

# School Finance

## EXPLORATION PROJECT

School Finance Exploration Project  
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CA Education Fund



## ▷ interim findings

During 2005-06, the California School Boards Association, Children Now, the League of Women Voters of California Education Fund and the California State Parent Teachers Association conducted nearly 70 interviews with key opinion and political leaders in California on school finance reform through a generous grant from the William and Flora Hewlett Foundation.

The interviewees included major statewide and regional business organizations, prominent business leaders, major statewide ethnic, faith based and community based organizations and leading policymakers and opinion leaders in California ranging across the ideological spectrum, and key members of the Education Coalition and other education leaders.

The interests and perspectives represented by the interviewees are likely to have great influence over the success or failure of any significant school finance reform effort. Either because of their own personal political influence or through their representation of powerful advocacy organizations, these 70 interview-

ees will play a key role in determining the outcome of any comprehensive package of finance and policy reforms in public education.

The goal of these interviews was to begin identifying common ground for the development of a comprehensive package of both reform and investment relative to California's public school system. While much work remains to be done to develop and implement such a package, it is clear based on these initial interviews that there is the potential for a diverse coalition of California leaders to come together and promote a comprehensive solution that is politically viable and will have a positive impact on California students.

The following is an analysis of the information gathered from these interviews. In addition, findings from various reports summarizing recent public opinion polls and focus groups are included to explore the similarities and distinctions between the views of the public and of key insiders on school reform and investment in California.

## ▷ a vision for every child: a mission for public schools

Both the public<sup>3</sup> and the key opinion and political leaders interviewed during this project believe that public education must accomplish a whole array of goals that lay the foundation for our social infrastructure, economy and democracy. The prevailing vision is that each child will exit the K-12 system with the option to either enter the workforce or college fully prepared and become active, thoughtful citizens.

To accomplish this vision, most believe that public schools have the obligation to ensure that all students, regardless of socio-economic, ethnic or language background, meet the state's standards, including basic literacy and computational skills, critical thinking skills, and exposure to science, history and the arts. In addition to the standards, many of the interviewees were also sensitive to meeting the individual needs and interests of students. This ranged from

<sup>1</sup> PPIC Statewide Survey: Education Issues in 2006. (2006) Public Policy Institute of California; Education Reform in California: A Recipe for Change. (2006) BatesNeimand

<sup>2</sup> 2006 Public School Funding Focus Group Research Study. (2006) Aurora Research Group.

<sup>3</sup> In PPIC's 2006 Education Issues Survey the public was almost evenly divided on the goals of K-12. Twenty-six percent said preparing students for college, 19% said teaching students the basics, 17% said teaching students life skills, 19% said preparing students for the workforce and 14% said preparing students to be good citizens.

providing career and technical education, to ensuring there were opportunities for students to appreciate art and culture and participate in service learning. While each constituency group may have had a particular focus on what was most important for public schools to accomplish, virtually everyone wanted students to exit high school with academic knowledge, life skills and the foundation necessary to fully participate in our democracy.

Similar to the public-at-large<sup>4</sup>, when interviewees described the ideal school they focused on the need to have knowledgeable and skilled adults working with students, high quality, up-to-date instructional materials and safe, enriching learning environments. They envisioned schools where parents and community members were active participants in the educational process and students have access to a wide range of education and enrichment opportunities.

There is disagreement among interviewees about whether California's public schools are successfully meeting these goals. For most, they see a system that is uneven, where children from low income and ethnic backgrounds do not have access to the same resources or educational outcomes as their counterparts throughout the state. Civil rights groups, ethnic associations, children's advocates and community organizers were

especially likely to identify these gaps in achievement and opportunity and label the system failing.

Business leaders also identified the achievement gap with concern, but were more likely to say that the system has made some progress in the last decade, albeit too slowly. In addition, virtually every business organization interviewed for this project saw major economic implications if there is not a rapid acceleration in student achievement so that California public school students are on par or performing beyond students in other states and nations.

Educators and many of the researchers who were interviewed also believed that the gap in student opportunities and achievement is an area for concern. In addition, they were more likely to comment that the system is making improvements and doing a reasonable job given the resources available.

