Exploring The Recession-Driven 'New Normal' for California's K-12 Public School Districts

Afternoon Roundtable Presentation

USC/SCAG 23rd Annual Demographic Workshop

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Roundtable Presentation Outline

1. The Effect of the Recession on California's School Districts

Today's roundtable will start with The Effect of the Recession on California's School Districts. This will include an overview of California's school districts and students, a quick summary of California school funding, how California's situation compares to other states, and a look at school district defaults as the bottom line.

Roundtable Presentation Outline

1. The Effect of the Recession on California's School Districts

2. How Enrollment Trends May Be Exacerbating Budgetary Problems

Next, we will discuss How Enrollment Trends May Be Exacerbating Budgetary Problems. This will cover general California and LA County trends, LAUSD-specific trends, and some information about the dynamics of Charter Schools.

Roundtable Presentation Outline

1. The Effect of the Recession on California's School Districts
2. How Enrollment Trends May Be Exacerbating Budgetary Problems
3. What Does the 'New Normal' Look Like For Public School Districts?

Third, we will address what the 'New Normal' looks like for public school districts, as well as what the recession looks like on the ground, including examples from a selected California school districts.

Roundtable Presentation Outline

1. The Effect of the Recession on California's School Districts
2. How Enrollment Trends May Be Exacerbating Budgetary Problems
3. What Does the 'New Normal' Look Like For Public School Districts?
4. Challenges to Measuring the 'New Normal'

Next, we will cover the challenges to uncovering, estimating and measuring the 'New Normal' for public school districts, including measuring and predicting charter school dynamics, the challenge of longitudinal data collection, and the disappointments with SSID and resulting implications for CALPADS.

Roundtable Presentation Outline

1. The Effect of the Recession on California's School Districts
2. How Enrollment Trends May Be Exacerbating Budgetary Problems
3. What Does the 'New Normal' Look Like For Public School Districts?
4. Challenges to Measuring the 'New Normal'
5. The Paradox: Do More With Less

Finally, we will explore the paradox that while staff, teacher and programs are being cut, the mandate is nonetheless being given to do more. We will discuss how a budget crisis drives the need for greater data accuracy & accountability, and actually has a silver lining: the opportunity to put better operational procedures and technologies in place.

Overview of California's School Districts

California:

- Has about 6.2 million students in grades K-12

California has about 6.2 million students, about 1.5 million more than Texas, the next most populous state (National Center for Education Statistics (NCES).

Overview of California's School Districts

California:

- Has about 6.2 million students in grades K-12
- Educates 1 in 8 of all the country's public school students

California educates one in eight public school students in the United States.

Overview of California's School Districts

California:

- Has about 6.2 million students in grades K-12
- Educates 1 in 8 of all the country's public school students
- About 25% English-language learners- highest in USA
- More than 50% of children living in low-income families

The state has the highest percentage (approx. 25%) of English learners in the nation and is near the top in the proportion (more than 50%) of children living in low-income families (www.Ed-Data.k12.ca.us).

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- Has almost 1,000 school districts:
  - Ranging in size from <10 to > 660,000 students
  - Most between 1,000 and 50,000 students

California has almost 1,000 school districts that vary dramatically in size. Some small districts serve fewer than 10 students, and the largest district—the Los Angeles Unified School District—educates approximately 660,000 students. The vast majority of California's students are in districts with enrollments between 1,000 and 50,000.

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- Has three types of school districts:
  - Elementary (kindergarten through 8th grade) – over half%
  - Unified (kindergarten through 12th grade) – over one-third%
  - High School (typically 9th through 12th grade) – almost 10%

California has three types of school districts: More than half are elementary (kindergarten through 8th grade); Over a third are unified (kindergarten through 12th grade); and almost a 10th are high school (typically 9th through 12th grade).

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- Had 750 charter schools in SY2008-09

In SY2008–09, California had 750 charter schools, serving 4.6% of the state's K–12 student population.

A Quick Summary of California School Funding

California public school districts receive funding from local, state, and federal sources.

A Quick Summary of California School Funding

The Revenue Limit

Revenue Limit District Funding

Money from Local Taxes

Money From the state

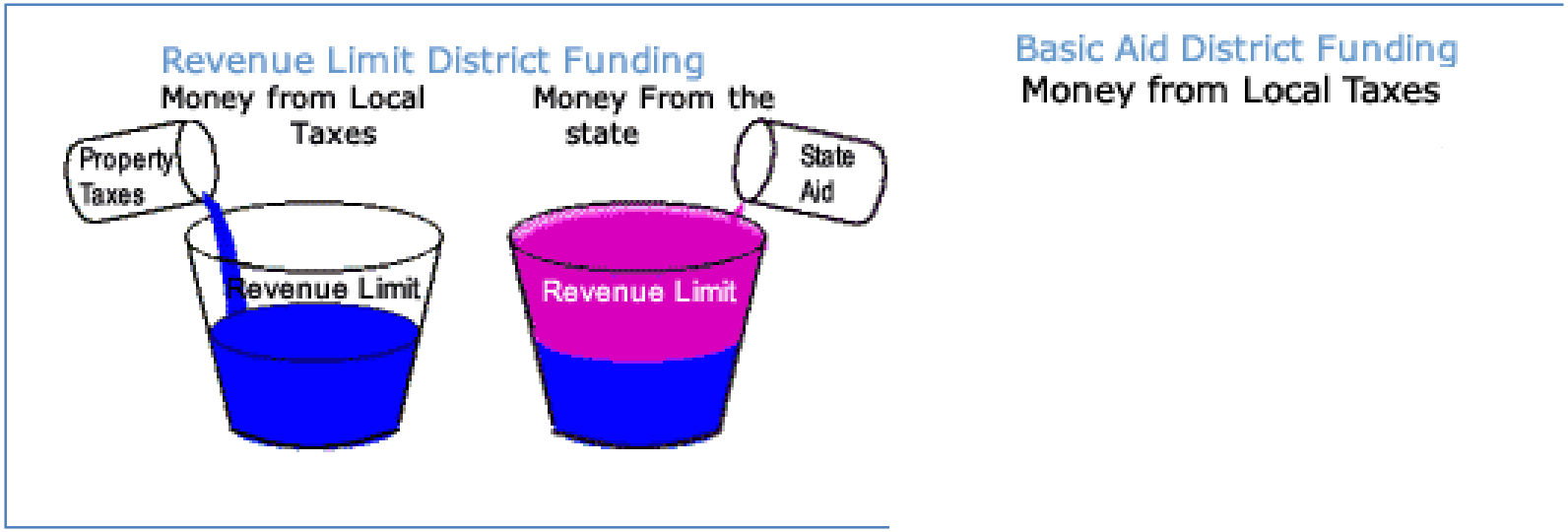
Basic Aid District Funding

Money from Local Taxes

A district's REVENUE LIMIT is the amount of general purpose funding it receives per student. This is calculated using average daily attendance (ADA). State and local funds are combined to make up a district's revenue limit funding.

A Quick Summary of California School Funding

The Revenue Limit

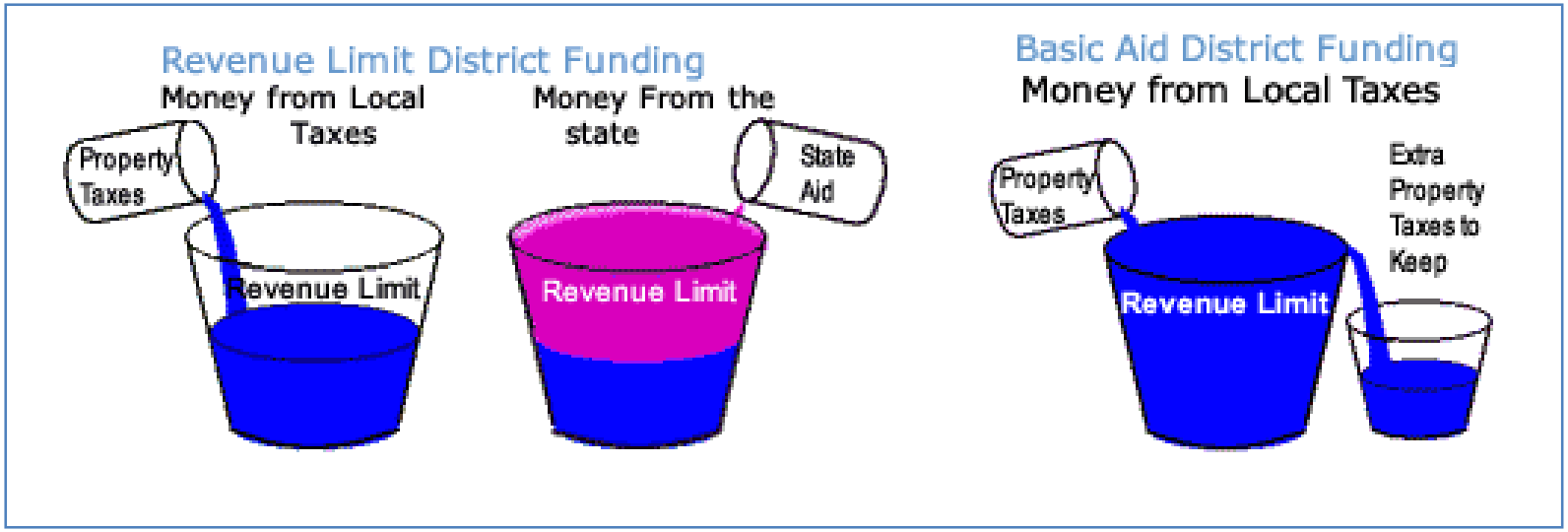


"Revenue Limits", EdSource, www.edsource.org

In this illustration, a bucket is used to represent a district's REVENUE LIMIT. Each district will have a different-sized bucket, representing its individualized revenue limit. Revenues raised through local property taxes are poured into the district's bucket. If the bucket is not filled all the way, the state comes by and tops it off with state tax revenues.

