Community Planning Workshop

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June 1, 2007
TO: **4J School Board**
FROM: **UO Think Tank Team**
SUBJECT: **PROGRESS UPDATE FROM THINK TANK**

Introduction

The purpose of this memo is to provide you with an update on the progress of the Think Tank being facilitated by the University of Oregon team. This memo summarizes the progress to date, including some of the recommendations by the Think Tank. The final products of the Think Tank will be reviewed at a work session on August 1st, but we want to get feedback on the scope and direction of this work.

Background

The strategic question facing the 4J District is: "What services and facilities will be needed to support the district's future instructional programs in order to increase achievement for all students and close the achievement gap?" In answering this question, the School Board will be taking into consideration declining enrollment, regional enrollment patterns, placement of special education programs, the location of alternative schools, and potential strategies such as boundary changes, grade and school configurations, and school closers and/or expansions (4J Trends and Issues Report 2007, p. 1).

The planning process to address these issues is taking place through a multi-phased process:

1. **Trends and Issues**: the District gathered information on trends, issues and best practices.
2. **Focus groups**: District staff were asked to develop possible options around eight topics: special education, Title 1, English language learners, kindergarten, high school size, elementary and middle school size, technology and grade configurations.
3. **Think Tank:** A team from the University of Oregon convened a "Think Tank" composed of community members with broad-ranging perspectives to make recommendations about how to integrate options that address the issues the District is facing and identify the implications of those options.
4. **Public Involvement:** Based on board direction, a team from the University of Oregon will develop a broad-based, deliberative process that will allow the public to learn about current trends and weigh in on the options.

Role of the Think Tank

The role of the Think Tank is to review information from the District, and make recommendations to the Board on how an integrated set of options should be presented in the public involvement process. In making these recommendations, the Think Tank was asked to recommend options and suggest ways of presenting or packaging the information.

Think Tank Members

Susan Ban	Executive Director, Shelter Care
Jim Carlson	Central Services Executive Director, City of Eugene
Steve Carmichael	United Way Board and former Lane County Youth Services Director
Serafina Clark	Senior Program Services Coordinator, Department of Children and Families
Virginia Farkas	4J Budget Committee and 4J Parent
Chuck Forrester	Executive Director, Lane Workforce Partnership
Gerry Gaydos	Managing Partner, Gaydos, Churnside & Balthrop
Emilio Hernandez	Assistant Vice Provost, Office of Institutional Equity and Diversity, University of Oregon and former appointee to the State Board of Education
Marilyn Klug	Regional Vice President, Peace Health
Steve Korth	Partner, McKay Investment Co. (Oakway Mall) and 4J Parent
Charis McGaughy	4J Parent
Hugh Prichard	Prichard Partners
Virginia Thompson	4J School Board, Former OUS Board

Development of Options for the Public Process

Information review

During its February and March meetings, the Think Tank reviewed the information from a range of sources, including:

1. Best practice data from the District
2. Focus Group reports on policy options
3. Information and from 4J staff, including financial, achievement and policy information
4. Other studies and reports about the District and education policies and trends

Developing Options

After reviewing the information, the Think Tank asked the UO team to "seed" the process by developing draft policy packages from the Best Practice information and Focus group reports. An initial draft of these packages was presented at the April 4J Board meeting.

After reviewing and working through these packages, the Think Tank identified a number of problems with presenting the information, including:

- False trade-offs with the packages (e.g., early intervention vs. special needs intervention)
- The packages entered a level of detail that seemed beyond the scope of the process
- The operational questions raised were complex due to budget uncertainty

As a result, the Think Tank is now working* with a revised approach that focuses on:

- Service and facility configurations
- Cross cutting issues and District policies

* Note: this memo was prepared before the Think Tank meeting on Monday June 4th, when this revised approach was formally reviewed

The following section outlines the issues being addressed by the Think Tank, including the topics on which they have made a recommendation.