Interviewees want the public school system to be successful and to serve every child, but there are varying shades of optimism and pessimism over whether that can be accomplished given the current structures in place and the state's political climate. The prospect of a comprehensive package of both reform and investment was met with both skepticism and hope, but virtually everyone agreed that for political and policy reasons it is the only way to proceed.

## core values: a road map of guiding principles

At the beginning of this interview process California was emerging from one of the most divisive special elections in its history. Constituency groups and policymakers were divided about how to proceed on public education policy and the political rhetoric made it appear as though there would be little opportunity for them to come together. Interestingly though, as each interview was conducted several themes emerged and it became clear that while there is vast diversity in terms of political ideology and knowledge of the nuances in the K-12 system,

there are a set of core values that are consistent among California's political and opinion leaders.

It is important to note that while interviewees touched on virtually all of these themes to some degree, the two or three they emphasized most varied. This variation could often, but not always, be closely linked to the type of organization the individual represented (i.e. business, education, community based organizations). In addition, a sharper divide was more likely to be seen once

<sup>4</sup> In the 2006 Aurora Research Group research study, focus group participants said that public schools are successful when students graduate and become productive, functional citizens; they have certified, high-quality teachers that care; students are assessed individually and taught at their own level; they have proper funding; parents are involved; everyone communicates, is involved and held accountable; and they have good leadership.

groups discussed the particular policy ideas that would ensure the system embodied these values. Our analysis of the interviews indicates that these divisions are not insurmountable and there is actually far greater agreement (as explored below) than many initially believed, but it will likely be important for a comprehensive package to move the system closer to the following values – responsibility, openness, stability & flexibility, adequacy and equity.

If these core values are used as guiding principles, they could form the basis for a diverse coalition that would support the development of a comprehensive package of both reform and investment. In addition, based on recent public opinion polls and focus groups these values/principles resonate with the public as well.<sup>5</sup>

### **Academic and Fiscal Accountability (Responsibility)**

An overwhelming number of interviewees stressed the importance of accountability in our public education system. Policymakers, educators, parents, students and community members each have a role to play and are responsible for the overall success of the system. Interviewees thought about accountability in very concrete terms. Most believed that public education should be accountable for the academic achievement of students and for the appropriate, effective use of public dollars.

Generally interviewees were supportive of standards, assessment and accountability, but there continues to be tension over the appropriate mechanism and measurements used by the state. There is little agreement over whether California has found the right balance in terms of curriculum, testing, measuring academic progress and interventions. While there are many nuances, there were essentially two broad opinions.

- Some interviewees were primarily focused on perfecting California's output measurements and accountability system.
- Others believed the accountability system was too narrow and the state should utilize multiple measurements and track inputs more systematically.

Academic accountability is an area that opinion and political leaders believe is essential, but without a unifying vision, it is likely that the public will continue to be confused about whether the system is being held accountable in appropriate ways for student outcomes.

Fiscal accountability was also one of the highest priorities for virtually every interviewee. It is incumbent upon policymakers and educators to ensure that public dollars are used both efficiently and effectively. Interviewees had varying degrees of knowledge about the fiscal oversight systems currently in place, so it was difficult for many of them to assess whether these systems provided the appropriate level of accountability. This is an area where opinion and political leaders, as well as the public, will need more information, otherwise the prevailing culture of distrust in public institutions will likely prevail.<sup>6</sup>

### **Transparent and Accessible Information (Openness)**

One of the key factors in holding a system accountable is ensuring there is transparent, accessible information. Interviewees consistently called for more accurate and contextualized data, especially on student achievement, site level resource allocations and overall funding levels.

Generally, interviewees believe that the public has access to better student achievement data than ever before, but that the information systems could be dramatically improved (see potential policy ideas below). Business leaders, civil rights groups,

<sup>5</sup> Based on a 2006 online poll, BatesNeimand found that the public wants to know that "we're putting children first to build a practical system based on standards, accountability, openness and responsibility."

<sup>6</sup> PPIC

community organizers and researchers were also especially interested in getting better information on the overall levels of funding and how funding was allocated from the state to school districts, and from school districts to schools. Many argued the lack of this information breeds distrust and makes it easy to say the system is failing and wasteful.