A Quick Summary of California School Funding

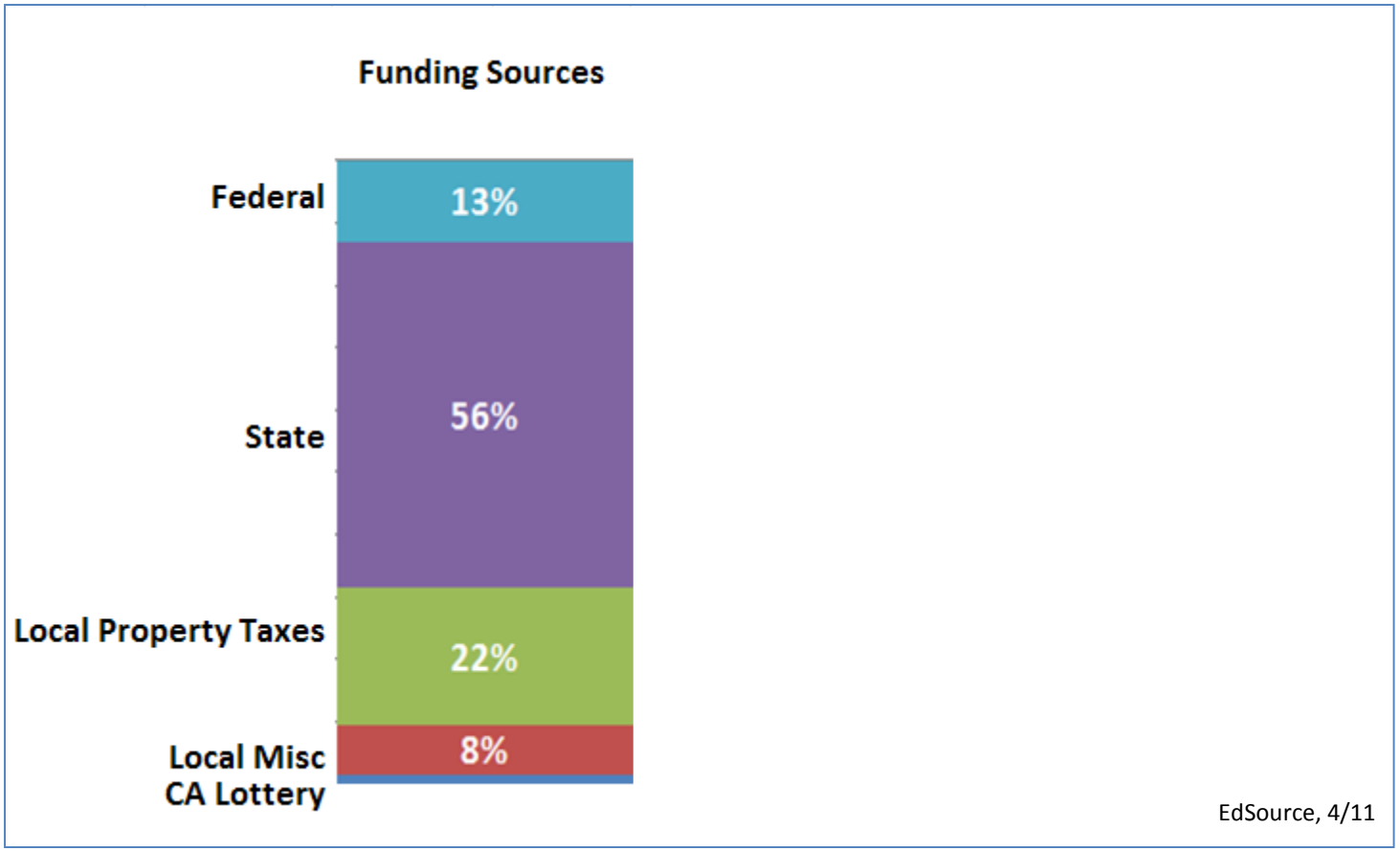
The Revenue Limit



"Revenue Limits", EdSource, www.edsource.org

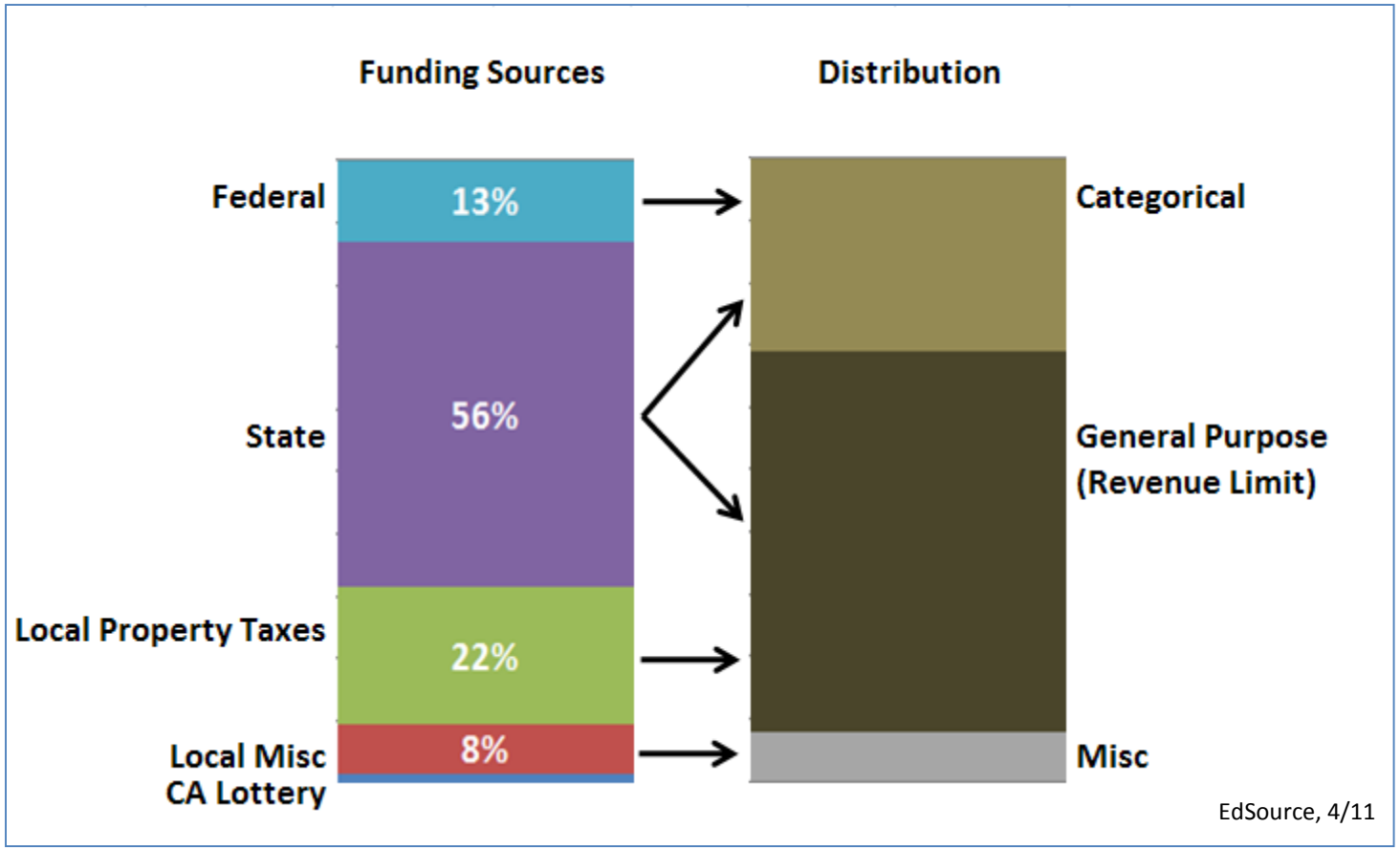
If the bucket is completely filled by local property tax revenues, the state has no need to "top off" the bucket. If the bucket overflows with local property taxes, the district gets to keep the overage. Districts whose buckets are filled by local property taxes are called "basic aid" or "excess revenue" districts. REVENUE LIMIT funding is general purpose, and districts have flexibility as to how they use those funds.