Facility and Service Configurations

1. Elementary School Size

Summary of information:

- Research on best practices has found that schools in the 300-400 range are optimal
- The Special Education Focus Group reported that schools with an enrollment below 350 would likely not be able to provide comprehensive support services to high needs groups
- Presently many schools are under or over best practice enrollment levels (140 to 650)
- Larger schools would allow more programs, such as Art, Music, and PE
- Consolidation of school-sites would decrease operational costs by approximately $177,000 per school-site at the elementary level

Think Tank Options	Recommendation
Question: Does the Think Tank recommend forwarding several different size ranges for elementary schools, such as: • Range of 300-400 • Range of 350-400 • Range of 350-site capacity **Considerations:** School size preferences, if enforced, will impact transfer flexibility and the number of school-sites closed.	**Recommendation for Board**: Elementary Schools in the 350-site occupancy range, with a recommendation that schools with enrollment greater than 400 explore ways to develop smaller learning communities **Rationale:** • Current size range of schools is not equitable nor fiscally logical • 350 needed for adequate special education programs at all schools or sites • For fiscal reasons, site capacity of newly constructed schools needs consideration

2. School Configuration

Summary of information:

- Some best practice research suggests that K-2, 3-8, 9-12 models are the most effective
- Focus Groups indicated that a K-3, 4-8, 9-12 model makes more sense in Oregon due to 3rd grade reporting requirements
- 4J administrators have suggested that transitions between schools are difficult for all kids but have a particularly negative impact on high needs students
- Elementary and middle schools would need to be reconfigured to adopt a K-2, 3-8, 9-12

Think Tank Options	Recommendation
Question: Should a K-3, 4-8, 9-12 model be forwarded to the public for consideration? **Considerations:** Including this option will significantly increase the complexity of the public decision-making. We do not currently have cost data on this reconfiguration option.	**Recommendation for Board**: Do not forward this configuration for consideration. **Rationale:** • Inadequate evidence to support configuration • Reconfiguration involves significant costs and disruptions to District • Model would increase transitions for students, which has a negative effect on high needs populations

3. Middle School Size

Summary of information:

- QEM research indicates that middle schools around 500 are optimal
- Currently, middle school enrollments range from 309 to 672
- Currently, middle school capacity ranges from 720-1020

Think Tank Options	Recommendation
Question: Does the Think Tank recommend forwarding several different size ranges for middle schools, such as: • Range of 400-600 • Range of 450-550 • Range of 350-Site occupancy **Considerations:** Limiting enrollment to best practice levels, if enforced, would not immediately impact 4J infrastructure unless a K-8 school was also added. Stricter upper limits will limit transfers.	**Recommendation for Board**: Middle schools in the 400-600 range. **Rationale:** • Larger enrollment increases opportunity for equity and programming • Limitations on range keep enrollment levels close to QEM recommended levels • 450-550 range was not forwarded because it falls within 400-600 range

4. High School Size

Summary of information:

- Research on best practices has found that schools in the 400-800 range are optimum
- There is no set enrollment size for smaller learning communities, however, Gates Foundation research suggests they must be smaller than 500 students
- Current range of sizes (Sheldon=1,642; South=1,700; Churchill=1,287; North=1,159).
- Projected HS enrollment in 2015 is 5,082 (from current of 5,788)
- Best practice research indicates that smaller learning communities increase attendance, participation, sense of community, parental engagement, and deter drop-outs.

