr. Spycher** will set the stage by sharing her thoughts on the CA ELD/ELA framework and implications for professional development. Then, California member districts will have an opportunity to collaborate and discuss how they may work together and support each other moving forward.

Panelists: *Dr. Pamela Spycher*, Senior Research Associate, WestEd

Moderator: *Maria Maldonado*, Assistant Superintendent of EL Services, Fresno Unified School District

**Break-out 2** INTEGRATING WIDA STANDARDS WITH ELA STANDARDS (**HARRIS ROOM**)

Using the CCSS speaking and listening standards as an example, the presenter will demonstrate how to tie them to WIDA's speaking **MPs** (the smallest grain size of the WIDA ELD standards). She will also touch on the new computerized speaking test, and will address the role of academic conversations in ELL classrooms.

Presenter: *Laura Wright*, Researcher, Wisconsin Center for Education Research, Wisconsin-Madison University

Moderator: *Debra Hopkins*, ELL Project Coordinator, CGCS

**Break-out 3** DISTRICT & COLLEGE PARTNERSHIPS WITH TEACHER/LEADERSHIP PREPARATION PROGRAMS (**GRAND BALLROOM B**)

Panelists will discuss how Colleges of Ed and Teacher Preparation programs are ensuring that teachers of ELLs feel confident and know how to work with ELL towards mastering the new higher standards. Participants will be encouraged to exchange ideas and provide feedback on this very important topic.

Panelists: *Dr. Rebecca Blum-Martínez*, Director, Multicultural Education Center; Latin American Programs in Education, University of New Mexico

*Dr. Laura Baecher*, Associate Professor, Hunter College CUNY

*Dr. Vanessa Y. Perez*, Associate Professor, Brooklyn College CUNY

Moderator: *Dr. Deborah Shanley*, Dean of School of Education, Brooklyn College, CUNY

6:00 pm – 8:00 pm **DINNER RECEPTION AT LEVINE MUSEUM OF THE NEW SOUTH**

200 East Seventh Street

Charlotte, NC 28202

(Meet in the Lobby at 5:45pm to walk to the Museum)

**FRIDAY May 15, 2015**

7:00 am – 8:00 am REGISTRATION

7:00 am – 8:00 am BUFFET BREAKFAST (**GRAND BALLROOM A**)

7:30 am – 8:00 am Dean of CUNY School of Education, **Deborah Shanley**, will report on feedback received and insights gained during the District & College Partnerships with Teacher/Leadership Preparation Programs breakout.

8:00 am – 9:00 am ACCELERATING ACHIEVEMENT FOR LONG-TERM ELLS (LTELS) (**GRAND PROMENADE D**)

Supporting LTELS in mastering grade-level academic language and content continues to be a challenge for districts nationwide. In this session, participants will hear from two districts with strong programs to support LTELS: **Miriam Atlas** will share the innovative work being done in San Diego, including their *Academic Language Development (ALD)* course designed specifically for LTELS, and **Nicole Knight** will share successful processes, tools, and learnings from their work in Oakland Unified.

Panelists: *Miriam Atlas*, EL Resource Teacher, San Diego Unified School District

*Nicole Knight*, Executive Director of ELL and Multilingual Achievement Office, Oakland Unified School District

Moderator: *Margarita Pinkos*, Executive Director, Department of Multicultural Education, The School District of Palm Beach County

<p>9:00am – 10:30am</p> <p>Coffee Service 9:30 am – 11:00 am</p>	<p><b>ELLS AND SPECIAL EDUCATION: A ROADMAP TO COLLABORATION</b></p> <p>In this session, participants will gain insight into various findings related to Sped/ELL issues in urban districts. <b>Estella Almanza de Schonewise</b>, a contributing author of <i>“Why Do ELLs Struggle with Reading?”</i> will share research findings important to distinguishing between language acquisition and reading difficulties. <b>Soledad Barreto &amp; Lisa Vargas-Sinapi</b> will share how the purposeful joint work of the offices of Special Education and English Language Learners of Providence Schools has resulted in improved diagnosis and services for ELLs with special needs.</p>
	<p>Panelists: <i>Soledad Barreto</i>, Director of ELL, Providence Public School District <i>Lisa Vargas-Sinapi</i>, Special Education Director, Providence Public Schools <i>Estella Almanza De Schonewise</i>, Adjunct Professor, Regis University</p> <p>Moderator: <i>Sue Gamm</i>, Council of the Great City Schools Consultant</p>
<p>10:30 am – 10:45 am</p>	<p><b>BREAK</b></p>
<p>10:45 am -11:45 am</p>	<p><b>PROMOTING DEVELOPMENT AND IMPROVING OUTCOMES FOR YOUNG DUAL/ENGLISH LANGUAGE LEARNERS</b></p> <p>In this session, participants will learn about the latest research regarding young ELLs and will discuss the implications for Pre-K programs serving greater number of ELLs. The presenter will also briefly discuss the work of National Academy of Sciences Committee on ELL/DLLs.</p> <p>Presenter: <i>Dr. Linda M Espinosa</i>, Professor Emeritus, University of Missouri-Columbia</p> <p>Moderator: <i>Jennifer Pearsall</i>, Executive Director of ELL Services, Charlotte-Mecklenburg Schools</p>
<p>11:45 am – 12:45 pm</p>	<p><b>MCGRAW-HILL EDUCATION AWARD FOR OUTSTANDING CONTRIBUTION TO ELL ACHIEVEMENT LUNCHEON (GRAND BALLROOM A)</b></p>
<p>12:45 pm – 2:00 pm</p>	<p><b>SPURRING THE IMPROVEMENT OF INSTRUCTIONAL MATERIALS FOR ELLS: EVOLUTION-IN-PROGRESS</b></p> <p>Participants will also hear an update from participating publishers, each of whom will briefly share how the development of their ELD/ELA materials for ELLs has been powerfully influenced by the input of CGCS member district panelists and experts.</p> <p>Panelists: <i>Angela Terry-Boggs</i>, National Geographic Learning <i>Jesus Cervantes</i>, Benchmark Education <i>Michele Burns</i>, Houghton Mifflin Harcourt</p> <p>Moderator: <i>Debra Hopkins</i>, ELL Project Coordinator, CGCS</p>
<p>2:00 pm – 3:00 pm</p>	<p><b>EFFECTIVE SEA/LEA RELATIONS ON BEHALF OF ELLS</b></p> <p>In this session, <b>Jennifer Pearsall</b> and <b>Nadja Trez</b> will share how SEAs and LEAs can build a culture of collaboration, helping to share best practices and build strong networks of support across a state. They will also address how collaborative data discussions can lead to program improvement, and how SEAs can further offer technical assistance to districts. The session will incorporate processing time so that participants can discuss, with your teams or at your tables, how your own SEA/LEA relationship works and how it could be improved.</p>
<p>Coffee Service 2:00 pm – 3:30 pm</p>	<p>Panelists: <i>Charlotte “Nadja” Trez</i>, Title III Director and ESL Consultant, NC Department of Public Instruction <i>Jennifer Pearsall</i>, Executive Director of ELL Services, Charlotte-Mecklenburg Schools</p> <p>Moderator: <i>Gabriela Uro</i>, Director of ELL Policy and Research, CGCS</p>
<p>3:00 pm – 3:15 pm</p>	<p><b>BREAK</b></p>
<p>3:15 pm – 3:45 pm</p>	<p><b>LEGISLATIVE UPDATE: WHAT’S HAPPENING “ON THE HILL”?</b></p> <p>Participants will learn about all the latest legislative action in Washington D.C., including the very latest developments regarding ESEA Reauthorization.</p>

	<p>Panelists: <i>Jeff Simering</i>, Director of Legislative Services, CGCS  <i>Gabriela Uro</i>, Director of ELL Policy and Research, CGCS  <i>Carol Aguirre</i>, ELL Policy Specialist, CGCS</p>
4:00 pm – 5:00 pm	<p><b>BREAK-OUT SESSIONS—TWO CONCURRENT SESSIONS</b></p> <p><b>Break Out 1</b> DISTRICTS WITH NEWER ELL POPULATIONS AND/OR GROWING DIVERSITY (<b>HARRIS ROOM</b>)  This session is designed for those districts that are experiencing dramatic growth and/or change in your ELL population. <b>Jacqueline Iribarren</b> will highlight some of the work being done in Milwaukee Public Schools where ELL achievement has shown promise.</p> <p>Panelists: <i>Jacqueline Iribarren</i>, Title III Program Coordinator, Milwaukee Public Schools</p> <p>Moderator: <i>Terry Walter</i>, Director of Special Instructional Projects, Leadership and Learning Division, San Diego Unified School District</p> <p><b>Break Out 2</b> ESTABLISHING EFFECTIVE SYSTEMS TO SUPPORT DUAL LANGUAGE INSTRUCTION (<b>GRAND BALLROOM B</b>)  Dual Language programs are on the upswing, and it’s important to ensure that you have the necessary systems, staffing, and PD plan in place before launching a dual-language initiative. <b>Olivia Hernandez</b> will share successes achieved and lessons learned while implementing system-wide dual-language initiatives in Austin, Texas. Participants will have the opportunity to ask questions, to discuss, and to consider next steps as you move your own dual language initiatives forward.</p> <p>Panelists: <i>Olivia Hernandez</i>, Director of ELL, Austin Independent School District</p> <p>Moderator: <i>Karen Garibay-Mulattieri</i>, Chief of EL Programs, Chicago Public Schools</p>
5:00 pm – 5:15 pm	ANNOUNCEMENT OF WINNERS OF THE PUBLISHER PASSPORT ACTIVITY ( <b>GRAND PROMENADE D</b> )
5:15 pm – 6:00 pm	SOUTHERN DISTRICTS: NETWORKING AND COLLABORATION ( <b>SHARON ROOM</b> )
<b>EVENING ON YOUR OWN</b>	
<b>SATURDAY May 16, 2015</b>	
8:00 am	BUFFET BREAKFAST ( <b>GRAND PROMENADE D</b> )
8:30 am – 9:30 am	ELL PROGRAM REVIEW, UPDATES & PLANNING ( <b>GRAND PROMENADE D</b> )
	Facilitator: <i>Gabriela Uro</i> , Director of ELL Policy and Research, CGCS
9:30 am – 10:00 am	2015 BIRE DEBRIEF Goals and objectives, issues, and venue for future meetings will be discussed.
10:00 am	BIRE MEETING ADJOURNS

## BIRE 2015 Summary

The Council's annual Bilingual, Immigrant, Refugee Education (BIRE) Directors Meeting was held in Charlotte, NC on May 13-16, 2015 at the Westin Charlotte Hotel. BIRE 2015 had the highest attendance in the meeting's seven year history with over 140 urban educators from across the country; and a growing number of districts brought teams, which allowed them to learn together and network across disciplines. District participation included:

- *Six district brought teams of four or more members:* Charlotte-Mecklenburg Schools, Clark County School District, Denver Public Schools, The District of Palm Beach County, Anchorage Public Schools and Chicago Public Schools
- *Twelve districts sent teams of 2 to 3 district staff:* Arlington Public Schools, Austin ISD, Cleveland Metropolitan School District, Jefferson County Public Schools, Fresno Unified SD, Hillsborough County School District, Houston ISD, The School District of Philadelphia, Providence Public Schools, Richmond City School District, Sacramento Unified SD, San Diego Unified SD, San Francisco Unified SD
- *Over 30 districts were represented.*

BIRE participants included central office staff, school-site staff, principals, experts/researchers, Council staff, and meeting sponsors. When possible, the BIRE meeting is preceded by school visits in the host district, which is followed by two and a half days of presentations and discussions addressing the most pressing ELL issues.

### Charlotte-Mecklenburg Schools Site Visits

Close to 50 BIRE participants visited Charlotte-Mecklenburg Schools (CMS) schools on Wednesday, May 13. At the end of the day participants shared their experience with CMS staff and other BIRE participants. A large number of visitors indicated being impressed by the leadership seen across all schools visited. Comments included—

- “The openness and the willingness of the administrators and their knowledge of ELLs.”
- “Coherence and consistency. It was evident that they were working on every child every day for a better tomorrow. The commitment to world languages.”
- “How empowered the principals were and how long they have been in their jobs. They spoke like they owned it. They had a vision.”

### BIRE Sessions

The formal BIRE meeting took place May 14th through the 16th with an agenda that included the most critical issues raised by Council's members throughout the year, including: (See the 2015 BIRE Agenda for detailed information.)

- A Framework for Raising Expectations and Instruction Rigor for English Language Learners—Working Session
- OCR Guidance for ELLs—Discussion with the U.S. Department of Education
- Refugee & Unaccompanied Minors—Education Initiatives
- ELLs with Special Needs—Updates and Working Session
- Legislative Update—Including ESEA Reauthorization
- Effective SEA/LEA relations on behalf of ELLS
- CGCS ELL Project Updates



- Celebration of the Award for Outstanding Contributions to ELL Achievement presented to Angie Estonina from San Francisco Unified School District, sponsored by McGraw-Hill Education

### BIRE 2015 Satisfaction Survey Results

We surveyed BIRE participants after the meeting to gauge their satisfaction with the topics and format of the meeting. Many district staff indicated that BIRE meetings are one of the best professional development opportunities for ELL program administrators they have. Some of the survey highlights are listed below—

#### *Increased Understanding*

- Over 90 percent of respondents indicated they strengthened their understanding of
  - how to raise rigor for ELLs, and
  - protocols and procedures to collect, analyze, and effectively use ELL data.
- About 71 percent of respondents expanded their understanding of scaffolding for ELLs—who to provide scaffolding to, how, and for how long? How to allow “productive struggle.”
- Some 76 percent of respondents learned how to utilize the Council’s *Framework for Raising Expectations and Instructional Rigor for English Language Learners* to advance ELL work in their district.

#### *Applying knowledge gained at BIRE*

A very high percentage of participants indicated that they felt confident to apply the information received at BIRE to their district’s ongoing work in either implementing higher standards or improving various aspects of instructional programming and services for ELLs. For example--

- Over 98 percent of respondents feel confident that they will be able to apply information learned at BIRE to their district’s ongoing Common Core/higher standards implementation efforts.
- Over 87 percent of respondents plan to review and improve diagnosis and services for ELLs with special needs.
- Over 85 percent of respondents plan to review and improve how they use ELL student data to guide instruction.
- Over 82 percent of respondents plan to review and improve services for young dual/English language learners.

#### *Ongoing issues of concern and interest*

The Council’s analysis of BIRE survey data, the meeting debriefing, and ongoing requests for assistance surfaced recurring needs and ongoing priorities in the areas of--

1. Fostering a sense of urgency and shared responsibility for ELL achievement at all levels of the school district and across departments and areas
2. Meeting the needs of long-term ELLs
3. Special education/ELL Issues
4. Working with complex text and ELLs who have beginning levels of English proficiency or have interrupted formal education (SIFE)
5. Implementing and sustaining Dual Language Immersion programs
6. Collecting and analyzing data (KPIs) to accurately monitor ELL achievement
7. Guidance for the creation and sustainability of effective Newcomer Centers
8. Technical assistant to prepare for visits from the U.S. Department of Education Office of Civil Rights (OCR) by learning from member districts who have gone through this process with OCR

Participants indicated they would like the Council to follow up on these areas via webinars, EdWires discussion threads, and targeted meetings (for instance, one focused on issues related to ELLs and students with disabilities).

### *ELL Program Review Boot Camp*

In addition, several districts were interested in the possibility of participating in a boot camp for districts who plan to conduct a review of their ELL programs. During this Council-led boot camp, multi-disciplinary teams from member districts would walk through a protocol and procedures used by the Council's Strategic Support Teams. District teams would leave the boot camp with a plan and next steps to conduct their own ELL program reviews.

### *Improvements for future BIRE meetings*

Participants indicated that BIRE meetings afford them a great opportunity to interact with and learn from their urban district colleagues, ELL experts, and Council staff. Among participant-provided feedback, the following were key recommendations the Council would like to pursue in future meetings:

- Expand opportunities for networking in small groups around specific challenges of practice
- Provide opportunities at the end of each day to share outcomes of each break-out session
- Increase opportunities to process and study together information learned during BIRE sessions so district teams can determine practical next steps.

**LEADERSHIP, GOVERNANCE & MANAGEMENT  
TASK FORCE**

**COUNCIL OF THE GREAT CITY SCHOOLS**  
**Task Force on Urban School Leadership, Governance,  
and Management**

**2015-2016**

***Task Force Goals***

- To improve the quality of leadership in urban public education.
- To improve the effectiveness of urban school boards
- To lengthen the tenure of urban school superintendents
- To enhance accountability, management, and operations of the nation's urban public school systems.

***Task Force Co-Chairs***

Jose Banda, Sacramento Superintendent  
Bill Isler, Pittsburgh School Board

**SCHOOL BOARD SURVEYS**

## 2015 Urban School Board Survey (Board Secretary Draft)

### Introduction

The Council of the Great City Schools is conducting a major study of its urban school boards and their relations with their superintendents. All information will be kept confidential and will be reported in the aggregate. The final report will be made available to all member districts on the Council's website. Please provide information current as of July 1, 2015.

Please complete the survey by September 1, 2015. If you have any questions or concerns, please call or email Moses Palacios at 202.393.2427 or mpalacios@cgcs.org.

This is one of three governance surveys that will constitute the study:

- one that is mostly data to be completed by Board Secretaries and reviewed by the Board Chair (this survey)
- one that is mostly opinions of governance to be completed by the Superintendents
- one that is mostly opinions of governance to be completed by the individual School Board Members

**NOTE:** In this survey, any variation on the term "student achievement" refers to the end results a districts seeks to create for the children it serves. Examples include, but are not limited to: literacy rates, numeracy rates, graduation rates, etc. "Student achievement," when used in this survey, does not refer to the means by which those results are created. Examples include, but are not limited to: literacy programs, numeracy programs, dropout programs, HR, budgeting, expenditures, or anything else that focuses on the work adults do in an effort to improve student achievement. The term "student achievement" is solely about student outcomes, not adult inputs; "student achievement" is not about what was intended by adults, but about what actually happened for children.

## 2015 Urban School Board Survey (Board Secretary Draft)

### District and Contact Information

**All district-specific and contact information is for internal use only and will be kept confidential.**

\* 1. Please select the school district for which you work:

\* 2. Please enter the following information for your district:

What is your district's current enrollment?

How many certified teachers (FTE) does your district currently employ?

**\* 3. Please enter the following contact information:**

Title of person who staffs the board (e.g., board secretary, board executive director, etc)

Name of lead person who staffs the board

Telephone number of lead person who staffs the board

Email address of lead person who staffs the board

**4. Please enter the following information about the president or chair of your school board:**

Title of person who chairs the school board (e.g., chair, president, director)

Name of person who chairs the school board

Telephone number of person who chairs the school board

Email address of person who chairs the school board

**5. Please enter the following information about the Superintendent or CEO of your district:**

Title of person who is the Superintendent (e.g., Superintendent, Chancellor, CEO, Director)

Name of person who is the Superintendent

Telephone number of person who is the Superintendent

Email address of person who is the Superintendent

**2015 Urban School Board Survey (Board Secretary Draft)**

**School Board Characteristics**

**\* 6. How many members currently serve on your School Board?**

Current number of Board members

\* 7. Which best describes how individuals are selected to serve on the school board?

- Elected
- Appointed (please specify who appoints below)
- Combination of elected and appointed members

If there are appointed members, who appoints them?

\* 8. How are Board members elected/appointed?

- Citywide
- Geographic Districts, Regions, or Wards
- Other (please specify)

\* 9. What is the term length for your School Board members?

- 2 years
- 3 years
- 4 years
- Other (please specify)

\* 10. Are your elections/appointments staggered or are all members elected or appointed at the same time?

- Staggered
- All at once

\* 11. Are School Board members' term limited?

- Yes
- No

\* 12. Please indicate the number of School Board members who have served the following number of years on your board:

Less than 2 years	<input type="text"/>
2-4 years	<input type="text"/>
5-8 years	<input type="text"/>
9-12 years	<input type="text"/>
More than 12 years	<input type="text"/>



**2015 Urban School Board Survey (Board Secretary Draft)**

**School Board Characteristics - Demographics**

\* 13. Please indicate the number of School Board members you have in each category

African American male	<input type="text"/>
African American female	<input type="text"/>
White male	<input type="text"/>
White female	<input type="text"/>
Latino male	<input type="text"/>
Latina female	<input type="text"/>
Asian male	<input type="text"/>
Asian female	<input type="text"/>
Other male (please specify)	<input type="text"/>
Other female (please specify)	<input type="text"/>

\* 14. To the best of your knowledge, how many of your School Board members are within the following age ranges?

20-29	<input type="text"/>
30-39	<input type="text"/>
40-49	<input type="text"/>
50-59	<input type="text"/>
60 or older	<input type="text"/>

\* 15. To the best of your knowledge, how many of your School Board members have a(n): (mark only the highest level of educational attainment)

High school education	<input type="text"/>
Associate's degree or 2 years of college	<input type="text"/>
Bachelor's degree	<input type="text"/>
Graduate degree	<input type="text"/>
Ph.D/Ed.D	<input type="text"/>
JD	<input type="text"/>
MD	<input type="text"/>

\* 16. To the best of your knowledge, how many of your School Board members work in each sector outside of their board responsibilities?

Private sector	<input type="text"/>
Law	<input type="text"/>
Medicine	<input type="text"/>
Nonprofit sector	<input type="text"/>
K-12 education	<input type="text"/>
Higher education	<input type="text"/>
Government (municipal, state, or federal)	<input type="text"/>
Military	<input type="text"/>
Homemaker	<input type="text"/>
Retired	<input type="text"/>
No other job	<input type="text"/>

17. What is the estimated percentage of voter turnout for School Board elections?

Percent of eligible voters

\* 18. What month of the year are your elections held?

\* 19. During typical School Board elections or appointments, what best characterizes the number of contestants for each seat?

- All seats have multiple contestants or applicants
- 75% to 99% of seats have multiple contestants or applicants
- 50 to 74% of seats have multiple contestants or applicants
- Fewer than 50% of seats have multiple contestants or applicants
- No seats are contested or applied for

\* 20. Are one or more of your board's seats required to be filled by current district parents?

- Yes
- No

\* 21. To the best of your knowledge, how many of your School Board members are currently district parents?

\* 22. To the best of your knowledge, how many of your School Board members are former district employees?

## 2015 Urban School Board Survey (Board Secretary Draft)

### School Board Characteristics - Operations

\* 23. How often are regularly scheduled School Board meetings held?

- Weekly
- Biweekly
- Monthly
- Other (please specify)

\* 24. Approximately how long does a typical School Board meeting last?

- Less than 1 hour
- 1-2 hours
- 3-4 hours
- 5-6 hours
- More than 6 hours

\* 25. How often are School Board work sessions held?

- Weekly
- Biweekly
- Monthly
- None
- Other (please specify)

\* 26. Approximately how long does a typical School Board work session last?

- Less than 1 hour
- 1-2 hours
- 3-4 hours
- 5-6 hours
- More than 6 hours

\* 27. Does your Board have an existing subcommittee structure?

- Yes
- No

28. If you answered 'Yes' to question 27, please indicate how many times each existing subcommittee meets in an average month. (Subcommittee names may differ slightly from those in your district).

	Average number of meetings per month	Standing or ad hoc?
Audit	<input type="text"/>	<input type="text"/>
Community Relations	<input type="text"/>	<input type="text"/>
Curriculum/Academic Achievement	<input type="text"/>	<input type="text"/>
Finance/Budget	<input type="text"/>	<input type="text"/>
Human Resources/Payroll	<input type="text"/>	<input type="text"/>
Information/Technology	<input type="text"/>	<input type="text"/>
Legislation/Policy	<input type="text"/>	<input type="text"/>
Property/Operations/Facilities	<input type="text"/>	<input type="text"/>
Safety/Security	<input type="text"/>	<input type="text"/>
Special Education	<input type="text"/>	<input type="text"/>
English Language Learners/Bilingual Education	<input type="text"/>	<input type="text"/>
Strategic Planning	<input type="text"/>	<input type="text"/>
Other	<input type="text"/>	<input type="text"/>

Other (please specify)

\* 29. Approximately how long does a typical regularly scheduled School Board committee meeting last?

- Less than 1 hour
- 1-2 hours
- 3-4 hours
- 5-6 hours
- More than 6 hours

\* 30. Please answer the following:

	Yes	No
Are your regularly scheduled School Board meetings streamed live via TV or internet?	<input type="radio"/>	<input type="radio"/>
Do you make video recordings of your regularly scheduled School Board meetings?	<input type="radio"/>	<input type="radio"/>
Do you make audio recordings of your regularly scheduled School Board meetings?	<input type="radio"/>	<input type="radio"/>

31. How many hours per week do you as School Board staff spend on requests by School Board members?

\* 32. Is there a support staff assigned to the School Board other than the lead person named earlier?

- Yes
- No

33. If you answered yes to the previous question, what staff are assigned to your School Board and work directly under its control? (Please indicate the total number in each position)

Researcher	<input type="text"/>
Secretary/Administrative Assistant	<input type="text"/>
Attorney or Counsel	<input type="text"/>
Treasurer	<input type="text"/>
Other (please specify position)	<input type="text"/>

\* 34. Do your individual School Board members have offices at district headquarters?

- Yes
- No

\* 35. What benefits do your School Board members receive? (Answer Yes or No and enter average dollar amount where appropriate).

Meeting expense allowance	<input type="text"/>
Credit card	<input type="text"/>
Car	<input type="text"/>
Driver	<input type="text"/>
Travel	<input type="text"/>
Stipend	<input type="text"/>
Nothing	<input type="text"/>

\* 36. How are School Board members compensated for participation in School Board work?

- Financial compensation
- No financial compensation
- Reimbursed for expenses only

## 2015 Urban School Board Survey (Board Secretary Draft)

### School Board Characteristics - Operations (Continued)

\* 37. How many hours of professional development are externally-mandated (i.e., by city, county, state, etc) during School Board members' first term?

\* 38. How many hours of professional development does the School Board mandate for each board member?

\* 39. From the list below, please indicate the areas in which your School Board has received training over the last year:

	Recieved
Board member roles/responsibilities	<input type="radio"/>
Board/Superintendent relations	<input type="radio"/>
Leadership skills	<input type="radio"/>
Legal issues	<input type="radio"/>
Board accountability	<input type="radio"/>
Communications	<input type="radio"/>
Student achievement	<input type="radio"/>
Community engagement/partnerships	<input type="radio"/>
Budget/resource allocation	<input type="radio"/>
Superintendent/district staff accountability	<input type="radio"/>
Policy governance/leadership models	<input type="radio"/>
Curriculum/educational programs	<input type="radio"/>
English language learners/bilingual education policy	<input type="radio"/>
Special Education Policy	<input type="radio"/>
Technology	<input type="radio"/>
Ethics and appropriate Board behavior	<input type="radio"/>

\* 40. How long ago, in months, was the last professional development/training that all School Board members attended together?

\* 41. How long ago, in months, was the last professional development/training specifically about effective governance that all School Board members attended together?

\* 42. Does your School Board use Robert's Rules of Order?

- Yes
- No

43. If you answered yes to the previous question, how many months ago was the School Board's last professional development/training on Robert's Rules of Order?

\* 44. Does the district have a board policy manual (that governs board and board member behaviors) distinct from an administrative/management policy manual (that governs employee behaviors)?

Yes

No

45. Do you have policies and procedures (i.e., a code of ethics) in place to discipline board members who violate board policy?

Yes (Please send a copy of policy to [mpalacios@cgcs.org](mailto:mpalacios@cgcs.org))

No

## 2015 Urban School Board Survey (Board Secretary Draft)

### School Board Characteristics - Governing and Finances

\* 46. Describe your annual School Board self-evaluation process.

