

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

Monday, May 17, 2010

Minutes

At 10:04 a.m. the second meeting of the Streamlining Illinois' Educational Delivery Systems Task Force was called to order by Gina Burkhardt, the CEO of Learning Point Associates, who is facilitating the Task Force. Ms. Burkhardt welcomed the group, reviewed the agenda for the day, and noted that Dr. Ron Fielder, of the Grant Wood AEA in Iowa, is returning to serve as a critical friend and external expert on educational service agencies during the Task Force's working session. She then facilitated the introductions of the Task Force members. Sixteen members were present or represented by a designee and five members were absent. One guest was in attendance.

Dr. Christopher Koch, the Illinois State Superintendent, observed that the overarching purpose of the Task Force is to better serve districts and students in Illinois. During their work today, he asked the Task Force members to continually reflect on the underlying goal of the Task Force to consider how to develop efficient regional systems of supports for students, schools, and districts that are equitable across the state. He noted that there is some interest among Task Force members in the role of ISBE and the overlap between the role of ISBE and the ROEs. In the interest of using time efficiently, he invited the ROE representatives to a separate meeting to examine this issue and report back to the larger group in July during the final meeting of the Task Force.

Ms. Burkhardt noted that a slightly revised matrix was sent to the Task Force in advance of this meeting. She asked the members to send any revisions they recommend to Peggie Garcia who will capture this information and update the matrix for next meeting. Michael Johnson, of the Illinois Association of School Boards, observed that in the funding category on the matrix, local dollars were not included. However, most of the funding that educational service agencies receive is local and not from federal or state dollars.

Ms. Burkhardt observed that funding would be an important category to consider during the Task Force's first work session. She asked the Task Force to break into three groups to explore the following three issues: context, customers, and services. She directed the Task Force members to consider the following questions:

- What is the environment within which you are working now (federal, state and local)?
- How will that environment change over the next three to five years? For example, how might the environment change as a result of the availability of funding through 1003(g) school improvement grants and the kinds of supports that those schools will need?

- Who are your customers and what types of services will meet their needs?
- Rather than focusing on past experience, what needs to happen to best support the needs of students and districts in Illinois in the future?

Dr. Fielder asked the members to consider in their small group discussions about context, what are the opportunities and threats? As you look at the next five to eight years, what are the services that ESAs in Illinois need to provide for students and districts? Regardless of who the provider is, what are the services that school districts and communities need?

After the Task Force members met in small groups, Ms. Burkhardt and Dr. Fielder presented the patterns that they captured, identified common themes, and asked the Task Force members to react to the summary and provide their feedback.

Within the context piece there were three major categories of responses – funding, policies, and other. In terms of funding, the task force expressed uncertainty about what funds are available and from what sources, particularly as ISBE continues to face historic funding challenges. There is also a stronger emphasis on competition for limited dollars and some thinking about using Race to the Top funding and other ARRA dollars to support educational service agencies.

In terms of policies, there was a great deal of discussion about the changing policy environment that includes an ever increasing focus on accountability, student achievement, college and career readiness and on all aspects of educator quality (e.g. mentoring, induction, leadership, certification, evaluation, etc.). The members are also interested in what ESEA reauthorization will look like on the federal level and how will it be implemented at the state and district levels. In addition, the members are unsure about how the new common core standards and assessments will be implemented and what their role will be in rolling out the new standards. The policy context related to special education is also changing and there is a greater emphasis on RTI.

Within the “other” category, Task Force members mentioned several topics including: systems accountability, the tradition of local control in Illinois, technology, district consolidation, changes on the horizon for ISBE and the statewide system of support, efficiency of services, support for public and private schooling, and a frustration with the slow pace of research that does not keep up with the needs of schools and districts. The field needs more information, more quickly, about what works to improve student achievement.