Think Tank Options	Recommendation
Questions: 1. Should all of the following configuration options be forwarded for further consideration: • Construct 1-2 new high schools to create 5-6 schools closer to 800 students • Maintain current configuration of 4 high schools • Reconfigure to 3 larger high schools with enrollment of 1700-1900 • Change to 3 high schools + 1 thematic school (e.g., International HS or Professional/Technical HS) 2. Should a more strict policy of limiting enrollment at high schools (e.g., 1,450 per school) be forwarded for further consideration? 3. Should all of the following career academy options be forwarded for further consideration: • Stand alone career academy • Career academy programs at each school 4. Should the option of creating smaller learning communities within current high schools (e.g., school-within-school programs) be forwarded for further consideration? **Considerations:** the cost of constructing a new high school or career academy is unknown, but would be substantial.	**Recommendations for Board**: • Maintain four high schools • Manage enrollment to create more consistent high school sizes across regions and more equitable programming across the District • Consider improving strength of career academy options at each high school, and explore community partnerships for these career academies **Rationale:** • Cost of constructing new schools is cost prohibitive • Only 3 schools would create schools with undesirably large enrollments • Creating independent career academies seems to be cost prohibitive and concerns were expressed that it may create real or perceived inequities in resources between schools

5. K-8 Schools

Summary of information:

- Research on best practices has K-8 Schools have some benefits for middle school students by maintaining elementary school environment and reducing transitions
- District will begin one K-8 in 2007 (merger of Jefferson and Magnet Arts)
- Capital costs of an all K-8 model for 4J is approximately $153 million
- Merging an elementary and middle school into K-8: save $261,000 in annual operational costs and incurs capital costs of $3-6 million (depending on the schools)
- Merging two elementary schools into K-8: increase annual operational costs by $86,000 and incur capital costs of $6-10 million (depending on the schools)

Think Tank Direction	Consensus? Board Questions?
So far: There was little enthusiasm for an all K-8 model for 4J. However, there was general agreement that 4J consider a K-8 model in future construction projects or convert an appropriately sized and located middle school building into a K-8.	
Questions: • Should an infrastructure option be forwarded to the public with the potential or flexibility for K-8 schools? • What should the District consider when putting forward a K-8 school? **Considerations:** Creating a scenario or option with a K-8 is complex without choosing specific schools or sites.	

6. Alternative School Size

Summary of information:

- Several alternative schools are comparable in size to mid-range neighborhood schools (e.g., 293), while others are considerably smaller (e.g., 97, 121, 131, 147)
- Current District policies allows the co-location of alternative schools on the same site (with shared administrative staff)

Think Tank Direction	Consensus? Board Questions?
So far: At the May 7th meeting, the Think Tank indicated that the District should apply the same site enrollment limits to alternative schools as they apply to neighborhood schools.	
Question: Should the options be sent forward with the same site enrollment limits for alternative schools as for neighborhood schools? **Considerations:** Some existing alternative schools would have to grow in size or co-locate and share administrative staff.	

NOTE: The following sections (7-10) involve some specific issues or questions raised for the *Shaping 4J's Future* process that relate to operations. The Think Tank is asked to provide some general feedback on these operational questions to help identify implications and frame the public deliberations.

7. Pre-Kindergarten and Kindergarten

Summary of information:

- District-wide all-day kindergarten would require a substantial reallocation of operational funding or funding from the state: an additional $3.4 million per year
- If money for kindergarten becomes available, there is not presently space to accommodate kindergarten programs at elementary schools
- The capital costs to build kindergarten space is approximately $410,000 per classroom and full-day kindergarten could require up to 44 new classrooms
- Best practice information indicates kindergarten has some short term gains
- Early education programs benefit low SES students, particularly in reading
- Pre-kindergarten programs are currently offered in High Schools to serve students with children and provide students instruction in child development
- Head Start and other providers provide Oregon Pre-kindergarten programs at some schools.

Think Tank Direction	Consensus? Board Questions?
So far: There has been discussion about the costs and benefits of all day kindergarten. We have not discussed the capital cost implications.	
Facility Question: Should the infrastructure options forwarded to the public include space for kindergarten? **Considerations:** All day kindergarten would increase enrollment at all schools, which can limits transfers and increased support services.	May 21: Yes, forward this option
Operations Question: What should the District consider when contemplating new targeted or District-wide kindergarten offerings? **Considerations**: Offering District-wide kindergarten under current budget would require reallocation of funding from other programs and services. In the future, the Legislature could allocate funding for K.	
Facility Question: Should the infrastructure options forwarded to the public include space for Pre-kindergartens in Elementary Schools? **Considerations:** Pre-kindergarten would increase enrollment at selected schools, which can limit transfers and increased support services. Most of the operational costs would be funded by other providers (e.g., Head Start and cooperatives).	