\* 47. How long ago, in months, did the board complete the most recent School Board self-evaluation?

\* 48. Describe your annual superintendent evaluation process.

\* 49. How long ago, in months, did the board complete the most recent superintendent evaluation?

\* 50. For approximately how many years have your last three superintendents served?

Current superintendent

Previous superintendent

Previous superintendent



\* 51. If your district has attempted to pass a bond or operating referendum in the last four years, was it approved by voters?

- Yes
- No
- Pending
- No operating referendum in the last four years

\* 52. How many teacher termination hearings did the board hold between January 1, 2014 and January 1, 2015?

\* 53. How many teachers were terminated for cause as the result of termination hearings held between January 1, 2014 and January 1, 2015?

\* 54. How many teachers were terminated for cause without a termination hearing between January 1, 2014 and January 1, 2015?

\* 55. How many student expulsion hearings did the board hold between January 1, 2014 and January 1, 2015?

\* 56. How many students were expelled as the result of expulsion hearings held between January 1, 2014 and January 1, 2015?

## 2015 Urban School Board Survey (Board Secretary Draft)

### School Board Characteristics - Governing and Finances

\* 57. Is the role of the School Board chair concerning interactions with the superintendent, the full School Board, and the public distinct from other board members?

If your answer is 'Yes', please attach the board chair's job description to [mpalacios@cgcs.org](mailto:mpalacios@cgcs.org).

- Yes
- No

58. Does the School Board have a clearly defined policy/procedure for how the board communicates with constituents and the press?

- Yes
- No

\* 59. Would your district be interested in participating in a deep evaluation of governance practices?

- Yes
- No

## 2015 Urban School Board Survey (Board Secretary Draft)

Thank You!

**Thank you for participating in the 2015 Urban School Board Survey. Please do not hesitate to contact Moses Palacios at 202-393-2427 or [mpalacios@cgcs.org](mailto:mpalacios@cgcs.org) with any questions or concerns about this survey.**

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## 2015 Urban School Board Survey (School Board Draft)

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## 2015 Urban School Board Survey (School Board Draft)

### District and Contact Information

All district-specific and contact information is for internal use only and will be kept confidential.

\* 1. Please select the school district on whose School Board you serve:

## 2015 Urban School Board Survey (School Board Draft)

### School Board Characteristics - Membership and Elections

2. Are you as a School Board member elected or appointed to your position?

- Elected
- Appointed

**2015 Urban School Board Survey (School Board Draft)**

\* 3. Approximately how much does the average School Board member spend on Board campaigns in total?

- \$0-\$1,000
- \$1,001-\$4,999
- \$5,000-\$9,999
- \$10,000-\$25,000
- Over \$25,000 (please specify)

\* 4. What constituent groups are regularly "active" in School Board elections? Check all that apply.

- Teacher unions
- Community organizations
- Religious organizations
- City government
- Public education foundations
- Businesses
- Ethnic/racial groups
- School reform coalitions
- Foundations
- Parent groups
- Other (please specify)

\* 5. How competitive are your School Board elections?

- Extremely competitive
- Very competitive
- Somewhat competitive
- Not competitive
- Other (please specify)

\* 6. Where does the average School Board member get the majority of their campaign funds?

- Personal wealth
- Family/friends
- Religious groups
- Employee unions
- General fundraising
- Other (please specify)

## 2015 Urban School Board Survey (School Board Draft)

7. Who appointed you to the School Board?

- Mayor
- City Council
- Governor
- Other (please specify)

## 2015 Urban School Board Survey (School Board Draft)

\* 8. Do you have an onboarding process for new board members?

- Yes
- No

9. If you answered yes to the previous question, describe your new board member onboarding process.

## 2015 Urban School Board Survey (School Board Draft)

### School Board Characteristics - Operations

\* 10. Approximately how many hours does the average School Board member spend each week on Board business?

- Less than 1 hour
- 1-2 hours
- 3-4 hours
- 5-6 hours
- More than 6 hours

\* 11. Of the total number of hours per month spent in regularly scheduled School Board meetings, how many of those hours are spent on the following items (answers should add up to the total number of hours per month spent in regularly scheduled board meetings)?

Community Relations/Engagement,

Human Resources/Payroll/Personnel,

Finance/Budget,

Measurable Student Achievement Outcomes (not including Community Relations/Engagement, Human Resources/Payroll/Personnel, Finance/Budget/Expenditures, any adult activities, any adult inputs, or any other items that do not directly measure student results),

Programs or procedures

Other (please specify)

\* 12. Of the total number of hours per month spent in School Board work sessions, how many of those hours are spent on the following items (answers should add up to the total number of hours per month spent in board work sessions)?

Community Relations/Engagement,

Human Resources/Payroll/Personnel,

Finance/Budget,

Measurable Student Achievement Outcomes (not including Community Relations/Engagement, Human Resources/Payroll/Personnel, Finance/Budget/Expenditures, any adult activities, any adult inputs, or any other items that do not directly measure student results),

Programs or procedures

Other (please specify)

\* 13. Of the total number of hours per month that School Board committees meets, how many of those hours are spent on the following items (answers should add up to the total number of hours per month that board committees meets)?

Community Relations/Engagement,

Human Resources/Payroll/Personnel,

Finance/Budget,

Measurable Student Achievement Outcomes (not including Community Relations/Engagement, Human Resources/Payroll/Personnel, Finance/Budget/Expenditures, any adult activities, any adult inputs, or any other items that do not directly measure student results),

Programs or procedures

Other (please specify)

\* 14. To what degree does your School Board as a whole engage in the following issues?

	Not at all engaged	Slightly engaged	Moderately engaged	Significantly engaged
Budgeting/funding	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Student achievement	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Charter schools	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
School choice	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Closing achievement gaps	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
School construction	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Educational technology	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Teacher quality	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Professional development	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Teacher shortages	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
No Child Left Behind	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Black male students	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
English language learners	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Hispanic students	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Special education/needs students	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Parental outreach/support	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Drug/alcohol policy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Discipline	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
School safety/climate	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Physical school conditions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Equity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



\* 15. From the list below, please indicate the areas in which your School Board has received training over the last year and those for which additional training is needed.

	Recieved	Needed
Board member roles/responsibilities	<input type="radio"/>	<input type="radio"/>
Board/Superintendent relations	<input type="radio"/>	<input type="radio"/>
Leadership skills	<input type="radio"/>	<input type="radio"/>
Legal issues	<input type="radio"/>	<input type="radio"/>
Board accountability	<input type="radio"/>	<input type="radio"/>
Communications	<input type="radio"/>	<input type="radio"/>
Student achievement	<input type="radio"/>	<input type="radio"/>
Community engagement/partnerships	<input type="radio"/>	<input type="radio"/>
Budget/resource allocation	<input type="radio"/>	<input type="radio"/>
Superintendent/district staff accountability	<input type="radio"/>	<input type="radio"/>
Policy governance/leadership models	<input type="radio"/>	<input type="radio"/>
Curriculum/educational programs	<input type="radio"/>	<input type="radio"/>
English language learners/bilingual education policy	<input type="radio"/>	<input type="radio"/>
Special Education Policy	<input type="radio"/>	<input type="radio"/>
Technology	<input type="radio"/>	<input type="radio"/>
Ethics and appropriate Board behavior	<input type="radio"/>	<input type="radio"/>

\* 16. Does the district have a board policy manual (that governs board and board member behaviors) distinct from an administrative/management policy manual (that governs employee behaviors)?

- Yes
- No

\* 17. Do you have policies and procedures (i.e., a code of ethics) in place to discipline School Board members who violate board policy?

- Yes
- No

18. If you answered yes to the previous question, please describe the policies and procedures you have in place to discipline board members who violate board policy - or email policy to [mpalacios@cgcs.org](mailto:mpalacios@cgcs.org)

If you answered yes, please email both documents to mpalacios@cgcs.org.

## 2015 Urban School Board Survey (School Board Draft)

### School Board Characteristics - Governing and Finances

\* 19. Describe your annual board self-evaluation process.

\* 20. How long ago, in months, did the School Board complete the most recent School Board self-evaluation?

\* 21. Describe your annual superintendent evaluation process.

\* 22. How long ago, in months, did the School Board complete the most recent superintendent evaluation?

\* 23. Does your superintendent evaluation use a research-based rubric assessing effective district leadership?

- Yes  
 No

If you answered yes, which research is your superintendent evaluation based on?

\* 24. Has the School Board approved or adopted SMART (specific, measurable, attainable, relevant, time-bound) student achievement outcome goals for SY15/16 (not including Community Relations/Engagement, Human Resources/Payroll/Personnel, Finance/Budget/Expenditures, any adult activities, any adult inputs, or any other items that do not directly measure student results)?

- Yes  
 No

## 2015 Urban School Board Survey (School Board Draft)

### School Board Characteristics - Governing and Finances

\* 25. What are the School Board's top three student achievement outcome goals for SY15/16?  
 (Not including Community Relations/Engagement, Human Resources/Payroll/Personnel, Finance/Budget/Expenditures, any adult activities, any adult inputs, or any other items that do not directly measure student results)

\* 26. How are these student achievement outcome goals reflected in the board's annual self-evaluation?

\* 27. How are these student achievement outcome goals reflected in the board's annual superintendent evaluation?

\* 28. How are these student achievement outcome goals reflected in the district's strategic plan?

\* 29. How frequently does the School Board monitor progress toward the student achievement outcome goals? [ Monthly, Bi-Monthly, Quarterly, Annually, Bi-Annually, Never ]

- Monthly
- Bi-Monthly
- Quarterly, Annually
- Bi-Annually
- Never

## 2015 Urban School Board Survey (School Board Draft)

### School Board Characteristics - Governing and Finances

\* 30. Please indicate if you strongly agree, agree, disagree, or strongly disagree with the following statements:

	Strongly Agree	Agree	Disagree	Strongly Disagree
Our board has developed intentional processes to hear from each representative group in our community (v. Our board gives greatest weight to the loudest voices in our community).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Our board gives direction to the superintendent only through the action of the full board or direction from the board chair (v. Our individual board members ask staff members for assistance in resolving problems).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

	Strongly Agree	Agree	Disagree	Strongly Disagree
Our board protects the superintendent and staff from the advice and instruction of individual board members (v. Our board expects staff to spend time responding to individual board questions and problems).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Our board has clearly defined a few high priority student achievement outcomes that are most important for the district (v. Our board has multiple goals and action plans or simply none at all).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Our board holds the superintendent accountable only for achieving the board approved student achievement outcomes for the district (v. Our board holds the superintendent accountable for numerous goals, activities, action plans, and constituent relations).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Our board meetings spend the majority of our time reviewing our student achievement learning outcomes (defining, clarifying, assessing progress); (v. Our board meetings are filled with numerous approvals).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Our board members and superintendent consistently see our job as being to release each student's potential. (v. Our board members and superintendent simply accept shortcomings in our students or in the district).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Our superintendent and principals know the board is going to support them, so they are more likely to take risks aimed at bringing about reform. (v. Our superintendent and principals are unsure of what our board members want or insecure about how they will respond to controversy, so they are reluctant to stick their necks out in an effort to bring about change).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We have developed non-negotiable goals for student achievement and instruction.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We have long term (five year) student achievement goals.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Goals are developed jointly by the board, administration.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Goals are communicated clearly to schools and community	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Board and superintendent agree formally on the political climate	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Board and superintendent agree on and align board training around district goals	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Board monitors implementation of the district instructional delivery	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Board regularly monitors progress toward student achievement goals	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Superintendent is held accountable for identifying and responding to system failure rather than board members addressing issues themselves	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Board has developed positive proactive steps designed to insure superintendent tenure of at least five years	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

\* 31. Does the School Board have an evergreen rollover contract with your superintendent?

- Yes
- No

\* 32. Please rate the following statements:

	Strongly Agree	Agree	Disagree	Strongly Disagree
Superintendent is engaged in a learning network that actively explores barriers to student achievement?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Superintendent received training in or developed expertise in the redesign of complex systems?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Superintendent received training in or developed expertise in the essentials of high performing schools?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Superintendent received training in or developed expertise in effective governance and decision making?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Superintendent received training in or developed expertise in leading strategic change?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Superintendent received training in or developed expertise in curriculum and instructional design?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

\* 33. In your opinion, what's the shortest amount of time an effective superintendent should remain in that position to get the best results for students?

\* 34. How long is the term of your superintendent's current contract?

\* 35. Does the School Board have a succession plan for the superintendent and staff to maintain continuity of goals and directions?

- Yes
- No

\* 36. What does the School Board do specifically to insure superintendent longevity?

\* 37. What does your School Board do specifically to monitor and support the superintendent so that he or she can effectively lead the district?

\* 38. What does the School Board do specifically to ensure long term district commitments and priorities for continuity?

\* 39. How many hours do you spend on school campuses to resolve conflicts?

\* 40. What role do you play in the management of the district?

\* 41. Are board member requests or questions of the superintendent focused mostly on policies or procedures?

- Mostly on procedures, operations, and other program details
- Mostly on broad policy matters and district direction

\* 42. Is the role of the School Board chair concerning interactions with the superintendent, the full School Board, and the public distinct from other board members?

(Please email the board chair's job description to [mpalacios@cgcs.org](mailto:mpalacios@cgcs.org)).

- Yes
- No

\* 43. In your opinion, to what extent has the School Board empowered the board chair to lead?

\* 44. What accountability measures has the board put in place for School Board members as individuals and as a body corporate?

\* 45. Does the School Board have a clearly defined policy/procedure for how the board communicates with constituents and the press?

- Yes
- No

If you answered yes to the previous question, please email the board communication policy/procedure to [mpalacios@cgcs.org](mailto:mpalacios@cgcs.org).

\* 46. In your opinion, what information should School Board members routinely consider that allows them to be more effective?

\* 47. What information that School Boards currently consider actually lessens their effectiveness?

\* 48. What are the three things the School Board spends the majority of its time on?

#1

#2

#3

## 2015 Urban School Board Survey (School Board Draft)

Thank You!

**Thank you for participating in the 2015 Urban School Board Survey. Please do not hesitate to contact Moses Palacios at 202-393-2427 or [mpalacios@cgcs.org](mailto:mpalacios@cgcs.org) with any questions or concerns about this survey.**

## Urban School Board Survey (Superintendent Draft)

### Introduction

The Council of the Great City Schools is conducting a major study of its urban school boards and their relations with their superintendents. All information will be kept confidential and will be reported in the aggregate. The final report will be made available to all member districts on the Council's website. Please provide information current as of July 1, 2015.

Please complete the survey by September 1, 2015. If you have any questions or concerns, please call or email Moses Palacios at 202.393.2427 or mpalacios@cgcs.org.

This is one of three governance surveys that will constitute the study:

- one that is mostly data to be completed by Board Secretaries and reviewed by the Board Chair
- one that is mostly opinions of governance to be completed by the Superintendents (this survey)
- one that is mostly opinions of governance to be completed by the individual Board Members

**NOTE:** In this survey, any variation on the term "student achievement" refers to the end results a districts seeks to create for the children it serves. Examples include, but are not limited to: literacy rates, numeracy rates, graduation rates, etc. "Student achievement," when used in this survey, does not refer to the means by which those results are created. Examples include, but are not limited to: literacy programs, numeracy programs, dropout programs, HR, budgeting, expenditures, or anything else that focuses on the work adults do in an effort to improve student achievement. The term "student achievement" is solely about student outcomes, not adult inputs; "student achievement" is not about what was intended by adults, but about what actually happened for children.

## Urban School Board Survey (Superintendent Draft)

### District and Contact Information

All district-specific and contact information is for internal use only and will be kept confidential.

\* 1. Please select the school district for which you serve as Superintendent, CEO, or Chancellor

## Urban School Board Survey (Superintendent Draft)

### School Board Characteristics - Operations



\* 2. Approximately how many hours do you spend each week on School Board business, board meetings, and responding to board member communication?

- Less than 1 hour
- 1-2 hours
- 3-6 hours
- 7-10 hours
- More than 10 hours

\* 3. Of the total number of hours per month you spend in regularly scheduled School Board meetings, how many of those hours are spent on the following items (answers should add up to the total number of hours per month spent in regularly scheduled board meetings)?

Community Relations/Engagement,

Human Resources/Payroll/Personnel,

Finance/Budget,

Measurable Student Achievement Outcomes (not including Community Relations/Engagement, Human Resources/Payroll/Personnel, Finance/Budget/Expenditures, any adult activities, any adult inputs, or any other items that do not directly measure student results),

Programs and procedures

Hours on other topics

Please specify topics from previous line

\* 4. Of the total number of hours you spend permonth in School Board work sessions, how many of those hours are spent on the following items (answers should add up to the total number of hours per month spent in board work sessions)?

Community Relations/Engagement,

Human Resources/Payroll/Personnel,

Finance/Budget,

Measurable Student Achievement Outcomes (not including Community Relations/Engagement, Human Resources/Payroll/Personnel, Finance/Budget/Expenditures, any adult activities, any adult inputs, or any other items that do not directly measure student results),

Programs and procedures

Hours on other topics

Please specify topics from previous line

\* 5. Of the total number of hours permonth that School Board committee meetings, how many of those hours are spent on the following items (answers should add up to the total number of hours per month that board committees meets)?

Community Relations/Engagement,

Human Resources/Payroll/Personnel,

Finance/Budget,

Measurable Student Achievement Outcomes (not including Community Relations/Engagement, Human Resources/Payroll/Personnel, Finance/Budget/Expenditures, any adult activities, any adult inputs, or any other items that do not directly measure student results),

Programs and procedures

Hours on other topics

Please specify topics from previous line

\* 6. To what degree does your School Board engage in the following issues?

	Not at all engaged	Slightly engaged	Moderately engaged	Significantly engaged
Budgeting/funding	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Student achievement	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Charter schools	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
School choice	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Closing achievement gaps	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
School construction	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Educational technology	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Teacher quality	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Professional development	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Teacher shortages	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
No Child Left Behind	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Black male students	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
English language learners	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Hispanic students	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Special education/needs students	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Parental outreach/support	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Drug/alcohol policy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Discipline	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
School safety/climate	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Physical school conditions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Equity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

\* 7. From the list below, please indicate the areas in which your School Board has received training and those for which additional training is needed.

	Recieved	Needed
Board member roles/responsibilities	<input type="radio"/>	<input type="radio"/>
Board/Superintendent relations	<input type="radio"/>	<input type="radio"/>
Leadership skills	<input type="radio"/>	<input type="radio"/>
Legal issues	<input type="radio"/>	<input type="radio"/>
Board accountability	<input type="radio"/>	<input type="radio"/>
Communications	<input type="radio"/>	<input type="radio"/>
Student achievement	<input type="radio"/>	<input type="radio"/>
Community engagement/partnerships	<input type="radio"/>	<input type="radio"/>
Budget/resource allocation	<input type="radio"/>	<input type="radio"/>
Superintendent/district staff accountability	<input type="radio"/>	<input type="radio"/>
Policy governance/leadership models	<input type="radio"/>	<input type="radio"/>
Curriculum/educational programs	<input type="radio"/>	<input type="radio"/>
English language learners/bilingual education policy	<input type="radio"/>	<input type="radio"/>
Special Education Policy	<input type="radio"/>	<input type="radio"/>
Technology	<input type="radio"/>	<input type="radio"/>
Equity	<input type="radio"/>	<input type="radio"/>
Ethics and appropriate Board behavior	<input type="radio"/>	<input type="radio"/>
Other	<input type="radio"/>	<input type="radio"/>

Other (please specify)

\* 8. Does the district have a board policy manual (that governs board and board member behaviors) distinct from an administrative/management policy manual (that governs employee behaviors)?

- Yes
- No

If you answered yes, please email both documents to [mpalacios@cgcs.org](mailto:mpalacios@cgcs.org).

\* 9. Does your School Board have policies and procedures (i.e., a code of ethics) in place to discipline board members who violate board policy?

- Yes
- No

10. If you answered yes to the previous question, please describe the policies and procedures your School Board has in place to discipline board members who violate board policy and how they enforce it.

\* 11. What accountability measures has the School Board put in place for board members as individuals and as a body corporate?

### Urban School Board Survey (Superintendent Draft)

#### School Board Characteristics - Governing and Finances

\* 12. Has the School Board approved or adopted SMART (specific, measurable, attainable, relevant, time-bound) student achievement outcome goals for SY15/16 (not including Community Relations/Engagement, Human Resources/Payroll/Personnel, Finance/Budget/Expenditures, any adult activities, any adult inputs, or any other items that do not directly measure student results)?

- Yes
- No

### Urban School Board Survey (Superintendent Draft)

#### School Board Characteristics - Governing and Finances

\* 13. What are the School Board's top three student achievement outcome goals for SY15/16? (Not including Community Relations/Engagement, Human Resources/Payroll/Personnel, Finance/Budget/Expenditures, any adult activities, any adult inputs, or any other items that do not directly measure student results)

\* 14. How are these student achievement outcome goals reflected in the School Board's annual self-evaluation?

\* 15. How long ago, in months, did your School Board complete its most recent board self-evaluation?

\* 16. How frequently does the School Board monitor progress toward the student achievement outcome goals? [ Monthly, Bi-Monthly, Quarterly, Annually, Bi-Annually, Never ]

- Monthly
- Bi-Monthly
- Quarterly, Annually
- Bi-Annually
- Never

\* 17. How are these student achievement outcome goals reflected in the district's strategic plan?

\* 18. How are these student achievement outcome goals reflected in the School Board's annual evaluation of you as superintendent?

\* 19. Describe your annual superintendent evaluation process.

\* 20. How long ago, in months, did your School Board complete the most recent evaluation of you as superintendent?

\* 21. Does your superintendent evaluation process use a research-based rubric assessing effective district leadership?

- Yes
- No

If you answered yes, which research is your superintendent evaluation based on?

## Urban School Board Survey (Superintendent Draft)

### School Board Characteristics - Governing and Finances

22. Is approval from your city/county government required for the following? (Check all that apply)

- School district budget
- Bond issue
- School levy

23. Does your district have a tax base against which it is permitted to levy taxes?

- Yes
- No

\* 24. In your opinion, what's the shortest amount of time you should remain in your position to get the best results for students?

\* 25. What does the School Board do specifically to ensure your longevity as a superintendent?

\* 26. Does the School Board have an evergreen rollover contract with you?

- Yes
- No

\* 27. Does the School Board have a succession plan for the superintendent and staff to maintain continuity of goals and directions?

- Yes
- No

\* 28. Please indicate whether you strongly agree, agree, disagree, or strongly disagree with the following statements:

	Strongly Agree	Agree	Disagree	Strongly Disagree
Our board has developed intentional processes to hear from each representative group in our community (v. Our board gives greatest weight to the loudest voices in our community).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Our board gives direction to the superintendent only through the action of the full board or direction from the board chair (v. Our individual board members ask staff members for assistance in resolving problems).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

	Strongly Agree	Agree	Disagree	Strongly Disagree
Our board protects the superintendent and staff from the advice and instruction of individual board members (v. Our board expects staff to spend time responding to individual board questions and problems).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Our board has clearly defined a few high priority student achievement outcomes that are most important for the district (v. Our board has multiple goals and action plans or simply none at all).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Our board holds the superintendent accountable only for achieving the board approved student achievement outcomes for the district (v. Our board holds the superintendent accountable for numerous goals, activities, action plans, and constituent relations).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Our board meetings spend the majority of our time reviewing our student achievement learning outcomes (defining, clarifying, assessing progress); (v. Our board meetings are filled with numerous approvals).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Our board members consistently see their job as being to release each student's potential. (v. Our board members simply accept shortcomings in our students or in the district).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Our superintendent and principals know the board is going to support them, so they are more likely to take risks aimed at bringing about reform. (v. Our superintendent and principals are unsure of what our board members want or insecure about how they will respond to controversy, so they are reluctant to stick their necks out in an effort to bring about change).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The board has developed/co-developed non-negotiable goals for student achievement.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The board has long term (five year) student achievement goals.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Goals are developed jointly by the board, administration.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Board goals are communicated clearly to schools and community	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Board and superintendent agree formally on the political climate	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Board and superintendent agree on and align board training around district goals	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Board monitors implementation of the district instructional delivery	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Board regularly monitors progress toward student achievement goals	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Superintendent is held accountable for identifying and responding to system failure rather than board members addressing issues themselves	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Board has developed positive proactive steps designed to insure superintendent tenure of at least five years	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



\* 29. Are board member requests or questions to you as superintendent focused mostly on policies or procedures?

- Mostly on procedures, operations, and other program details
- Mostly on broad policy matters and district direction

\* 30. Is the role of the School Board chair concerning interactions with the superintendent, the full School Board, and the public distinct from other board members?

- Yes
- No

If you answered the previous question, please attach the board chair's job description to [mpalacios@cgcs.org](mailto:mpalacios@cgcs.org).

\* 31. What does the School Board do specifically to monitor and support you as the superintendent so you can effectively lead the district?

\* 32. What information should School Board members routinely consider to allow them to be most effective?

\* 33. What information does my School Board currently consider routinely that lessens their effectiveness?

\* 34. What are the three things my School Board spends the majority of its time and energy on?

#1

#2

#3

\* 35. Would your district be interested in participating in a deep evaluation of governance practices?

- Yes
- No

## Urban School Board Survey (Superintendent Draft)

Thank You!

Thank you for participating in the 2015 Urban School Board Survey. Please do not hesitate to contact

Moses Palacios at 202-393-2427 or [mpalacios@cgcs.org](mailto:mpalacios@cgcs.org) with any questions or concerns about this survey.

DRAFT

**KPI BUSINESS**

**ActPoint KPI June 26, 2015 Update**

This update report highlights new accomplishments and challenges for the ActPoint KPI project. The purpose of this report is to describe these accomplishments and challenges for our business partner, the Council of the Great City Schools, and to work on ways to maximize the business opportunity.

**2015 Financial Results**

Summary through May 30, 2015:

		2015	2014
Total subscriptions of ActPoint KPI licenses (\$)	May YTD	\$166,325	\$188,399
TransACT net income for ActPoint revenue (\$)	May YTD	<span style="color: red;">\$(27.4k)</span>	<span style="color: red;">\$(71.4k)</span>
Total royalties of ActPoint KPI for CGCS (\$)	May YTD	\$22,300	\$24,030
Total retention of existing accounts (%)	May YTD	64%	67%

**Analysis:**

May 2015 year-to-date subscriptions have declined slightly, mostly due to weak retention results (64%). Fortunately, most of the losses were offset by new sales. The majority of cancellations are for 10 districts that failed to enter any survey data, representing \$68,299 YTD in total lost sales, or \$8,560 in YTD royalty losses.

Results are substantially lower than originally anticipated when the contract began. We did not expect that data entry would be such a severe obstacle for the districts to complete. In spite of the retention issues, we have a positive outlook on the latter half of 2015 due to the launch of the California Data Import Project in early July.

We continue to be faced with the same challenges affecting retention and new sales:

1. Poor survey completion rates, leading to poor retention (see chart #4)
2. Limited number of peer districts to compare to, limiting value for subscribers
3. District personnel are slow to buy-in and implement once the Chief has made the purchase.

TransACT continues to try new methods to achieve sales and retention goals, including:

1. Develop the California Data Import Project, announced this week and schedule to launch July 7, 2015. Raw data for 43 standard KPIs has been imported for more than 1,000 CA districts. This project required calculations based on millions of raw data points.
2. New onboarding process that incorporates a webinar series for all personnel responsible for survey completion and implementation, fostering buy-in and commitment to ActPoint KPI.
3. Review and simplify standard survey questions that will target smaller, non-council districts. This is estimated to reduce survey questions by 50%. Work in progress; not implemented.