In their discussion of customers, the small groups generated five categories:

- *district and school stakeholders* (e.g. superintendents, teachers, administrators)
- *policymakers* (e.g. state legislators and leaders at ISBE)
- *stakeholders from the community* (e.g. voters, advocates, non-voters, media)
- *parents and students* (e.g. customers for services related to adult education and programs for truants and dropouts)
- *other* (e.g. representatives from organizations that serve the homeless, mentally ill, incarcerated youth, senior citizens, or provide emergency services or health services.

Ms. Burkhardt asked the Task Force members which of these stakeholder groups are their primary customers and how they distinguish primary from secondary? She further asked them to consider how resources are targeted now and how might they be better targeted in the future.

For the final section of the morning work session, the Task Force members generated four categories of services that they provide:

- *district and school-based services* (e.g. private placements, educational programs, summer and extended learning, special education, ELL, transition services, pre-school, early intervention, kindergarten readiness, professional development, school improvement, supplemental services, technology, industry certification)
- *compliance* (e.g. school records, 504/ADA, certification renewal, compliance with the Freedom of Information Act, accreditation, 403(b) plans)
- *adult education and GED programs*
- *other support services* (e.g. substitute teachers, workforce development, custodians, food services, transportation, school based health services, school construction, and safe schools).

The Task Force members also outlined issues that will affect their future work including: data collection, communication, curriculum alignment, new evaluation system for teachers, legal obligations, and levels of delivery. Ms. Burkhardt asked the Task Force to consider which of these services are most important? How do they tie to the context and the customers? Which services provide the best return on investment and have the greatest impact? When the Task Force members begin to design their ideal system, they should determine who should best deliver all of these services and how to deliver them as efficiently as possible. Dr. Fielder agreed that the Task Force should be thoughtful about identifying their core services and asked them to further consider which services should be or are subsidized by state/federal dollars and which should be more entrepreneurial.

The Task Force then provided feedback to the facilitators about the categories of context, customers and services. Darlene Ruscitti, of Area 1, remarked that it is essential to examine the context piece as connected to the customers to determine who is driving much of what is going on. She commented that the services that ROEs provide are often delivered in partnership with other organizations and facilitating these relationships is an important role of the ROEs. Jodi Scott, of Area 3, commented that the first consideration of what services to provide is often what is legally mandated. Beyond that, it should be services that impact teaching and learning. Rebecca Woodhull agreed with that assessment, remarking that the Task Force should begin with the end goal in mind, which is student improvement, and then all of the ESA's services and resources should be aligned with that end goal. Dr. Ruscitti supported that goal and urged the Task Force members to examine the context of students that are now in the system (e.g. technology-driven, post-9/11) and to think about how ESAs in the state can help to educate the next great generation of students. What services can the ESAs provide to ensure that these students will be successful? Ms. Burkhardt asked the Task Force if they are directly or indirectly

impacting teaching and learning through their core services. Gineen O’Neil, of the Southwest Cook County Cooperative for Special Education, clarified that some ESAs, particularly EFEs and special education cooperatives, do provide direct services to students.

Ms. Burkhardt thanked the Task Force members for the information they generated during the morning session and commented that this foundation will help the group to create the ideal framework for ESAs in the state during the afternoon session. Before moving on to the development of an ideal system, she asked the Task Force to develop criteria against which they will benchmark the ideal systems that they create. Dr. Fielder then introduced the discussion of criteria with two practical examples: purchasing a television and investigating living options for aging parents. He encouraged the Task Force to consider criteria that currently exist in legislation or other documents that describe mandated service as well as criteria related to collaboration between educational service agencies, increasing the efficiency and effectiveness of services, improving the alignment of services, equity, on-time delivery, affordability, fairness, meeting both urban and rural needs, 21st century delivery systems, quality of service, and political feasibility. Dr. Fielder directed the Task Force to brainstorm a number of criteria and then come to consensus on the five primary criteria on which they would like to judge their ideal systems.