A Quick Summary of California School Funding



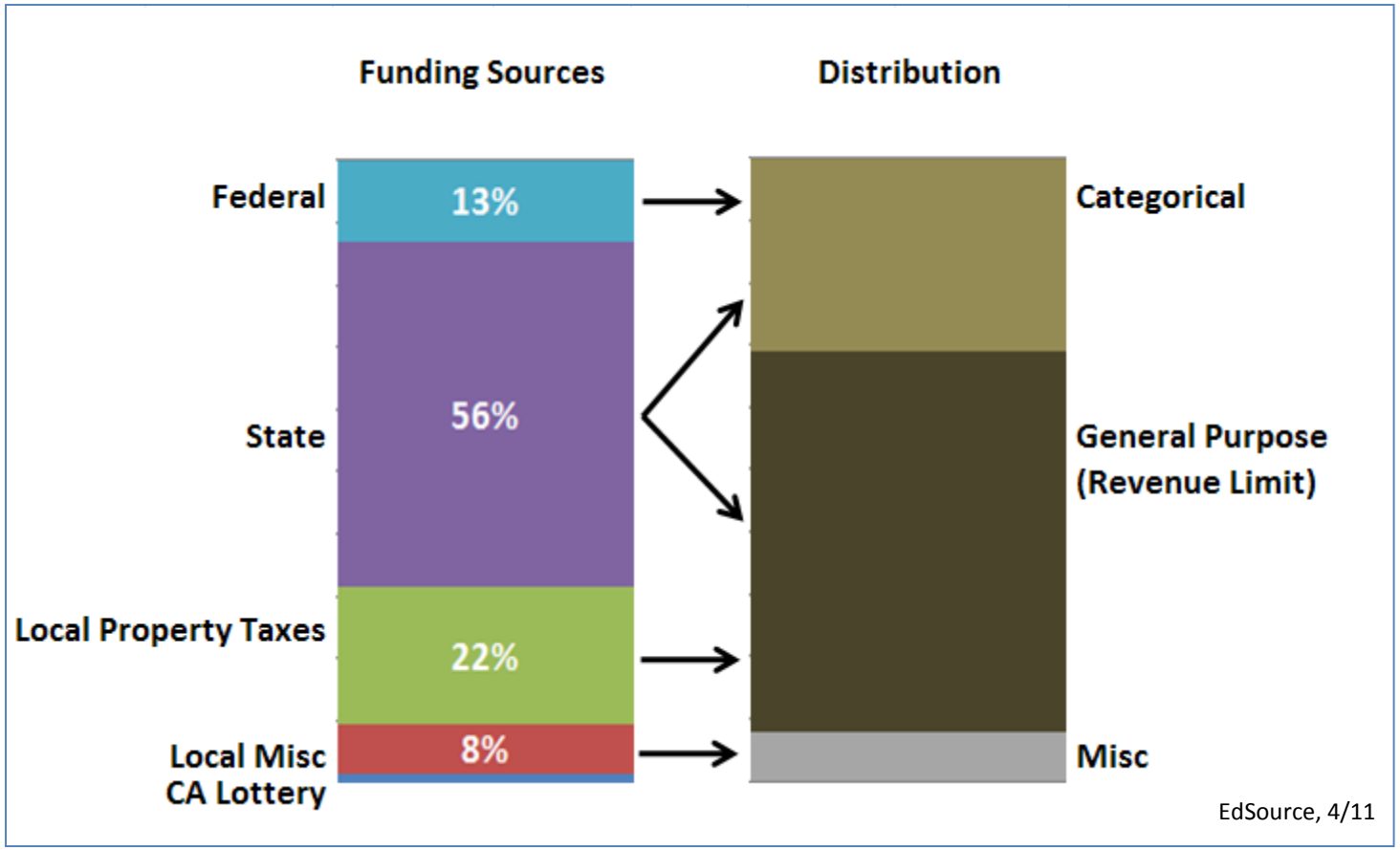
Average funding over the last 10 years has been about 13% Federal, 56% State, and 22% Local Property Taxes. Another 8% comes from miscellaneous local revenues, including fees on commercial or residential construction, special elections for parcel taxes, contributions from parents, businesses and foundations, cafeteria sales, and interest on investments by local school districts. About 1.5% comes from the California Lottery (about $125/student annually).

A Quick Summary of California School Funding



Part of the state funding makes up a district's REVENUE LIMIT; another part contributes to its CATEGORICAL FUNDING. California's Education Code dictates that much of the State's funding must be categorical, or earmarked for specific students (such as SPED) or programs (such as CSR, Class Size Reduction), and local school districts' collective bargaining commitments.

A Quick Summary of California School Funding



Most of these categorical funds come with requirements that districts must adhere to in order to be eligible to receive them, such as CSR. But meeting those eligibility requirements can be expensive. In a budget crisis, the cost of meeting the requirements can offset the benefit of receiving the funding. In a tight financial climate, many school districts are forced to give up categorically-funded programs because the prohibitive costs of meeting the funding eligibility requirements.

A Quick Summary of California School Funding

From the Capital Construction Perspective:

- Since 1998, California has invested more than $97 billion ($35.4 billion in state bonds plus $62 billion in local bond measures) in improving and expanding its school facilities.

The Effect of the Recession on Capital Construction:

- Issues with the State's and LAUSD's credit ratings have resulted in bonds not been sold for periods of time
- Bonds not being sold affects availability of bond money and construction timelines
- The recession has made voters less willing to vote for further bond measures
- Withdrawal of voter support has had a negative effect on projects with multiple stages
- The later stages of construction projects may be delayed or cancelled
- A major issue now is reduced or cancelled funding for maintenance projects

Although California has invested over $97 billion on schools capital improvements since 1998, the recession has had a negative effect on capital construction and repairs. Credit rating issues have resulting in periods without bond sales, making funding unstable and affecting construction timelines. Voters have become reluctant to support bond measures, which has resulted in delays or cancellations to multi-stage and capital maintenance projects.

A Quick Summary of California School Funding

State Revenue Limit Per Avg Daily Attendance (ADA), FY0809 - FY1314

State's RL Per ADA	08-09	09-10	10-11	11-12	12-13	13-14
COLA %	**5.66%**	**4.25%**	**-0.39%**	**2.24%**	**3.20%**	**2.70%**
Deficit Rate	**7.8440%**	**18.3550%**	**17.9630%**	**19.7540%**	**19.7540%**	**19.7540%**
Base RL	$5,821.00	$6,150.00	$6,411.00	$6,386.00	$6,529.00	$6,738.00
COLA	**329.00**	**262.00**	**(25.00)**	**143.00**	**209.00**	**182.00**
Undef. RL	$6,150.00	$6,412.00	$6,386.00	$6,529.00	$6,738.00	$6,920.00
Deficit	482.41	1,176.92	1,147.12	1,289.74	1,331.02	1,366.98
Funded RL before add'l. decrease	**$5,667.59**	**$5,235.08**	**$5,238.88**	**$5,239.26**	**$5,406.98**	**$5,553.02**
Add'l. Revenue Limit Reduction	$ -	$ 252.99	$ -	$ -	$ -	$ -
Add'l. Revenue Limit Reduction				$ -	$ -	$ -
Net funded RL after add'l. reduction	**$5,667.59**	**$4,982.09**	**$5,238.88**	**$5,239.26**	**$5,406.98**	**$5,553.02**
Inc./Dec. (before add'l. RL decrease)	$ (153.41)	$ (432.51)	$ 3.80	$ 0.38	$ 167.72	$ 146.04
Effective COLA (before add'l. RL reduction)	**-2.6355%**	**-7.6313%**	**0.0726%**	**0.0073%**	**3.2012%**	**2.7010%**
Total of deficit and add'l. reduction	$ 482.41	$1,429.91	$1,147.12	$1,289.74	$1,331.02	$1,366.98
Total % of deficit and add'l. reduction	**7.8441%**	**22.3005%**	**17.9630%**	**19.7540%**	**19.7539%**	**19.7540%**
Effective COLA (after addt'l. RL reduction)		**-12.1000%**	**5.1500%**	**0.0100%**	**3.2000%**	**2.7000%**

A recession shrinks the State's revenues. This results in a districts' REVENUE LIMITS (RL) being reduced due to DEFICITS. The State owes each school district its guaranteed RL, and the State plans for its obligations by estimating the RL for each district. The estimate includes a COLA applied to the base RL, which equals its Undeficited RL. At the same time, counties collect their local property taxes, which they report to the State.