**Positives:**

Despite a slow start, 2015 is looking to be a positive year in new ActPoint KPI subscriptions, as reflective in the graph below. The California Data Import project looks to be the most promising revenue stream for the balance of 2015.

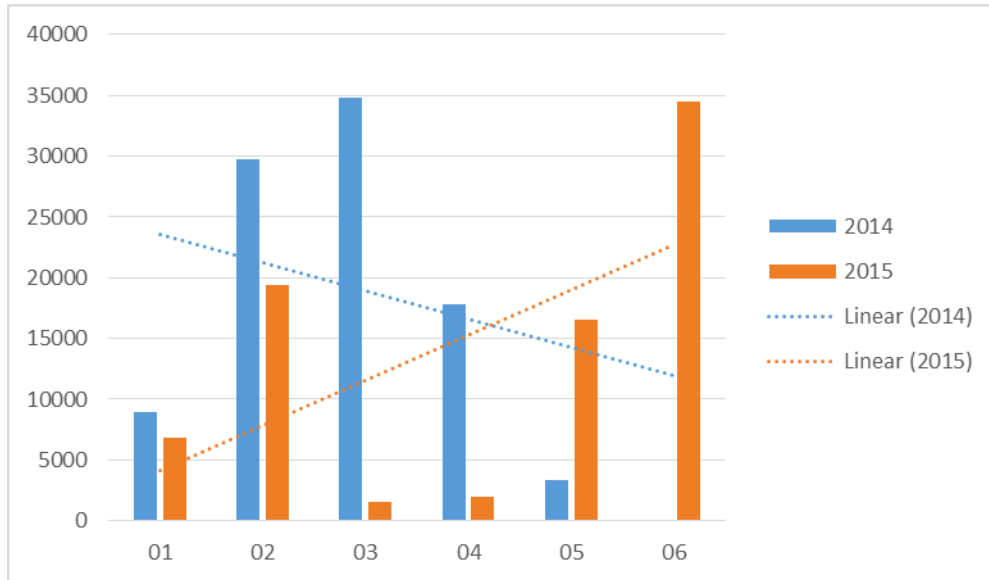


Table #1 Year over year subscriptions

Top 3 positives:

1. California Data Import project ready for launch July 7. No data entry required for 43 KPIs.
2. Onboarding process changed to better encourage staff to complete surveys
3. Data import added >1,000 districts for better comparative benchmarking.

TransACT continues to service the Council of the Great City Schools districts with a standard subscription to ActPoint KPI without cost.

**Negatives:**

While we feel the worst is behind us, the impact of 2015 cancellations cannot be ignored. To-date 10 accounts (\$68,299 in subscription value) have confirmed cancellation in 2015, compared to 7 accounts (\$34,520 in subscription value) over the same time period in 2014. The distribution of these cancellations by product is represented below. All 10 cancellations did not input survey data for the 2013-14 school year (they don't do the work, they cancel).

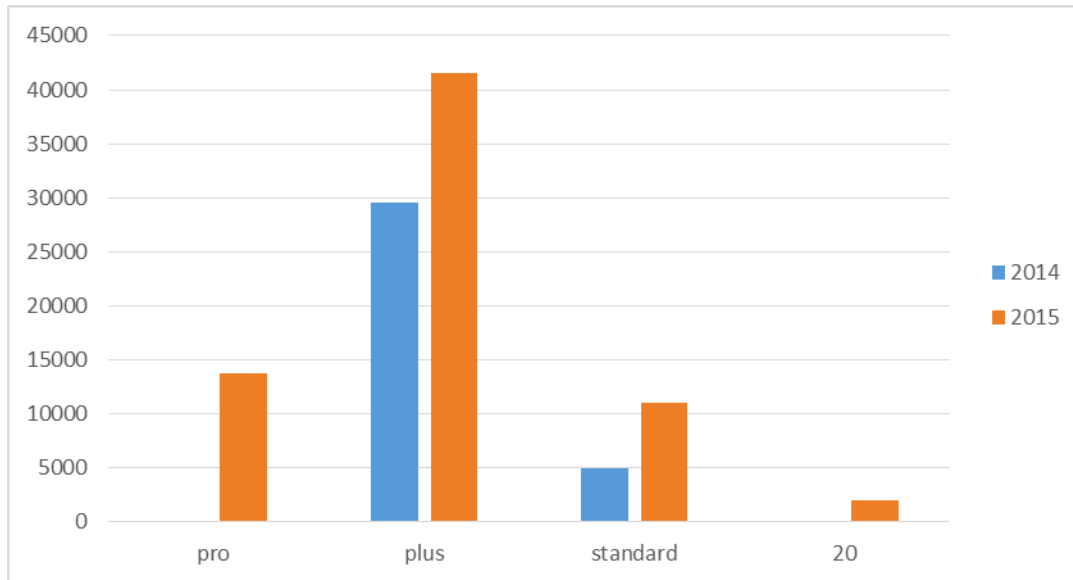


Table #2

**Top 3 negatives:**

1. Poor subscription retention rate of 64% YTD.
2. Retention rate heavily influenced by districts that failed to input any data into the surveys.
3. Slow start for CoSN in spite of heaving marketing, webinars and general marketing

**New subscribers since 1/1/2015:**

<b>Account</b>	<b>Product</b>	<b>Value (\$)</b>	<b>Royalty (\$)</b>
Vancouver Board of Education	Finance	\$6,875	\$1,250
Temecula Valley Unified School District	KPI 20	\$3,500	\$510
District 25 Bedford	KPI Std	\$3,550	\$300
Kerman Unified	KPI Std	\$3,550	\$300
East Side Union High School District	KPI Custom	\$8,750	\$1,020
Corning Elementary School District	KPI 20	\$1,500	\$150
Shasta Union High School District	KPI 20	\$2,000	\$300
Fulton County Board of Education	Operations	\$8,250	\$1,500
Dekalb County School District (GA)	Operations	\$8,250	\$1,500
Cartwright School District	KPI Std	\$4,900	\$450
Howard County Public School System	KPI Pro	\$13,750	\$2,500
Wicomico County School District	KPI Plus	\$7,900	\$900
Jurupa Unified School District	KPI Plus	\$7,900	\$900

Chart #3 New subscribers in 2015

**Cancelled subscribers since 1/1/2015:**

<b>Account</b>	<b>Product</b>	<b>Value (\$)</b>	<b>Royalty (\$)</b>	<b>Survey Completion (%)</b>	
				<b>12-13</b>	<b>13-14</b>
San Marino Unified School District	KPI Std	\$3,550	\$300	0	0
Ceres Unified School District	KPI Std	\$4,900	\$450	0	0
Val Verde Unified School District	KPI Plus	\$7,399	\$900	100	0
Anaheim City School District	KPI Plus	\$8,750	\$1,020	0	0
Beaverton School District 48	KPI Pro	\$13,750	\$2,500	100	0
Coachella Valley Unified SD	KPI Plus	\$7,900	\$900	0	0
Big Spring School District	KPI 20	\$2,000	\$300	0	0
Desert Sands Unified School District	KPI Plus	\$8,750	\$1,020	0	0
Pascack Valley Regional HS District	KPI Std	\$2,550	\$150	0	0
Riverside Unified School District	KPI Plus	\$8,750	\$1,020	0	0

Chart #4 Cancelled subscribers in 2015

**Sales Report (2015 results)**

**CoSN**

We anticipate this relationship with CoSN will produce new IT customers, which can then be upgraded to one of the standard KPI packages including Finance, Operations, HR and IT.

2015 YTD results are below:

2015 Pipeline accounts: **76, valued at \$162,300**

2015 Sales with purchase order: **\$0**

2015 Royalties generated to date: **\$0**

Here is the marketing web page: <http://www.actpoint.com/cosn/>

**California Data Import Project**

Newly developed KPI service in California has the ability to import state data for 43 standard KPIs. With the help of CGCS and School Services of California, TransACT was able to locate the data points in the SACS (and other) databases, and do a manual import of the data into the ActPoint KPI system. Launch date is July 7.

2015 YTD results are below.

2015 Pipeline accounts: **22, valued at \$75,500**

2015 Sales with purchase order: **\$5,500**

2015 Royalties generated to date: **\$810**

Here is the marketing web page: <http://www.actpoint.com/ca/>

**Other Sales Report (2015 results)**

2015 Pipeline accounts: **36, valued at \$253,646**

2015 Sales with purchase order: **\$84,775**

2015 Royalties generated to date: **\$10,770**

**2015 Highlights**

New KPI Data Import product – new charts and functionality

New website at [www.actpoint.com](http://www.actpoint.com)

New collection of promotional videos at <http://www.actpoint.com/video-home/>

New LiveHelp service (“chat with us”) available on all web pages

2013-2014 surveys approved for release by CGCS (Feb 2015)

**Issues to discuss (MC and RP)**

- Contract modification on royalty minimums – Delete reference to minimum royalties through end of contract period. Need some adjustment to bring contract into alignment with reality.
- Use CFO/COO/CIO/HRD meetings to invite existing customers and prospective customers to build KPI community with a connection to CGCS. Would work for districts > 25,000 enrollment.
- Sunset EduPortal for CGCS July 31. Jon has already downloaded all data. Need approval from MC.



**ANCHORAGE FACILITIES REPORT**



## **Review of the Facilities Operations of the Anchorage School District**

December 2014

The Anchorage School District (ASD) Board of Education requested that the Council of the Great City Schools (CGCS) provide a high-level management review of the district's facilities operations.<sup>1</sup> Specifically, the board requested that the Council—

- Review and evaluate the leadership and management, organization, and operations of the district's facilities operations, including the Facilities Department and the Maintenance & Operations Departments.
- Develop recommendations that would help the facilities operations achieve greater operational efficiencies and effectiveness.

In response to this request, the Council assembled a Strategic Support Team (the team) of senior managers with extensive experience in facilities operations from other major urban school systems across the country. The team was composed of the following individuals. (Attachment A provides brief resumes for each of the team members.)

Robert Carlson, Project Director  
Director, Management Services  
Council of the Great City Schools

David Koch, Principal Investigator  
Chief Administrative Officer (Retired)  
Los Angeles Unified School District

John Dufay  
Executive Director, Maintenance & Operations  
Albuquerque Public Schools

Joe Edgens  
Executive Director, Facility Services (Retired)  
Metropolitan Nashville Public Schools

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<sup>1</sup> The Council has conducted over 250 instructional, management, and operational reviews in over 50 big-city school districts over the last several years. The reports generated by these reviews are often critical, but they also have been the foundation for improving the operations, organization, instruction, and management of many urban school systems nationally. In other cases, the reports are complimentary and form the basis for identifying “best practices” for other urban school systems to replicate. (Attachment E lists the reviews that the Council has conducted.)

Karin Temple  
Associate Superintendent, Operations and Facilities  
Fresno Unified School District

Jaime Torrens  
Chief Facilities Officer  
Miami-Dade Public Schools

Steve Young  
Chief, Facilities Management (Retired)  
Indianapolis Public Schools

The team conducted its fieldwork for the project during a four-day site visit to Anchorage on December 2-5, 2014. The general schedule for the site visit is described below. (The Working Agenda for the site visit is presented in Appendix B.)

The team met with two members of the school board on the evening of the first day of the site visit to discuss expectations and objectives for the review and to make final adjustments to the work schedule. The team used the second and third days to conduct interviews with staff members and other individuals (a list of individuals interviewed is presented in Attachment C), and to review documents, reports, and data provided by the district (a list of documents reviewed by the team is presented in Appendix D).<sup>2</sup> The final day of the site visit was devoted to synthesizing and refining the team's findings and recommendations.

The Council sent a draft of this document to team members for their review to ensure the accuracy of the report and to obtain their concurrence with the final observations and recommendations. This management letter contains proposals that have been designed by the team to help improve the efficiency and effectiveness of the district's facilities functions.

## **The Anchorage School District Facilities Operations**

The Anchorage School District (ASD) district is the largest public school system in Alaska and the 93<sup>rd</sup> largest system in the United States. The district operates more than 100 schools with approximately 48,000 students and nearly 5,000 staff members.

ASD is a dependent school system, as it is a component unit of the municipality of Anchorage. The district is governed by a seven member Board of Education, which is elected at-large from the community. The ASD Superintendent is hired by and acts under the direction of the board and is responsible for running the day-to-day district activities.

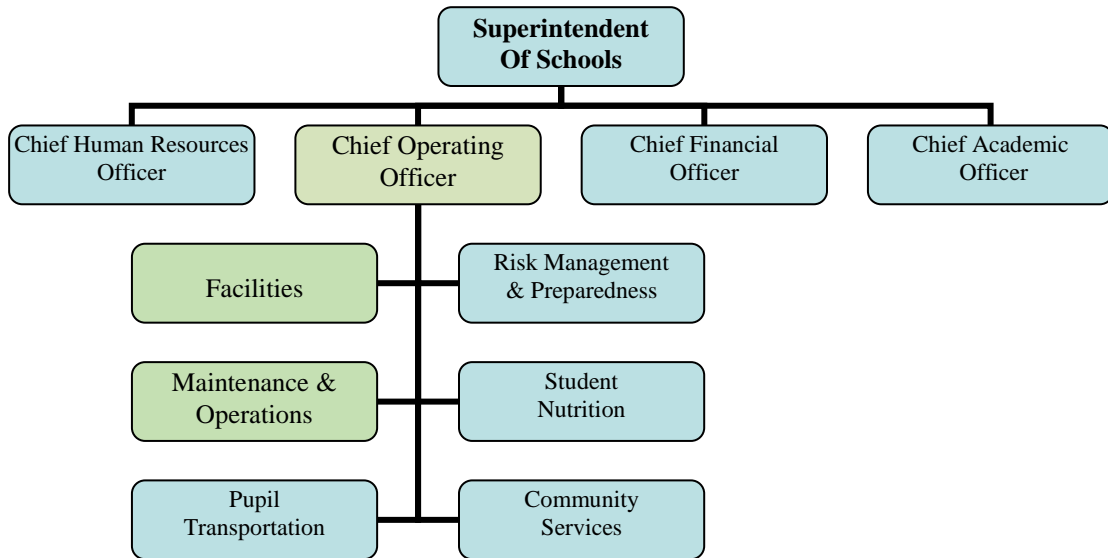
Exhibit 1 below displays the overall District organization and the direct reports to the Superintendent which include the Chief Operations Officer (COO), the Chief Financial Officer

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<sup>2</sup> The Council's peer reviews are based on interviews with school district staff and others, a review of documents provided by the district, the development or review of comparability data, and the teams' professional judgments. In conducting interviews the teams must rely on the willingness of those being interviewed to be factual and forthcoming, but cannot always judge the accuracy of their statements.

(CFO), Chief Human Resources Officer (CHRO), and the Chief Academic Officer (CAO). The COO's direct reports include Facilities, Maintenance & Operations, Pupil Transportation, Risk Management & Preparedness, Student Nutrition, and Community Services Departments.

**Exhibit 1. ASD Organization Chart – May 2014**



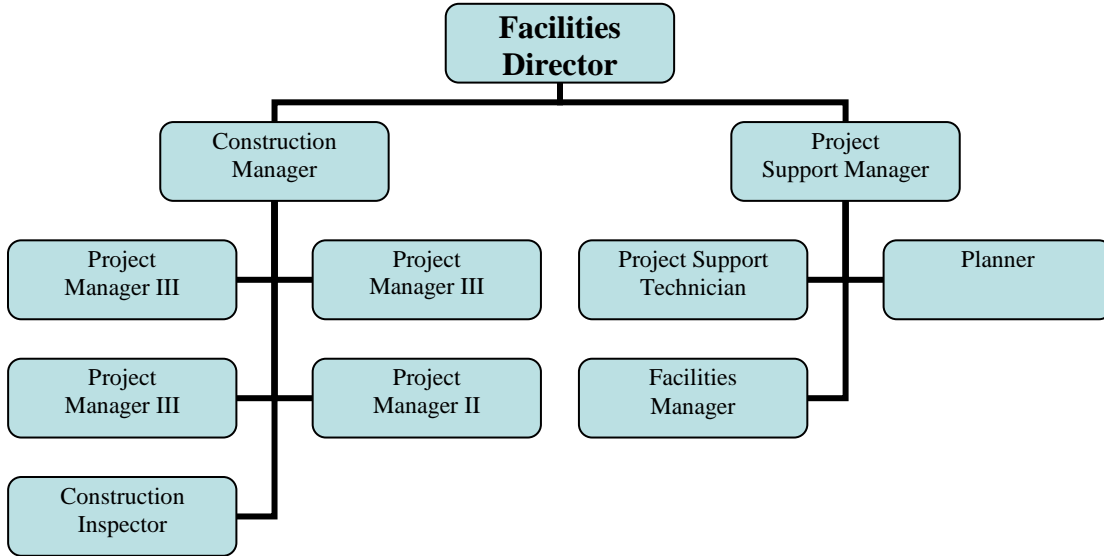
Source: Prepared by CGCS based on information provided by the ASD

The Facilities Department is headed by the Facilities Director (See Exhibit 2 below) with two direct reports--the Construction Manager and the Project Support Manager. The Facilities Director position has been vacant for approximately three years and, as a result, the day-to-day management and supervision of the department has been assumed by the COO.

The Construction Manager has a staff of approximately 17 (including five direct reports) regular Project Managers, Construction Inspectors, and Engineering Assistants who oversee the district's various new construction, renovation, and major deferred maintenance projects. (The Construction Manager's organization also includes five temporary positions not shown in the chart below.)

The Project Support Manager, who has a regular staff of five (including three direct reports), provides planning, design, budgetary, and reporting support to the Project Managers in Construction Branch of the Facilities Department. (The Project Support Manager's organization also includes four temporary positions not shown in the chart below.)

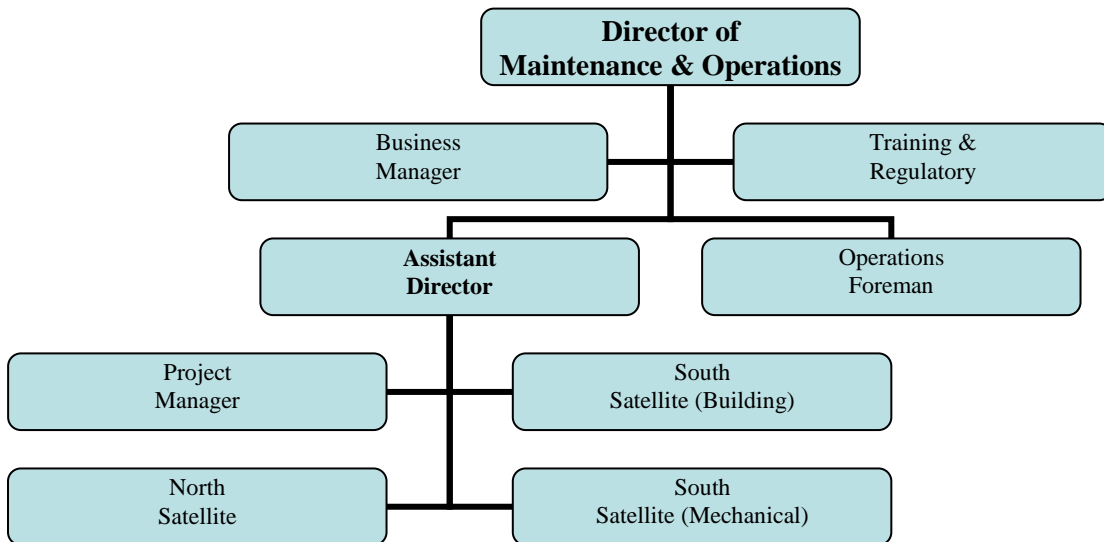
**Exhibit 2. Facilities Department Organization Chart**



Source: Prepared by CGCS based on information provided by the ASD

The Maintenance & Operations Department has almost 200 employees and is headed by the Director (See Exhibit 3 below). The Director of Maintenance & Operations has four direct reports, including the Assistant Director, a Business Manager, the Training and Regulatory Manager, and the Foreman of Operations. Under the Assistant Director are the Supervisors of the North Satellite, the South Satellite – Building, and the South Satellite - Mechanical. The Assistant Director also has a Project Manager reporting to him. Each of the Satellite Supervisors has a cadre of skilled crafts, including carpentry, electrical, glass, HVAC, plumbing, lock & key, welding, painting, roofing, fire/security alarms, and general maintenance.

**Exhibit 3. Maintenance & Operations Department Organization Chart**



Source: Prepared by CGCS based on information provided by the ASD

The FY 2015 General Fund operating budget amounts to approximately \$567.6 million. In addition, \$12.3 million is budgeted in a separate Capital Projects fund. About \$38.0 million of the General Fund is allocated to the Maintenance & Operations Department including approximately \$20.0 million for maintenance personnel, supplies and equipment, and \$18.0 million to provide custodial services. The costs of the Facilities Department are allocated to projects on a time and materials basis estimated as a percentage of the overall project cost.

## **Findings and Observations**

The Council's Strategic Support Team findings and observations are organized into four general areas: Commendations, Leadership and Management, Organization, and Operations. These finding and observations are followed by a series of corresponding recommendations.

### **Commendations**

- The district has a Strategic plan that includes a goal that all departments will rank in the top quartile for operational efficiency.
- The staff members of the Facilities and the Maintenance & Operations (M&O) Departments were found to be competent, hard-working, and dedicated to their assigned tasks and responsibilities.
- The district has a Facility Condition Index that reports the physical status of each of the district's sites.
- The district has a rolling Six-Year Facilities Plan.
- The district has comprehensive educational specification documents for elementary, middle, and high schools that describe design requirements for both new schools and renewal projects.
- School principals generally expressed satisfaction with service levels and response times of the M&O Department and the Facilities Department.
- The M&O Department has established a robust Preventive Maintenance program.
- The Planning Unit of the Facilities Department demonstrated in-depth institutional knowledge and perspective.
- The M&O Department appeared to have vigorous training programs, including safety, certifications, and compliance.
- The Facilities and Purchasing Departments appear to have achieved a well-integrated working relationship.
- The leadership of the M&O Department appears to be capable and well-equipped to improve the efficiency and effectiveness of the district's maintenance and custodial services.

## Leadership and Management

- The district’s capital program is primarily driven by an annual bond-levy process that, because of its limited one year cycle, does not readily support larger, multi-year projects.
- The Facilities Department has endured an extended period (three years) without dedicated leadership because of the vacancy in its Director position. As a result –
  - The department does not have an executive with facilities expertise to champion capital projects and maintenance issues.
  - Organizational stovepipes have developed that hinder communications and impede effectiveness.
  - Management bottlenecks have developed that impact timely decision-making and organizational responsiveness.
- The school board has recently embarked on a unique project management model for capital projects in the West High School/Romig Middle School complex that consists of an *ad hoc* steering committee (composed of three board members and several community representatives) that blurs lines of governance, administration, and management—and may create risks for the district in terms of performance and fiscal accountability. Specifically –
  - The team was unable to determine whether this steering committee has a board-approved charter that would define its membership, duties, responsibilities, accountability, budget, timelines, and scope.
  - The steering committee has engaged (under a district contract) a project management firm for a 9½ month period (11/14/14 thru 8/1/15) for \$221,295 to perform certain project-management (P/M) tasks with which the team has the following concerns –
    - The services of the contracted project manager apparently exclude a standard P/M task of cost estimation. (The team was advised that the cost-estimating task would be performed by the project architect, contrary to industry best practices, and as a result could create a conflict of interest).
    - The P/M tasks performed by the contractor are not likely to relieve the internal staff’s workload and may result in duplicative work and additional cost.
  - The projects envisioned for the West High/Romig Middle School complex, if funded, are likely to require the total resources of the annual bond levy for several years, at the expense of all other district projects.
- The team noted several significant gaps in strategic thinking and forward planning in the facilities and capital program areas. For example –
  - The team saw no evidence of strategic business plans for the Facilities and M&O Departments.

## Review of the Facilities Operations of the Anchorage School District

- It was unclear whether capital projects were driven by the scope of work or by funding.
- There appears to be little connection between the Six Year Facilities Plan and the legislative facilities requests (as listed on the district’s web-site).
- Capital-grant requests to the State are not prioritized by the district and are not consistently monitored or managed centrally.
- There is no formal process that identifies, prioritizes, and funds deferred maintenance projects.
- The Facilities Department’s Project Managers and M&O’s Supervisors do not have a formal process for coordinating project planning and design review.
- The Facilities and the M&O Departments use a variety of indices, including the Facility Condition Index (FCI), the Educational Adequacy Index (EAI), and the Maintenance Work Order System (Maximo). However, the district does not routinely use other important metrics. For example—
  - Analytical tools and techniques (such as return on investment, cost benefits, total cost of ownership, life cycle costing, risk analysis, repair vs. replace analysis, and business case justification) are not always used to drive decision-making.
  - The team saw little evidence that management has developed systems that use data related to the backlog of maintenance work orders or employee workloads to develop staffing allocations among the skilled crafts.
  - The team saw little indication that standards have been established to measure cleanliness, functionality, or response time.
  - There are no service-level agreements or Memoranda of Understanding (MOUs) for specific projects between principals and the facilities departments’ managers.
  - Employee productivity is not measured (e.g., there is no attempt to distinguish productive work time from time spent traveling to/from job sites).
- The ‘soft’ costs of designing and engineering ASD capital projects approximate 30 percent of total project cost (with 70 percent going to actual construction), which appears to be high based on the team’s experience. Specifically, architectural costs for ASD projects appear to be almost double industry standards. For example, based on the 2014 CGCS KPI reporting project<sup>3, 4</sup>—

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<sup>3</sup> *Managing for Results in America’s Great City Schools, A Report of the Performance Measurement and Benchmarking Project, Results from Fiscal Year 2012-13, Council of the Great City Schools, October, 2014.*

<sup>4</sup> ASD soft costs apparently include costs for art, FF&E, and other project elements that are not included in the Council’s KPI on “Major Maintenance-Design to Construction Cost Ratio” and the Renovations-Design to Construction Cost Ratio.” ASD could back out these costs for a more comparable measure, something the team could not do with the data it had.



## Review of the Facilities Operations of the Anchorage School District

- The district reported its Design-to-Construction Cost Ratio at 22.6 percent for major maintenance projects, compared to a median of 7.1 percent among CGCS districts.
- The district reported its Design-to-Construction Cost Ratio at 25.0 percent for renovation projects, compared to a median of 12.6 percent among CGCS districts.
- The district did not report its Design-to-Construction Cost Ratio for new construction projects; however, staff estimated it to be between 15 and 20 percent, compared to a median of 8.2 percent among CGCS districts.
- Internal and external communications issues were identified both within and between the Facilities and the M&O Departments. For example –
  - The district does not appear to actively promote its achievements and improvements in the facilities area.
  - It was reported to the team that the status of capital projects (including the scope, schedules, and budgets) are not clearly communicated to the school board, schools, or the community.
  - There appears to be no formal process for reporting budgeted vs. actual expenditures, along with relevant explanations, for bond or legislative grant projects.
  - Principals do not receive regular status reports on open M&O work orders.
  - There is no customer sign-off on completed work orders or capital projects.
  - Neither the Facilities nor the M&O Department uses customer surveys to gauge perceptions of their performance.
  - The M&O Department does not maintain a presence on the district's web-site that includes FAQs and other useful information.
  - There has been insufficient coordination between Facilities and M&O during the planning, development, and execution of construction projects.
  - Principals indicated they often do not know whether to call Facilities or M&O with questions, concerns, and problems.
- The Facilities Department lacks formal training programs for the development of management skills or the improvement of technical competences among its employees.
- It was reported to the team that staff morale was low in both the Facilities and the M&O Departments. This situation could be attributed to --

## Review of the Facilities Operations of the Anchorage School District

- Salary levels and pay scales that are not competitive with other arms of the municipality or the private sector<sup>5</sup>
- Budget uncertainties that create job insecurity
- A general sense of not being appreciated or respected.