In their small groups, the Task Force identified five general themes for their criteria:

- *coordination and alignment* (e.g. avoid duplication, create clear communication channels, develop a central point of contact for districts, work in partnership with ISBE)
- *funding* (e.g. improving the efficiency and effectiveness of services, leveraging other sources of funding, ensuring services are both cost-effective and research-based with a proven record of success)
- *needs and mandates* (providing services that meet the needs of local districts and support compliance)
- *access and consistency* (e.g. equal access to core services across the state, consistent quality access across state, equity vs. adequacy)
- *accountability* (e.g. analyzing outcomes, ensuring quality across the state, ESAs holding themselves accountable).

After lunch, Ms. Burkhardt remarked that the outcomes of the afternoon activity will be the driving force behind the recommendations that the Task Force makes to the Governor and the state legislature. She asked the members to propose what the statewide systems of ESAs should look like in the future, based on the context, customers and services that they discussed in the morning. She requested that they base their ideal design in reality, but work to design the system that will best serve the state of Illinois moving forward. In designing their systems, she urged the Task Force members to keep in mind both challenges related to context and funding and the system of criteria that they proposed in the morning.

After discussing their ideal designs, the small groups then shared the highlights from their conversation. Dr. Woodhull's group proposed that ISBE should hold regional units accountable (through a third party), provide funding for core services, set minimums for delivery of core services, develop a communication system utilizing technology to facilitate better communication between ROEs that includes an ISBE point person for ROEs, and reduce the number of competitive grants in favor of providing more formula grants. Michael Johnson commented that the state should only set standards for services that they are willing to fund. In response to a question about whether these proposed regional units would be based on geography or responsibility, Dr. Woodhull indicated that the units should be based on geography and student population.

The group also proposed that ROEs should consolidate whenever possible and formalize locally designed collaborative systems through intergovernmental agreements in order to share services and reduce duplication. For example, a special education cooperative might coordinate services with the three districts with which they work. Representative Roger Eddy noted that he supported the vision for local participation in inter-governmental agreements because this model allows for local decision making. Because of a lack of funding for mandates, much of the funding that supports ESAs is local. He argued that his school board would say, "this is our money, are we still going to receive services?" He further urged the Task Force members to think about one of the missions of the Task Force being to eliminate duplication and to consider how to eliminate services that are obsolete or duplicated. As just one example, both ROEs and ISBE deal with teacher recertification. He recommended the implementation of an appeals process to replace the current system in which multiple people handle the same recertification request.

In response to a question about which services the group considered to be core, Dr. Woodhull responded that these services were those that were legally mandated including professional development, school improvement planning, safety, and alternative programs. Rich Myers, of Area 2, suggested that a good core service might be for ROEs to help districts connect school improvement plans to recertification plans. Kay Poyner-Brown, of Intermediate Service Center 2, agreed that school improvement plans should be driving the structure of services provided by ESAs. Ms. Burkhardt and Dr. Andrea Brown urged caution with this approach as researchers often find that school improvement plans are pieces of paper that are not connected to implementation of improvement efforts, the delivery of services, or outcome-based accountability systems.

In presenting his group's proposal, Larry Fillingim, of Area 6, encouraged the Task Force to consider reorganizing current boundaries to align services provided by ROEs, EFEs, LTCs, and special education cooperatives. He also recommended that ESAs in Illinois explore the cooperative purchasing structure that has been successful in Iowa. In order to provide services in a cost-effective manner, ESAs will have to consolidate staff, reduce the number of jobs and the size of the payroll, and improve technology and reporting capabilities. As with the first group,

they agreed that their core services should be those that are legally mandated. Finally, they believe that ISBE should hold ESAs accountable.