### **An Overarching Plan that Encourages Innovation (Stability & Flexibility)**

The reform pendulum is a phenomenon that is expected and, in many cases, brings trepidation in the public education system. Numerous interviewees commented on the need for stability in the system, the ability to plan, without creating a structure that is overly constrained so that schools can respond to the unique needs of their students and community.

Similar to the previous principles outlined above, interviewees were most interested in academic and fiscal stability and flexibility. By and large they stated the need for a system that has an overall plan for the academic improvement of students, but allowed for individualization and local responsiveness. On fiscal matters, many, but not all, want to ensure there is a balance between fiscal oversight and devolving as much financial decision-making to schools and districts as possible.

There will likely be extensive debate about how to reconcile what could be considered competing values, but it is doubtful that a comprehensive package that is too rigid or that doesn't have a coherent, statewide framework, will attract and maintain a diverse coalition of constituency groups.

### **Core Resources for Every Child (Adequacy)**

Many interviewees, especially those who represent civil rights organizations, ethnic associations, community organizations, education associations,

and research institutions, stated their belief that California's public education system is under resourced, both in terms of actual dollars and staff per student. These individuals often invoked images from other states and commented on the materials, services and opportunities that should be available to students.

Business leaders were divided on whether public education needed more funding to meet its fundamental charge. Some business leaders felt strongly that increased efficiency alone could ensure that students would get what they needed to be successful. When asked to identify specific inefficiencies in the system, most were linked to structural, policy decisions (see below) and not waste, fraud or abuse. Other business leaders argued that public schools do need more resources and that if coupled with necessary reforms, they would be willing to advocate for an increased investment in K-12.

### **Focus Resources on Students Most in Need (Equity)**

The prevailing view among interviewees was that certain students, primarily low-income, English Learner, special education and possibly foster youth, need more resources to meet California's rigorous expectations. Many interviewees cited research that indicates not all students start with the same foundational skills or have the same support structures, so schools need to potentially provide a different educational environment, program and resources in order to meet their unique needs. These resources include an equitable distribution of skilled and knowledgeable staff; high quality, up-to-date instructional materials; safe, adequate facilities; and extra learning and youth development opportunities.

While virtually every interviewee believed targeting resources was the best policy approach, many discussed the political challenges of moving in this

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direction. For some, there was the belief that all schools in California are under-resourced, so if there were to be a major investment everyone should receive more. Additionally, concerns were raised about the political backlash if active voters believe children in their community are not getting needed resources.

Even with these considerations, interviewees tended to believe that significant investments need to be targeted in order to most effectively leverage limited resources to have the greatest educational impact.

## ► key public policy areas and reform ideas

The following reform ideas generated the most support among interviewees. To the extent possible, information is provided on how interviewees talked about these reforms, why they believe they have promise and what concerns were raised. It is important to note that while the interviews followed a common protocol, the discussions were dynamic and interviewees did not necessarily address every policy area. Therefore, in the following discussion, the number of positive or negative responses to specific policy proposals are based only on the subset of interviewees that directly addressed each issue.

### **Recruitment, Retention and Equitable Distribution of Staff**

Having well-trained, experienced staff equitably distributed throughout the public school system was highly valued by most interviewees. In fact, it was the most commonly cited priority during the interview process (25 of the 46 interviewees who responded to this question listed this as a priority).

Interviewees have identified various strategies to attract, retain and ensure the appropriate distribution of staff, especially teachers, with a primary focus on compensation reforms and improvements to working conditions. Forty-three respondents were supportive of compensation reform, 10 were willing to consider it and only one was opposed to reform in this area. Improving working conditions,

especially in hard-to-staff schools, garnered the support of 35 respondents, with no opposition. Interestingly, the balance between compensation reform and working conditions varied among interviewees, with most focusing almost exclusively on compensation reform (23 respondents); some saying the most leverage is to improve working conditions (13 respondents); and a significant proportion (22 respondents) believing that a combination of approaches is the preferable option.

While there were varying degrees of interest and support for the specific reform ideas outlined below, most interviewees were open to exploring these strategies further, especially if a comprehensive package included well-developed reform proposals and additional resources.

#### *I. Staff Compensation Reform*

While several of the interviewees (16 respondents) discussed the desire to increase teacher compensation overall, the vast majority of respondents explored three specific compensation reform concepts – performance pay, differential pay and incentive pay.