### Organization

- There is no School Board-level Facilities Committee or other School Board sub-committee with a dedicated focus on facilities construction, renewal, and maintenance issues.
- The district has no Chief Facilities Officer or other single position that focuses exclusively on the full range of facilities issues.
- The roles of Project Managers and Construction Inspectors are not clearly differentiated and tend to overlap in practice.
- The assignment of multiple Project Managers to the various capital projects at an individual school creates confusion, weak coordination, and unneeded disruption.
- The team heard concerns related to the lack of quality controls on work due to vacancies and increased workloads.
- The overall staffing of custodial personnel appears to be reasonable based on a comparison with peer districts. For example, ASD reported an average of one custodian for every 26,593 square feet, compared to the mean square footage per custodian among CGCS districts of 25,501.<sup>6</sup>

### Operations

- The team did not always see standard procedures in either the Facilities Department or the M&O Department to support School Board Policies. For example --
  - The team did not see guidelines regarding the appropriate use of alternative contracting methods, such as Design/Build and Construction Management at Risk.
  - The District does not use Master Specifications and for its capital projects.
- District contracts do not appear to hold architects and engineers accountable for design errors, and construction contractors do not appear to be assessed liquidated damages for delays.
- The thresholds for approval of construction change-orders appear to be higher than typical. For example --

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<sup>5</sup> The Council team did not conduct an independent salary survey.

<sup>6</sup> *Managing for Results in America's Great City Schools, A Report of the Performance Measurement and Benchmarking Project, Results from Fiscal Year 2012-13, Council of the Great City Schools, October, 2014.*

## Review of the Facilities Operations of the Anchorage School District

- Change orders for up to \$100,000 can be approved by the Facilities Director.
- Change orders for up to \$250,000 can be approved the Superintendent.
- The district's work-order system is outdated, inadequate, and underutilized. For example –
  - The system does not provide for adequate description of the work being requested.
  - School administrators are unable to track the status of open work orders.
  - Customers are unable to prioritize outstanding work requests.
  - Actual costs are not automatically or routinely compared to cost estimates.
  - The system does not produce productivity reports or cost summaries by craft or school location.
- The district does not have a fully digitized set of as-built drawings for each of its facilities.
- Formal evaluations of work done previously by architects, engineers, and contractors are not used in the assessments of their responses to RFPs and bids.
- The team heard concerns about the ability of the Facilities Department to accurately estimate the cost of capital projects. For example --
  - Project Managers indicated they include a 10 percent to 15 percent contingency allowance in estimates for unforeseen conditions.
  - A limited review of six bid documents by the team found that district estimates were approximately 35 percent higher than the related bids.
  - Principals indicated that Facilities Department estimates for legislative grant projects often understate the eventual cost.
- The team was advised that tasks associated with commissioning are not included in the concept-to-completion continuum.
- The team noted a number of processes and procedures that inhibited the efficiency of maintenance workers. For example --
  - The Department does not make use of Open Purchase Orders or Requirements Contracts to reduce workers' travel time in obtaining supplies and parts.
  - The Department does not utilize multi-craft mobile maintenance methods to address the backlog of lower priority work orders.
  - Maintenance personnel do make effective use of P-Cards.

- Maintenance staff report to central or satellite locations at the beginning and end of each work day, rather than going directly to/from the locations of their assigned work.
- Facilities-related KPIs indicate the district generally exceeds the median of other CGCS districts, which may reasonably be due to its geographic and environmental uniqueness. (See Exhibit 4 below, which displays selected KPIs from the CGCS annual report: *Managing for Results in America’s Great City Schools*<sup>7</sup> for 2014.)

**Exhibit 4. Comparison of Selected CGCS KPIs**

<b>KPI</b>	<b>Anchorage</b>	<b>CGCS Median</b>	<b>CGCS 1<sup>st</sup> Quartile</b>
M&O Cost per Student	\$1,193	\$1,080	\$770
M&O Cost Ratio to District Budget	9.5%	9.3%	6.7%
Work Order Completion Time <sup>8</sup>	23	9	4
Routine Maintenance cost per square foot	\$1.47	\$1.06	\$0.85

**Recommendations<sup>9</sup>**

1. Establish a Board Facilities Committee with a dedicated focus on facilities funding, construction, renewal, and maintenance issues.
2. Merge all facilities related departments, offices, and programs into a new Facilities Department. including --
  - a. The current Facilities Department (capital program functions)
  - b. The Maintenance & Operations Department (including skilled crafts and custodial operations)

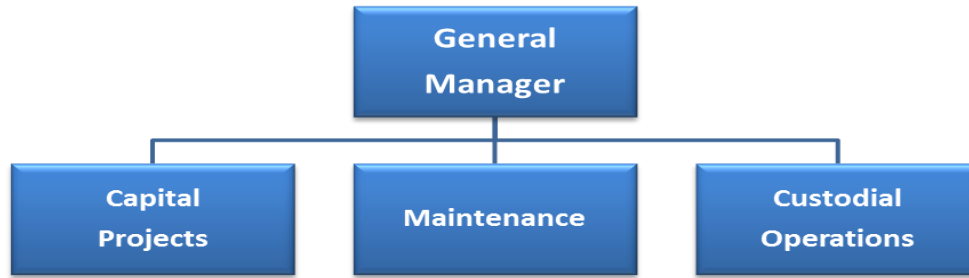
The new Facilities Department should to be headed by a General Manager of Facilities or a Chief Facilities Officer. The following organization chart (Exhibit 5) displays a high level sample of a functional organization recommended by the team.

<sup>7</sup> *Managing for Results in America’s Great City Schools, A Report of the Performance Measurement and Benchmarking Project, Results from Fiscal Year 2012-13, Council of the Great City Schools, October, 2014.*

<sup>8</sup> The Council’s KPI on “Work Order Completion Time” is the average time (in days) it takes to complete a work order. The district’s higher than average completion time may be due to its including preventive maintenance work.

<sup>9</sup> The Council is in the process of gathering additional information to help guide the district in the implementation of these recommendations.

**Exhibit 5. Sample New Facilities Organization Overview**



Prepared by CGCS

3. Fill all critical facilities personnel vacancies on a timely basis.
4. Clarify the roles and responsibilities of staff positions and determine that the right people with the appropriate skill sets are in the proper positions in the new facilities organization.
5. Review funding stream options for the capital program to assess the viability of a more stable, longer-term financing mechanism that would accommodate larger, multi-year projects.
6. Clearly define the scope and responsibilities of any capital project steering committees so that lines of governing authority, management performance, conflict of interest guidelines, and fiscal accountability are precisely delineated.
7. Develop a comprehensive strategic business plan for the new Facilities Department, including –
  - a. A departmental vision
  - b. Achievable goals and objectives linked to the district’s strategic plan
  - c. Implementation timelines
  - d. Identified responsibilities and accountabilities
  - e. Defined performance measures, including Key Performance Indicators (KPIs) and industry standards, for each of the organization’s units.
8. Create a data-driven organization by adopting a decision-making model that relies upon fact-based and analysis-centric business-case justifications, including the use of tools and techniques such as –
  - a. Full life-cycle costing
  - b. Return on investment and cost-benefit analysis
  - c. Repair vs. replace (using service-record data in the maintenance work-order system) and buy vs. build analysis.

- d. Sustainability analysis
9. Create an ongoing program to review, evaluate, update, document, and disseminate service-level standards and employee productivity measures.
10. Centralize, coordinate, and prioritize all capital funding requests to ensure that limited resources are dedicated to the most critical projects.
11. Create a deferred-maintenance backlog report for use in prioritizing projects.
12. Establish formal processes for project managers and M&O supervisors to coordinate activities, project planning, and design reviews.
13. Devise strategies to address the high ratio of architectural and engineering “soft” costs, including standardized designs and expanded provider competition.
14. Expand internal and external communications efforts, including-
  - a. publicizing and disseminating facilities improvements and achievements
  - b. Enhancing status reports on capital projects
  - c. Providing explanations of variances between budget and actual project expenditures
  - d. Providing status reports on open work orders
  - e. Obtaining customer sign-off on completed projects and work orders
  - f. Utilizing surveys to gauge customer satisfaction
  - g. Establishing web presence for the maintenance and custodial operating units.
15. Establish formal training and professional development programs to enhance management skills and technical competences of facilities employees.
16. Compare the competitiveness of facilities salary levels and pay scales with other arms of the municipality and other employers.
17. Develop standard operating procedures and manuals for the new facilities organization.
18. Enhance contract language to hold contractors accountable for errors and delays.
19. Review the appropriateness of change-order approval thresholds.
20. Enhance or replace the current work order system so that –
  - a. The cost and status of jobs can be easily tracked
  - b. Customers can prioritize requests

Review of the Facilities Operations of the Anchorage School District

- c. Cost data are linked to actual payroll information and vendor invoices
  - d. Resources utilization by location, craft, and project types can be readily evaluated.
21. Establish an archival function for building plans and ‘as built’ drawings utilizing digital technology.
  22. Establish standards and processes for the evaluation of contractors’ performance.
  23. Enhance estimation techniques to ensure the accuracy of project-cost projections.
  24. Include commissioning tasks in the concept-to-completion continuum.
  25. Better utilize modern procurement tools, including P-cards, master contracts, open purchase orders, term bids, and Job Order Contracting, to expedite repairs and improve productivity.
  26. Consider the advantages of mobile maintenance strategies to address the back-log of maintenance work orders.
  27. Review the time-saving advantages of having workers report directly to job-sites rather than to maintenance yards.
  28. Improve the coordination of site work by assigning projects to Project Managers based on location.

## ATTACHMENT A. STRATEGIC SUPPORT TEAM

### **Robert Carlson**

**Robert Carlson** is Director of Management Services for the Council of the Great City Schools. In that capacity, he provides Strategic Support Teams and manages operational reviews for superintendents and senior managers; convenes annual meetings of Chief Financial Officers, Chief Operating Officers, Transportation Directors, and Chief Information Officers and Technology Directors; fields hundreds of requests for management information; and has developed and maintains a Web-based management library. Prior to joining the Council, Dr. Carlson was an executive assistant in the Office of the Superintendent of the District of Columbia Public Schools. He holds doctoral and masters degrees in administration from The Catholic University of America; a B.A. degree in political science from Ohio Wesleyan University; and has done advanced graduate work in political science at Syracuse University and the State Universities of New York.

### **David W. Koch**

**David Koch** is the former Chief Administrative Officer for the Los Angeles Unified School District (LAUSD). The LAUSD is the nation's second largest public school system, with more than 700,000 students in grades K-12, an annual budget of more than \$9 billion, and more than 80,000 full- and part-time employees. Mr. Koch's responsibilities encompassed virtually all non-instructional operations of the district, including finance, facilities, information technology, and all of the business functions. Mr. Koch also served the LAUSD as business manager, executive director of information services, and deputy controller. Mr. Koch was also business manager for the Kansas City, Missouri Public School District and was with Arthur Young and Company prior to entering public service. He is a graduate of the University of Missouri and a Certified Public Accountant in the states of California, Missouri, and Kansas. Currently a resident of Long Beach, California, Mr. Koch provides consulting services to public sector clients and companies doing business with public sector agencies.

### **John Dufay**

**John Dufay** is the Executive Director, Maintenance & Operations for the Albuquerque Public Schools.

### **Joe Edgens**

**Joe A. Edgens** is the retired Executive Director of Facilities Services for the Metropolitan Nashville Public Schools. Mr. Edgens was born in Nashville and graduated from the Nashville Public Schools. He graduated from the University of Tennessee in Knoxville with a Bachelor of Architecture degree as a member of the first graduating class from the School of Architecture at the University of Tennessee. Mr. Edgens has been licensed to practice architecture since 1974. He spent fourteen years in private architectural practice, the last three of which he had his own practice. In 1983 Mr. Edgens sold out of his private practice. He then worked for a contractor/developer for six years as Director of Planning and Construction. Mr. Edgens



accepted the position of Director of Planning and Construction with the Metro Board of Public Education in March of 1989. In 1995 Joe was appointed to the position of Executive Director of Facility Services. The Departments under his supervision are Planning and Construction, Maintenance, Operations (custodians and grounds), Facility Use, and ADA Compliance. These Departments have over 900 employees and operating budgets exceeding \$43,000,000. Capital facility projects completed during his tenure with the Nashville School District exceed one billion dollars.

### **Karin Temple**

**Karin Temple** is the Associate Superintendent, Operations and Facilities for the Fresno Unified School District. Fresno Unified is the fourth largest school district in California with enrollment of approximately 73,000 students. In addition to facilities management and planning and maintenance and operations, Ms. Temple is responsible for food services, purchasing/warehouse, safety/security, and student transportation. She manages 1300 employees and \$175 million in operating budgets, and is overseeing implementation of a \$280 million bond program. Ms. Temple has served Fresno Unified since 2006. Prior to joining the District, she worked as a management consultant for a national firm providing performance improvement and interim management services to public agencies. She started her public service career in local government finance and budget administration positions. Ms. Temple received a Master of Public Affairs degree from Indiana University, Bloomington, and a Bachelor of Arts degree in Political Science from Duke University.

### **Jaime Torrens**

**Jaime Torrens** is the Chief Facilities Officer for the Miami-Dade County Public Schools (M-DCPS). Mr. Torrens is responsible for facilities planning, construction, maintenance, operations and inspections at the fourth largest school system in the nation serving over 340,000 students. As a member of the Superintendent's Cabinet, he manages a staff of nearly 1,500 professional, technical and trades personnel responsible for all aspects of 4,000 buildings comprising 45 million square feet on over 400 school campuses and ancillary facilities. Mr. Torrens has served M-DCPS since 1985. He is charged with leading the district's multi-billion dollar five-year capital program which, since 2006-07, has opened over 70,000 new student stations, including 35 new schools and 47 additions and K-8 conversions. Mr. Torrens holds a Master of Science in Management and a Bachelor of Science in Electrical Engineering from Florida International University and he is a LEED Accredited Professional.

### **Steve Young**

**Steve Young** retired as the Chief, Facilities Management with Indianapolis Public Schools (IPS) in 2012. IPS is the largest school district in Indiana with a student enrollment of over 32,000. The Facilities Management Division is comprised of over 200 craft and administrative employees responsible for the maintenance and repair of 98 district buildings. IPS recently completed a 10-year, \$648 million Capital Improvements Program (CIP). The CIP included the construction of 7 new elementary schools and the renovation of an additional 49 schools in the district. Prior to coming to IPS in 1998, Mr. Young was the Manager of Facilities at Fort Sam Houston, the U.S. Army Medical Command Headquarters and Training Center in San Antonio,

Texas. He has also served as a Manager of Military Construction for the Army Corps of Engineers in San Antonio. He began working for the Corps of Engineers in 1984 after serving for 12 years in the U.S. Air Force as a Fighter Pilot and Flight Training Instructor.

**ATTACHMENT B. WORKING AGENDA**

**Strategic Support/Technical Assistance Team  
Facilities, Maintenance and Operations  
Anchorage School District  
December 2-5, 2014**

**Contacts  
Dory Hunt**

Executive Assistant, Office of the Superintendent  
907-742-4312; [Hunt\\_Dory@asdk12.org](mailto:Hunt_Dory@asdk12.org)

**Working Agenda**

Subject to Change as Required

**Tuesday, December 2**

**Team Arrival**

6:15 p.m.

**Team to Meet in Hotel Lobby**

Anchorage Marriott Hotel  
820 W 7th Ave,  
907-279-8000

6:30 p.m.

**Dinner Meeting**

Snow Goose Restaurant  
717 West Third Avenue  
907.277.7727

**Tam Agosti-Gisler**

**Pat Higgins**

School Board Members

**Wednesday, December 3**

7:00 - 7:45 a.m.

**Continental Breakfast**

Anchorage School District  
5530 E. Northern Lights Blvd.

**Requirements**

Internet Connectivity  
White Board/Flip Charts  
LCD Projector

8:00 - 8:45 a.m.

**Team Interviews**

**Mark Foster**

Chief Financial Officer

**Andy Ratiff**

Acting Ex. Dir., Management &  
Budget

9:00 - 9:45 a.m.

**Team Interviews**

**Dave Whiting**

Executive Director, Procurement

**Thomas Johns**

Purchasing Office, Manager

**Dane Sutterfield**

Purchasing Supervisor

10:00 - 10:45 a.m.

**Team Interview**

**Mike Abbott**

Chief Operating Officer

Review of the Facilities Operations of the Anchorage School District

11:00 - 12:00 p.m.	Working Luncheon at 1301 Labar Street	
1:00 - 1:45 p.m.	<b>Team Interview</b>	<b><u>Edie Knapp</u></b> Construction Manager
2:00 - 2:45 a.m.	<b>Team Interviews</b>	<b><u>Kely Kass</u></b> <b><u>Calvin Mundt</u></b> <b><u>Charlie Peters</u></b> <b><u>Randy Ribble</u></b> Project Managers
3:00 - 3:30 p.m.	<b>Team Working Session</b>	<b><u>Kathy Kelly</u></b> <b><u>Dave Pettry</u></b> <b><u>Paul Kapinos</u></b> <b><u>Joseph Johnson</u></b> Construction Inspectors
3:45 - 4:15 p.m.	<b>Team Interviews</b>	<b><u>Rachael Molina Lodoen</u></b> Project Support Mgr. <b><u>Kandace Thompson</u></b> Project Support Technician <b><u>Dana Menendez</u></b> Facility Manager/PM
4:30 - 5:15 p.m.	<b>Team Interviews</b>	<b><u>Mary Cary</u></b> Planner/PMI <b><u>Yuki Janson</u></b> <b><u>Linyi Long</u></b> PMs
5:15 p.m.	Team Discussion of Work Plan for Balance of Site Visit	

**Thursday, December 4**

7:00 - 7:45 a.m.	<b>Continental Breakfast</b>	
8:00 - 8:45 a.m.	<b>Team Interview</b>	<b><u>Darin Hargraves</u></b> Director, M&O <b><u>Alex Belanger</u></b> Asst. Director, M&O
9:00 - 9:45 a.m.	<b>Team Interview</b>	<b><u>Steven Golab</u></b> Business Manager <b><u>Steve Cochran</u></b> Training & Regulatory
10:00 - 10:45 a.m.	<b>Team Interview</b>	<b><u>Bob Davis</u></b> Operations Foreman
11:00 - 11:45 a.m.	<b>Team Interviews</b>	<b><u>Mike McGough</u></b> Project Manager

Review of the Facilities Operations of the Anchorage School District

12:00 - 1:00 p.m.	Working Luncheon	
1:00 - 2:15 p.m.	<b>Team Interviews</b>	<b><u>Chris Borst</u></b> <b><u>Kathy Egle</u></b> <b><u>Terry Schnese</u></b> Satellite Supervisors
2:30 - 3:30 p.m.	<b>Team Interviews</b>	<b>Damien Stella</b> <b>Joel Neimeyer</b>
3:30 - 4:30 p.m.	<b>Team Interviews</b>	<b><u>Building Principals</u></b> (Randomly Selected)
Team Discussion of Work Plan for Balance of Site Visit		

**Friday, December 5**

7:00 - 7:45 a.m.	<b>Continental Breakfast</b>	
8:00 - 12:00 Noon.	<b>Team Meeting</b>	<b>Discussion of Findings &amp; Recommendations</b>
12:00 - 1:00 p.m.	<b>Working Luncheon</b>	
1:00 p.m.	<b>Adjournment &amp; Departures</b>	

**ATTACHMENT C. DISTRICT PERSONNEL INTERVIEWED**

- Kathleen Plunkett, Board Member
- Tam Agosti-Gisler, Board Member
- Mark Foster, Chief Financial Officer
- Mike Abbott, Chief Operating Officer
- Andy Ratiff, Acting Executive Director, Management & Budget
- Dave Whiting, Executive Director, Procurement
- Thomas Johns, Purchasing Office, Manager
- Dane Sutterfield, Purchasing Supervisor
- Edie Knapp, Construction Manager
- Kely Kass, Project Manager
- Calvin Mundt, Project Manager
- Charlie Peters, Project Manager
- Randy Ribble, Project Manager
- Rachael Molina Lodoen, Project Support Mgr.
- Kandace Thompson, Project Support Technician
- Dana Menendez, Facility Manager
- Kathy Kelly, Construction Inspector
- Paul Kapinos, Construction Inspector
- Joseph Johnson, Construction Inspector
- Rachael Molina Lodoen, Project Support Manager
- Dana Menendez, Facility Manager
- Mary Cary, Planner/Project Manager
- Yuki Janson, Project Manager
- Linyl Long, Project Manager
- Darin Hargraves, Director, Maintenance & Operations
- Alex Belanger, Assistant Director, Maintenance & Operations
- Steve Cochran, Training & Regulatory
- Bob Davis, Operations Foreman
- Chris Borst, Satellite Supervisor
- Kathy Egle, Satellite Supervisor
- Terry Schnese, Satellite Supervisor
- Kerston Johnson, Principal
- Sam Spinella, Principal
- Rick Stone, Principal
- Sven Gustafson, Principal
- Greg Balcao, Principal
- Anita Stevens, Principal

Review of the Facilities Operations of the Anchorage School District

- Damien Stella, Owner & Principal, PM & E Services, LLC
- Joel Neimeyer, Program Officer, Rasmuson Foundation

## ATTACHMENT D. DOCUMENTS REVIEWED

- Comprehensive Annual Financial Report for the Fiscal Year ended June 30, 2014
- Comprehensive Annual Financial Report for the Fiscal Year ended June 30, 2013
- Maintenance & Operations Budget, 11/24/2014
- Purchase Order No. 12C0017 – Turnagain and Spring Hill Roof Upgrades, 10/08/12
- Turnagain Roof Upgrades Permits. 3/12/13
- Turnagain Roof Replacement Inspection Report, 1/30/13
- Invoice for Advertising Services for Turnagain Project, 3/04/13 to 3/10/13
- Purchase Order No. PO32327 – Turnagain Roof Sprinkler Lines, 9/10/13
- Application for Payment, Professional Services, Design Services for Roof Upgrades at Turnagain and Spring Hill Schools, 11/14/12
- Invoice for Document Copying of Turnagain Roof Specifications, 3/22/13
- Purchase Order No. 13C0028 – Contract Modification #2 for Turnagain Roof, 1/13/14
- Anchorage School District Debt Retirement School Construction Project Reports, June 30, 2012 (with Independent Auditor’s Report thereon)
- Anchorage School District’s Strategic Plan, Destination 2020
- Anchorage School District School Board Policies
  - Procurement Procedures Section 725
  - Long Range Planning and Funding Sources Sections 741 and 746
  - Project Development Facilities/Site Design and Construction Section 742
  - Construction Contracts Section 743
  - Acceptance of Projects Section 744
- Comments on Three Pending West High Capital Projects, Blythe Marston, May 30, 2014
- Construction Project Status Report as of 4/30/2014
- Construction Project Status Report as of 7/1/2014
- Construction Project Status Report as of 10/30/2013
- Facility Department Construction Projects Update, 10/1/2014
- Capital Project (prorate budget) FY 2013-14 Preliminary Budget
- Capital Project (prorate budget) FY 2014-15 Preliminary Budget
- Requirement List Report (8.3), October 9, 2014
- System Renewal Requirement Crosstab Report (8.4), October 9, 2014
- Site Summary Information and Assessment Results (8.5)
- System Renewal Report (8.6), October 9, 2014
- Anchorage School District Educational Adequacy Assessment, Executive Summary, November 28, 2012
- Facilities Department Project Procedures Manual, June 15, 2012



## Review of the Facilities Operations of the Anchorage School District

- Anchorage School District FY16 Application for Funding, Attachment C – Preventative Maintenance Program
- Work Orders by Work Type (between 7/1/13 to 6/30/2014), Report Date 9/16/2014
- Summary of Scheduled and Completed Work Orders (between 7/1/13 to 6/30/2014), Report Date 9/16/2014
- Summary of Incomplete Work Orders by Age and Status (between 7/1/13 to 6/30/2014), Report Date 9/16/2014
- Scheduled vs Unscheduled Work Order Hours by Month (between 7/1/13 to 6/30/2014), Report Date 9/16/2014
- Unscheduled Maintenance Trends (between 7/1/13 to 6/30/2014), Report Date 9/16/2014
- Energy Use Report 7/2013 thru 6/2014
- School List Report (8.1), October 9, 2014
- Requirement Summary Report (8.2), October 9, 2014
- Alaska Department of Education - Capital Project Administration Handbook, 2007
- Alaska Department of Education - Capital Improvement Project (CIP) Submittals, updated June 2014
- Alaska Department of Education – A Handbook to Writing Educational Specifications, 2005 edition
- Annual Project Summary, Debt Retirement for the Year ended June 30, 2013
- Capital Projects Budget Summary, FY13
- Capital Projects Budget Summary, FY14
- The State of Alaska Preventative Maintenance Site Visit, June 25, 2013
- ASD Organization Charts, 2014-15
- Organization Chart - Facilities Department, 10/24/2014
- Facilities Staffing Roster – FY14-15
- Organization Chart – Maintenance & Operations, FY14-15
- Maintenance & Operations Staffing Roster, FY14-15
- Alaska Department of Education Anchorage Site Visit Report, April 1 & 2, 2013
- Review of the Organizational Structure and Staffing Levels of the Anchorage School District, the Council of the Great City Schools, 6/25/2012
- Six Year Capital Improvement Plan, July 1, 2013-June 30, 2019
- Six Year Capital Improvement Plan, July 1, 2014-June 30, 2020
- Facility Condition Assessment Reports, October 30, 2013
- District Educational Specifications, High Schools, September 2012
- District Educational Specifications, Middle Schools, September 2012
- District Educational Specifications, Elementary Schools, September 2012
- Purchasing Management Review and Analysis Report, March 2010
- Response To Purchasing Management Review And Analysis, June 15, 2010
- DEED Debt Agreements & Transfers, Bond Elections from 1999-2014, 6/25-7/19/2014

## Review of the Facilities Operations of the Anchorage School District

- Request for Proposal, August 19, 2014, Project Management Services at West/Romig
- Contract Form; RFP 2014-601, November 14, 2015 – August 1, 2015 (Project Management for West/Romig Steering Committee, \$221,295)
- Letter from ARCADIS (Kent Crandall), November 9, 2014 (“Clarifying needed scopes”)
- Job Descriptions
  - Director of Facilities
  - Manager, Construction
  - Manager I, Facilities Project
  - Manager, Facilities Project II
- Utilities Expenditures by Location for 2012/13 – 2013/14
- Report to the Committee, October 29, 2012, Mikuda Cottrell & Co.
- Audit Wrap-up, year ended June 30, 2014, BDO USA, LLP
- Audit Wrap-up, year ended June 30, 2013, BDO USA, LLP
- Legislative Request Summary by School, February 07, 2014
- Sample VFA Report; Benny Benson School, Dec. 3, 2014
- Capital Improvement Advisory Committee Orientation (P/P), 12/3/2014
- Project Scope- PM for Steering Committee (undated)
- Typical Evaluation Criteria For A/E Services (undated)

**OMAHA FACILITIES REPORT**



## **Review of the Buildings and Grounds Operations of the Omaha Public Schools**

Mark Evans, Superintendent of the Omaha Public Schools (OPS), requested that the Council of Great City Schools (CGCS) provide a high-level management review of the school district's Building & Grounds (B&G) Division. He asked that the review include an<sup>1</sup>--

- Evaluation of the organization and management of the district's B&G division.
- Recommendations that would help achieve greater operational efficiencies and effectiveness in the B&G Division.

In response to this request, the Council assembled a Strategic Support Team of senior managers with extensive experience in facilities operations from other major city school systems across the country. The team was composed of the following individuals. (Attachment A provides brief resumes of team members.)