The discussion digressed for a short conversation about the role of EFEs in the future. Marc Kiehna, of Area 5, noted that districts in his region will now be entering their own codes into the Illinois Student Information System. However, the EFE used to take responsibility for that task, but now their role is being downsized through technology. He commented that more part-timers are taking positions as directors of EFEs because of the reduction of duties for directors. He asked the group about the future best role for EFEs. Don Smoot, of the Three Rivers Education for Employment Center, responded that the role of the EFE should return to the role that was originally intended, to assist schools and districts with curriculum development and to supervise alignment of the curriculum with standards. Over time, the EFEs have become so administrative in nature and so focused on grant administration that they no longer serve their original purpose.

Dr. Ruscitti presented the final proposal for her group. She argued that they are looking at a new framework that would call for radical efficiencies. In terms of criteria, her group discussed different (to serve the next generation), better (higher standards), and cheaper (what can ESAs do more cost-effectively). She remarked that ESAs statewide need to embrace a systems approach, develop a streamlined delivery system that is focused on best practices, and build local and regional capacity to ensure sustainability of the system statewide. In their group's vision, ISBE would be at the core and supported by the surrounding ROEs. ISBE would define the core services and each region would provide those core services within their regions. In addition to these basic services, ROEs might collaborate to deliver non-essential services, like gifted education, or ROEs might develop specialty services that they could market statewide. Her group envisions a system in which all of the ESAs work together to support schools and to help every child be successful. Finally, the group discussed a system that would allow for both accountability and flexibility and for both core values as well as core services. For example, ISBE might develop a rating system for regional superintendents to be rated in the same way that judges and lawyers are currently rated. The group did not have time to explore these questions, but wanted to raise them for the Task Force: where does Chicago fit in this statewide system of ESAs and what pieces of the system are driven by the federal government?

Mike Kelly, Superintendent of Carlinville Community Unit School District 1, added to his group's proposal that the governor and legislature, advised by ISBE, should create state policy informed by research and the ROEs should implement this policy statewide through their leadership and coordination. Regional superintendents also need to be accountable, either through political accountability to boards that are elected (rather than superintendents) or through third party, external evaluations conducted by groups like North Central. Regional superintendents should want to prove that they are delivering for their constituents and have a strong report card. Finally, he observed that there is too much inefficiency in the system now. Each region needs to have experts on special education and technology, but this expertise does

not have to reside in a regional superintendent. As a result, boundaries need to be changed to facilitate a more efficient and effective system.

Mark Kiehna was intrigued by the research and development focus in this proposal and commented that it was much like the Center for School Improvement and Research Collaborative that is part of the updated version of Illinois' Race to the Top application. Representative Eddy remarked that research is important, but implementation is more important. Consequently, universities should not be involved in school reform unless they are on the ground and understand the realities of schools and districts. Ms. Burkhardt added that there is a place for academics who are conducting rigorous research, but that research is not typically tied to a system of application and accountability. Thus, ISBE or organizations working in partnership with ISBE should help navigate the application of academic research to practice in schools and districts. Dr. Woodhull spoke on behalf of universities and urged the Task Force to tap into the national research expertise and research-base about what works when making decisions about education.

Dan Montgomery, president of the North Suburban Teachers Union, observed that the Task Force's discussion has been fairly heavy on accountability and fairly light on support. He heard a great deal during the last meeting about how starved ISBE and the ROEs are for funding, but with the absence of funding, ISBE and the ROEs will have a limited ability to support change in schools and districts throughout the state.

Ms. Burkhardt thanked the group for their efforts. The facilitators and ISBE will take what the Task Force members have provided and craft one or more scenarios to explore at the next meeting. Dr. Koch observed that he will host a separate meeting with the ROEs to discuss ISBE's role. He observed that ISBE is the ROE for Chicago, so this will have to be incorporated into the final recommendations. He commented that the funding piece will be an important challenge to address because ISBE cannot delegate services if there is no funding to support it. The state's Race to the Top proposal outlines a more efficient delivery of some services, but the state needs to do more to link services to needs, to build capacity, and to streamline the delivery of services across the state.

The meeting was adjourned by Ms. Burkhardt at 2:49 p.m.