Performance pay was the most highly charged compensation reform strategy, with strong advocates for and against this approach (18 supportive, 11 open to the concept and 5 opposed). By and large the business community was the most

interested in pursuing this model. Proponents discussed the need to reward outstanding teachers and to identify teachers that may be struggling. Many of these same business leaders, as well as educators, researchers, and civil rights groups raised concerns about how to create a fair and accurate system. Some educators discussed the possibility of piloting this approach if there were additional resources to do so, there were multiple measures and it was locally negotiated.

Numerous interviewees advocated for (25 respondents) or were open (7 respondents) to the idea of implementing differential pay in order to attract teachers with credentials in math, science, special education and EL. Three respondents were opposed. For math and science teachers the prevailing discussion was about the need to compete for staff given existing market demands. Special education and EL teachers were also mentioned because of the increased work load (e.g. IEPs), the need for specialized training and the current shortages. Some interviewees were concerned that paying teachers different amounts based on subject area could create animosity at the school site and promote an unhealthy school culture.

Incentive pay to attract teachers to the hardest to staff schools was the most supported concept of the compensation reform strategies (33 supportive, 8 open to the idea, 1 opposed). Interviewees from business, education organizations, civil rights groups, community organizations and researchers talked about the need for greater equity in the distribution of teachers and many saw this strategy as a promising approach. Some researchers and educators commented though that the incentive may need to be substantial to actually draw teachers to hard-to-staff schools. In addition, other interviewees

also questioned whether using salary incentives would create the right motivation for teachers to work in these schools.

## *II. Working Conditions*

Making schools inviting places to work and learn was mentioned by virtually every interviewee. Respondents often used the term working conditions as short hand for ensuring that school facilities are well equipped, inviting and the school grounds are safe (13 respondents); there is a collegial, collaborative working relationship among teachers; and the principal is a knowledgeable, respected instructional leader (20 respondents). Some interviewees also discussed the need for smaller class size (13 respondents), and collaboration and preparation time for teachers (8 respondents).

While it is ideal to ensure that all schools are a desirable place to work and learn, many interviewees (26 respondents) believed that the state should start by targeting school investments in hard-to-staff schools in order to support students and to attract and retain skilled and knowledgeable teachers, administrators, and certificated staff (i.e. counselors, nurses). Some interviewees also discussed the importance of giving schools and districts the flexibility to determine the right combination of working condition improvements in order to meet the unique needs of their students and community.

## **School Finance and Governance Reform**

Fiscal and governance reform were closely linked in the interview conversations, because much of the debate is not only about how the money gets allocated, but who gets to make the decisions. Reforms in this area were often identified as a priority for interviewees, and all of the interviewees stated

California's public school finance system is too convoluted and impossible to explain to the public. In addition, most had concerns that the decision making process is not clear and/or oriented to ensure student success.

### *III. A Weighted Student Formula*

The concept of a weighted student formula was viewed favorably by interviewees. Of the 42 interviewees that commented on this reform, 31 were supportive, 11 thought the idea had merit, but wanted to consider it more, and none were opposed. A weighted student formula made conceptual sense to interviewees because it was seen as being a more rational approach than our current school funding system. In addition, interviewees talked about it in terms of equity (certain students getting more, certain high cost regions getting more), transparency (it is easier to explain to the public), as well as stability and flexibility (districts will know what they will receive and have the ability to spend it to meet local needs).

There was a difference in opinion among interviewees about whether the weighted student formula should solely be an allocation model from the state to school districts or if the funding should flow all the way to school sites. Eight of the interviewees believed that school sites should have greater control over resources, five were open to the idea and two were opposed. This governance question focused mainly on whether school sites, namely the principal, should be making more, or all, of the funding decisions. Much of this debate centers on questions of capacity, the role of the school district and how to ensure both flexibility and quality decision making.

A handful of interviewees also raised concerns about how the state was going to ensure that the money is spent on high need students (that the additional "weights" would reach them). For some, this conflict was resolved by the existence of the state's academic accountability system, but others had specific concerns with the current accountability measurements and mechanisms in place and/or believed that existing categorical programs serve an important function.