Robert Carlson, Project Director  
Director, Management Services  
Council of the Great City Schools

Terry Burgess, Principal Investigator  
Special Assistant to the Superintendent  
Charlotte Mecklenburg Schools

Joe Edgens  
Executive Director, Facility Services (Retired)  
Metropolitan Nashville Public Schools

John Dufay  
Executive Director, Maintenance & Operations  
Albuquerque Public Schools

William Lewis  
Chief of Capital Programs (Retired)  
Charleston County School District

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<sup>1</sup> The Council has conducted over 250 instructional, management, and operational reviews in more than 50 big-city school districts over the last 15 years. The reviews have been the foundation for improving the operations, organization, instruction, and management of many urban school systems. The reports often form the basis for identifying "best practices" for our Great City School nationwide to replicate.

Lee Dulgeroff  
Executive Director, Facilities Planning  
San Diego Unified School District

Lester Herndon  
Assistant Supt., Capital Facilities & Enrollment Planning  
Seattle Public Schools

The team conducted its fieldwork for the project during a four-day site visit to Omaha on January 4-7, 2015. The general schedule for the site visit is described below. (A working agenda is presented in Appendix B.)

The team met with the Superintendent and Executive Director of District Operational Services on the first day of the site visit to discuss expectations and objectives for the review and to make final adjustments to the work schedule. The team used the first two full days of the site visit to conduct interviews with staff members.<sup>2</sup> (A list of individuals interviewed is imbedded in the working agenda in Attachment B). The team also reviewed documents, reports, and data provided by the district. The documents, reports and data are presented in Appendix C. The final day of the visit was devoted to synthesizing and refining the team's findings and recommendations and providing the Executive Director with a preliminary briefing.

The Council sent a draft of this document to team members for their review in order to ensure the accuracy of the report and obtain their concurrence with the final recommendations. This management letter contains the findings and recommendations that have been designed by the team to help improve the operational efficiency and effectiveness of the district's management of the B&G Division.

### **The Omaha Public Schools**

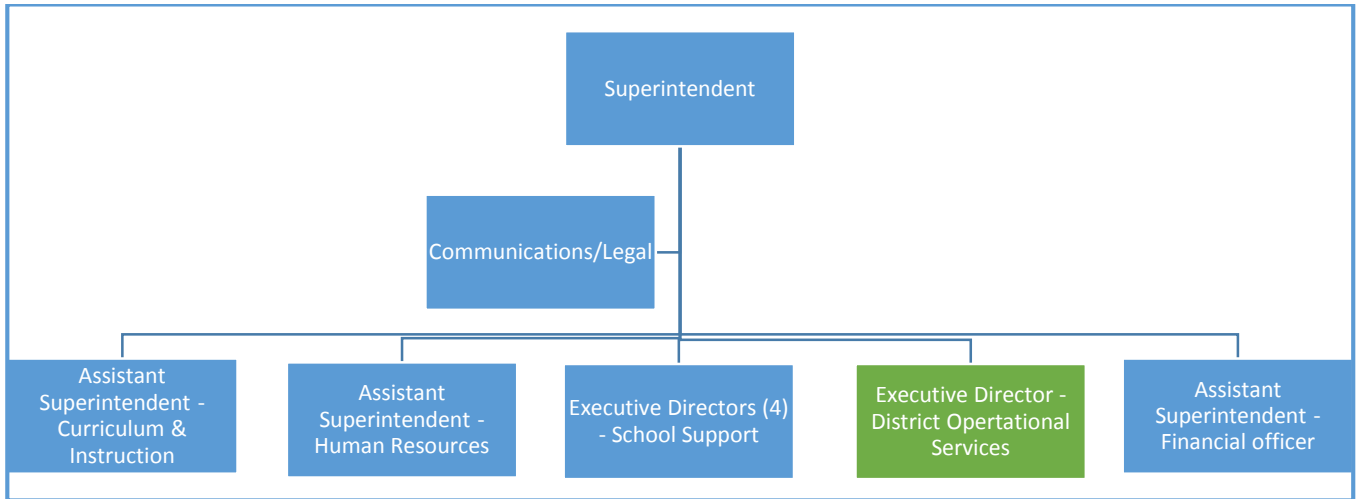
The Omaha Public Schools is the largest school district in the state of Nebraska. The district operates 93 schools with over 51,000 students supported by over 7,000 certificated and non-certificated employees. The general fund operating budget is approximately \$507 million.

The school district is governed by a nine member Board of Education elected from geographical sub-districts. The board hires the Superintendent to serve as Chief Executive Officer of the district. The Superintendent is responsible to the Board for the effective operation of the school system, including implementation of the district's Strategic Plan 2014. An abridged overview of the Superintendent's administrative organizational structure is displayed below in Exhibit 1.

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<sup>2</sup> The Council's peer reviews are based on interviews of staff, review of documents and the teams' professional judgment. In conducting interviews the teams must rely on the willingness of those interviewed to be factual and forthcoming, and cannot always judge the accuracy of their statements.

**Exhibit 1. Superintendent’s Administrative Organization**

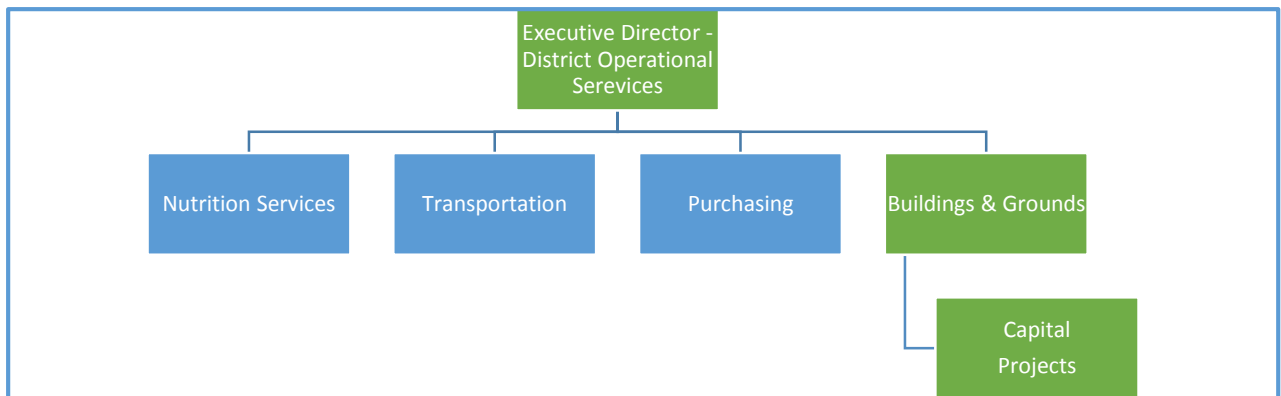


Source: Prepared by CGCS based on information provided by the OPS

**Operations Services**

The Executive Director of Operations is a direct report to the Superintendent and is responsible for nutrition services, transportation, purchasing, and the B&G divisions. The Executive Director’s organization is shown below in Exhibit 2.

**Exhibit 2. Executive Director’s Operations Organization**

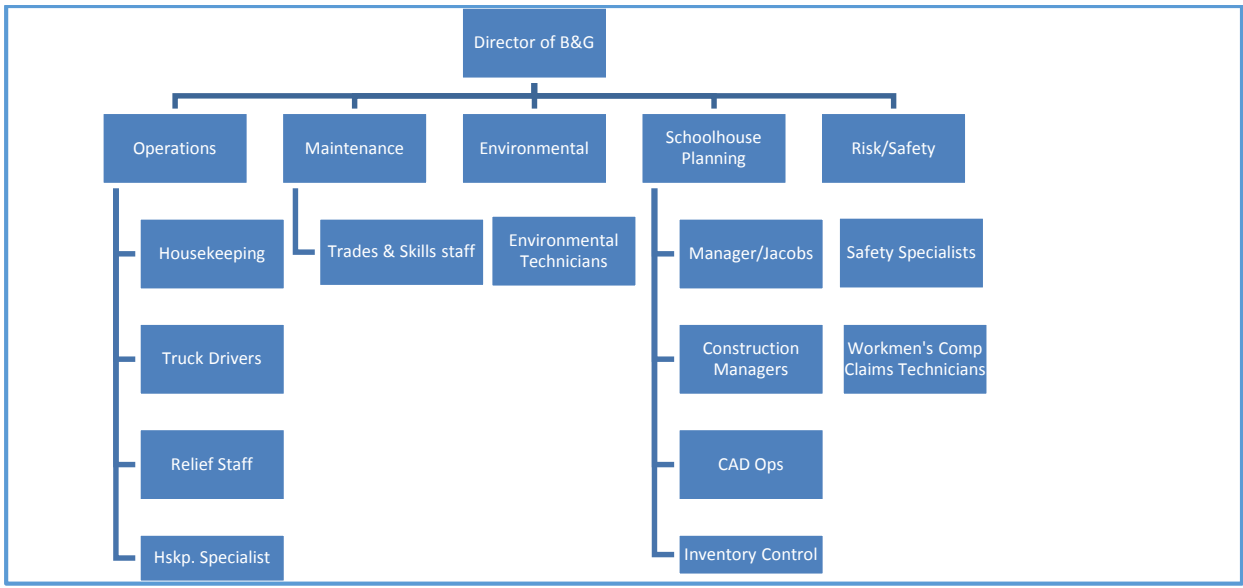


Source: Prepared by CGCS based on information provided by the OPS

**Building & Grounds Division**

The Director of the Building and Grounds Division (B&G) oversees a budget of approximately \$50.4 million, which comprises 9.3 percent of the district’s general fund (FY 2015). The director is responsible coordinating activities performed by plant operations, plant maintenance, schoolhouse planning, risk management, and the environmental work center. (The organization of the B&G Division is presented in Exhibit 3 below.)

**Exhibit 3. Buildings & Grounds Division**



Source: Prepared by CGCS based on information provided by the OPS

The Supervisor and Manager of Plant Operations oversees a staff of eight truck drivers and tractor operators, five housekeeping specialists, and 400 school building engineers and custodians, who are responsible for maintaining clean, healthy, and safe buildings and grounds. The Supervisor and Manager of Plant Maintenance oversees an energy systems specialist, a preventative maintenance technician, and a staff of approximately 80 trades employees, who are responsible for the maintenance, repair, and upgrading of the district’s physical properties, buildings, and equipment. A construction manager coordinates the work of the schoolhouse planning unit with two full-time and one part-time CAD operators, and two inventory control and facilities management technicians, who are responsible for the overall design, planning, and any modifications to the district’s campuses, building and grounds.<sup>3</sup>

The Risk Management Office is supervised by a manager, who oversees a fire safety specialist, a safety and health specialist, and a claims specialist, who are responsible for functions related to fire-drill planning and compliance, insurance and workers compensation, occupational safety, and fire prevention and assessment. The Environmental Work Center is supervised by an environmental specialist, who oversees three environmental technicians. These technicians are responsible for the development and implementation of all programs governed by environmental regulations or directives and for the control of substances that can or potentially can have a negative effect on human health.

<sup>3</sup>The supervisory functions of the unit had been assumed by the B&G Director because the authorized position of school planning manager (supervisor) had not been filled at the time of the site visit.

## **Findings and Observations**

The Council's Strategic Support Team findings and observations are organized into the following sections: Commendations, a priority issue, and issues related to the capital program and the Building and Grounds (B&G) Division. This section will be followed by another with the team's recommendations and proposals.

### **Commendations**

- The team was impressed by the professionalism and dedication of the employees who were interviewed. For example –
  - The director, managers, and staff of the Building and Grounds Division are competent, capable, engaged in their work and proud to be OPS employees.
  - The B&G Division is open to making operational changes that would improve efficiencies and accountability.
- The Superintendent and district Director of Communications have done an admirable job of building public trust and confidence.
- The Superintendent has created a well-defined road map for the district.
- The district's use of ground-source geothermal heating pumps to boost efficiency and reduce the operational costs of heating and cooling systems is commendable.

### **Priority Issue**

- The B&G Director's span of control is too broad. In addition to overseeing a \$50 million budget and day-to-day activities associated with the operation and maintenance of all school properties, the director has assumed responsibility for all aspects of capital project functions funded by the \$421 million dollar bond levy.

### **Capital Program**

- The leadership of the schoolhouse planning unit is not at a sufficiently high level in the organization to ensure adequate oversight of the capital program funded by the new \$421 million bond levy.
- The key position of schoolhouse planning manager (supervisor) has not been filled for over two years and the unit is understaffed.
- There is no cross-functional project-management office (PMO) to ensure coordination of the capital program and operational and maintenance projects.
- A budget analyst in the finance office has not been assigned to the capital program.



- There is no detailed capital-program execution plan.
- There appears to be no cash-flow plan that incorporates expenditure projects and a bond sale calendar for the capital program.
- There is no communications plan in the capital program to help lay the foundation for continued public support for capital projects.
- The team saw no evidence of a formal process to provide monthly status reports to the Superintendent and the School Board on the new bond program.
- There is limited knowledge of the construction manager at-risk process (CMaR).<sup>4</sup>

### **Buildings and Grounds Division**

- The team noted several weaknesses in the internal controls in the Buildings and Grounds Division that expose the district to potential fraud, waste, and abuse. For example –
  - There is no annual external financial and contract auditing process.
  - B&G managers serve as contract officers, resulting in a lack of appropriate separation of contracting duties and responsibilities (e.g., the award of contracts, the initiation of changes to contracts, and the authorize payments for goods received or services rendered).
  - There is no asset-tagging or asset-inventory system, which would allow for improved predictive and preventive maintenance or planning for capital replacement.
  - Warehouse inventory systems are not used for all storage locations and may be inadequate in other key warehouse locations.
- By and large, B&G is not a data driven organization. For example, performance information is not collected for many of its functions and key performance indicators (KPIs) are not used to measure performance or compare with others.
- The team noted a general lack of planning in the B&G Division. For example –
  - The division has no strategic business plan with goals and objectives, targets and benchmarks, or performance measures.
  - There is no preventative, predictive, corrective, or scheduled asset replacement plan in B&G.

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<sup>4</sup> CMaR is a delivery method that entails a commitment by the construction manager to deliver the project within a Guaranteed Maximum Price (GMP).

- The division does not use customer surveys to determine the level of customer satisfaction for the services it provides.
- The division does not have a formal quality-assurance function for validating business processes or developing and enforcing sound management practices.
- The B&G division lacks independent hiring/termination authority, which prevents managers from moving quickly on personnel issues and burdens them with excessive bureaucracy.
- The B&G division lacks a defined line-item budget or funding stream to address the district's deferred maintenance backlog.
- B&G staff do not have on-going professional development or training opportunities to keep staff informed and at high-capacity. For example –
  - B&G staff members' knowledge of school board policies and administrative procedures appears limited (e.g., who has authority for approval or denial of change orders).
  - Housekeepers who respond to night calls are not trained in safety and security procedures.
- The risk-management function is too narrowly defined and too deeply embedded within the organization to perform at an enterprise-wide or strategic level.
- The division does not have a construction-management software system.
- The TMA system, which could provide greater control and planning for predictive and preventive maintenance is not fully implemented.<sup>5</sup>
- The division does not have a system for tracking warranties resulting in work being done by staff that should be the responsibility of vendors or contractors.

## **Recommendations**

### **Capital Program**

1. Create a Capital Programs Division under the leadership of a new director with adequate staff reporting to the Executive Director of Operations to ensure oversight and responsibility for providing regular status reports and capital-related issues to the Board of Education, Superintendent, and community.

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<sup>5</sup> The TMA System is a comprehensive maintenance management software application for managing work orders and developing a preventive maintenance program.

2. Develop a comprehensive and detailed capital programs execution plan including-
  - a. Achievable goals and objectives linked to the district's strategic plan
  - b. Identified responsibilities and accountabilities
  - c. Cash flow plan incorporating expenditure projections and a bond-sale calendar.
3. Create a Program Management Office (PMO) – a staff position reporting to the Executive Director – to ensure cross-functional coordination of the capital program and all operational and maintenance projects, and assign a budget analyst in the district's finance office to oversee the financial aspects of the capital program.
4. Evaluate the advantages and disadvantages of the construction manager at-risk (CMaR) option to determine under what conditions it might be used to most effectively benefit the district.

### **Building and Grounds**

5. Evaluate the internal controls in the B&G Division and modify existing policies, procedures, and practices to limit the district's exposure to potential fraud, waste and abuse.
6. Implement a Quality Assurance Management system in the B&G division that would assist it to become a data-driven organization, including, for example--
  - a. Development of a business plan with goals, objectives, targets and benchmarks to guide decisions.
  - b. Key performance indicators (KPIs) for measuring and reporting performance on a quarterly basis in all major functional areas.
  - c. An ISO 9000 or equivalent program that would provide techniques and tools for process improvements.
7. Use surveys to assess the level of customer satisfaction with B&G services.
8. Fully implement the TMA system so B&G can better manage the district's facilities, buildings, areas, users, security, assets, equipment, vehicles, technicians, etc.
9. Establish a system to track warranty information so that vendors and contractors are held responsible for their contractual obligations.
10. Provide the B&G division with greater input and authority to hire, promote, and terminate its employees.

Review of Buildings and Grounds Operations of the Omaha Public Schools

11. Provide the B&G division with a defined line-item budget or funding stream to address the district's deferred maintenance backlog.
12. Establish a formal training and professional development program so B&G staff have a clear understanding of district policies and administrative procedures.
13. Realign the risk safety management unit as a direct report to the Executive Director of Operations so its responsibilities and scope is at an enterprise-wide level.

**ATTACHMENT A - STRATEGIC SUPPORT TEAM**

**Robert Carlson**

**Robert Carlson** is Director of Management Services for the Council of the Great City Schools. In that capacity, he provides Strategic Support Teams and manages operational reviews for superintendents and senior managers; convenes annual meetings of Chief Financial Officers, Chief Operating Officers, Transportation Directors, and Chief Information Officers and Technology Directors; fields hundreds of requests for management information; and has developed and maintains a Web-based management library. Prior to joining the Council, Dr. Carlson was an executive assistant in the Office of the Superintendent of the District of Columbia Public Schools. He holds doctoral and master's degrees in administration from The Catholic University of America; a B.A. degree in political science from Ohio Wesleyan University; and has done advanced graduate work in political science at Syracuse University and the State Universities of New York.

**Terry Burgess**

**Terry Burgess** has over twenty-five years of experience in education including as the Chief Operating Officer in the Detroit Public Schools and other executive experience in the Charlotte, San Diego, Philadelphia, Kansas City and Atlanta school districts. He spent sixteen years with the Marriott Corporation analyzing and designing facilities and central office departments for school systems. He has provided leadership for study teams from Wisconsin to Florida, and from California to Virginia. He has assessed programs as small as Franklin County Schools in Apalachicola, FL (four schools) and as large as the Puerto Rico Department of Education (400 schools). Terry has Masters and Education Specialist degrees in administration and supervision. He also has post-graduate studies in leadership, human relations, and motivational strategies and provides solution-focused improvements to significantly increased organizational efficiency and effectiveness.

**Joe Edgens**

**Joe A. Edgens** is the retired Executive Director of Facility Services for the Metropolitan Nashville Public Schools. He graduated from the University of Tennessee in Knoxville with a Bachelor of Architecture degree as a member of the first graduating class from the School of Architecture at the University of Tennessee. Mr. Edgens has been licensed to practice architecture since 1974. He spent fourteen years in private architectural practice, the last three of which he had his own practice. In 1983 Mr. Edgens sold out of his private practice. He then worked for a contractor/developer for six years as Director of Planning and Construction. Mr. Edgens accepted the position of Director of Planning and Construction with the Metro Board of Public Education in March of 1989. In 1995 Joe was appointed to the position of Executive Director of Facility Services. The Departments under his supervision are Planning and Construction, Maintenance, Operations (custodians and grounds), Facility Use, and ADA Compliance. These Departments

have over 900 employees and operating budgets exceeding \$43,000,000. Capital facility projects during his tenure with the Nashville School District exceed \$1,000,000,000.

**William H. Lewis**

**Bill Lewis** is the former Chief Operating Officer for Capital Projects for the Charleston County School District (CCSD) which is the second largest public school system in the State of South Carolina serving over 48,000 students. He developed the strategy to recapitalize the district's schools in a series of four 5-year capital programs to reduce the district's deferred maintenance backlog. Mr. Lewis successfully managed the district's first three 5-year capital programs executing over \$1.5 billion of new and renovated schools on schedule and under budget. The district's deferred maintenance backlog was reduced by over \$600 million. His' prior experience included a 28-year career in the Navy's Civil Engineer Corps serving in a wide range of public works, expeditionary engineering (SEABEES) and construction management. He holds a professional engineer license, a SEABEE combat warfare designation and a Level I contracting warrant for AE, Construction and Real Estate contacts and held two major commands as the Commanding Officer of Engineering Field Activity Mediterranean serving as the Navy's Chief Engineer in Europe, North Africa and Southwest Asia. He also served as the Commander NAVFAC Southern Division serving as the Navy's Chief Engineer for the central 26-states doing over \$1 billion of military construction per year. He holds a bachelors and masters in Civil Engineering from the Ohio State University, and attended executive management and leadership programs at the University of Michigan, Ross School of Business and the Harvard Business School.

**Lee Dulgeroff**

**Lee Dulgeroff** is Chief of Facilities Planning and Construction at San Diego Unified School District which serves more than 132,000 students in pre-school through grade 12 and is the second largest district in California. The district has 226 educational facilities including 117 traditional elementary schools, 9 K-8 schools, 25 traditional middle schools, 24 high schools, 49 charter schools, and 14 atypical/alternative schools. Mr. Dulgeroff oversees the San Diego Unified capital facilities program, instructional facilities planning, real estate, neighborhood schools and enrollment options and special projects. The San Diego Unified \$5B capital facilities program is one of the largest public works projects in California. Mr. Dulgeroff managed the development of two successful general obligation bond measures Propositions S and Z that passed in 2008 and 2012 for school renovation and new construction. For the past 15-years, he has managed the district's facilities projects including the previous capital facilities bond program, Proposition MM, a \$1.51B capital improvement bond program that modernized and expanded 161 existing school campuses and built 13 new schools. Mr. Dulgeroff has over 25-years of experience in planning, designing and managing public and private facilities development projects. He designed and managed U.S. Department of Defense and commercial construction projects prior to his work at San Diego Unified School District. Mr. Dulgeroff received a Bachelor of Science Degree in Aerospace Engineering from San Diego State University and a Master of Degree in Computer Information Systems from the University of Phoenix. Over the years Mr. Dulgeroff has received numerous awards for his work; he was recently named "2014 Honoree" by the Construction Management Association of America's San Diego Chapter. He and his wife Kristin have two children attending public schools.

### **Lester “Flip” Herndon**

**Flip Herndon** is Assistant Superintendent of Capital, Facilities and Enrollment Planning at Seattle Public Schools, where he oversees the capital and facilities program including the recently passed capital levy (\$700 million dollars) that will be renovating or replacing 17 buildings in Seattle. He has over 20 years of experience in education ranging from middle school teacher, high school track coach, elementary principal and superintendent. He received a Bachelor of Arts Degree in History from Whitman College, a Master of Education Degree from Harvard University, and a Doctorate in Education from the University of Washington. He and his wife Suzanne have three boys attending public schools. Hobbies include hiking/mountain climbing, marathon running, and long distance bicycle riding.

### **John Dufay**

**John Dufay** is the Executive Director of Maintenance and Support Operations for Albuquerque Public Schools which contains 15.2 million square feet in 2,100 buildings. The M&O Division is comprised of 267 skilled technicians representing seven service departments and a financial/accounting office. As a 1976 graduate of the University of New Mexico, College of Architecture, he commenced his professional career with a local design firm, initially focusing on high end custom homes and small commercial and multi-housing projects and later expanding into environmental issues and assessments. In 1985, Mr. Dufay accepted a staff architect position at Los Alamos National Laboratory where he worked on ADA accessibility, energy projects, renovation and major upgrade projects. He returned to the University of New Mexico, graduating with a M.S. in Environmental Science in 1992. In 1988 — in response to the Federal law for managing asbestos in schools (AHERA) Mr. Dufay was hired as the first environmental management planner charged with creating the only in-house environmental management program. In the 1990s, he designed a new technology third generation type of constructed wetlands for waste water treatment and recycling which was extremely effective and efficient. A patent was filed on the technology in 1997 and in December 2000 the U.S. Federal Patent and Trademark Office issue Utility Patent #6159371 for *Constructed Wetlands Remediation System, Sub-surface Aeration for Nitrification/Denitrification of Waste Water*.

**ATTACHMENT B - WORKING AGENDA  
AND  
STAFF INTERVIEWED**

**Strategic Support/Technical Assistance Team  
Facilities, Maintenance and Operations  
Omaha Public Schools  
January 4-7, 2015**

**Prime Contact**

**Dr. Antoinette Turnquist**

Executive Director, District Operational Services  
(402) 557-2201; antoinette.turnquist@ops.org

**Working Agenda**

**Subject to Change as Required**

**Sunday, January 4**

**Team Arrival**

6:15 p.m.

**Team to Meet in Hotel Lobby  
Hilton Omaha  
1001 Cass Street**

6:30 p.m.

**Dinner Meeting**

**Mark A. Evans**

Superintendent

**Antoinette Turnquist**

Executive Director

**Monday, January 5**

7:00 - 7:45 a.m.

**Continental Breakfast**

OPS Service Center  
4041 North 72<sup>nd</sup> Street

**Requirements**

Internet Connectivity  
White Board/Flip Charts

8:00 - 9:00 a.m.

**Team Interviews**

**Dennis Pool**

Assistant Superintendent  
Finance & Administration

**Ibrahima Diop**

Director Accounting

**Todd Andrews**

Communications Director



Review of Buildings and Grounds Operations of the Omaha Public Schools

9:15 - 10:15 a.m.                      **Team Interview**                      **Antoinette Turnquist**  
Executive Director  
**Susan Colvin**  
Director, Supply Chain  
**Jim Skrobo**  
Purchasing Specialist

10:30 - 11:30 a.m.                      **Team Interview**                      **Mark Warneke**  
Director of B& G

12:00 - 1:00 p.m.	Working Luncheon – Superintendent Mark Evans
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1:00 - 1:45 a.m.                      **Team Interviews**                      **Merle Stebbins**  
Maintenance Supervisor  
**Mark Rickley**  
Manager

2:00 - 2:45 a.m.                      **Team Interviews**                      **Jon Lucas**  
Operations Supervisor  
**Doug Fritz**  
Manager

3:00 - 3:45 a.m.                      **Team Interviews**                      **Shelley Bengston**  
Environmental Specialist

4:00 - 4:45 a.m.                      **Team Interview**                      **Connie Telfeyan**  
Risk Management  
Manager

5:00 p.m.	Team Discussion of Work Plan for Balance of Site Visit
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**Tuesday, January 6**

7:00 - 7:45 a.m.                      **Continental Breakfast**

8:00 - 9:00 a.m.                      **Team Interviews**                      **Carl Bloomer**  
**Jeremy Madson**  
Construction Managers

9:15 - 10:00 a.m.                      **Team Interview**                      **John Neal**  
Preventive Maintenance  
**Andy David**  
Maintenance Inventory

Review of Buildings and Grounds Operations of the Omaha Public Schools

10:15 - 11:00 a.m.	<b>Team Interview</b>	<b><u>Jennifer Valenti</u></b> Facility Management <b><u>Mike Neigebauer</u></b> Technology Technician
11:15 - 12:00 Noon	<b>Team Interview</b>	<b><u>Beto Rangel</u></b> Head Housekeeper
12:00 - 1:00 p.m.	Working Luncheon	<b>Megan Neiles-Brasch</b> In-House Counsel
1:00 - 1:45 p.m.	<b>Team Interviews</b>	<b><u>Selected Crafts</u></b> <b><u>Crafts Counsel</u></b>
2:00 - 2:45 p.m.	<b>Team Interview</b>	<b><u>Joel Rastede</u></b> EMS Specialist
3:00 - 3:45 p.m.	<b>Team Interviews</b>	<b><u>David Fannon</u></b> <b><u>Cory Mellor</u></b> <b><u>Charles Nelson</u></b> Environmental Technicians
4:00 - 4:45 p.m.	<b>Team Interviews</b>	<b><u>Anthony Dixon</u></b> <b><u>Chad Knott</u></b> <b><u>Dan Urzendowski</u></b> <b><u>Ron Bush</u></b> Housekeeping Specialists
Team Discussion of Work Plan for Balance of Site Visit		

**Wednesday, January 7**

7:00 - 7:45 a.m.	<b>Continental Breakfast</b>	
8:00 - 12:00 Noon.	<b>Team Meeting with Discussion of Findings &amp; Recommendations</b>	
12:00 - 1:00 p.m.	<b>Working Luncheon</b>	<b><u>Antoinette Turnquist</u></b> Executive Director
1:00 p.m.	<b>Adjournment &amp; Departures</b>	

**ATTACHMENT C – DATA & INFORMATION REVIEWED**

The following information and data were shared with and reviewed by the Council team.

