

Illinois State Board of Education
Streamlining Illinois' Educational Delivery Systems Task Force

Tuesday, April 20, 2010
Minutes

At 10:04 a.m. the first meeting of the Streamlining Illinois' Educational Delivery Systems Task Force was called to order by Dr. Christopher Koch, the Illinois State Superintendent. He noted that the Illinois State Board of Education (ISBE) facilitates several Task Forces, but that the Streamlining Task Force is of particular interest and importance in the state. Given the current budget situation in Illinois, he commented that the Task Force has the opportunity to think comprehensively about how the regional system can efficiently provide school and districts throughout the state with high quality educational services. He stated that he does not have any preconceived notions about the outcomes of this Task Force and hoped that all Task Force members were entering the meeting with an open mind. He provided an overview of the work of the Task Force and the focus for each of the three meetings. The dual purposes of today's meeting are to ensure that everyone on the Task Force has a common understanding of the current composition of the state system of regional support and to begin to examine the research and data from other states. During the second meeting, the Task Force will dig deeper into the current situation in Illinois and further examine best practices from across the country. Finally, during the third meeting, the Task Force will discuss the recommendations that will be sent to the Governor and the legislature in August. The overall goal of the Task Force and the recommendations that are developed will target getting students and the schools and districts that serve them equitable access to high quality assistance that is cost efficient, of high quality and supports the overarching goals set by the ISBE and the legislature.

Dr. Koch introduced Gina Burkhardt, the CEO of Learning Point Associates, who will serve as a facilitator. Ms. Burkhardt welcomed the group and facilitated the introductions of the Task Force members. Eighteen members were present or represented by a designee and three members were absent, two of whom are legislators who were in session. Ms. Burkhardt opened the Task Force's discussion of the current situation in Illinois by asking the members to provide feedback and to comment on the accuracy on the information in the matrix that ISBE prepared for the Task Force. Susie Morrison, Deputy Superintendent and Chief of Staff at ISBE, noted that matrix provided information across the system of all educational service agencies (ESAs) in the state. The Task Force members received copies of the school code sections related to ESAs and a state map that outlined the service areas for each ESA. Ms. Morrison observed that her takeaway from the map was that there are many overlapping service area boundaries. She opened the conversation about the matrix by asking the representatives from the Regional Offices of Education (ROEs) to comment.

Darlene Ruscitti of Area I remarked that the mission of the Task Force should be to consider a systems approach so that ESAs throughout the state are adding value to the classroom. She further commented that consistency of services throughout the state is more important than each ROE striving to protect its territory. Instead of competing with other ESAs to offer similar services, she would like to explore how the ESAs in Area I can best work together to serve

schools and districts. She added a description of the variety of services that her ROE offers, ranging from compliance, to school safety, to working with parents and the community.

Kay Pangle of Area 4 described how her ROE develops school improvement plans every year that are linked to her staff's analysis of state report card data and the needs of stakeholders in the region. Her team identifies areas in which schools and districts need support and develop professional development programs and services that are aligned with those needs. In addition, one of the most labor intensive areas of service for her office is related to teaching certification. Teachers in the region submit their renewal requests to the ROE. ROE staff members then review the statements of assurance of completed professional development, follow up with teachers if necessary, certify the quality of the statements, and forward the renewal requests to ISBE for their final approval. Area 4 also runs alternative programs for students.

Preston Williams, Superintendent of Urbana School District 116, remarked that an important role for the ROE is to serve as a liaison between the school district and ISBE. His ROE is quite helpful in this regard. Marc Kiehna of Area 5 added that ROEs are often not limited to K-12 education, but also provide adult education services and education programs in the prison system. Dr. Koch commented that ESAs could provide some support for the Department of Corrections, which is a school district, because they are engaged in very complex work, but do not currently have the appropriate resources to serve all of the needs of incarcerated youth. The Governor is also interested in looking at the glaring need in Illinois to provide more appropriate services for these young people. Ms. Ruscitti noted that through safe schools, ROEs can work with districts to provide support and services for these students as they make the difficult transition back to traditional schools. Dr. Koch agreed that ESAs certainly have a role to play in helping to serve the complex needs of these students through social/emotional and special education services.

Marc Kiehna observed that although there are overlapping boundaries in many areas of the state, in his region, the boundaries for the different types of ESAs are almost identical. This facilitates cooperation and collaboration among the agencies. His active participation on the Boards of other ESAs enables his office to coordinate resources. For example with a recent RTI initiative, the special education cooperative worked collaboratively with the ROE in order to provide professional development about RTI for all teachers, not just for special education teachers. Larry Fillingim of Area 6 agreed that collaboration was critical. In his region, the directors of the ROE, EFE, and special education cooperative meet monthly with school district superintendents to coordinate efforts so that they can maximize the resources they have to benefit the schools and students in their region.