A few interviewees also discussed the potential difficulty in determining the weights for each student subgroup. Their concerns ranged from the inability to ground the weights with solid research and the yearly political negotiating over the weights, to the possibility of encouraging a culture of victimization. Even with these concerns, most interviewees believed the promise of a weighted student formula outweighed the potential implementation difficulties.

### *IV. Local Revenue Authority*

Granting school boards the ability to raise revenue locally was seen by many interviewees, especially in the business and education community, as a useful way of activating community members that have become disengaged in their local schools since the passage of Proposition 13. Interviewees discussed the importance of a local connection between generating revenue and decision making because it could help ensure that the public was paying closer attention and would hold school boards accountable for how funds are allocated. In addition, many respondents commented that it would be an opportunity to augment the amount of resources available to students and make certain local priorities were met.

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Twenty-eight of the interviewees supported this model and five were open to the idea. Four respondents were opposed. Even among supporters there were concerns though about the potential to create inequity in the system. Respondents believed that if the state played a role in providing adequate funding and implemented a mechanism for ensuring equity (so that there was not too much disparity between districts' funding levels), this would be a reform worth pursuing.

Researchers on teacher recruitment and retention also cautioned that it was especially important to ensure equitable funding within a region. Teachers tend to seek employment within a set regional market, so if hard to staff schools don't have the same, or even more, funding to attract teachers within a region a maldistribution of less experienced teachers in these schools could result.

## Data

Of the nearly 70 interviewees that participated in this outreach process, nearly two thirds (44 respondents) wanted better, more user-friendly academic and fiscal data. Most believed this information would help inform and engage the public, ensure accountability, and could lead to better state, local and site based decision making. While none of the participants believed that creating better data systems would be the linchpin in a comprehensive package, over half mentioned that it is an important element and believe it was well overdue.

### V. Linked Data Systems

California currently offers publicly available academic and fiscal data, but many interviewees commented that the data is often difficult to understand, is not longitudinal and is isolated

in separate data systems. At a minimum, many interviewees (41 respondents) would like to see a student identifier system to track student achievement scores over time. In addition, some respondents (13) wanted better site based financial data, such as actual teacher salaries (instead of averages), as well as curriculum offerings and other resources available at the school site.

Several interviewees (21 respondents) also advocated for or were open to a teacher identifier in order to track the movement and qualifications of teachers. In addition, the teacher identifier could be used to link teacher data with student data. By and large most respondents were interested in a teacher identifier for research purposes and to target professional development opportunities, but some also saw it as a necessary component in order to implement performance pay.

While each of these data options could independently enhance transparency in the system, many interviewees saw value in linking them for research purposes and to help inform decision-making.

### VI. User-friendly Educator and Public Formats

In addition to creating and maintaining improved data systems, respondents wanted to make sure the information could be used by educators to inform practice and policy and by the public, so they could access information, advocate for changes and hold the system accountable.

## Choice

While only two interviewees mentioned that expanding access to choice in the public school system should be part of a comprehensive reform and investment package, the support for charter schools was significant enough to warrant its inclusion in this portion of the analysis.

### *VII. Charter Schools*

Many interviewees were supportive of charter schools (25 supportive, eight open to the idea). A handful of key leaders were strong proponents of these programs generally and advocated expanding access to charters by raising the statewide cap or allowing for multiple authorizers. They talked about the competitive pressure charters put on the system and how they allowed for greater innovation.

By and large interviewees were moderately supportive of charters because of the belief that they provided more choice and flexibility for parents. Even among supporters though, many felt that charter schools should be unnecessary because ideally neighborhood schools would be the community's first choice.

### **Revenue Options**

Forty-five of the interviewees, which includes representatives from every constituency subgroup that participated in this process, said they would be willing to consider and potentially advocate for an increased investment in K-12 public education if it were coupled with structural reforms.

Many of the interviewees were uncomfortable identifying a particular tax or set of taxes in order to raise revenue. Instead they discuss taxing principles. The two most prominent principles were that the tax should be progressive in nature (13 respondents) and that it be a collective investment (14 respondents). In addition, numerous interviewees commented that polling should be used to help determine the tax, as well as taking into account good tax policy in order to ensure there is a minimal impact on any one sector of the state's economy.