- Financial and Regulatory Audit Reports for several years
- B&G and Capital Budgets for several years
- 2014 Facilities Studies
- Facilities Assessments
- Maintenance Five Year Plan
- Facilities Capital Plan
- Bond Solicitation Documents
- Education Specification Guidelines
- Stakeholder Engagements
- Strategic Plan 2014
- OPEN BOOKS
- Board Policies and Regulations
- Facilities Study, 2014
- RFP requesting a written quote for Inspection/Service work on Elevators, Dumbwaiters, Lifts at various facilities
- Request for Quote, April 2, 2014
- Sample Request for Quote
- Financial Statements and Supplementary Information Together with Independent Auditor's Report, August 31, 2014
- Financial Statements and Supplementary Information Together with Independent Auditor's Report, August 31, 2013
- Internal Control Assessment, Business Services Building and Grounds, April 23, 2008
- Bid No: 14-023 for Asbestos Removal At Various Schools, March 12, 2014
- Building & Grounds Staffing Chart, 2014
- Project Manual for Fire Alarm Replacement at Field Club Elementary School
- RFQ Stakeholder Engagement and Communication Services, February 7, 2014
- Proposal for the Telecommunications Upgrade Projects at Bryan Middle and Bancroft Elementary Schools
- Purchase Order 115317 – Labor, Materials and Equipment for the Telecommunications Upgrade Projects at Bryan Middle and Bancroft Elementary Schools
- Purchase Order 151137 - Labor, Materials and Equipment for the Telecommunications Infrastructure Upgrade Projects at Bryan Middle and Bancroft Elementary Schools

- Purchase Order 15387 – Labor and Material Necessary To Replace a Fire Alarm System
- Purchase Order 151619 – Cooling Rower Replacement Project Demo
- Owner Contractor Agreement for Mechanical Upgrade at J.P Lord Elementary School
- Bid Invitation for Workers’ Compensation Managed Care Services
- Purchase Order 121900 – Mechanical Upgrade Demo
- Purchase Order 150026 – Dryer Floor DRI POD
- Purchase Order 156189 – Labor and Materials for Tuckpointing
- Purchase Order 154667 – Labor and Materials for North Plaza Entrance Concrete Replacement
- Budget Preparation for 2013-2014
- Budget Preparation for 2014-2015
- Internal Audit of Internal Control Environment, June 2007
- Bid for Refuse Pickup and Disposal
- Bid for Evaluation of Fine Art Throughout the District
- Inspection of Asbestos-Containing Materials in Schools
- Subscriber Agreement for Self-Insured Employer
- RFP for Lead-Based Paint Inspection Services
- RFP for On-Site Air Monitoring and Inspection Services for Asbestos Abatement Projects
- RFP for Facility Assessment Services
- RFP for Radon Testing
- Agreement for Stadium Reconstruction
- Agreement for Facility Improvements
- Agreement for a Joint Elementary School, Library and Community Center
- Bid Form for Combined Construction
- Architect’s Contract
- Bidder Prequalification for Future Asbestos Removal Projects
- RFP for Construction Materials Testing and Special Inspections
- RFQ for Architectural and Engineering Services
- Standard Form of Agreement Between Owner and Construction Manager as Constructor
- Agreement to Construct and Establish Two Childhood Education Infant/Toddler Facilities
- Proposal for Classroom Hot Water Piping
- Agreement for Refuse Pickup and Disposal at all designated district buildings
- First Amendment to Maintenance and Repair Contract

## Review of Buildings and Grounds Operations of the Omaha Public Schools

- Agreement for Monitoring and Maintenance of Intrusion Alarms
- Maintenance 5-Year Plan Recap
- Proposal for Providing Pest Management Services

**MINNEAPOLIS SCHOOL BOARD RETREAT**



Minneapolis School Board Retreat  
With the  
Council of the Great City Schools  
May 19, 2015

Summary of Discussion

The Minneapolis School Board asked Michael Casserly, executive director of the Council of the Great City Schools, to brief it on the process of searching for and selecting a new school superintendent. (The district is currently served by an interim superintendent.) The discussion was held at the school board offices on March 24, 2015. At the meeting, Casserly indicated that the school board should ask itself five fundamental questions before it starts the search in earnest.

- What is the political, financial, and demographic context in which the next superintendent of the Minneapolis Public Schools will have to operate?
- What do you want the school district to look like in five to ten years? In what direction do you want to take the school system? Are you generally satisfied with the current direction of the school system? Why or why not? And would the community agree with your assessment?
- What are the specific challenges and issues that the new Minneapolis superintendent will likely face over the next three to five years?
- What are the board's major priorities over the next several years that you want the next superintendent to address?
- What did you learn from your interactions with your former superintendents that would help inform what you are looking for in your next superintendent?

Casserly indicated that once these questions were addressed, the school board would be in a better position to determine what kind of superintendent it was searching for and what kinds of skills this leader would need in order to take the school system where the board wanted it to go.

The school board asked Casserly to return to Minneapolis to facilitate a discussion around these five questions. This discussion was held on May 19, 2015 in the Assembly Room of the Davis Center. All but one of the school board members attended all or part of the four-hour meeting.

(1) The board began its discussion by taking up the first general question: What is the political, financial, and demographic context in which the next superintendent of the Minneapolis Public Schools will have to operate? In response, the board mostly focused on the changing politics of the state and the shifting demographics of the city, competition from other providers that was eroding the district's "market share" of school-aged children, and the growing polarization in the debate about public education. Sample contextual issues that emerged from the discussion included the following:

- The board saw the district operating in a state that invests in its schools and is generally inclined to support public education and its publically-elected school boards. At the same time, the board saw the city as more progressive than the populace statewide. One board member pointed out, "We are a blue city in a state that is becoming more purple." The board also saw the district as generally more progressive and stable than most other urban school systems with which they were familiar. The board worried that the growing differences demographically and politically between the city and state were adding divisions that did not previously exist. These emerging political divisions were seen as detrimental to the city, its school system, or the children it served, because new forces were aligning against the welfare of the state's public schools and their students. The board saw the state's and city's increasing interest in funding early childhood programs to the exclusion of the regular k-12 school system as evidence of waning political support. Nonetheless, the school board saw that the state itself was under enormous pressure economically because it was not producing the numbers of high school graduates it needed to stay competitive with other states.
- In addition, school board members saw the economics of the city as growing stronger overall, but that the benefits of this growth were uneven. Large racial and economic gaps are widening in the city, a situation that is exacerbated by rising gentrification. Segregation in the city was seen by the board as growing, in part, because of this gentrification and the Minneapolis-specific choice plan, but also because of the rising numbers of immigrant students, English-language learners, and students with disabilities in the district. The board saw this growing inequality as adding to political tensions around where to deploy the school district's scarce resources. For example, school buildings in some sections of town were overcrowded and old, while buildings in other areas were not. At the same time, the school board did not see the district or city agencies as pulling together to address these issues.
- Members of the board also saw new competition from aggressive charter school operators as eroding the school system's market share of the city's school-aged children, even as the school system's enrollment was increasing. This situation was seen as part of a



growing nationwide polarization pitting partisan forces against one another and intensifying divisions between union and non-union interests—all of which was creating an atmosphere of misinformation about public education and undermining its support.

From these discussions, the school board generally agreed that their new superintendent needed to be a strong advocate for not only the school system and its students, but for public education in general. In addition, the board saw it as important that the new superintendent have the political skills and racial sensitivity to bridge the differences among the district's disparate communities and could unite those communities and various state and local political entities behind the school system.

(2) The school board then took up the topic of the general direction of the school system. Much of this discussion focused on the strategic plan that the board had approved with considerable—but not universal—community input last fall. The citizenry elected three new board members after the plan was approved. The plan itself was built around three overarching priorities—accelerated school achievement, gains among the district's lowest performing students that would be fast enough to narrow performance gaps, and significant annual increases in the district's four-year graduation rate. The strategic plan also included six specific goals, including improved student outcomes, equity, family and community partnerships, effective teachers and staff, effective management of district resources, and the allocation of resources to meet the needs of a diverse student body. The discussion among school board members generally revolved around the following points.

- The school board remained in broad agreement that the strategic plan represented the right goals for the district. There was some concern about whether the goals were too aggressive and set too high, but board members who were involved in the plan's development last year expressed their desire to set stretch goals, pointing out that it was better to set goals that were too high than too low—which would signal low expectations. In addition, there was some uncertainty among new board members about what some of the specific elements in the strategic plan meant, which suggested that a detailed briefing on the plan itself might be in order. In general, the board indicated that it was open to minor tweaks in the plan, but that they were in agreement about the direction this plan set for the district.
- The board was also in broad agreement about the theory of action spelled out in the plan: the school as the unit of change. This theory of action posits that student outcomes can be improved by giving schools more programming and funding autonomy, conducting more student-based budgeting and allocating resources more carefully around student needs, tailoring instructional time around student needs, implementing what works, and monitoring and evaluating the effects. Some board members were not clear about the operational ramifications of some components of the theory of action, but there was general accord that the plan continued to reflect what had been agreed to and what the elected school board members thought the district and community needed.
- There were also questions about how the plan was going to be implemented. District staff who attended the meeting indicated that a detailed implementation plan or

management plan had been assembled, but they admitted that it had not been broadly circulated. Board members indicated that having a copy would help their understanding of how the plan was likely to work. Discussion ensued about the role of the school board—or lack of it—in the implementation process.

From this discussion, the school board concluded that it needed a superintendent who had the skills to implement the strategic plan and meet its goals. Because so many goals were designed around accelerating student achievement and narrowing achievement gaps, the board agreed that this meant that the next superintendent should be someone with a track record of improving student achievement. The board also agreed that since the theory of action was built around site-based management, the ability of the superintendent to build staff capacity at the building level to meet the district's goals and improve performance was imperative.

(3) The school board then took up the third question: What are the specific challenges and issues that the new Minneapolis superintendent will likely face over the next three to five years?

In addition to implementing the 2020 strategic plan and shifting the district towards school-based resource allocations and site-based management, the school board indicated that the major foreseeable challenges over the next several years would entail the following—

- Passing a community referendum in 2016 to support smaller class sizes, more STEM programming, and other initiatives for which public support would have to be built
- Negotiating a new teachers contract

These challenges suggested to the school board that its next superintendent would need to be someone with good negotiating skills who could communicate with disparate community factions and rally broad community support for the school system.

(4) In addition to these challenges, the school board indicated that it had a number of other priorities that would shape its expectations of the new superintendent. These priorities included—

- Retaining students in the school system, competing against charter forces, and increasing the school system's market share of children in Minneapolis—not just increasing enrollment
- Addressing teacher shortages in specialized areas, increasing the diversity of the teaching force to better reflect the community, and enhancing respect for teaching and teachers throughout the community
- Building and energizing an organizational culture that sets high expectations, infusing staff with a sense of shared responsibility for results, and creating an environment of cultural competence, responsiveness, and respect for racial and language diversity

- Boosting principals’ capacity for site-based decision-making and preparing the community for the site-based theory of action articulated in the strategic plan. Also, it is a priority of the board to improve implementation of the principal evaluation system.
- Enhancing the school system’s deployment and use of technology in classrooms, its emphasis on STEM, its sense of innovation, and its global orientation
- Creating and boosting community support for and confidence in the school district’s efforts, especially in communities that have not always been engaged in the school system’s work. This would mean being visible in and accessible to every segment of the community, as well as to students. It would also entail navigating very diverse community interests while valuing all groups, including both long-term residents of the city and new immigrants.

Once again, these priorities suggested that the next superintendent should have strong communication skills, the ability to engage people from very diverse backgrounds, and the skills to reverse some of the insularity that some board members indicated made the school system seem stale and out-of-date.

(5) Finally, the board tackled the last question: What did you learn from your interactions with your former superintendents that would help inform what you are looking for in your next superintendent? In response, board members indicated that would like its next superintendent to—

- Be an active leader in school board discussions and help the school board make viable choices that move the school system forward and help it meet its goals,
- Develop consensus with the board about the nature of the work, and work in tandem with the school board on shared goals,
- Hold the school board accountable for sustaining its commitment to the strategic plan, its priorities, and its sense of direction so it doesn’t backslide on its goals when things get difficult,
- Appreciate the diversity of the board and its varied opinions, and help manage the way it works, and
- Be able to make tough decisions in the face of conflict and differences of opinion on the board.

The school board also articulated a number of personal characteristics, skills, and attitudes it would like to see in its next superintendent. The main ones included—

- A vision for the school system’s future that was consistent with what the board articulated in its strategic plan.
- The ability to raise expectations in the school system, raise student achievement, and improve teaching and learning in the ways articulated in the strategic plan.
- A person who can prioritize his or her time and energies on behalf of students and families of the district, who can lead in a fish bowl, and who can withstand the pressure cooker of the urban school superintendency and stay focused on the work.
- A person who can build the capacity of teachers and staff at the school level to meet district goals, establish a culture of respect, support, and shared responsibility for better student outcomes at the building level, and the ability to help transition personnel as they move from a centralized system to a more school-based one where staff are being held increasingly accountable for results.
- A person with a sense of humor and sense of perspective about what is important and what is not, and who—if they move here from somewhere else—will adapt to the culture and life of Minneapolis.
- A person with the capacity to value diversity and to identify the elements of institutional racism in the school district, and one who is willing to tackle and defeat it.
- A person who does not see public education as a business, but values its mission and can articulate its importance to the citizenry and their elected representatives; who can rally allies in support of the district’ mission, its leadership, and work; who can build a sense of trust in the district and engage and empower others—including students—to work in service of higher academic improvement; and who has the capacity to never lose sight of the children in the system—those who do well and those who struggle.

As the session was drawing to a close, Casserly briefly discussed the role of the board and how it differed from the role of the superintendent and the administration.

He described the main role of the school board as setting the district’s overall vision, defining the school system’s core beliefs and values, approving the broad outlines of the district’s theory of action, developing policy that would direct the administration and provide guard rails around the district’s actions, selecting and evaluating the superintendent on progress towards district goals, and providing monitoring and oversight.

Conversely, Casserly indicated what the role of the school board was not. The role of the board was not to oversee implementation, management, operations, or staffing. These were the responsibilities of the administration.

He gave two examples to differentiate the role of the board from the role of the administration. The first involved strategic planning where both the board and the administration play a part. The board's role in strategic planning is to define the general direction, set broad goals, agree on the general theory of action in pursuit of the goals, define the broad indicators by which the district determines that it is moving in the right direction at the right speed, and monitor the district's progress. Monitoring progress involves requesting regular briefings and asking questions to better understand what is being done.

The administration's role in strategic planning is to provide technical assistance to the board in defining goals and indicators, and developing and implementing a detailed plan for carrying out the vision and direction of the board.

A second example involved budgeting. Here the role of the board is to review, approve, or reject the district's proposed budget, but its role is not to alter individual lines. If a board rejects a budget, it has the obligation to tell the superintendent why it has rejected it.

After the discussion, the Minneapolis board agreed that it would like to have more training on board governance, and Casserly indicated he could make recommendations.

The final minutes of the retreat involved synthesizing and summarizing what the board had agreed on in terms of its next superintendent. These included someone who could accelerate student achievement, narrow achievement gaps, and meet the academic goals of the strategic plan; someone who could build the capacity of school-based staff and facilitate the transition to new site-based management; someone who could engage disparate elements of the local community in support of the school system and of public education broadly; and someone who could create a school system culture of respect, tolerance, collaboration, and innovation.

Casserly indicated that the school board was on the cusp of doing something unusual and important if it was going to lead improvements in the school system, and that involved setting and sustaining a single vision that bridged differing boards and differing superintendents. He indicated that if the board could maintain that focus and continuity of action, then it stood a very good chance of creating momentum around its reforms and achieving the academic gains it sought.

The session ended at 6:00 pm.

**COO MEETING**



**AGENDA**  
**CHIEF OPERATING OFFICERS**  
**Renaissance Hotel, Clark County**  
**April 21-24, 2015**

Tuesday Morning, April 21	Activity
7:00 - 8:00	Breakfast
	<b>General Session</b>
8:15 - 9:00	Welcome, Introductions and Review of Agenda
9:00 - 10:00	Using KPIs in the Work Place
10:15 - 10:30	Break
10:45 - 11:45	Enterprise Risk Management
Depending on Time Sequencing	Wrap Up
Tuesday Afternoon, April 21	Activity
12:00 - 1:00	Luncheon
	<b>COO Working Session</b>
1:15 - 2:15	Organizational, Leadership, Management and Operational Issues and Challenges
2:30 - 2:45	Break
3:00 - 4:00	Addressing the Organizational, Leadership, Management and Operational Issues and Challenges, viz., What Works
Depending on Time Sequencing	Wrap Up
	<b>Reception</b>
5:15 -	Welcome to Clark County
Wednesday Morning, April 22	Activity
7:00 - 8:00	Breakfast
	<b>COO &amp; Transportation Directors Joint Session</b>
8:15 - 9:00	Interpreting KPI Data
9:15 - 10:00	K12 Management Practices in Student Transportation
10:15 - 10:30	Break
10:45 - 11:30	Industry Best Practices (Platinum Sponsors)
Depending on Time Sequencing	Wrap Up
Wednesday Afternoon, April 22	Activity
12:00 - 1:00	Luncheon
	<b>COO &amp; Facilities Directors Joint Session</b>
1:15 - 2:00	Reversing the Cycle of Deterioration in the Nation's Public School Buildings- Report Overview

2:15 - 3:00	<b>K12 Management Practices in Facilities Operations</b>
3:15 - 3:30	Break
3:45 - 4:45	<b>Industry Best Practices (Platinum Sponsors)</b>
Depending on Time Sequencing	<b>Wrap Up</b>
	<b>Reception</b>
5:15 -	<b>Awards Presentation</b>
<b>Thursday Morning, April 23</b>	<b>Activity</b>
7:00 - 8:00	Breakfast
	<b>COOs &amp; Chiefs of Safety and Security Joint Session</b>
8:15 - 9:00	<b>A Common Vision for K-12 Security/Safety Standards</b>
9:15 - 10:00	<b>K12 Management Practices in Safety &amp; Security</b>
10:15 - 10:30	Break
10:45 - 11:30	<b>Industry Best Practices (Platinum Sponsors)</b>
Depending on Time Sequencing	<b>Wrap Up</b>
<b>Thursday Afternoon, April 23</b>	<b>Activity</b>
12:00 - 1:00	Luncheon
	<b>COOs &amp; Procurement Directors Joint Session</b>
1:15 - 2:00	<b>Best Practices From a K12 Perspective</b>
2:15 - 2:45	<b>Industry Best Practices (Platinum Sponsors)</b>
3:00 - 3:15	Break & Reconvene for General Session
	<b>General Session</b>
3:30 - 4:30	<b>Summative Report Outs &amp; Next Steps</b>
Depending on Time Sequencing	<b>Wrap Up</b>
	<b>Dinner On Own</b>
<b>Friday Morning, April 24</b>	<b>Activity</b>
7:00 - 8:00	Breakfast
	<b>General Session</b>
8:15 -	<b>Round Robin Discussion – Topics of Interest</b>
Depending on Time Sequencing	<b>Wrap Up &amp; Departures</b>



**FINANCE TASK FORCE**

# **COUNCIL OF THE GREAT CITY SCHOOLS**

## **Task Force on Urban School Finance**

**2015-2016**

### ***Task Force Goals***

To challenge the inequities in state funding of urban public schools.

To increase federal funding and support of urban public schools.

To pass new federal school infrastructure legislation to help repair, renovate and build urban public school buildings.

To enhance the ability of urban schools to use Medicaid for health services to students.

### ***Task Force Co-Chairs***

Thomas Ahart, Des Moines Superintendent  
Larry Feldman, Miami-Dade County School Board

## **OFFICE MOVE**

07/09/15

**COUNCIL OF THE GREAT CITY SCHOOLS  
OPTIONS FOR OFFICE SPACE RELOCATION - 1st Year comparison**

	1331 Pennsylvania Avenue			1325 G Street NW	600 13th Street NW	1201 F Street NW	1301 Penn Avenue
	FULL SERVICE			Full Service	NNN	NNN	Full Service
	3rd Floor South Bldg	11th Floor North Bldg	12th Floor North Bldg	9th Floor	3rd Floor	6th Floor	CURRENT SPACE
Size/SF	10,667	8,293	7,629	7,629	7,629	7,292	6,501
Price/SF	\$45.00	\$45.00	\$45.00	\$49.00	\$45.00	\$46.00	\$44.00
Tax/OExp	\$0.00	\$0.00	\$0.00	\$0.00	\$23.30	\$24.98	\$2.39
Total/SF	\$45.00	\$45.00	\$45.00	\$49.00	\$68.30	\$70.98	\$46.39
Total per Year	\$480,015.00	\$373,185.00	\$343,305.00	\$373,821.00	\$521,060.70	\$517,586.16	\$301,581.39
<b>Amenities:</b>							
Fitness Center	No	No	No	Yes	Yes	Yes	No
Conf Center	No	No	No	Yes	Yes	No	No
Roof Terrace	No	No	No	no	Yes	Yes	No
Windows	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Ceiling Height	Low	Low	Low		9 ft		High
Other	Facing Freedom Plaza	Facing Freedom Plaza	Facing F Street	No street View	Outdoor Patio		
Increased Cost compared to current lease	\$178,433.61	\$71,603.61	\$41,723.61	\$72,239.61	\$219,479.31	\$216,004.77	

**NOTE ON SIZE:** Required size is 7,629 square ft. Larger size indicates the space cannot be broken down, smaller size indicates maximum space available.

07/09/15

**COUNCIL OF THE GREAT CITY SCHOOLS  
OPTIONS FOR OFFICE SPACE RELOCATION - 2nd Year comparison**

	1331 Pennsylvania Avenue			1325 G Street NW	600 13th Street	1201 F Street	1301 Penn Avenue
	FULL SERVICE			Full Service	NNN	NNN	Full Service
	3rd Floor South Bldg	11th Floor North Bldg	12th Floor North Bldg	9th Floor	3rd Floor	6th Floor	CURRENT SPACE
Size/SF	10,667	8,293	7,629	7,629	7,629	7,292	6,501
Price/SF	\$46.35	\$46.35	\$46.35	\$50.47	\$46.35	\$47.38	\$45.32
Tax/OExp	\$1.22	\$1.22	\$1.22	\$1.37	\$24.47	\$26.23	\$2.51
Total/SF	\$47.57	\$47.57	\$47.57	\$51.84	\$70.82	\$73.61	\$47.83
Total per Year	\$507,455.86	\$394,518.74	\$362,930.60	\$395,472.10	\$540,247.64	\$536,756.83	\$310,939.58
<b>Amenities:</b>							
Fitness Center	No	No	No	Yes	Yes	Yes	No
Conf Center	No	No	No	Yes	Yes	No	No
Roof Terrace	No	No	No	No	Yes	Yes	No
Windows	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Ceiling Height	Low	Low	Low		9 ft		High
Other	Facing Freedom Plaza	Facing Freedom Plaza	Facing F Street	No Street View	Outdoor Patio		
Increased Cost compared to current lease	\$196,516.28	\$83,579.16	\$51,991.02	\$84,532.52	\$229,308.06	\$225,817.25	

**NOTE ON SIZE:** Required size is 7,629 square ft. Larger size indicates the space cannot be broken down, smaller size indicates maximum space available.





PREPARED FOR

CGCS

June 24, 2015

## CONTENTS

Section 1	About Us
Section 2	Scope of Services
Section 3	Compensation
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Section 5	Project Experience





Millar + Associates was created from a long tradition of design excellence with a renewed spirit of service. After years of running independent profit centers for a \$200m commercial real estate firm and top 30 national interior design firm, Olivia Millar launched M+A. As a testament to the quality Millar and her team bring to projects, all their clients came with the team to the new firm. The M+A team puts one quality above all other aspects of their practice: customer service. Our customers are at the heart of our firm, they are the driving factor behind our inspiration, work ethic, and deliverables. We take pride in the following comments from past and ongoing clients and we're happy to provide more references upon request.

### INSPIRATION

*"During the design process, M+A listened to my particular desires and took the initiative to research our existing brand and story. From this, and with little additional guidance, your team seemingly read my mind and drew inspiration from what we gave you."*

*- Paul Innella, President & CEO, TDI*

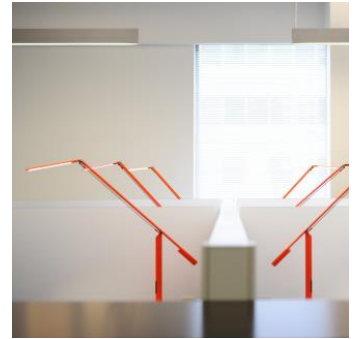
Millar + Associates does not have an identifiable style, we develop each project's aesthetic based on our clients brand, programmatic goals, and sense of identity. During our programming and schematic design phases we invest extra time to better understand our clients and develop a partnership that endures through the course of the project and beyond. This deeper understanding helps us produce a design platform that sets the stage for the project's success.

### WORK ETHIC

*"This project has been a major endeavor for our organization. It has been a relief to all of us involved knowing that we have been in highly capable hands who understand our needs and constraints."*

*- Antoinette Durkin, Former Executive Director, The Washington Campus*

The Millar + Associates team invests a lot of time up front to understand our client's requirements and coordinate consultants so the design and construction documentation processes are smooth. As a firm, M+A remains small so our service level transcends industry standards and our clients always receive extensive senior involvement.



*Patient-Centered Outcomes  
Research Institute*

### DELIVERABLES

*"The construction documents were delivered ahead of schedule and the resulting construction cost was under our budget. I recommend this team to anyone looking for elegant design delivered in a timely manner."  
- Debbie Eng, COO, The Chertoff Group*

Millar + Associates understands what matters to our clients most: schedule and budget. To this end, senior team members are involved in all aspects of the project and are empowered to direct resources as necessary to meet and exceed client expectations. We are proud to say that many of the general contractors we have worked with recommend us to their clients because of our quick response time and team approach.

Our commitment to customer service is rooted in our time as real estate advisors, contractors, and end users. These unique perspectives inform our culture and service model. We meet high-end design projects with the same energy as we do fast-paced, budget driven projects. Each receives the same senior involvement, team commitment, and creative thinking because our motivation is client satisfaction above all else.

### CERTIFIED BUSINESS ENTERPRISE (CBE)

*"The Department of Small and Local Business Development (DSLBD) supports the development, economic growth, and retention of District-based businesses, and promotes economic development throughout the District's commercial districts."  
- DSLBD website*

Millar + Associates is a certified business enterprise in the District of Columbia. We are proud to be a Woman-owned, DC resident-owned small business with DC residents as employees.