Kay Pangle commented that the ROEs and the Intermediate Service Centers should be separate rows on the ISBE matrix. Kay Poyner-Brown, of Intermediate Service Center 2, agreed and elaborated with a description of her intermediate service agency. Her organization has some parallel responsibilities with ROEs, but they also provide different services. The three Intermediate Service Centers in suburban Cook County collectively serve as many students as Chicago Public Schools. Under the guidance of a governing board of constituents and stakeholders, her organization provides services including professional development, Regional

System of Support Provider (RESPRO) services for schools in academic status, Reading First delivery, and safe schools.

Susie Morrison then asked the Task Force members about their funding sources. The members reported that most of them support their work by combining funding streams from the federal government (particularly for EFEs and special education cooperatives), state funding for professional development, and revenue received from conferences or workshops. Ms. Morrison commented that, on average, federal funds comprise less than 10 percent of ROE budgets.

Kay Pangle, Darlene Ruscitti, and Rich Myers observed that their organizations do not begin with the funding stream. Instead their work begins with the needs of their clients and then they pursue funding to meet the needs of their clients. Ms. Ruscitti further commented that she will often work collaboratively with districts in her region to explore funding opportunities, but she will never compete with them.

Ms. Morrison then transitioned the discussion to learn more about the special education cooperatives in the state. Dr. Gineen O'Neil, of the Southwest Cook County Cooperative Association for Special Education, mentioned that the cooperatives are all quite different, but do have some similar basic components. IDEA funds flow through all of the cooperatives, they are all evaluated and accountable in the same way as school districts, they all strive to deliver cost-effective and high-quality services, and provide professional development for their member districts based on the districts' needs. The goal of the cooperatives is to support districts and build their capacity to serve students more effectively. She noted that although ROEs serve all districts throughout the state, cooperatives do not because districts choose to be members of cooperatives. Dr. Koch observed that the recent trend was for districts to withdraw from their cooperative and provide services through the district's central office.

Mike Kelly, Superintendent of Carlinville School District, pointed out that for small districts, special education cooperatives were not voluntary because they provide essential services. Michael Jacoby, of the Illinois Association of School Business Officials, observed that this aspect of voluntary participation in the ESA might be a criterion for the Task Force to consider in their recommendations. Mike Kelly further commented that there is not an existing mechanism to coordinate services between the ROE and the special education cooperatives. In his ROE there are four special education cooperatives, and in his special education cooperative, three ROEs are represented. As a result, it is difficult for his staff members to know who to call to receive services. While he does not question the commitment of ESAs in Illinois, he contended that districts need a more efficient delivery of services. Matt Klosterman, Superintendent of Belleville School District, added that equity is also an important concern for the Task Force to address because ROEs are challenged to meet the varied needs of districts. Thus, the state should ensure that all districts are served equitably, particularly when resources are scarce.

Ms. Morrison then transitioned to a discussion of the Education for Employment System (EFEs) in Illinois. Don Smoot, of the Three Rivers Education for Employment Center, remarked that the EFEs were created as requirement for receiving Perkins funding. This federal requirement for a statewide regional delivery system for Career and Technical Education (CTE) remains in effect.

The original intent was to have EFEs aligned with community college boundaries, but it didn't work out quite that way over time. The main purpose of the EFE is to administer state and federal CTE grants. EFEs also uphold CTE statutes. There are 57 EFEs, but all of them meet the needs of their region in different ways. In terms of evaluation and accountability, there are annual audits, local evaluations, federal monitoring visits, and annual assessments on Perkins performance measures.

Ms. Morrison thanked the group for providing so much input into the matrix. She reflected on the comments that Illinois received after the first round of Race to the Top in which one of the themes was that Illinois has a demonstrated lack of capacity to carry out the plans in their proposal. She noted that Illinois needs to coordinate the statewide capacity of ESAs intentionally, maximize resources, and spend money wisely to benefit students throughout the state. Dr. Andrea Brown, a member of the Illinois State Board of Education, remarked that the ESAs in Illinois would be critical to bringing best practices to scale across the state.