### *VIII. Proposition 13*

Approximately one-third of the interviewees (23 respondents), including representatives from every constituency group in this process, thought that Proposition 13 should be revisited in some way, but very few thought it was a politically viable option. In addition, nine interviewees were open to the idea of rethinking Proposition 13 and only one interviewee stated opposition. While many discussed the inequities it has created for new homeowners and businesses, most believed the public would be reluctant to trade the stability Proposition 13 provides.

A few organizations with access to polling information indicated that property taxes are not necessarily the third rail for the electorate. It may just be that taxes in general are viewed with suspicion.

### *IX. Other*

Below is a list of some of the other revenue options that were identified by interviewees.

- Sixteen interviewees were supportive of lowering the threshold on local parcel taxes to 55 percent.
- The income tax garnered 14 supportive responses, 4 maybes and two opposed.
- The concept of a statewide parcel tax was attractive to 13 interviewees, while 5 were opposed and 5 were open to the idea.
- Twelve interviewees were supportive of sales tax, 4 were willing to consider the idea and 4 were opposed.
- A tax on services was supported by 10 interviewees, one interviewee was opposed and one was open to the idea.

## ► Other Reform Ideas Mentioned

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Because of the number and diversity of interviewees that participated in this process, several other reform ideas were identified. The following is a brief overview of the reform ideas that were mentioned most frequently, but did not have a critical mass of support.

### **Academic Accountability**

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#### *X. Opportunity to Learn Index*

Ten respondents, primarily from civil rights and community-based organizations, discussed the need to have an opportunity to learn index that would provide a single number, similar to the Academic Performance Index (API), that measures the resources available to students. Some interviewees believed this approach would oversimplify the data.

#### *XI. SARC*

Nine respondents mentioned the need to reformat the SARC. Some interviewees wanted the SARC to have more detailed, contextualized information on each school, while others wanted to streamline and simplify the document.

### **Fiscal Accountability and Reform**

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#### *XII. Consolidate/Sunset Categorical Programs*

While most of the interviewees focused on the weighted student formula, several (19 respondents) advocated that the state consolidate and/or sunset State developed categorical programs. Interviewees from the business community, education management and researchers were most likely to hold this view.

#### *XIII. Budget Stability*

A few interviewees (9 respondents) discussed the value of having the State produce two or three year budgets for K-12 in order to allow school districts and schools to plan.

#### *XIV. Contracting Out*

Several business and advocacy organizations (8 respondents) were interested in providing districts the flexibility to contract out busing, gardening, janitorial and food services in order to save resources. Two interviewees were concerned about a potential lack of oversight, the loss of community and the need to provide workers with a living wage if this kind of reform were to be implemented.

### **Quality Staff and Learning Materials**

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#### *XV. Professional Development/Mentors*

Many interviewees mentioned the need to provide professional development and mentors in order to train and support teachers and principals (16 mentioned professional development, 8 mentioned mentoring and 5 mentioned both). In particular, support for the Peer Assistance and Review Program (PAR) was referred to eight times and support for the Beginning Teacher Support and Assistance Program (BTSA) was mentioned five times.

#### *XVI. Alternative Credentials*

Concerns were raised by some interviewees about the difficulty of attracting teachers into the profession, especially mid-career professionals. Six respondents were interested in allowing teachers to “test out” of both subject matter and

pedagogical requirements in order to enter the classroom more quickly.

#### *XVII. Credentialing Reform*

Ten interviewees commented on the real or perceived disconnect between the information taught in credentialing programs and the actual needs of teachers in classrooms. Some wanted higher education tenure reform, new requirements from the CTC or an index, similar to the API, for teacher credentialing programs.

#### *XVIII. Teacher Assignment*

In addition to incentives, some interviewees (14 supportive, 2 were open to the idea) also discussed the need to reform teacher assignment practices in order to staff hard to staff schools. Business leaders talked about having greater management authority when they mentioned this idea, and some civil rights and community organizations discussed the importance of putting the students' needs over the needs of the adults in the system. Others raised concerns about whether teachers would stay in the district, or the profession, if they were forced to relocate and whether they would continue to be good teachers if they stayed.

#### *XIX. Teacher Tenure*

There were concerns raised by eight interviewees about teacher tenure. Respondents were interested in ways to streamline and reduce the cost of dismissing teachers.