**SEABURY APG**  
AIRLINE  PLANNING

November 21, 2012

Millar + Associates  
1785 Massachusetts Ave NW  
Suite 108  
Washington, DC 20036

Dear Ms. Millar:

I would very much like to thank you and your associates for your superb professional skills in designing our new office space.

We have had many office moves over the years, and experienced many architects and interior design firms. By far, our experience with you and your firm was the best we have experienced in our 16 years.

Your vision for an attractive and functional workspace was expertly delivered from concept to implementation. The space design, color treatments, materials selection were all performed at the highest level.

I must say I actually look forward to going into the office. It is such an attractive place to work and due in large part to your design.

Kind regards,



Stephen Still  
Managing Director and Founder



Millar + Associates  
1785 Massachusetts Ave NW  
Suite 108  
Washington, DC 20036

Mrs. Millar:

It is with tremendous pleasure that I write this letter extoling the exemplary performance of your firm while serving TDI during the build-out of our new headquarters office space here in Washington, DC. I can say, without a doubt, that Millar + Associates is by far the best vendor with whom TDI has had the distinct privilege of working in its eleven years of existence.

First, let me commend your ability to transition our contract from Mancini Duffy to Millar + Associates. Believe me, as the owner and founder of TDI, I am able to understand the trials and tribulations of starting a business. You accomplished this without missing a beat in serving our needs. Most importantly, the transition was seamless to TDI as the stellar level of service continued from project start to finish.

Your team, including Steve Sorrell and Annie Richards – all the while with you at the helm – worked on a condensed schedule, with difficult requirements, and came out shining. During the design process, Millar + Associates listened to my particular desires and took the initiative to research our existing brand and story. From this, and with little additional guidance, your team seemingly read my mind and drew inspiration from what we gave you.

All along the way, you made it extremely easy to move forward as you were always prepared and constantly put forth ideas and designs that were exactly as I'd hoped. Your entire team provided fantastic customer service and were extremely attentive and thorough.

If, at any point in what I know will be a successful future for your firm, you need a reference, please rely upon me to express to a prospective customer how pleased everybody at TDI is with Millar + Associates.

Sincerely,

A handwritten signature in black ink, appearing to read "Paul Innella", written over a horizontal line.

Paul Innella  
President & CEO

1155 Connecticut Avenue NW  
11<sup>th</sup> Floor  
Washington, DC 20036

Phone: 202.337.5600  
Fax: 202.337.5601  
www.tdisecurity.com





To Whom It May Concern:

It is our pleasure to recommend Millar + Associates for your project. Olivia, Steve and the entire design team far exceeded our expectations in terms of customer service, attention to detail and the high level of design they helped us achieve in our new space. We brought several challenges to the table and know it could not have been easy for Olivia and Steve, but their patience, flexibility and willingness to happily shift gears to accommodate our ever changing needs made all of the difference. They guided us through the complex planning and design process, making sure that our questions and concerns were addressed. The end result was an unbelievable success -- and an award winning space to boot. Our space reflects who we are as an organization and what matters most to us and we can't thank Millar + Associates enough for their incredible work!

Sincerely,

Lisa Eisen  
National Director

Shannon Oliver  
Operations Manager



December 20, 2012

Millar + Associates  
1785 Massachusetts Ave. NW  
Washington, DC 20036

Dear Olivia,

I wanted to personally thank you for the outstanding service provided by Millar + Associates in support of our office relocation this year. You and your team were invaluable in helping us to plan and manage a range of issues including new office design and layout, renovation supervision and contractor management. Millar + Associates played a critical role in coordinating and communicating with our headquarters building and office services team in Minnesota. Because of your dedication, professionalism, extensive local knowledge and networks, and hands-on approach; we were able to complete the relocation on-time and within budget. We are delighted with our new office!

I would wholeheartedly recommend Millar + Associates to any other organization who values strong customer service, innovative thinking, attention to detail, accountability, follow-through, and adaptability/flexibility. Millar + Associates exceeded my expectations in delivering value-added service.

Sincerely,

Bradley J. Buck  
Senior Director  
Operations and Corporate Engagement



### SCOPE OF SERVICES

Millar + Associates will provide full design, documentation, and administration services for the new CGCS offices in Washington, DC. It is our understanding that CGCS will relocate to approximately 7,400 SF with an occupancy starting the summer of 2016.

#### *Project Kick-off*

This phase sets the stage for a successful project as all future work is based on the work done during these meetings. While the most challenging part of this phase is predicting future growth, M+A will work with you to understand your vision for the firm and project goals.

We will meet to discuss the business parameters of the project; goals, project responsibilities, schedule, budget, and the approval process.

M+A will provide one review of the preliminary schedule and budget. This proposal does not include Project Management Services in the base fee. (see Optional Services below) so M+A will not be responsible for preparing the schedule and budget in the base fee.

M+A will prepare meeting minutes summarizing the content of the meeting and assigning responsibility to parties who have action items.

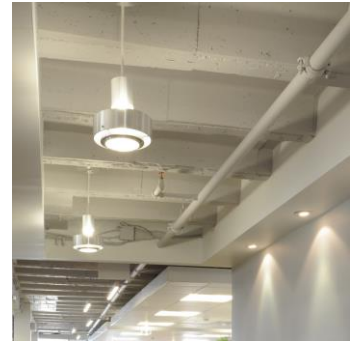
We will tour the existing facility to discuss what are successful elements and what could use improvement, current space standards, and support requirements.

Timeline – We anticipate this phase to last 1 week  
Meetings – One Kick-off Meeting and one Site Tour

#### *Programming*

M+A will meet with the senior Client representatives (or space committee) to review their space requirements, comment on our observations of their existing space, discuss projected growth, necessary support areas and their effectiveness, and desired image. This meeting is typically 1.5 hours and covers both quantitative needs and visual goals.

These are services that M+A provides standard that not all firms do. We feel these efforts improve our service and your project.



*American Council on Renewable Energy*



M+A understands that each organization is different so the best way to derive information and the most appropriate strategy for engaging staff will vary by organization. Therefore we offer one of three approaches to staff involvement. Should more approaches be desired M+A will prepare a plan, and fee, to perform this additional work. One of the following three strategies is included in this proposal:

- 1) M+A will conduct two hours of focus groups (two, one-hour sessions or three, 40-minute sessions). These session will cover aesthetic preferences as well as likes/dislikes of the current space and staff goals for the project. A report will be prepared for senior management to summarize the outcomes.
- 2) M+A will embed themselves in the existing office for (two) three-and-a-half hour visits to track what kind of work staff are doing, what areas are occupied, how common areas are used, etc. A report will be prepared for senior management to summarize the outcomes.
- 3) M+A will conduct up to five Director and/or Department leadership interviews. In this scenario the middle management speaks for the staff as an informed leader of the organization and their staff. These interviews address culture and functional requirements as well as aesthetics. A report will be prepared for senior management to summarize the outcomes.

In addition to one of the above, a questionnaire will be issued to staff. The Client will review the content prior to issue but typically this survey addresses staff experience relative to daylight, coffee/pantry concerns, conference space availability, person storage, access to daylight, etc. We will review the responses and compile the data for inclusion in the Programming Report.

M+A will issue a *General and Department Filing and Storage Survey* to be completed by the Client and returned to M+A.

The final Programming Report will summarize the use, size, requirements, organization, and adjacencies for each space. It will also provide detailed analysis of the questionnaire responses and outcomes from programming exercises above. M+A will also make recommendations for how to improve space efficiency.

Timeline - We anticipate this will take 2 weeks

These are services that M+A provides standard that not all firms do. We feel these efforts improve our service and your project.

Meetings – Four hours of interviews and/or Focus Groups, One Qualitative Visioning Session, One meeting to present the Programming Report

#### *Evaluation of Alternatives*

M+A will produce test fits based on the approved program with one revision as necessary. This process is meant to evaluate the buildings footprint and its effect on the successful implementation of the program. This work is typically paid for by the prospective landlord.

**M+A provides a chart that compares each test fit to the program to help our clients assess the efficiency of each prospective location.**

We will perform a code review of the test fit and any remaining suites effected by the test fit.

When the preferred space is selected, M+A will review the draft lease if available for coordination.

**Based on our review of the Workletter we will provide guidance for negotiating infrastructure provided by landlord and its impact on the project.**

Timeline – M+A anticipates that this phase will take one week per test fit. The duration of this phase will depend on the real estate decision making process.

Meetings – One visit to the selected site and one meeting to review the test fits and discuss our findings.

#### *Schematic Design*

M+A performs a detailed survey of the existing architectural conditions including slab heights, window sill condition, ceiling conflicts, and ADA compliance. We then update the CAD files provided by owner.

During this phase we further develop the test fit into a full space plan, incorporating any revisions made to the program or as a result of field conditions uncovered during our site visit.

**These are services that M+A provides standard that not all firms do. We feel these efforts improve our service and your project.**

We present the plan for review, make one revision if necessary, and present the final plan for approval.

The Client needs to provide M+A with full equipment specifications, per our *Equipment Survey Form*, so equipment can be incorporated into the plan and provided the correct clearances, power, etc.

M+A will prepare meeting minutes summarizing the content of the meeting and assigning responsibility to parties who have action items.

**In addition, M+A will add pricing note to the final plan allowing the General Contractor to prepare budget pricing.**

We begin to resolve the programmatic requirements of your project and develop design concepts for special areas including reception and conference facilities.

Three color and material palettes will be developed that support the programming report and the image the client seeks to portray. Palettes will include flooring, base, paint, wall covering, woods, plastic laminates, and any specialty finishes.

If client plans to renovate in place then swing space and phasing plans will be discussed at this point.

M+A will coordinate with the project's engineers and specialty consultants who will be responsible to see that their work is integrated with the overall concept.

Present the Schematic Design, with one revision if required.

**Once decisions have been made in this phase M+A will prepare an annotated plan for a GC to prepare preliminary pricing**

Timeline – We anticipate that it will take three weeks

Meetings – One day has been allocated for a detailed site survey and there will be one client meeting to present the Schematic Design

These are services that M+A provides standard that not all firms do. We feel these efforts improve our service and your project.

*Design Development*

Following approval of the Schematic Design, we will develop the concepts in greater detail to more fully describe the interior architecture, color, materials, and furnishings of the space.

We will refine the space plans in detail for each area of the facility to illustrate how the various elements are integrated into an effective overall plan and design consistent with your operational, financial and aesthetic goals.

We will further refine the selected color and materials palette. Select specific materials and colors for all areas. This is exclusive of “unique” selections for private offices and detailed furniture specifications.

**We will prepare sketch's in 3D to communicate the architecture of the space and once material selections have been made they will be applied to the 3D image.**

M+A will develop important details and refine the millwork design.

Coordinate with the project's engineers and specialty consultants who will be responsible to see that their work is integrated with the overall concept.

We will need to work with the team to establish final requirements for audio visual, security, storage, power & data locations, LAN room requirements, special equipment locations, and any other special requirements.

We will review and comment on the budget and schedule as they relate to the quality and quantity decisions required during this phase of the project.

Present the detailed architectural design scheme, with up to two revisions if required.

*These are services that M+A provides standard that not all firms do. We feel these efforts improve our service and your project.*

Present the final Design Development package for senior management approval.

The final Design development package will constitute the 50% construction documentation submission.

Timeline – M+A anticipates that this phase will take four weeks.

Meetings – Three design presentations and one technology coordination meeting

### *Construction Documents*

Based on the approved Design Development package, construction drawings and specifications will be prepared to convey the design and execute the work.

Preparation of construction documents delineating the work to be performed, including:

- Demolition plans, if applicable
- Partition plans showing the layout and including wall types, doors, frames and hardware
- Reflected ceiling plans with ceiling types and light fixtures
- Telephone, electric, and communications outlet location plans
- Finish plans keyed with floor and wall material locations
- Elevations as required to convey design intent
- Millwork and ceiling details as required
- Schedules including equipment, lighting, finish, and doors

If changes are made after the design development package has been approved additional expenses may be incurred.

Coordination with the project engineers and other special consultants whose responsibility it will be to ensure that their drawings and specifications comply with the design documents.

Submit drawings to the landlord for approval if requested by the Client or otherwise made known to M+A as a requirement.

*These are services that M+A provides standard that not all firms do. We feel these efforts improve our service and your project.*

Timeline – M+A anticipates that this phase will take four weeks.  
Meetings – One coordination meeting with the engineers and one meeting to review drawings with the client.

#### *Bidding & Permit*

M+A will respond to questions presented by bidding General Contractors during the bid process.

The architectural drawings, signed and sealed by Millar + Associates, will be prepared and submitted as required to obtain regulatory agency approval to proceed with the construction work.

Assisting the filing representative retained by CGCS or General Contractor in filing contract documents with the local building department to obtain the issuance of a work permit and providing the expediter with the reasonable information requested in a timely manner. M+A will respond to any questions that arise out of this review.

If the bids are more than 10% over the agreed budget then M+A will provide value engineering services, including revised drawings, at no additional charge.

Timeline – We have based this proposal on two weeks for bidding the project and nine weeks for permit review.  
Meetings – We don't anticipate any meetings during this phase

#### *Construction Administration*

This phase of the project includes the services required and performed by Millar + Associates during the Construction phase of this assignment.

One site visit per week to observe the construction for general conformance with the design intent expressed in the contract documents and, in conjunction with these, attendance at meetings and review of meeting minutes prepared by the contractor for distribution.

Respond to Requests for Information (RFI's) by the General Contractor.

These are services that M+A provides standard that not all firms do. We feel these efforts improve our service and your project.

Review the initial partition layout prior to construction.

M+A will rely on the General Contractor to prepare minutes during this phase.

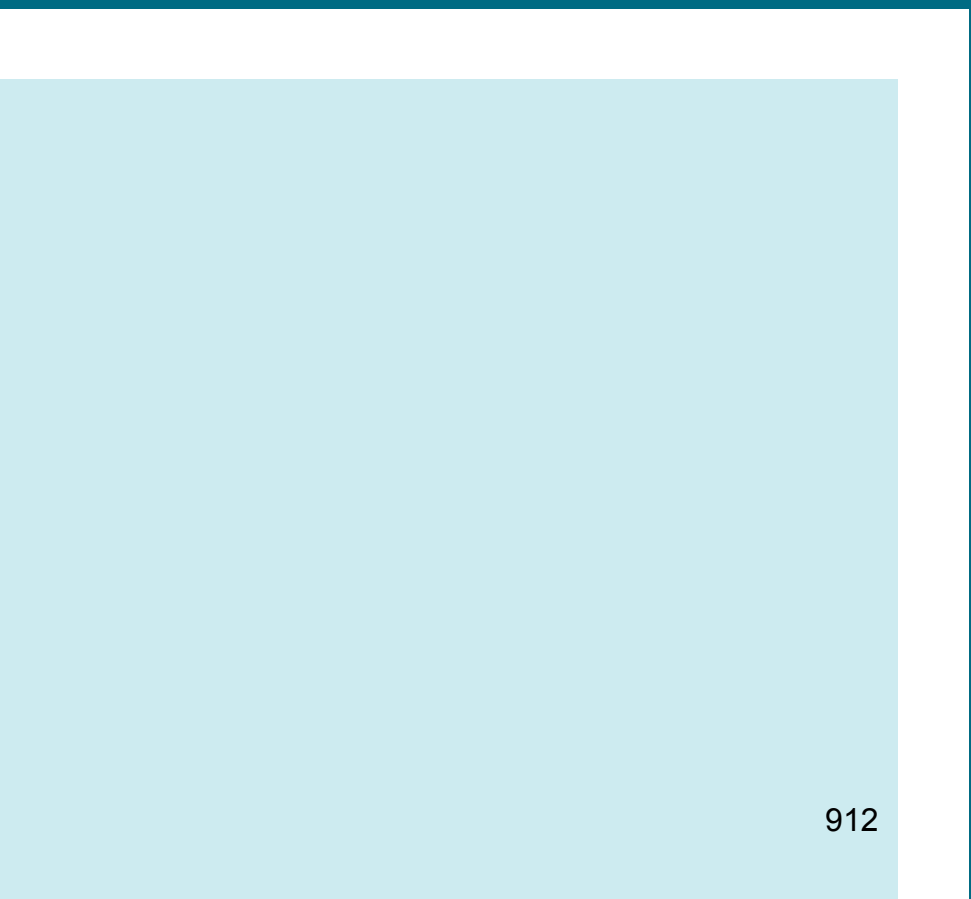
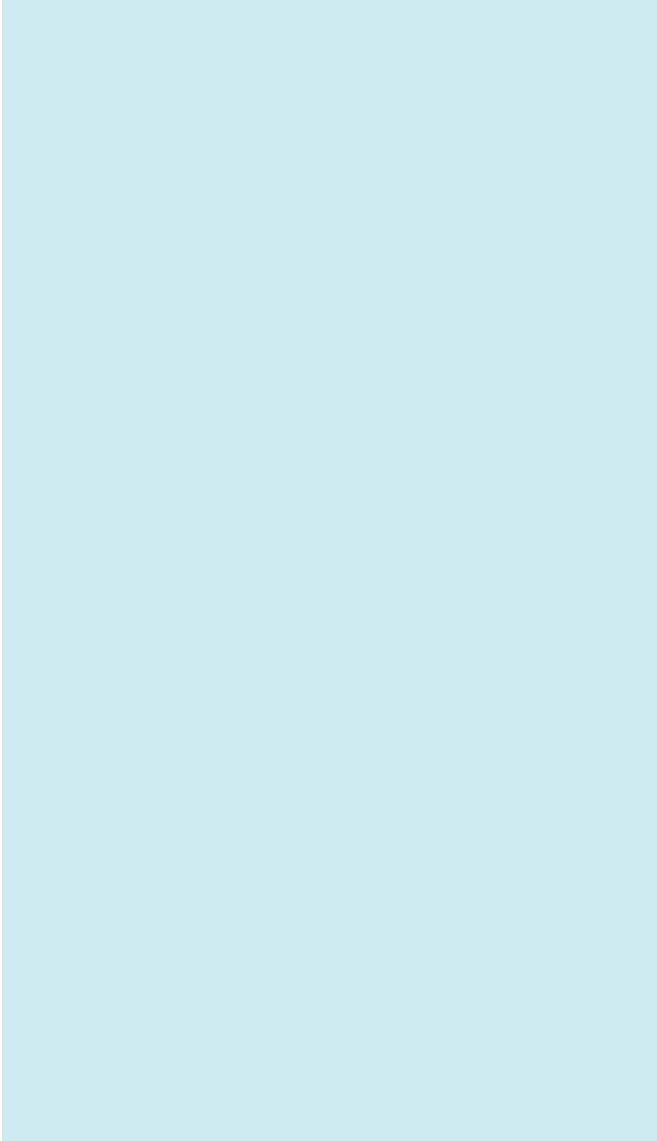
M+A will review and comment on each initial submittal of shop drawings, product data, and samples.

Review and process invoices and applications for payment, including recommendations for action and verification of discounts, rebates or cost credits.

Prepare and distribute initial Construction Punch List summarizing incomplete and/or incorrect items, follow-up on corrective activities, and a final Construction Punch List.

This phase ends at Substantial Completion. The construction schedule may vary but this proposal assumes 10 weeks of Construction Administration.

Timeline - See above for anticipated construction phase  
Meetings - One meeting per week of construction





## COMPENSATION & REIMBURSABLE EXPENSES

For the Basic Services outlined above Millar + Associates fee will be \$3.65 per rentable square foot, exclusive of consultant's fees and all applicable sales taxes.

The fee for MEP (Mechanical, Electrical, and Plumbing) services is \$1.15/RSF. This includes one supplemental AC unit. Additional supplemental units will incur an additional \$1,500 fee. This proposal includes Caliber Engineering; if a different engineer is required the price may change.

### Pre-Design:

Programming	\$0.22/RSF
Test fits	*\$0.12/RSF
(*Typically paid by prospective buildings - not included in total below)	
Site Survey & Pricing	\$0.15/RSF

### Design:

Schematic Design	\$0.29/RSF
Design Development	\$0.80/RSF
Construction Documents	\$1.16/RSF
Bidding & Permit	\$0.15/RSF
<u>Construction Administration</u>	<u>\$0.88/RSF</u>
<b>Total</b>	<b>\$3.65/RSF</b>

Any work outside the Scope of Services will be discussed with CGCS prior to commencement.

This proposal does not include services as follows; structural engineering service, permit expediting, or any other consultants unless expressly mentioned in the Scope of Services. Optional services are not included in the base fee, but are listed here as an additional cost:

### Optional Services:

Furniture services	\$0.65/RSF
Project Management	\$0.75/RSF
Signage	\$0.10/RSF



Target Government Affairs Office

For fees and reimbursable expenses, invoices will be rendered monthly with payment due upon receipt. Invoices unpaid after thirty days will accrue interest at prime plus 1%.

In addition to the Basic Services fee described above, we will bill all out-of-pocket expenses directly related to this project at actual cost plus 15% for administrative costs. Examples of Reimbursable Expenses include, but are not limited to, reproduction charges, facsimile and messenger charges, travel expenses, and postage, as well as the costs for filing of plans and obtaining of permits.

It is Millar + Associates policy to pass along all discounts and rebates to our clients; we do not mark up or impose add-on charges for furniture and finishes specification and/or procurement services.

Millar + Associates Standard Terms and Conditions, which are incorporated herein by reference, will be forwarded under separate cover and made available upon request.

**RATE SCHEDULE**

Millar + Associates hourly rate schedule, as of June 1, 2014 is as follows:

Architecture:

Principal-in-Charge	\$150/Hr
Project Manager	\$120/Hr
Project Architect	\$100/Hr
Senior Designer	\$95/Hr
Designer	\$85/Hr
CAD Operator	\$65/Hr
Administrator	\$50/Hr

Millar + Associates reserves the right to revise hourly rates as required. If you accept the terms of this agreement please sign below and return to [omillar@millar-associates.com](mailto:omillar@millar-associates.com). Thanks!

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Name: \_\_\_\_\_ Title: \_\_\_\_\_







# OLIVIA MILLAR IIDA, LEED BD+C

## PROJECT EXECUTIVE

### SUMMARY

Olivia Millar is the Founding Principal of Millar + Associates LLC. Mrs. Millar's background puts her in a unique position to lead this local team through all phases of the process. As evidenced in her resume, Mrs. Millar has a broad range of experience in management, real estate services, interior design, and sustainability. Within Interior Design Mrs. Millar has worked with a diverse range of clients including commercial, professional services, law firms, associations, financial institutions, and government agencies. Mrs. Millar started Millar + Associates to provide her clients with the highest level of service and attention to detail. Millar's passion is to understand and support the business goals of M+A's clients. It is Millar + Associate's belief that a commitment to your goals and a profound understanding of your business render the most successful results.

### EXPERIENCE

#### NOTABLE DESIGN PROJECTS

Associated General Contractor of America Arlington VA	17,400 SF
Capital One Various	10-100,000 SF
The Chertoff Group Washington DC	12,500 SF
The Schusterman Foundation Washington DC	10,000 SF
American Association for Clinical Chemistry Washington DC	22,000 SF
Ritz Carlton Headquarters Chevy Chase MD	Multiple Projects
Patient-Centered Outcomes Research Institute Washington DC	25,000 SF
Seabury APG/Diio Reston VA	9,800 SF
Tetrad Digital Integrity Washington DC	7,500 SF

### EDUCATION

George Washington University  
*M.F.A. Interior Design*

George Washington University  
*B.A. Visual Communications  
Presidential Arts Scholar*

### AWARDS & RECOGNITION

The Charles & Lynn Schusterman  
Family Foundation  
*2013 NAIOP MD/DC  
Award of Merit  
2013 IIDA MAC  
Premiere Silver Award Recipient  
2013 ASID MD  
2<sup>nd</sup> Place, Commercial Interiors*

### PCORI

*2013 ASID MD  
1<sup>st</sup> Place, Commercial Interiors  
2012 Zeftron  
Honorable mention sustainable  
practice award*

### PUBLICATIONS

Washington Business Journal  
*Six Part Series on Green Business*  
Washington Business Journal  
*Consider Tax Law as You  
Design Space*  
FOCUS Magazine  
*A&D Panel on Sustainability*  
Business & Leasing Finance News  
*Why Taking the "LEED" Matters*  
Mid-Atlantic Real Estate Journal  
*LEEDing the Way*

### SPEAKING ENGAGEMENTS & INTERVIEWS

American Real Estate Woman,  
New York Chapter  
Maryland Economic Development  
Association  
Commercial Real Estate Women  
(CREW) Hampton Roads  
Greater Washington Board of Trade  
Real Estate Weekly  
National Real Estate Advisor  
Perspective New York





# WENNIE SCHERRER

## DESIGN DIRECTOR

### SUMMARY

Wennie Scherrer is a Design Director with Millar + Associates. She has a proven track record for designing outstanding commercial interior projects of various sizes and backgrounds. Her professional experience as a designer has been gained through work at various leading design firms on projects consisting of Retail, Education, Transportation, Laboratory, Hotel, Healthcare and predominantly Office Design. She leads the overall concept of design for each project, mentors the design staff, maintains the programmatic and aesthetic requirements of the project, and keeps the staff informed of the industry trends and trade practices. Her project portfolio includes local, national and international clients and projects that have received repeat work, LEED certifications, as well as design awards.

### EXPERIENCE

#### NOTABLE DESIGN PROJECTS

B'nai B'rith Youth Organization Washington DC	6,000 SF
AmeriSphere Washington DC	7,500 SF
American Association for Clinical Chemistry Washington DC	22,000 SF
Capital One Various	10-100,000 SF
DC Business Improvement District Washington DC	15,000 SF
Sustainable Building Partners Fairfax VA	4,500 SF
National Health Care Anti-Fraud Association Washington DC	4,500 SF
Relief International Washington DC	8,000 SF
Paladino McLean VA	4,500 SF
DC Public Charter School Board Washington DC	21,500 SF
Connections Media Washington DC	8,100 SF

### EDUCATION

California State University  
*Bachelor of Art, Interior Design with  
Architectural emphasis*

### AWARDS & RECOGNITION

American Society of Hematology  
2011 IIDA MAC  
*Premier Silver Award*  
2011 NAIOP Award  
*Best Sustainable Design*  
2011 Core Net Global Mid Atlantic  
*Sustainability Award*  
LEED Platinum Certification

### PUBLICATIONS

Interiors & Sources Magazine  
*American Society of Hematology*  
Interior Design Magazine  
*American Society of Hematology*

### COMMUNITY INVOLVEMENT

CREW DC





# ANNIE RICHARDS

## LEED AP, NCIDQ

### TECHNICAL LEAD

#### SUMMARY

Annie is an interior designer with diverse industry experience including corporate, hospitality, non-profit, government, and residential design. Her work involves all aspects of the process including design, lighting, furniture selection, AV and MEP coordination, construction documentation, signage and art advising, LEED, ADA compliance, and construction management. Her knowledge of materials and experience with furniture procurement, construction techniques, and drafting techniques afford her a unique ability to convey design intent to clients and help them make informed decisions. Annie’s extensive knowledge of the code and permit process inform her oversight of the work product and help reduce the number of permit comments and change orders. Quality control is paramount at M+A and Annie ensures it is infused in every stage of the project.

