

NEGOTIATING EBM

A Conversation Starter for Superintendents and Union Presidents



WHY WE ARE HERE

- Introductions.
- Has everyone seen the EBF distribution for their district?
- Purpose of this meeting:
 - Jump start the local conversations that will be needed to determine how to spend the new money that may come to your district from EBM.
- In our view, this new funding model provides an opportunity for districts and staff to discuss how any new money will be used.
 - Some of this discussion will inevitably happen in negotiations, but districts and unions should be thinking about this now and sharing their viewpoints.
 - Panelist viewpoints:

WHY WE ARE HERE

- What are our common interests and issues?
 - Improving educational experiences and outcomes for students
 - Recruit and retain, new salaries, new programs, what else?
- What is our local responsibility to show that this new formula actually works?
 - To get the money to fully fund this model, we've got to show all along that this formula is working.
 - Recognize change and improvement take time

WHAT CHANGES IN THE LAW

- Prior to FY18 funding theory was that equal dollars per child meant equal educational opportunity
- General State Aid (GSA) – per student theory
 - State set a foundation level (\$ per average daily attendee or ADA)
 - State calculated local effort (\$ per ADA)
 - GSA was (with adjustments) equal to the difference
 - For example, if the foundation level was \$6,100 and your district generated (according to the formula) \$3,100, GSA was equal to \$3,000 per ADA

WHAT CHANGES IN THE LAW

- EBM – equal educational opportunity is based on student needs
 - Children are different
 - Research demonstrates that different educational inputs (resources or dollars) are required if we expect different children to achieve success in school
 - Calculates an adequacy level, the resources (dollars) required for the group of children in your district, to be successful
- Grant calculation is not unlike old GSA calculation: EBM calculates adequacy level (\$ required for total average enrollment), subtracts calculated local capacity, and the difference is the state funding requirement

SIMPLIFIED EXPLANATION OF THE LAW

- Calculate the cost of the 27 elements. (“Adequacy Target”).
- Adjust of local cost of living (“Regionalization”).
- Determine local resources that can support education (“Local Capacity”).
- Determine gap between adequacy target and local capacity (“Adequacy Level”).
- Distribute Funds based on adequacy level.
 - Districts that with lower adequacy levels receive more of the funds.
 - The funds this year are not enough to bring districts all the way up to adequacy, but they are a start.

THE 27 ELEMENTS (1)

Evidence Based Elements:		Variable	Students				
	Core FTE						
	Core Teachers K-3						
1a	(Low Income)	Class Size	15				
1b	Core Teachers K-3	Class Size	20				
	Core Teachers 4-12						
2a	(Low Income)	Class Size	20				
2b	Core Teachers 4-12	Class Size	25				
3	Specialist Teachers	K-5 % of Core	20%	6-8 %	20%	9-12	33%
4	Instructional Facilitators	K-5	200	6-8	200	9-12	200
5	Core Intervention Teachers	K-5	450	6-8	450	9-12	600
6	Substitutes	9 Days/FTE	33.33% of average teacher or sp ed aide salary				
7a	Core Guidance	K-5	450	6-8	250	9-12	250
7b	Nurse	K-5	750	6-8	750	9-12	750
8	Supervisory Aides	K-5	225	6-8	225	9-12	200
9a	Librarian	K-5	450	6-8	450	9-12	600
9b	Library Aide/Media Tech	K-5	300	6-8	300	9-12	300
10a	Principal	K-5	450	6-8	450	9-12	600
10b	Asst Principal	K-5	450	6-8	450	9-12	600
11	School Site Staff	K-5	225	6-8	225	9-12	200