A Quick Summary of California School Funding

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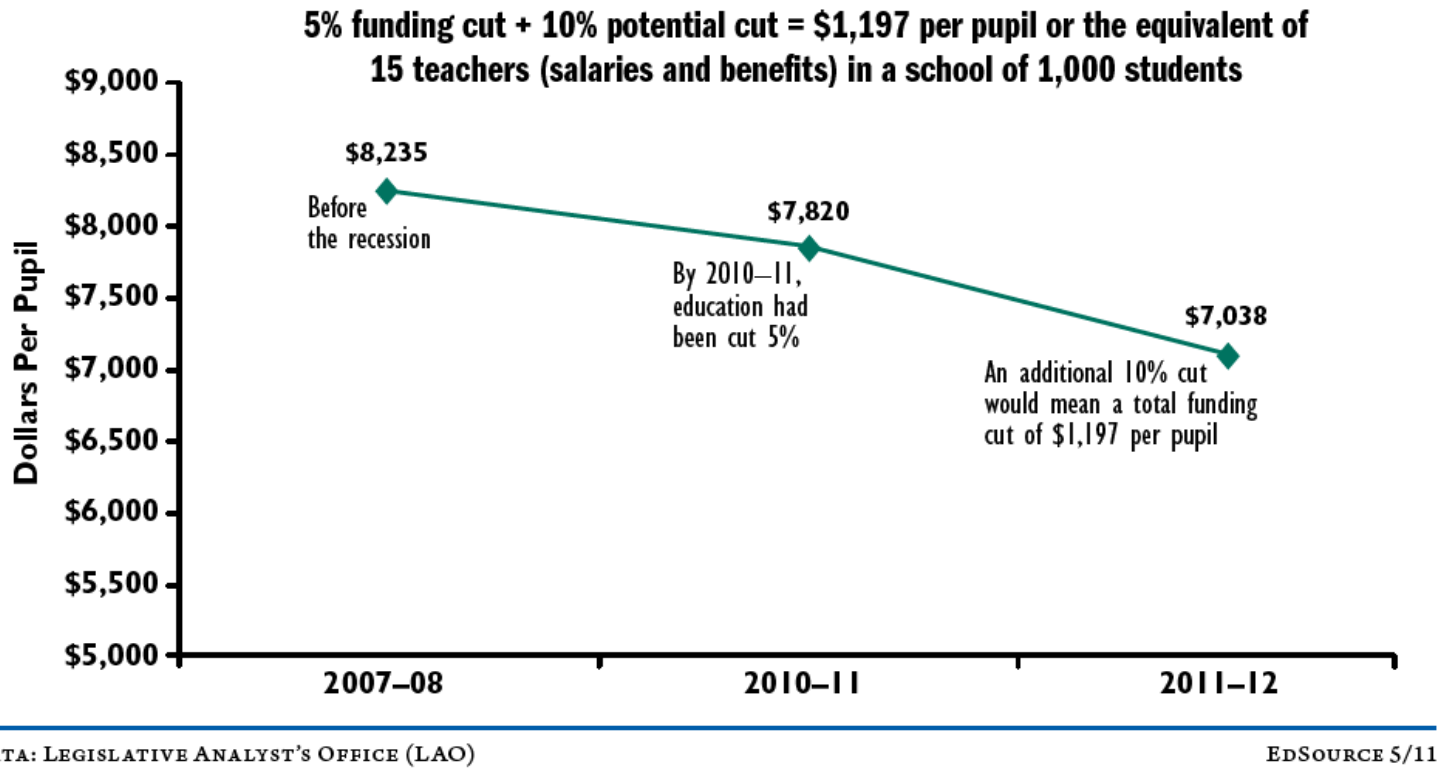
The State then computes how much of the property taxes they estimated actually materialized. The difference between their estimate and the actual collection equals the deficit. The State applies the deficit rate to the Undeficited RL, and the result is the Funded R, which becomes the projected RL for the following year. The deficit rate is the indicator of how the RL will change. The current estimate is for the deficit rate to grow through FY11-12, and then hold at that level.

Is There a Possibility of School District Defaults?



EdSource
http://www.edsource.org/pub11-fiscal-crisis-brief.html

According to the non-partisan Legislative Analyst's Office, per-pupil spending was "reduced by 5% between 2007-08 and 2010-11…The 10% potential cut in educational funding [being discussed]…would be in addition to the 5% already cut." The continuing cuts could potentially result in $1,197 less funding per pupil in 2011-12.

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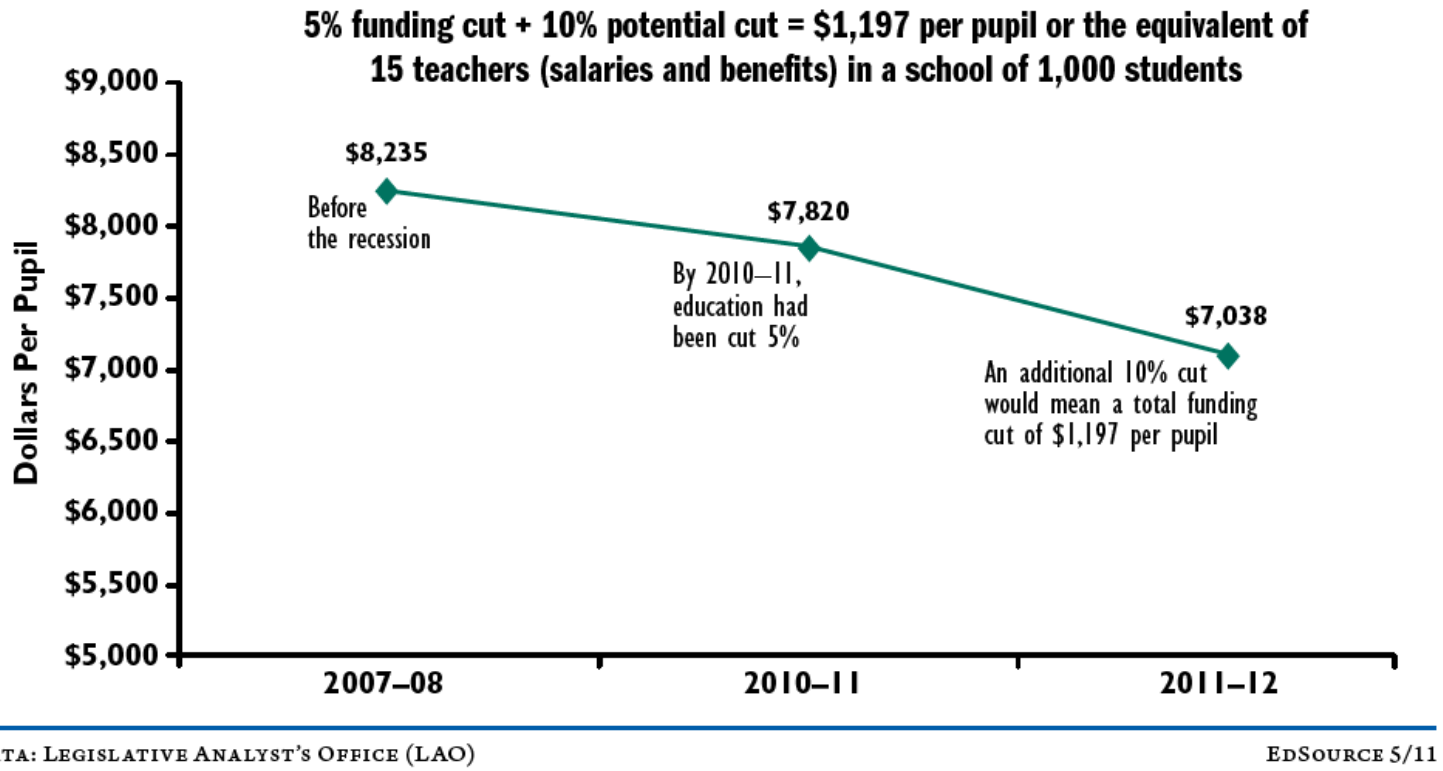

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School Services of California calculated the gross amount that could be lost if the Governor approves a $4 billion to $5 billion cut to education. They maintain that the standing $349 cut per-pupil could be increased to as much as $825, which could trigger the need for 150 to 300 requests for emergency appropriations. Absent other kinds of structural relief, most districts would have no option but to turn to the State and ask for these emergency loans.