8. ELL Programs

Summary of information:

- Enrollment projections for ELL students predict enrollment of approximately 500 ELL students by 2012
- There is a disproportional representation of ELL students on lower end of achievement gap and ELL students have a high drop-out rate
- Many of the options under discussion are unique to Spanish because enrollment of Spanish speakers is sufficiently high to support such programming
- A dual language immersion program combines half native English speakers with half native Spanish speakers and teaches all of them in both languages. This has been shown to be a best practice for ELL achievement
- Clustering of ELL students primarily improves efficiency of service delivery where ELL enrollment is low and helps reinforce cultural identity

Think Tank Direction	**Consensus? Board Questions?**
So far: The Think Tank has reviewed the Focus Group options and Best Practice research. Concerns have been expressed about the achievement gap related to ELL students. There was interest in dual immersion programs and concern about clustering students.	
Facility Question: If necessary, should the infrastructure options forwarded to the public include an option with dedicated space for a potential Spanish-language dual-immersion program? **Considerations:** Infrastructure implications depend upon the model, school, and configuration (elementary, middle, K-8).	
Operations Question: What should the District consider in offering programs and services to English language learners? **Considerations:** See notes above.	

9. Technology

Summary of information:

- Technology programs can benefit special needs populations, particularly early interventions in reading and math for ELL and special education students
- Computer based education can increase scores and reduce the amount of time needed to achieve outcomes, particularly in writing
- In addition to providing educational support and technological literacy, technology is also needed to help administer 4J programs. For instance, some schools lack wireless internet access.
- The District employs 3 FTE district-wide support positions to service the instructional needs of all 40 school programs
- The District does not provide dedicated IT staffing, but a number of schools use their own resources to hire technology staff
- The District can include technology for infrastructure for bonds in new buildings and major reconstruction.
- The District currently allocates $5 million in general funds for technology.

Think Tank Direction	**Consensus? Board Questions?**
So far: The Think Tank has reviewed the information on technology from the Focus Group report and best practice research.	
Facility Question: Should an option be forwarded that incorporates technology infrastructure (e.g. providing wireless services at all schools)? **Considerations:** See notes above	
Operations Question: What should the District consider in developing technology programs and services? **Considerations:** See notes above	

10. Special Education

Summary of information:

- The number of students who receive Special Education services will increase by nearly 500 students between 2006 (2,602) and 2015 (3,079)
- Currently the District operates separate learning centers to provide special education services
- Integrating special education services across the District requires schools of at least 350 students
- Programs such as individualized instruction, differentiated instruction, and early intervention have been shown to improve special education outcomes
- Some evidence that technologically-assisted programs are particularly effective
- There is no negative impact on non-disabled students when special education students are integrated into classrooms

Think Tank Direction	Consensus? Board Questions?
So far: The Think Tank has reviewed the Focus Group and best practice research and agreed that every schools needs to be large enough to accommodate special education students. This influenced several recommendations about school and school site size. The Think Tank also noted it was important for equity reasons that these services be available across the entire district.	
Operations Questions: • Should the District strive to integrate special education instruction with general education across the District? • What should the District consider in offering programs and services to special education students? **Considerations:** Federal law requires 80% of special education (SPED) students to receive 80% of their instruction in general education classrooms. Cross-district integration of programming will require some schools to take on new SPED programs that do not have them currently.	