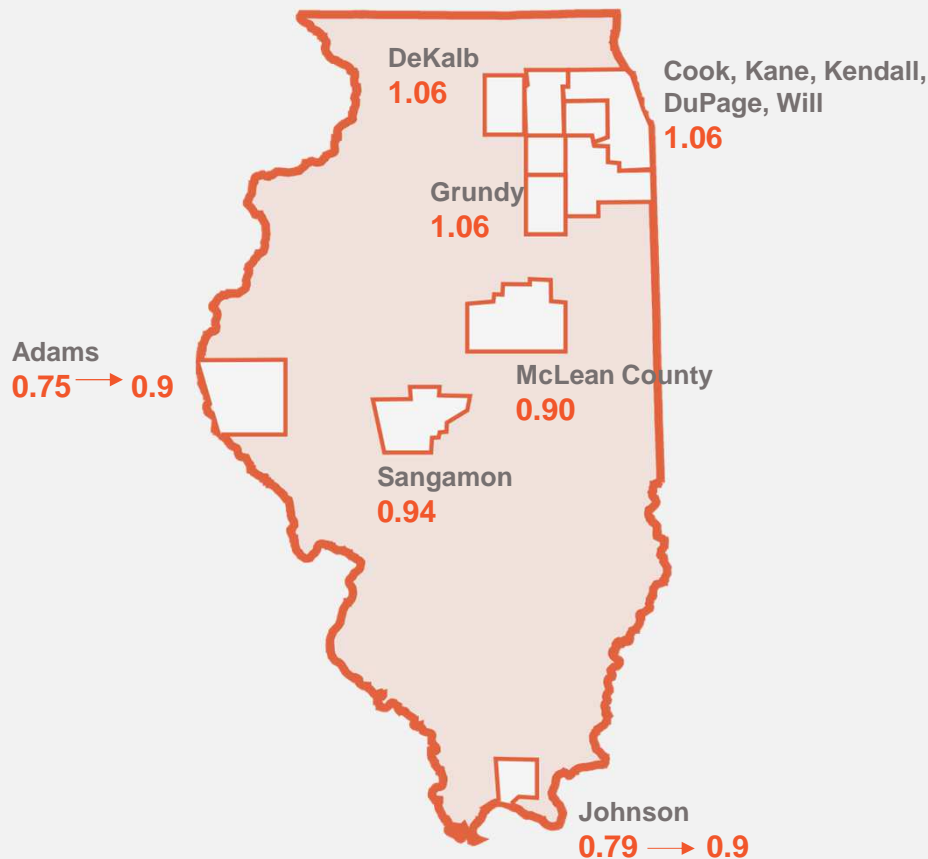
- E.g., the formula recommends funding:
 - #1a: In a low income K-3 setting, the formula recommends one teacher for 15 students
 - #4: One Instructional Facilitator for every 200 students, (same for all categories)
 - #9b: One Library Aide/Media Tech for every 300 students

THE 27 ELEMENTS (2)

Per Student/Central Services							
12	Gifted	\$ per Student	\$40				CW4
13	Professional Development	\$ per Student	\$125				CW4
14	Instructional Materials	\$ per Student	\$190				CW4
15	Assessment	\$ per Student	\$25				CW4
16	Computer Technology	\$ per Student	\$285.50	+ \$285.50 by grant for Tier 1 & 2			CW4
17	Student Activities		K-5 \$100	6-8 \$200	9-12 \$675		
18	Operations and Maintenance	\$ per Student	\$1,038				Salary = \$352.92
19	Central Offices	\$ per Student	\$742				Salary = \$368.48
20	Employee Benefits	30% of Salary	30%				
Diverse Learners							
21	Intervention Tchr (Poverty/EL)	Per DHS	125	Per EL	125		
22	Pupil Support Tchr (Poverty/EL)	Per DHS	125	Per EL	125		
23	Extended Day Tchr (Poverty/EL)	Per DHS	120	Per EL	120		
24	Summer Sch Tchr (Poverty/EL)	Per DHS	120	Per EL	120		
25	English Learners Tchr (EL)			Per EL	100		
26a	Special Ed Teachers	K-5	141	6-8	141	9-12	141
26b	Psychologist	K-5	1000	6-8	1000	9-12	1000
26c	Special Ed Aides	K-5	141	6-8	141	9-12	141