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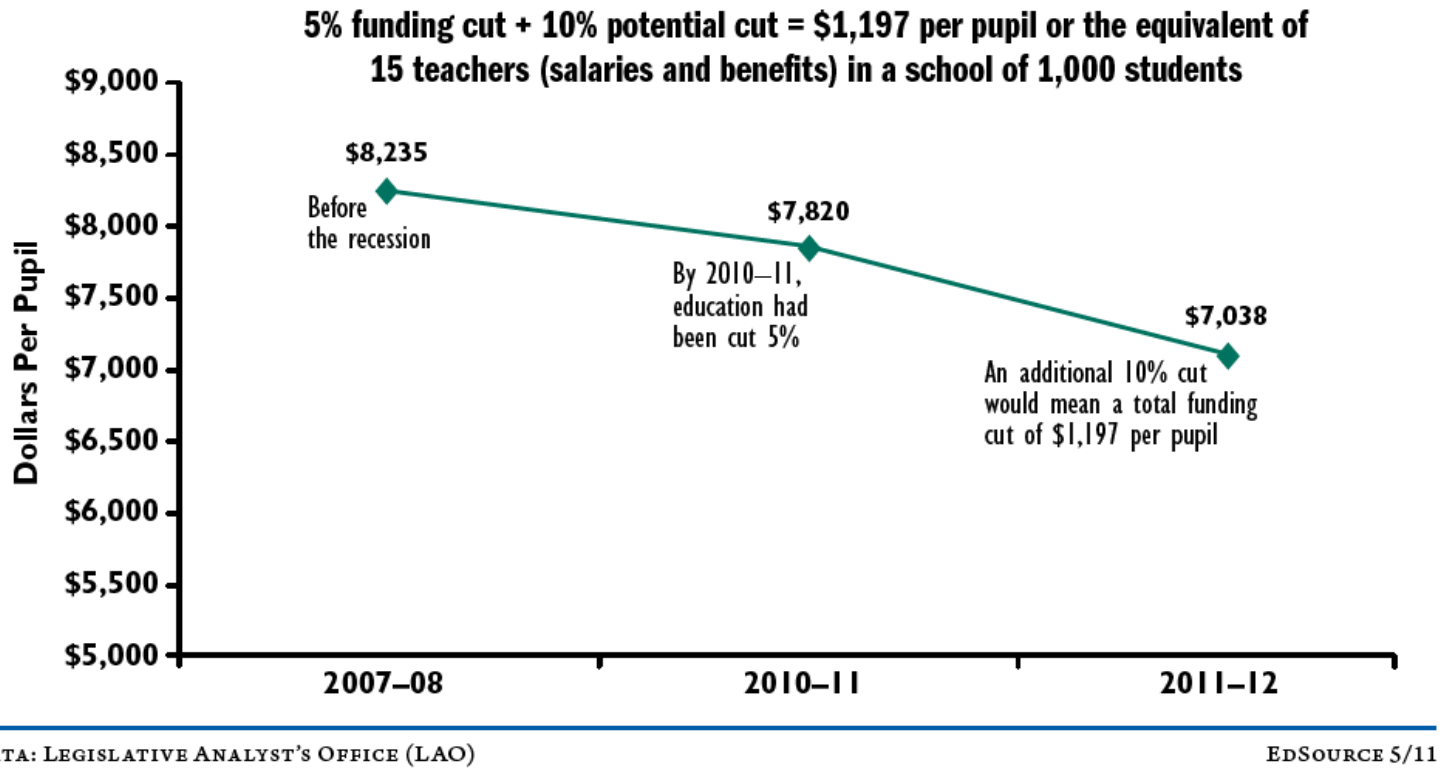

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Further, class sizes have risen to the point that many classrooms are already "fire-marshal full," so for many schools even an early budget and second layoff window would not help districts that can't lay off additional staff because of physical, statutory, or collective bargaining constraints. After four years of cuts that hit public education disproportionately, most districts have nowhere to turn but to declare themselves either "qualified" or "negative" and to turn to the State for help.

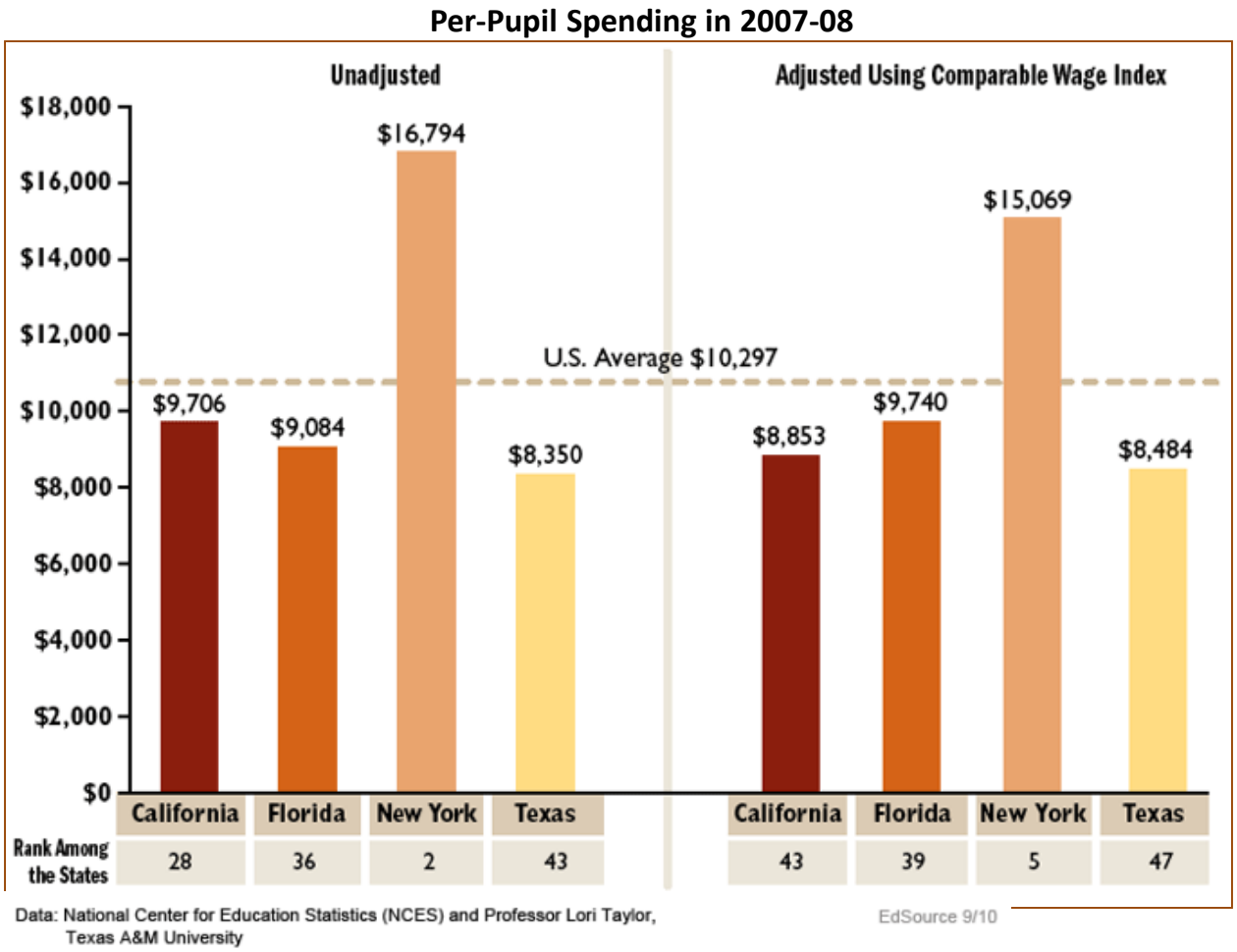
How Does California Compare to Other States in Terms of Spending?

California:

- Has the largest number of students
- Has more English-learners than any other state
- Has substantial numbers of students from low-income backgrounds
- Has fewer school staff per pupil than all but one other state
- Spends less than the national average per pupil, especially when regional cost-of-labor differences are accounted-for
- Began to lose ground in per-pupil spending the late 1970s and has remained below the national average since 1982

It is inherently difficult to compare California to other states. The data show that California schools are attempting to educate the most diverse and challenging school population in the country, and are doing it with substantially fewer human resources than almost any other state.

How Does California Compare to Other States in Terms of Spending?



The left side of the chart displays unadjusted expenditures in 2007–08 for the country's four largest states. California spent $9,706 per pupil, which earned the state a rank of 28th. On the right side, after the figures are adjusted based on the average salary costs in each state, the rankings change, especially for expensive California. With those adjustments, California's per-pupil expenditure of $9,706 falls to $8,853, and its ranking of 28th falls to 43rd.

How Does California Compare to Other States in Terms of Staffing?

Ratio of Staff to 1,000 Pupils by Position, Fall 2008-09

	California Rank in U.S.	U.S. Ratio	California Ratio	% of U.S. Ratio
Total Staff to Students	**49**	**128.4**	**93.3**	**73%**
All Professional (certified) Staff to Students	50	73.2	52.4	72%
Total District Staff (including classified staff)	36	6.6	5.5	83%
District Officials/Administrators Only	45	1.3	0.6	50%*
Total School Staff (including classified staff)	49	97.8	71.3	73%
Certified School Staff Only	50	73.7	54.6	74%
School Principals & Asst. Principals	48	3.2	2.3	71%
Guidance Counselors	51	2.2	1.2	56%
Librarians	51	1.1	0.2	17%
All Teachers	50	65.4†	48.0†	73%
Elementary Teachers (grades 1-8)	34	52.1	48.3	93%
Secondary Teachers (grades 9-12)	51	82.9	43.8	53%

DATA: National Center for Education Statistics (NCES) Common Core of Data, 2008–09, 1/24/11

In 2008–09, California ranked 36th in the country in per-pupil expenditures. The state's modest per-pupil expenditures, combined with high labor costs (for example, average teacher salaries in California were the third highest in the country in 2008–09), result in schools not being able to hire as many people.