#### EXPERIENCE

##### NOTABLE DESIGN PROJECTS

Associated General Contractors of America Arlington VA	17,400 SF
Tetrad Digital Integrity Washington DC	7,500 SF
The Chertoff Group Washington DC	12,500 SF
Seabury APG/Diio Reston VA	9,800 SF
American Association for Clinical Chemistry Washington DC	22,000 SF
American Council on Renewable Energy Washington DC	4,500 SF
Capital One Laurel MD	100,000 SF
Patient-Centered Outcomes Research Institute Washington DC	25,000 SF
The Schusterman Foundation Washington DC	10,000 SF

#### EDUCATION

East Carolina University,  
*Bachelor of Science, Interior Design*

#### AWARDS & RECOGNITION

The Charles & Lynn Schusterman  
Family Foundation  
2013 NAIOP MD/DC  
*Award of Merit*  
2013 IIDA MAC  
*Premiere Silver Award Recipient*  
2013 ASID MD  
*2<sup>nd</sup> Place, Commercial Interiors*

#### PCORI

2013 ASID MD  
*1<sup>st</sup> Place, Commercial Interiors*  
2012 Zeftron  
*Honorable mention sustainable  
practice award*



# ELLYN KORN

## DESIGNER

### SUMMARY

Ellyn is an interior designer who supports the team, and the client, through careful listening during programming; informed finish selection, diligent consultant coordination, as well as participating in thoughtful design solutions and their translation into complete construction documents. Ellyn’s skills in AutoCAD and other design software, as well as hand drafting and rendering, enable her to better communicate the design to the team and build consensus on the end product before fabrication begins. She works closely with the team leaders to provide quality design that meets the project goals and an uncompromising aesthetic that M+A clients will enjoy for the duration of their lease term.

### EDUCATION

Arizona State University,  
*Bachelor of Science, Interior Design*

### AWARDS & RECOGNITION

Best in Show  
*Student Interior Design Competition*

First Place  
*Arizona State Fair Art Show*

### COMMUNITY INVOLVEMENT

IIDA

### EXPERIENCE

#### NOTABLE DESIGN PROJECTS

American Association for Clinical Chemistry Washington DC	22,000 SF
AmeriSphere Washington DC	7,500 SF
NASDAQ Rockville MD	2,000 SF
Sustainable Building Partners Fairfax VA	4,500 SF
National Health Care Anti-Fraud Association Washington DC	4,500 SF
B'nai B'rith Youth Organization Washington DC	8,400 SF
Capital One Various	10-100,000 SF
The Schusterman Foundation Washington DC	10,000 SF
DC Public Charter School Board Washington DC	21,500 SF
Connections Media Washington DC	8,100 SF
NVG Washington DC	4,000 SF







**PROJECT FEATURES**



Project Manager



Repeat Client



Jurisdiction



No Permit Comments



Green Project



LEED Project

**SERVICES**



Art



Signage



Furniture



Lease Comments



Construction Documents



Construction Administration

**PROJECT DETAILS  
 ICON LEGEND**

The following pages highlight Millar + Associates' portfolio of projects.

Icons illustrating important project details will appear on the portfolio pages. To the left, is a key which defines these icons.

**ACORE**  
AMERICAN COUNCIL ON  
RENEWABLE ENERGY

**PROJECT FEATURES:**



**SERVICES:**



# ACORE

AMERICAN COUNCIL ON  
RENEWABLE ENERGY

## ABOUT

The American Council on Renewable Energy (ACORE) left 9,000+ RSF on the 7th floor at 1600 K St. with the goals of reducing their real estate footprint, maintaining the same staff level, and avoiding coming out of pocket for construction or furniture. M+A worked with ACORE to understand the changes they were prepared to make to their culture and aligned these goals with the design. After M+A test-fit several buildings, they decided to move just one floor down in their current building into a 4,500 SF suite. While they moved into space that was half the square footage, M+A was able to provide more than their program requirements with respect to seating, conference, and storage. This large increase in efficiency was driven by ACORE's decision to move everyone into workstations. The reduced square footage allowed the design team to add a conference room beyond what they originally required. We were also able to reuse a lot of the existing wood walls, glass, ceiling tile, lighting, and keep the pantry location (i.e. plumbing), helping to keep costs down. In addition, the M+A team worked with the furniture dealer to create a design that not only reduced costs, but also increased light penetration, such that the construction and furniture costs were completely covered by the TI allowance.

Olivia Millar, IIDA, LEED BD+C  
Principal  
Project Executive  
202.800.2900  
omillar@millar-associates.com



# RAINN



## PROJECT FEATURES:



## SERVICES:



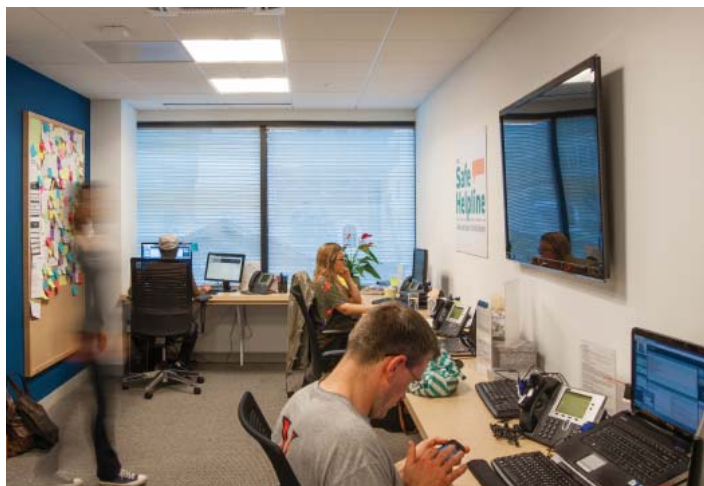
**“You guys did a great job”**  
– Scott Berkowitz, CEO  
RAINN



# RAINN

## ABOUT

RAINN engaged the Millar + Associates team to design their new 4,500 SF office space. The new facility had to house a growing staff and the 24/7 hotline. While RAINN's space wasn't directly off the elevator M+A worked with the brokerage team to get landlord approval in the lease to extend the RAINN logo outside the suite, creating more prominence for the organization. The staff space included a divisible conference room and a mix of perimeter offices, interior workstations, and a benching solution for interns. To maintain access to daylight M+A placed the low intern desks next to a section of window to allow maximum daylight penetration to the interior spaces. RAINN wanted a bright space so a lot of light colors were used, also allowing daylight to bounce deeper in the space. A few strong colors were used sparingly to add interest without overpowering the space. The very efficient layout M+A provided RAINN allowed them to reach 80 SF per person, a remarkably efficient floor plan which provided real estate savings for RAINN. M+A also designed in three "back-drop" areas where conference rooms or corridors could also provide back-drops for the staff's many press interviews. M+A also designed a bright and functional space for the many volunteers who staff the hotline around the clock.



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Project Executive  
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omillar@millar-associates.com



**PROJECT FEATURES:**



**SERVICES:**



**M+A Team**

Project Executive	Olivia Millar
Technical Director	Steve Sorrell
Project Designer	Annie Richards

**References**

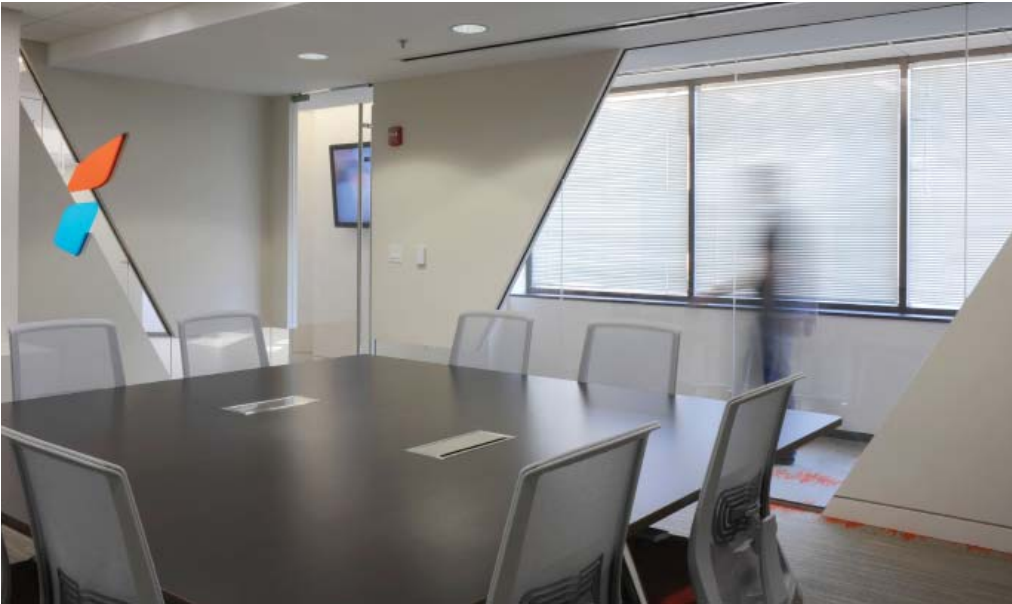
Paul Innella, President  
202.470.3723  
[paul.innella@tdisecurity.com](mailto:paul.innella@tdisecurity.com)

# TDI

## ABOUT

Tetrad Digital Integrity (TDI) relocated their offices to a whole floor at 1155 Connecticut Ave. The Cyber Security Consulting firm has a majority of their employees housed off-site at their client's offices but needed a corporate headquarters that provided a professional environment which reinforced identity and corporate branding while still maintaining security and functionality. The Millar team drew their inspiration from TDI's description of their image and the "hacker" iconography of the semicolon and the backslash which inspired the design. This project was in full swing when Mancini announced that they were closing the DC office. TDI committed to stay with the team that had served them so well to date, and in return the team committed to produce the Permit drawings ahead of the agreed date to ensure no transition related issues interfered with the schedule. The Millar team issued the drawings ahead of schedule and the drawing set had no building permit questions from the regulatory agency so the project maintained its schedule and high level of design.

Olivia Millar, IIDA, LEED BD+C  
Principal  
Project Executive  
202.800.2900  
omillar@millar-associates.com





**PROJECT FEATURES:**



**SERVICES:**



**“M+A brought to life our vision for an office environment reflective of our brand’s spirit and values. Their professionalism got the project done on time, on spec and within budget.”**

**– Matt Grossman, CEO**





## BBYO

B'NAI B'RITH YOUTH ORGANIZATION

### ABOUT

B'nai B'rith Youth Organization (BBYO) engages Jewish youth with their community to create a positive identity and meaningful experiences. When BBYO relocated their International Headquarters to two floors at the Hillel building in Washington DC the goals were to honor the youthful nature of the work, maximize efficiency to allow room to grow, reuse existing build-out to keep costs down, and provide meeting spaces to accommodate the many styles and age groups in the office. We were able to meet the aggressive budget for this project by reusing most of the ceiling and lighting, keeping existing offices and glass fronts in place, and getting creative with material selection and placement. The space provides some private offices, some shared offices, many open workstations and intern stations. In addition there are casual meeting space in and around pantries on each floor with AV and whiteboards for work. There is also a traditional conference room and a privacy room. The resulting space provides collaboration and privacy while demonstrating a sophisticated yet youthful space.



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Principal  
Project Executive  
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omillar@millar-associates.com



**PROJECT FEATURES:**



**SERVICES:**



**M+A Team**

Project Executive	Olivia Millar
Technical Director	Steve Sorrell
Project Designer	Annie Richards
Designer	Fan Wang

**References**

Dave Lukens, COO  
703.837.5311  
lukensd@agc.org



# AGC

ASSOCIATED GENERAL  
CONTRACTORS OF AMERICA

## ABOUT

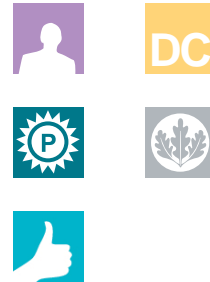
AGC first hired M+A to conduct an in-depth programming study of how people were working in their current space. The majority of staff were in offices, yet many complained about noise levels and not having enough meeting space. M+A embedded themselves in AGC's offices for two days observing the work performed. In addition M+A issued surveys and compiled the results. Our research showed that many offices were empty and that many meetings were happening in the hallways and in doors to people's offices. AGC recognized that the work process of their staff today was very different than 10 years prior and took this relocation as an opportunity to modernize their space and reduce their real estate costs. M+A designed a space that allowed AGC to reduce their rentable square footage by 22% while adding staff. In addition the new space offers more conference rooms, lots of daylight penetration, privacy rooms, and more casual collaboration areas. In the end AGC reports that the office is quieter now than it was when everyone had a door and people are actually using the amenity spaces that sat vacant in the old office.



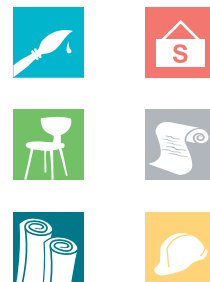
Olivia Millar, IIDA, LEED BD+C  
Principal  
Project Executive  
202.800.2900  
omillar@millar-associates.com



**PROJECT FEATURES:**



**SERVICES:**



**M+A Team**

Project Executive	Olivia Millar
Project Architect	Steve Sorrell
Project Designer	Annie Richards

**References**

Orlando Gonzales, Chief of Staff  
202.827.7664  
ogonzales@pcori.org



## PCORI

THE PATIENT-CENTERED  
OUTCOMES RESEARCH INSTITUTE

### ABOUT

Patient Centered Outreach Research Institute (PCORI) was created by the Federal Government to conduct research and provide information about the best available evidence to help patients and their health care providers make more informed decisions. We engaged with PCORI when they had only one employee and were just starting to build the organization. During the course of the design process the organization grew and their requirements solidified. The Millar team was able to stay flexible and accommodate PCORI's changing goals while maintaining budget and schedule requirements. PCORI expects tremendous growth as they continue to build the organization, therefore the space itself needed to be a powerful tool in recruiting the best talent. While the aging base building presented some challenges we were able to achieve the modern, open-yet-private design that PCORI needed to support their grant management teams and scientists. This project exemplifies the success possible when a team is carefully chosen and clear in the desired end result. From the engineer to the landlord, project manager to the general contractor, this team never lost sight of PCORI's goals. The exact same team has already embarked on an expansion space for PCORI and look forward to the same level of success.

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Principal  
Project Executive  
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MILLAR + ASSOCIATES LLC  
1785 Massachusetts Ave. NW  
Washington, DC 20036  
202.588.6420  
[millar-associates.com](http://millar-associates.com) 934

## Options for Office Relocation

Name/Address	Floor/Suite	Advertised	Smallest Space	Base Price	Operating	Tax	Cost per Sq Ft	Cost per Sq Ft	Overall Costs	Overall 2
		Space	Breakdown	per Sq Ft	Expenses					
		A	B	C	D	F	A x C	B x C	A x (C+D+F)	B x (C+D+F)
1 National Place - 1331 Penn NW	300 South	10667	7500	\$45.00	\$14.00	\$7.88	\$ 480,015.00	\$ 337,500.00	\$ 713,408.96	\$ 501,600.00
National Place - 1331 Penn NW	6th floor	7871	7871	\$44.00	\$14.00	\$7.88	\$ 346,324.00	\$ 346,324.00	\$ 518,541.48	\$ 518,541.48
National Place - 1331 Penn NW	7th floor	9907	9907	\$45.00	\$14.00	\$7.88	\$ 445,815.00	\$ 445,815.00	\$ 662,580.16	\$ 662,580.16
Hamilton Square - 600 14th St NW	9th floor	8002	8002	\$47.00	\$13.15	\$13.46	\$ 376,094.00	\$ 376,094.00	\$ 589,027.22	\$ 589,027.22
2 National Press Building - 529 14th St NW	Suite 200	7005	7005	\$44.50	\$12.81	\$5.02	\$ 311,722.50	\$ 311,722.50	\$ 436,621.65	\$ 436,621.65
National Press Building - 529 14th St NW	Suite 230	7658	7658	\$44.50	\$12.81	\$5.02	\$ 340,781.00	\$ 340,781.00	\$ 477,323.14	\$ 477,323.14
National Press Building - 529 14th St NW	Suite 1230	7043	7043	\$46.00	\$12.81	\$5.02	\$ 323,978.00	\$ 323,978.00	\$ 449,554.69	\$ 449,554.69
3 1801 Penn Ave NW	8th floor	9834	9834	\$61.00		\$12.67	\$ 599,874.00	\$ 599,874.00	\$ 724,470.78	\$ 724,470.78
4 1325 G St. NW	5th floor	11568	7500	\$48.00	\$9.31	\$8.05	\$ 555,264.00	\$ 360,000.00	\$ 756,084.48	\$ 490,200.00
1325 G St. NW	9th floor	8250	7500	\$49.00	\$9.31	\$8.05	\$ 404,250.00	\$ 367,500.00	\$ 547,470.00	\$ 497,700.00
5 1310 G St. NW	2nd floor	6652	6652	\$48.00	\$11.49	\$10.27	\$ 319,296.00	\$ 319,296.00	\$ 464,043.52	\$ 464,043.52
6 600 13th St. NW	3rd floor N	9278	7500	\$45.00	\$13.00	\$6.79	\$ 417,510.00	\$ 337,500.00	\$ 601,121.62	\$ 485,925.00
600 13th St. NW	3rd floor S	9519	7500	\$45.00	\$13.00	\$6.79	\$ 428,355.00	\$ 337,500.00	\$ 616,736.01	\$ 485,925.00
7 Heurich Building - 1201 Penn NW	Suite 450	8224	8224	\$63.00	\$13.37	\$5.14	\$ 518,112.00	\$ 518,112.00	\$ 670,338.24	\$ 670,338.24
8 1201 F St.	6th floor	7292	7292	\$46.00	\$12.98	\$8.75	\$ 335,432.00	\$ 335,432.00	\$ 493,887.16	\$ 493,887.16
1201 F St.	7th floor	6081	6081	\$46.00	\$12.98	\$8.75	\$ 279,726.00	\$ 279,726.00	\$ 411,866.13	\$ 411,866.13
9 1120 G St.	Suite 450	8059	8059	\$48.00		\$6.42	\$ 386,832.00	\$ 386,832.00	\$ 438,570.78	\$ 438,570.78
1120 G St.	9th floor	6994	6994	\$49.00		\$6.42	\$ 342,706.00	\$ 342,706.00	\$ 387,607.48	\$ 387,607.48
10 Herald Square - 1250 H St NW	4th floor	18755	8000	\$52.00		\$7.49	\$ 975,260.00	\$ 416,000.00	\$ 1,115,734.95	\$ 475,920.00
Herald Square - 1250 H St NW	6th floor	9000	9000	\$52.00		\$7.49	\$ 468,000.00	\$ 468,000.00	\$ 535,410.00	\$ 535,410.00
11 Southern Railway Building - 1500 K St. NW	Suite 300	8106	8106	\$55.00	\$13.17	\$8.98	\$ 445,830.00	\$ 445,830.00	\$ 625,377.90	\$ 625,377.90
12 1430 K St. NW	9th floor	6500	6500	\$51.00			\$ 331,500.00	\$ 331,500.00	\$ 331,500.00	\$ 331,500.00
13 1250 Eye St. NW	Suite 300	12057	7500	\$56.00	\$11.20	\$8.24	\$ 675,192.00	\$ 420,000.00	\$ 909,580.08	\$ 565,800.00
1250 Eye St. NW	Suite 900	9854	9854	\$56.00	\$11.20	\$8.24	\$ 551,824.00	\$ 551,824.00	\$ 743,385.76	\$ 743,385.76
1250 Eye St. NW	Suite 1000	9512	9512	\$56.00	\$11.20	\$8.24	\$ 532,672.00	\$ 532,672.00	\$ 717,585.28	\$ 717,585.28

## TOUR #1 May 21, 2015

Please give your impressions of the pros and cons of each of the office spaces we visited today. Thank you!!!

<b>National Place - 1331 Pennsylvania Avenue (Commodity A Building) \$45 + \$20</b>		
<b>Name</b>	<b>Pros</b>	<b>Cons</b>
Teri This is on my short list.	I like the address. The building is nice. I like that it is connected to the JW Marriott and have access from F Street and Pennsylvania Avenue. Price range is not too far from our current rent.	Available space facing Freedom Plaza too big for our needs. BUT, still #1 on my list for now.
Shirley This is my one and only choice	Perfect location, space large enough for me to have an office, proper space for setting up a full network and server room and other offsite staff can be comfortable when in the office	None for me
Carol	Perfect location and great space to fit our needs as we grow. Great natural light. Additionally, we could rent the extra space. Like that it has a gym and rooftop.	None
Henry	This would be my choice of the three facilities we visited today. Reasons: location, amenities, price range	Perhaps too big for our needs on the Pa. Ave. side -- unless we can sublet, but wondering if a tenant would mind sharing a one-door entrance (not counting the emergency exit)
Terry T.	I like the location. Same view we have is a plus. Building and lobby very nice. Space large enough for a larger conference room & eating area. good that we will be connecting to the JW Marriott to use their conference room without going outside. getting off the elevator was pleasant and very well lighted area. Very close to the elevator to.	NONE



Manish	Good and familiar location. A short walk to multiple metro stations (Metro Center, Federal Triangle, and Archives). Preferred the 10,000 sf space on the sixth floor because of the view, the recently remodeled hallways, and the fact that the sixth floor can be accessed from the north or south tower elevators. Twelfth floor space was nice, too, especially if we can get additional space closer to the elevator.	Need to find a suitable tenant for sixth floor 10,000 sf office. Long walk in narrow hallway to get to twelfth floor office space.
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Hamilton Square - 600 14th Street NW (Trophy Building) \$47 + \$27.50 NNN		
Name	Pros	Cons
Teri I'm okay to X this.	Building is nice. I like the terrace on the Pent House level.	Too expensive. Space was not impressive for the price.
Shirley	It's ok	Ceillings are low
Carol	The conference room on the PH level.	Expensive.
Henry	Very nice decor; this would be my second choice	Outside entrance seems to get lost between two restaurants, but once inside, Wow! Facility probably too pricey for CGCS; and I don't know whether good or bad,,the interior seems to have a corporate feel to it.

TERRY	Liked the conference room (no charge) to use it. the Terrace was a hit. very nice.	Office space was just OK.
Manish	Terrace, conference room, and other amenities were nice. A FITNESS CENTER AND SHOWER!	Didn't seem particularly special for the high price. A few minutes further walk from Archives metro.

<b>National Press - 529 14th Street NW (Commodity A Building) \$46 + \$20</b>		
<b>Name</b>	<b>Pros</b>	<b>Cons</b>
Teri I'm okay to X this.	Price range is not too far from our current rent.	Office space and windows not impressive.
Shirley	Not impressed. Overall design was strange	Space was tight
Carol	Location.	Hallways leading to the office are very narrow and has an outdated ugly design in the lobby and courtyard areas.

Terry	connected to the Shops	office space was set up crazy. was not impressed. did not like being on the 2nd floor. people can see you.
Henry	Like the location and amenities	Office space seems old, dreary and crummy. No thank you!
Manish	Price and location was right. Might see a lot of famous people in the elevators.	Weird space shape. Even exterior offices didn't have big windows because of outside building design. No garage parking for the building. Low floors could be noisy.

**TOUR #2 May 27, 2015**

<b>1801 Pennsylvania Avenue NW (Trophy Building) \$58 + \$20 NNN</b>		
<b>Name</b>	<b>Pros</b>	<b>Cons</b>
Teri Rank 3 of 4 today	Address is Pennsylvania Ave. Looks and feels new. One block from Farragut West Metro. Upgraded HVAC at no-cost. Beautiful rooftop terrace w/ furniture. Parking. Health club w/ shower & towel service, free to tenants.	High end, expensive. Location on other side of White House, hard to get to by car.
Moses		Hard to get to. Commute would be hard on folks.
Renata	Beautiful rooftop	Hard to get to

<b>1325 G Street NW (Commodity A Building) \$49 + \$27.50</b>		
<b>Name</b>	<b>Pros</b>	<b>Cons</b>
Teri Rank 2 of 4 today	Wide space with no columns and lots of windows. One block to Metro Center. Small health club and extra meeting space free to tenants.	Windows looks out to alleys and building wall. 5th floor so not much light gets in. No terrace.
Moses	Good floor space and future conference center looks promising. Also has a welcoming and modern lobby	Not much natural light.

	with large windows. Fair quality gym with towel service.	
Renata	Good floor space	Back alley way and not much natural light.

<b>1310 G Street NW (Commodity A Building) \$48 + \$20</b>		
<b>Name</b>	<b>Pros</b>	<b>Cons</b>
Teri Rank 4 of 4 today.	One block to Metro Center station. Small fitness center with towel service free to tenants. Very small roof top deck.	The whole place looks and feels worn down. I am okay to eliminate this one
Moses	Good location.	Feels and looks outdated.
Renata	Good location	Feels old and dated

600 13th Street NW (Trophy Building) \$45 + 20 NNN		
Name	Pros	Cons
Teri Rank 1 of 4 today	Directly across Metro Center station. Price range mid \$40s. Available space can be reduced to fit our required size. One space has furnished private open air patio. The other side has additional office space in place of the patio. Lots of natural light from windows looking out to 13th Street either on G St corner, or F St corner. 3,500 sq ft spa-quality fitness center free to tenants. Beautiful furnished roof top terrace.	Available space is 9,834 sq ft, hopefully can be cut down to desired size.
Moses	My top pick of the visits on this day. Great location, great views of 13th and G St street, stylish rooftop and top notch gym. The renovations to the building are very tasteful and modern. Square footage is a bit more than we need but offers plenty of room to grow.	NA
Renata	SUper nice and modern. Awesome space with natural light and great gym	

### TOUR #3 June 17, 2015

<b>Heurich Building - 1201 Pennsylvania Avenue NW (Trophy Building) \$63+\$18.51 NNN</b>		
<b>Name</b>	<b>Pros</b>	<b>Cons</b>
Teri Rank 2 of 4 today	I like the Pennsylvania Avenue address. Space available is looking out on E Street, nice light from windows. Lobby will be renovated. Conference Facility, Fitness Center.	Price is too high. Space available is way bigger than our needs (8,224 sq ft) and cannot be reduced unless we go down to 6,500. No access to roof terrace.
Carol	Location. Future renovations to the lobby area, fitness center and conference room.	Pricey.
Gabi Rank 2 of 4 today	location, conference center and wall of windows	price Renovations in 2016 AC will not be redone with the renovation

<b>1201 F Street NW (Trophy Building) \$46+\$22 NNN</b>		
<b>Name</b>	<b>Pros</b>	<b>Cons</b>
Teri Rank 1 of 4 today	Space available is the right size for our needs. Very nice rooftop terrace. Fitness Center. Windows look out to 12th Street & F Street.	Triple net is more expensive. No conference facility in building.
Carol	Location. Fitness center & rooftop. A lot of natural light.	
Gabi Rank 1 of 4 today	Space and its layout, big offices along windows fitness center still close to current offices Rooftop was nice	no conference center puzzled by poor functioning elevators for such a high price building parking is \$290

<b>1120 G Street NW (Class B Office) \$48+\$6.42</b>		
<b>Name</b>	<b>Pros</b>	<b>Cons</b>
Teri Rank 4 of 4 today	Rate is low.	Ceilings are low. Not a nice building. Space available (8,059) is bigger than our needs. The space don't have much windows.
Renata		Location not the great. Building just ok



Carol		Older building, no amenities
Gabi Rank 4 of 4 today	nada	tired and older building, dark space location

1250 H Street NW - Herald Square (Class A Office) \$48-\$52 + \$7.49		
Name	Pros	Cons
Teri Rank 3 of 4	Has a small rooftop terrace. Fitness Center and Conferencing Facility in building. Ceilings are high.	Cheaper space has very little window area looking out to H Street. To get windows along H & 12th Streets we need to take 9,000 sq ft of space at higher rate.
Renata	Fitness center and nice space if we take larger amount of space	
Gabi rank 3 of 4	location, especially with the windows looking out on 13th fitness center and the conference facility to come higher ceilings only if we take the space overlooking 13th and H (not the alley)	its a bit farther than our current location but still in the area

## **PERSONNEL**