- E.g., the formula recommends funding:
 - #12: The formula recommends \$40 for each gifted student (~~CW4~~ means there is no regionalization factor calculation)
 - #18: The formula recommends \$1,038 per student for O&M, \$352.92 of which is recommended for O&M Salaries.
 - #21: one FTE Intervention Teacher per 125 low income (per DHS) and per English Learner (can be duplicated, i.e. two FTE for 125 low income English Learners)

REGIONALIZATION FACTOR



- To determine the Final Adequacy Target, a Regionalization Factor is applied. The Regionalization Factor or Comparable Wage Index (CWI) is a measure of regional variations in salaries.
- Initial Adequacy * CWI = Final Adequacy Target
- For Example, if adequacy was determined to be \$10,000,000 for a district, adequacy would be adjusted to:
 - \$9,000,000 in Adams County (even though CWI is .75)
 - \$9,400,000 in Sangamon
 - \$10,600,000 in Will County

DETERMINING ADEQUACY

Determining a district's resources is needed to obtain the calculated %
Adequacy Level.

$$\text{Resources} \div \text{Adequacy Target} = \text{Adequacy LEVEL}$$

• For Example:

- High property wealth district:

$$\begin{array}{l} \text{Resources} \\ \$23,793,210 \end{array} \div \begin{array}{l} \text{Adequacy} \\ \text{Target} \\ \$24,498,359 \end{array} = \begin{array}{l} \text{Adequacy} \\ \text{LEVEL} \\ 97.0\% \end{array}$$

- Low property wealth district:

$$\begin{array}{l} \text{Resources} \\ \$ 13,589,596 \end{array} \div \begin{array}{l} \text{Adequacy} \\ \text{Target} \\ \$ 24,124,777 \end{array} = \begin{array}{l} \text{Adequacy} \\ \text{LEVEL} \\ 56.0\% \end{array}$$

WHY WE ARE HERE

- Icebreaker – How could the new school funding landscape impact your district?

WHAT'S IN THE LAW

- The good for negotiations:
 - Focus on sufficient staff to meet student needs – equity of opportunity.
 - Based on local need – different for all districts.
 - Should help teacher work load issues.
 - Focused on improving student outcomes.
 - Funding at state average salary should increase salaries in our traditionally underfunded (property poor) districts.
 - Provides a road-map for efficiencies (effect size – not quite in law but definitely in the research).

WHAT'S IN THE LAW

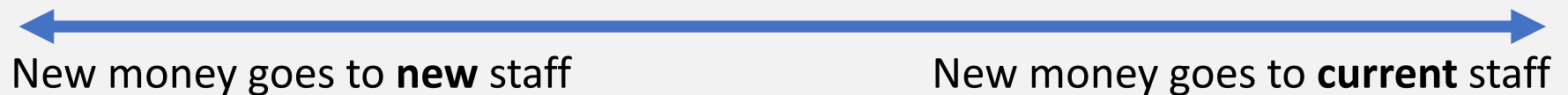
- The not quite so good for negotiations:
 - Not fully funded yet.
 - The bill allocates \$350 million in new funding this year, but ISBE estimates that \$7.2 billion is needed for every district to have adequate funding.
 - We have ongoing organizing work to do to continue funding the model.
 - Adequacy target may provide a rationale to lower local tax rate / contribution in some districts.

WHAT'S THE LAW SAY ABOUT BARGAINING

- Nothing.
- Nothing changes.

HOW CAN YOU USE THE MONEY

- Some of the money comes with a target
 - Tech funds
 - O&M
- Most of the money is focused on staffing/programming, and we can use a continuum bounded by:



IN PLACING YOUR DISTRICT ON THAT CONTINUUM, CONSIDER:

- Balance the need for higher salaries to attract and retain high quality staff with the need to provide new staffing.
- Effect sizes may help decide what's important in your district.
- Consider any shortcomings in student experiences, opportunities and performance that district data brings to light.
- Could mentor teachers (as full time assignments) help with the teacher pipeline in your area?
- And....

TABLE GROUPS – 15-20 minutes

- Generate suggestions
- Generate questions

STUMP THE PANEL

- Answer questions folks generated