Several Task Force members commented on the morning discussion. Mike Kelly observed that the public is not informed about the ESA system that they are currently funding in Illinois and they would probably not consider the current system a good use of their tax dollars. Mike Jacoby remarked that what he hears from his members is that the quality of services provided by ESAs varies widely across the state. He argued that the Task Force should recommend that there is a statewide need for more equity and accountability for ESAs. If ESAs are not providing high-quality service to districts, they should no longer be in business. Mary Jane Morris, of the Illinois Education Association, finds the ROEs that she works with across the state to be collaborative. In addition, she noted that several ROEs have strong expertise in particular specialty areas, but that expertise is inconsistent across the system. Thus, the Task Force should explore ways to share that expertise more consistently throughout the state. Darlene Ruscitti pointed out that change can be difficult, but the Task Force should have the political will to do what makes sense for schools and districts. Dr. Michael Johnson, of the Illinois Association of School Boards, argued that because the regional superintendents are currently elected to their offices, the state will need to fully fund the ESA system if state leaders want the regional superintendents to be accountable to ISBE rather than to the voters. Dr. Ron Fielder, of the Grant Wood AEA in Iowa, noted that this system of elected ESA leaders is becoming more unusual as such a system now exists in only three states, Montana, Arizona, and Illinois.

Gina Burkhart summarized the wide ranging morning discussion by noting that the Task Force members had discussed funding, collaboration, communication, leveraging efforts, quality assurance, accountability, boundaries, formal and informal structures, governance, oversight and equity of services. During the lunch break, she encouraged the members to consider how to define and measure impact, to think about what success should look like, and to outline outcomes that can help the group to frame the conversation moving forward.

After the break, Ron Fielder presented the national perspective on behalf of the Association of Educational Service Agencies. He reviewed the legal definitions of ESAs, their geographic spread throughout the country, the services and supports that ESAs provide, funding sources for ESAs, Board composition, clients, and accountability measures. He observed that ESAs are needed now more than ever as support for change and growth. ESAs can be a solution in tough

times, but increased visibility also means increased scrutiny. He remarked that Ohio and Georgia are currently rethinking their systems of ESAs and Michigan is considering consolidating their ESAs because of the lack of resources in that state. Nationally, an emerging trend is that more and more states are considering how ESAs can function as a comprehensive and coordinated statewide system.

After providing the national context, Dr. Fielder then went on to describe the system of ESAs in Iowa. In 1975, 15 Area Education Agencies (AEAs) and 15 community colleges were created at same time and with the same boundaries. The community colleges provide the region with services related to CTE while the AEAs provide services related to special education, professional development, technology, curriculum, and instruction. Dr. Fielder observed that the delivery of professional development has shifted dramatically over time from the central delivery mechanism 10 years ago being conferences or workshops at the AEA to AEA staff now much more frequently traveling to schools to provide teachers with job-embedded professional development. The delivery of professional development continues to evolve as more and more teachers are demanding online professional development that they can access at any time during the day or night at their convenience.

Dr. Fielder noted that the AEAs in Iowa receive the highest level of subsidies in the nation. They receive funding from the federal government (e.g. IDEA dollars), state funding, and revenue from state and local property taxes. State leaders decided that it was important for the government to provide this subsidy because they value equity and consistency of services across the state. In exchange for this financial support, Iowa set up a system of quality assurance. In fact, Iowa is the only state in the country with a mandatory accreditation process for ESAs. Five to eight other states are considering voluntary accreditation processes, but the process in Iowa is mandatory. Each AEA must document how the agency fulfills the nine standards that are required by state law. Each AEA must annually submit a budget and a progress report to the Iowa Department of Education. Every five years their accreditation status is reviewed. Dr. Fielder has welcomed feedback from the accreditation process because it helped his AEA to improve. In Iowa, this process has improved the quality of service and provided more uniform access to services across the state. It is interesting to note that AEAs in Iowa are the only form of government that voluntarily downsized. Some AEAs realized they could not provide high-quality services on all of the nine standards. As a result, they merged with other AEAs and saved the state, on average, \$650,000 annually in senior administrator salaries. Dr. Andrea Brown asked if this comprehensive system in Iowa is coordinated by an executive director. Dr. Fielder responded that they were able to hire the former speaker of the House for this position, a leader who was highly respected on both sides of the aisle, to make connections between the AEAs and ensure that services are delivered equitably across the state.