#### *XX. Step and Column*

A few interviewees (five respondents) mentioned the need to reform step and column. Some believed it is important to link college coursework and professional development to the district

and/or school's site plan. In addition, some interviewees had concerns that the predictability of salary over a career could be a disincentive to entering the profession (little perceived opportunity for advancement without leaving the classroom). Others countered that this stability in salary is a draw.

#### *XXI. Art and Music*

Ensuring students have access to the arts and music was valued by many of the interviewees (15 respondents). There was disagreement though about the role of the state in ensuring these opportunities or whether it should be an explicit part of a comprehensive package of reform and investment.

### **Governance**

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#### *XXII. Local Control (Home Rule)*

Several interviewees mentioned the need to provide more local control (22 supportive, two willing to consider idea). There were only a few ideas on how to implement this concept. Primarily interviewees discussed local taxing authority or categorical reform. The concept of "home rule" was also raised. With home rule, districts would be allowed to go to their electorate to pass "ordinances" that would supersede state law in specific areas. This would exclude areas of State interest (i.e. standards, accountability, compliance with civil rights and special education laws).

#### *XXIII. Mayoral Control*

During the interview process, there were both strong proponents (seven respondents) and opponents (four respondents) of mayoral control. Many interviewees also took the opportunity to discuss both the policy issues of mayoral

control, as well as the specific political context in Los Angeles and Sacramento regarding Los Angeles Unified School District.

#### *XXIV. District Size and Unification*

The ideal size and configuration of school districts in California was raised by a few interviewees (9 respondents). Some were interested in providing incentives for unification (i.e. home rule opportunities, changes to district funding formulas). Others were interested in ensuring that school districts did not exceed a certain size.

#### *XXV. State Governance*

A few interviewees (19 respondents) discussed their concerns about overlapping governance structures at the state level, including an elected Superintendent of Public Instruction, an appointed State Board of Education, the California Commission on Teacher Credentialing and an appointed Secretary of Education. There were mixed opinions about how to streamline governance at the state level and for the most part interviewees were reluctant to include any reform in this area in a comprehensive reform and investment package due to concerns over political feasibility.

### **Support Services**

#### *XXVI. School Nurses/School Counselors*

Several interviewees commented on the need to ensure that high-quality school nurses (seven respondents) and counselors (23 respondents) were available to students. Similar to the arts and music though there was little agreement about the role of the state in requiring certain ratios or whether school nurses and counselors should be part of a comprehensive reform and investment package.

#### *XXVII. School Linked Services*

There was general recognition by interviewees that students have fundamental needs, such as health and dental care, nutrition, housing and safety, which have to be met in order for them to learn. Interviewees tended to disagree though about the role of the school in providing access to these services. Generally, interviewees thought schools should partner with other agencies or provide referrals to services. Some believed with sufficient funding schools could provide some of these services or act as a location for the delivery of services.

### **A Comprehensive Reform and Investment Package**

By mid-2007 it is anticipated that several culminating factors will set the stage for a public policy discussion on ways to rethink and support K-12 public education in California. While this analysis provides some broad brush strokes on what influential California leaders' value and would potentially support, it is only a start. The California School Boards Association, Children Now, The League of Women Voters of California Education Fund and the California State Parent Teachers Association will move to the second phase of the school finance project and continue policy and political mapping based on the 2006 interviews and subsequent constituency conversations.

In addition, the publication of the "Getting Down to Facts" school finance reports by Stanford's Institute for Research on Education Policy and Practice has started a vigorous debate regarding the need for structural reform and increased investment in California's K-12 school system. Utilizing these reports and other information, the Governor's Committee on Educational Excellence, the Legislative leadership and the Superintendent of Public Instruction may

provide recommendations for reform that will further shape the discourse.

Several efforts are being planned to ensure that constituency groups and the public have an opportunity to shape and further refine the reform policies and investment strategies that may be included in a comprehensive K-12 package. This includes regional community forums, legislative activities and potentially initiative efforts. The School Finance Exploration Partnership will play a critical role in developing and implementing these community engagement strategies to ensure that the policy framework for education reform and finance is built on the foundation of both statewide leadership and the vision of communities throughout California.

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