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Compared with the U.S. average, California has about half as many school district administrators, guidance, counselors, and high school teachers per 1,000 students. The state ranks last in the number of school librarians per pupil. (EdSOURCE)

2 – How Enrollment Trends May Be Exacerbating Budgetary Problems

Decline in enrollment:

- Decline in ADA = less RL funding
- Decline in ADA may not mean lower operating costs

Because a school district's RL is calculated using its ADA (Avg Daily Attendance), districts in counties with K-12 decline will receive progressively less RL funding as their ADA decreases. But a decrease in a district's enrollment doesn't mean that that the operational costs of running the district– heating, cooling, maintenance, security– will automatically go down.

2 – How Enrollment Trends May Be Exacerbating Budgetary Problems

Decline in enrollment:

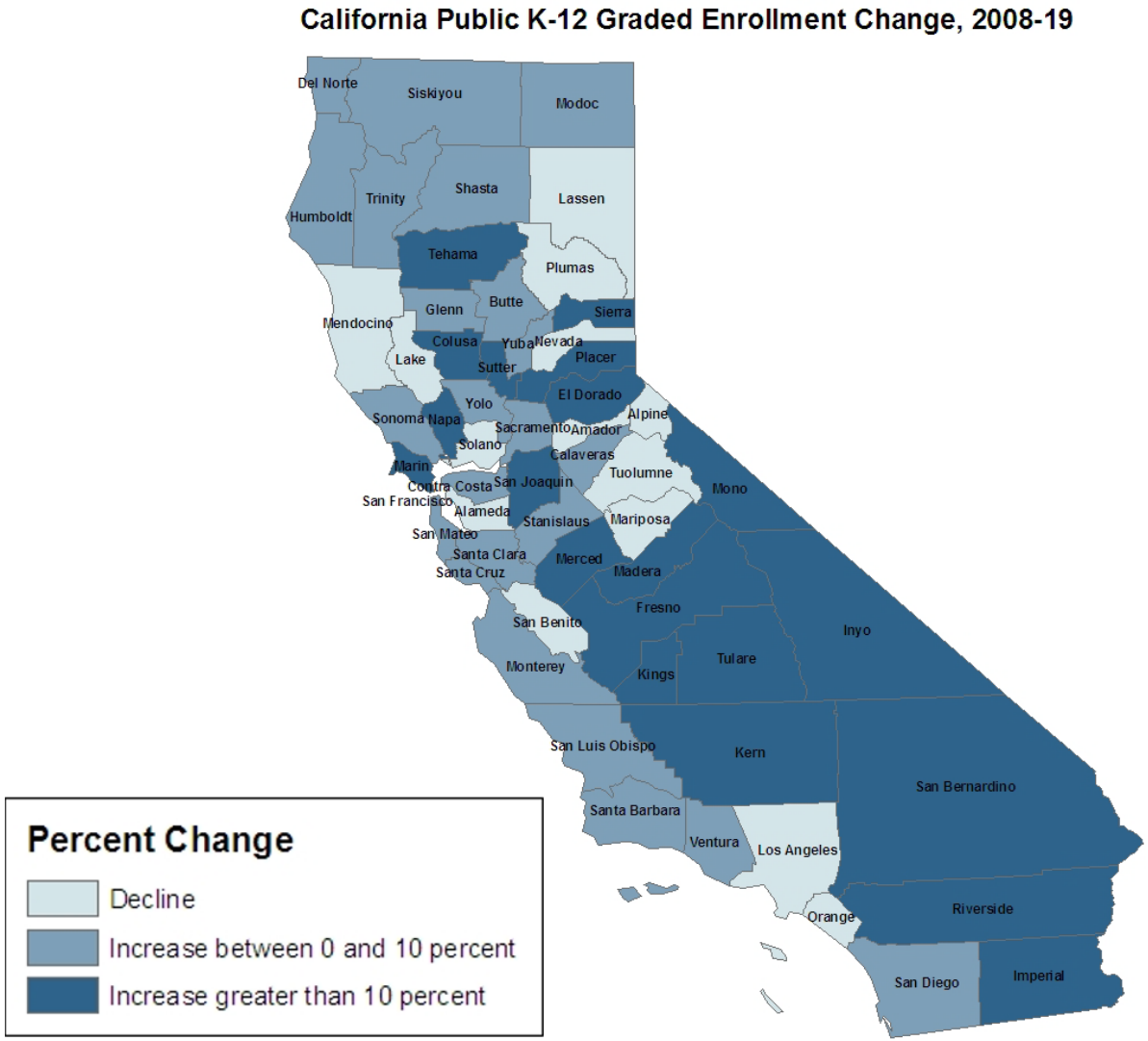
- Decline in ADA = less RL funding
- Decline in ADA may not mean lower operating costs

Increase in enrollment:

- Must ensure enough seating capacity
- Funding strategies for new capital construction

For counties with enrollment increases, there can be other challenges. These counties may have the problem of having to ensure enough seats to house their growing K-12 populations. They may have to develop strategies for funding facilities development, such as garnering voter support for capital construction bonds.

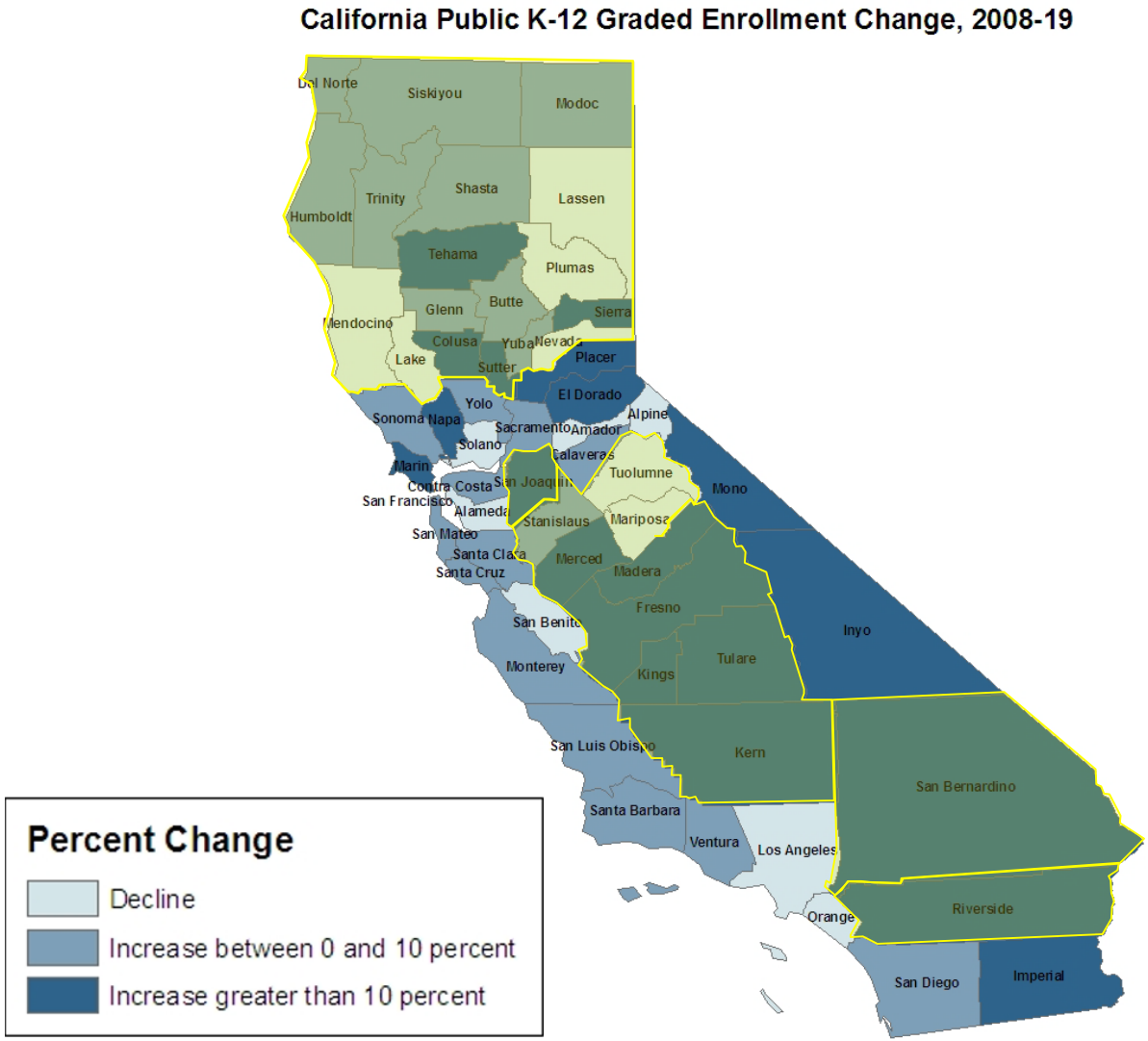
2 – How Enrollment Trends May Be Exacerbating Budgetary Problems



California DOF, *California Public K–12 Graded Enrollment and High School Graduate Projections by County, 2010 Series.* February 2011.