Dr. Fielder went on to discuss two trends for ESAs national nationwide. First, many ESAs are beginning to specialize in particular areas where they have comparative advantage and then market this service or product statewide. For example, Dr. Fielder's AEA developed an exemplary bundle of products and services related to a science curriculum. Rather than create a new curriculum for clients in their region, four other AEAs in Iowa purchase the exemplary services from Grant Wood AEA. Rich Myers found this to be an appealing idea. The challenge would still be to ensure equal access, but with available technology, ROEs can focus more on

areas of expertise because they no longer need to be spatially close to the client. Second, partly as a result of declining state funding and partly as a result of a lack of consumer satisfaction, Dr. Fielder observed that many ESAs are becoming more entrepreneurial. For example, when ESAs in Minnesota experienced state funding decreases, they developed health insurance cooperatives. Because of their purchasing power, they were able to make a profit on this line of service at the same time that they were able to offer districts better rates than they could negotiate individually. This profit is then invested into funding educational services for districts in the region. ESAs are in a good position to run these types of cooperatives that provide districts with cost savings, promote efficiency throughout the region, and enable the ESA to invest in the development of educational services that will meet the needs of districts. ESAs throughout the country are running cooperatives for a range of services that include health insurance, food services, online application processes for district staff, legal services, sports referees, etc. The advantage of this type of entrepreneurial activity is that ESAs can be more responsive to district needs; however, the disadvantage is that there might be less equity statewide for districts that cannot afford to purchase any services. Hybrid models are emerging and this might be an avenue that Illinois would like to explore. Dr. Fielder asked the Task Force to consider if they want to play in the open market or if they would prefer to build a system that is focused on equity and uniformity of services. Dan Montgomery, the President of the North Suburban Teachers Union, cautioned that ESAs in Illinois should keep education as their primary focus and business support secondary.

Dr. Fielder noted that Iowa is more homogenous in nature than Illinois. The Iowa model might not transfer easily, but there are some lessons that Illinois can learn from Iowa and some principles that could inform the coordination of ESAs in Illinois. He encouraged the Task Force members to consider what criteria would be critical if they redesigned the system from scratch and to use those criteria as they begin to discuss how to best coordinate services across the state. He also urged them to get wide consensus on these criteria before making a decision about recommendations to the legislature and the Governor.

Dr. Fielder then opened the floor to questions. Don Smoot noted that local control was an important tradition in Illinois and that ESA superintendents are elected by local voters. He asked how local interests are represented in Iowa. Michael Johnson agreed that a change to accountability in Illinois from elected officials to customer satisfaction surveys concerned him. Dr. Fielder responded that he meets regularly with the district superintendents in his region. He noted that there might be different levels of accountability, but it would be just as logical for his Board to dismiss him if the superintendents in his region were not satisfied as for the voters to not return a superintendent to his or her office. In fact, the districts in his region see the AEA as providing valuable support and services that allow them to operate with the limited resources that they have available. He pointed out that his job is to provide districts with resources, services and research-based innovations that are on the cutting edge, like instructional coaches and professional development to implement the formative assessment process. Rebecca Woodhull, Director of the Illinois Office of Educational Services, asked about the role of the Iowa Department of Education. Dr. Fielder responded that the State Board sets the strategic direction for the state and approves the budget for the AEAs. Then the AEAs work with the state education agency and districts to implement the programs and policies that have been defined by the Board.

The Task Force members then began to consider possible directions for their recommendations. Darlene Ruscitti commented that the Task Force should begin to define what services every district in Illinois deserved to receive and how to measure the quality of those services. Mike Kelly encouraged the Task Force to consider giving funds directly to districts so that ESAs can develop a menu of service options that are based on district needs rather than on what the ROEs would like to provide. He also urged the state to consider a system in which struggling districts can receive support, but incentives can also be provided for districts that meet targets for student achievement so that districts do not receive additional funding only when they fail to meet AYP.

Gina Burkhardt concluded the meeting by observing that the conversation had far exceeded her expectations. She pointed out that next meeting would take place on May 17, 2010 from 10 a.m. – 3 p.m. at the Parke Hotel in Bloomington. Chris Koch stated that the purpose of the next meeting would be to come to a consensus on criteria that the Task Force should consider as they develop recommendations to streamline ESAs in Illinois. Kay Poyner-Brown remarked that the Task Force has to recognize where Illinois currently is, where silos exist, and then begin from that starting point. She also asked for a deeper examination of how federal and state policies (e.g. with turnaround schools) might play into the Task Force's recommendations. Mary Jane Morris asked for clarification about whether the Task Force's recommendations would include Chicago. Dr. Koch agreed that if the Task Force is to examine how to provide services equitably throughout the state, it makes sense to include Chicago. Gina Burkhardt remarked that ISBE would put appropriate parameters around the work of the Task Force at the next meeting. She adjourned the meeting at 2:58 p.m.