11. Title 1

Summary of information:

- To qualify as a Title 1 school, schools must have 43% or more of their students qualify for free and reduced lunch.
- Research suggests that schools with over 50% of students who qualify for free and reduced lunch, achievement begins to decline.
- Programs such as tutoring, early intervention, and supplemental programs (after school and summer school) have positive impacts on achievement

Think Tank Direction	Consensus? Board Questions?
So far: Based on Focus Group options and best practice research, the Think Tank agreed that every schools needs to be large enough to allow programs and services for Title 1 students. This influenced several recommendations about school and school site size. The Think Tank also noted it was important for equity reasons that Title 1 services be available across the entire district.	
Operations Questions: • Should the District strive to integrate Title 1 populations and services across the District? • What should the District consider in offering programs and services to Title 1 students? • What should the District consider in determining the programs and services for lower grades vs. upper grades? **Considerations:** Integration of populations may have implications on Choice, enrollment management, and school boundaries	

District Policies and Cross-Cutting Issues

In addition to the options presented by the Focus Groups, the District has also asked the Think Tank to weigh in on several broader issues that have arisen during the Shaping 4J's Future process, including specific issues from Think Tank discussions.

12. Criteria for School Closures

Summary of information:

- See list of current School Closure policies provided by 4J (Policy #8430)

Think Tank Direction	Consensus? Board Questions?
So far: The Think Tank has discussed the implications of school size and decreasing enrollment on school closures. The specific criteria have not been reviewed.	
Question: Should the District amend or revised their criteria for School closure? **Considerations:** The criteria for closure can affect regional enrollment, transportation costs, facility maintenance and renovation costs, have community impacts, and have fiscal impacts.	

13. School Choice

Summary of information:

- The 4J District has a long history of open enrollment
- The District requires alternative programs to be distinctive and draw students from throughout the district (Schools of the Future Report)
- The majority of students exercising school choice are from families with higher socioeconomic status who have resided in Eugene for some time (Access and Options Committee Report)
- The combination of equity and access issues have created the perception of a two-tier system time (Access and Options Committee Report)

Think Tank Direction	Consensus? Board Questions?
So far: School choice has been discussed throughout the Think Tank deliberation process, but no specific recommendations or considerations have been put forward.	
Questions: • Should the District consider revising its School Choice policies? If so, how and why? • Should the District use another term (such as District-wide schools) in place of "Alternative Schools" **Considerations:**	

14. School Boundaries

Summary of information:

- The Access and Options report recommends that the District consider attendance boundary changes to address demographic changes impacting neighborhood schools. The report noted that some schools are overflowing while other schools are struggling to maintain their enrollment.
- School boundaries currently have limited effect on enrollment and student composition due to school choice. However, if the District increases programming at under enrolled schools and/or limits school choice, boundaries will be a more significant factor.
- The current District policy about school boundaries states: "Attendance boundaries have been established to ensure adequate facilities for all students attending School District 4J schools. The superintendent is authorized to make boundary changes which are necessary as a result of the opening or closing of a school or adjustments to balance enrollments between schools." Eugene 4J District Policy #8440

Think Tank Direction	Consensus? Board Questions?
So far: The Think Tank has discussed the issue of boundary enrollment vs. actual enrollment, and the achievement concerns that occur when there are high concentrations of low income populations.	
Questions: If the District changes school boundaries, what factors should it consider? **Considerations:** The criteria for school boundaries can affect regional enrollment; costs of transportation, facility maintenance and renovation; and have community and fiscal impacts.	

15. Location of Alternative Schools

Summary of information:

- Currently minority, special education and ELL students are under-represented in alternative schools (maybe this is redundant with the other two points next to it)
- See 4J information about location of alternative schools

Think Tank Direction	Consensus? Board Questions?
So far: The issue of alternative school location has been discussed generally.	
Questions: What should the District consider in developing policies about Alternative School location? **Considerations:** See above	

16. District-Wide vs. Site Based Decision Making

Summary of information:

- Historically, the District has had strong site-based decision making (i.e., individual schools have significant independence on programming and staffing decisions)
- There has not been clear distinction, however, on what issues are 'site-based' and which are District-wide responsibility.

Think Tank Direction	Consensus? Board Questions?
So far: This issues has been discussed generally.	
Questions: What should the District consider when setting policy about site-based and district-wide decision making? **Considerations:** See notes above	