The DOF's K-12 enrollment projections show that state-wide, K-12 enrollments are expected to grow by 3% between SY 2010-11 and SY2019-20.

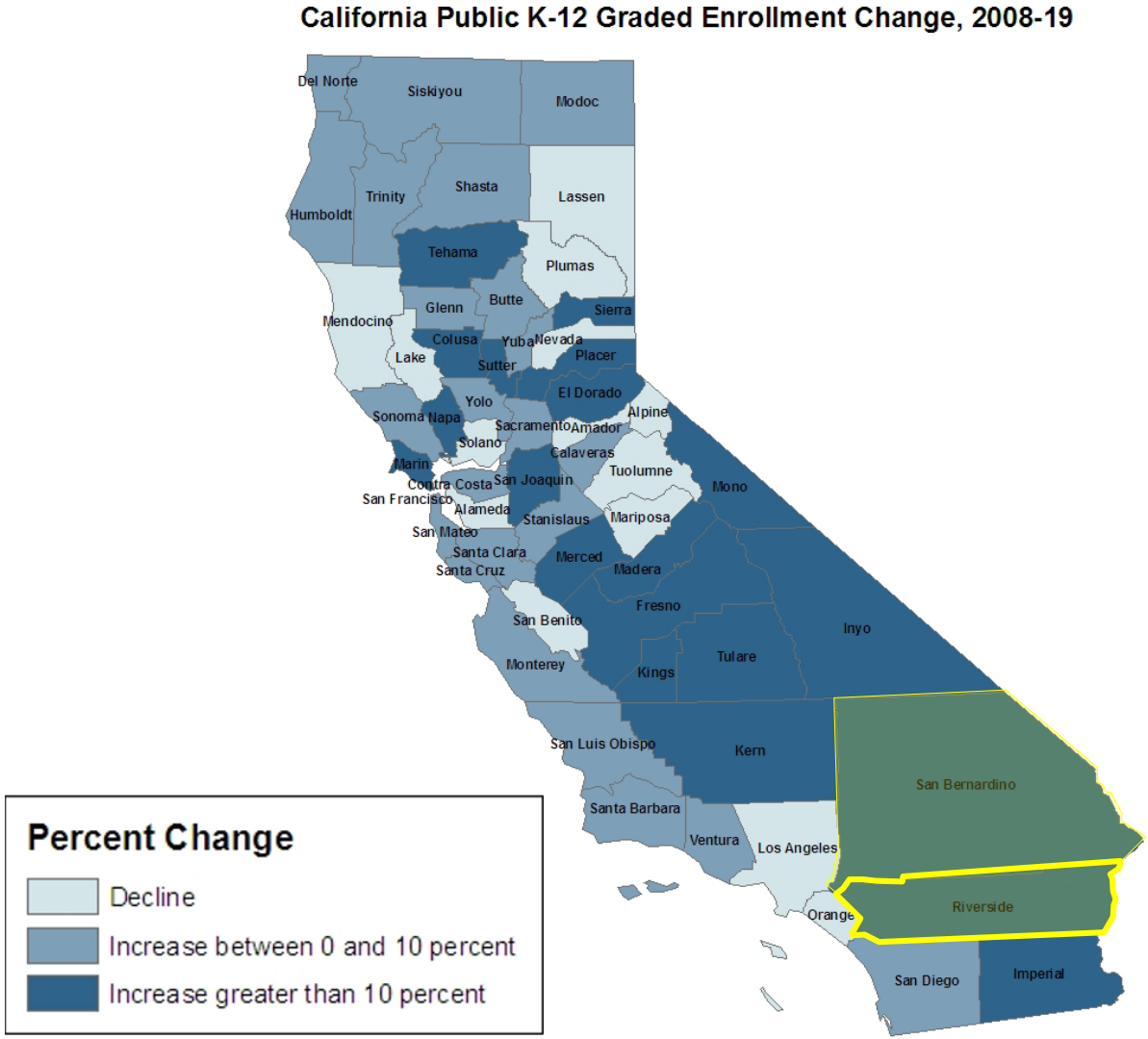
2 – How Enrollment Trends May Be Exacerbating Budgetary Problems



California DOF, *California Public K–12 Graded Enrollment and High School Graduate Projections by County, 2010 Series.* February 2011.

The Inland Empire, Central Valley and Northern California regions are projected to grow,

2 – How Enrollment Trends May Be Exacerbating Budgetary Problems



California DOF, *California Public K–12 Graded Enrollment and High School Graduate Projections by County, 2010 Series.* February 2011.

With the Inland Empire projected to have the highest growth rates by SY2019-20, and with Riverside county being the highest in the state at 34% (+162,000).

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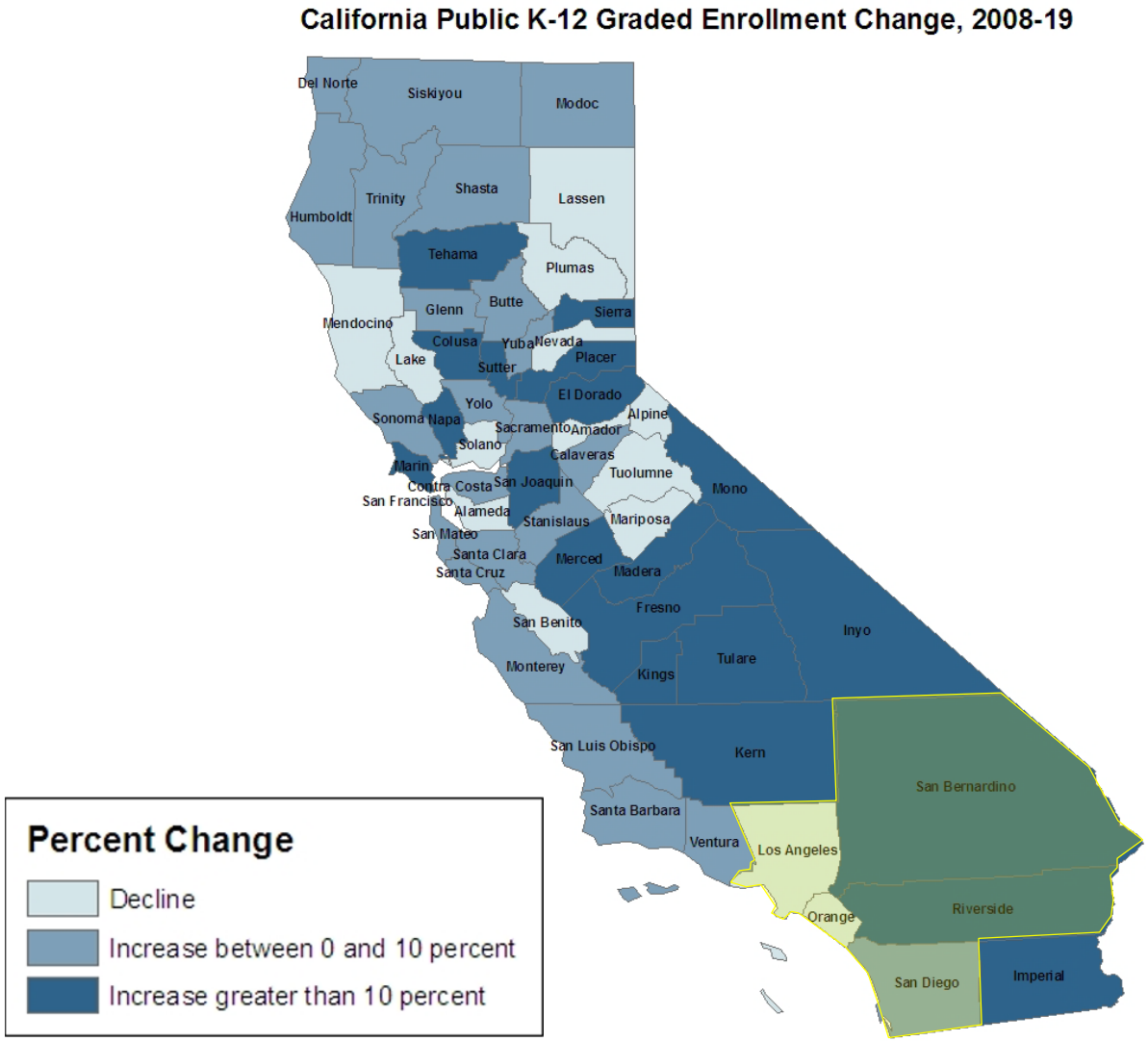
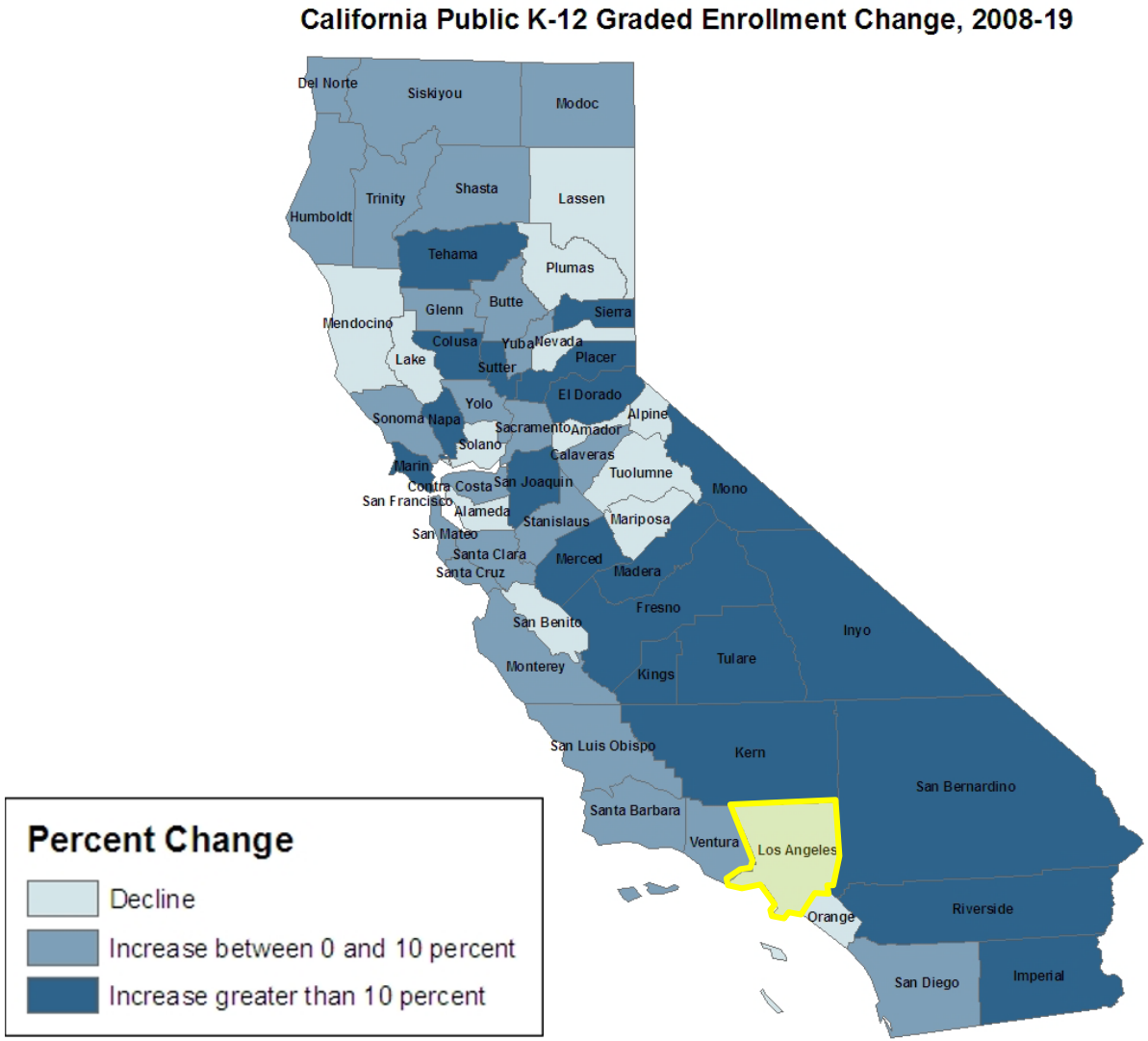


California DOF, *California Public K–12 Graded Enrollment and High School Graduate Projections by County, 2010 Series.* February 2011.

In 2008-2009, enrollments among five southern California counties—Los Angeles, Orange, San Diego, San Bernardino, and Riverside—contained 56% of the state's K-12 enrollment. By 2019-20, these counties are expected to lose 3%, reducing their proportion of the state's enrollment to 53%.

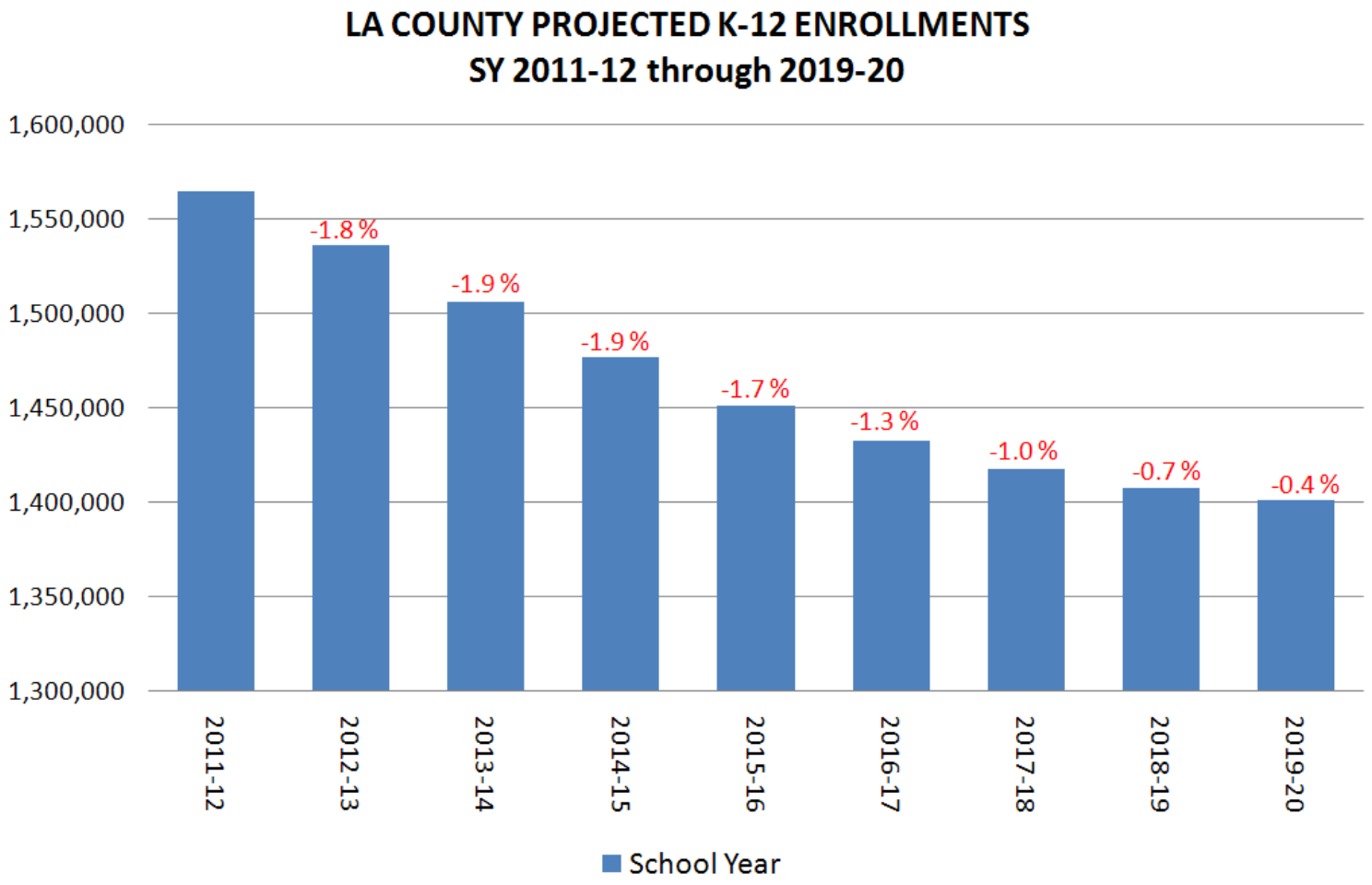
2 – How Enrollment Trends May Be Exacerbating Budgetary Problems



California DOF, *California Public K–12 Graded Enrollment and High School Graduate Projections by County, 2010 Series.* February 2011.

Los Angeles County contains the largest number of students statewide. One of the few counties in the state projected to decline, Los Angeles County, is expected to drop 12%, or a loss of about 186,000 students, between SY2008-09 and SY2019-20.

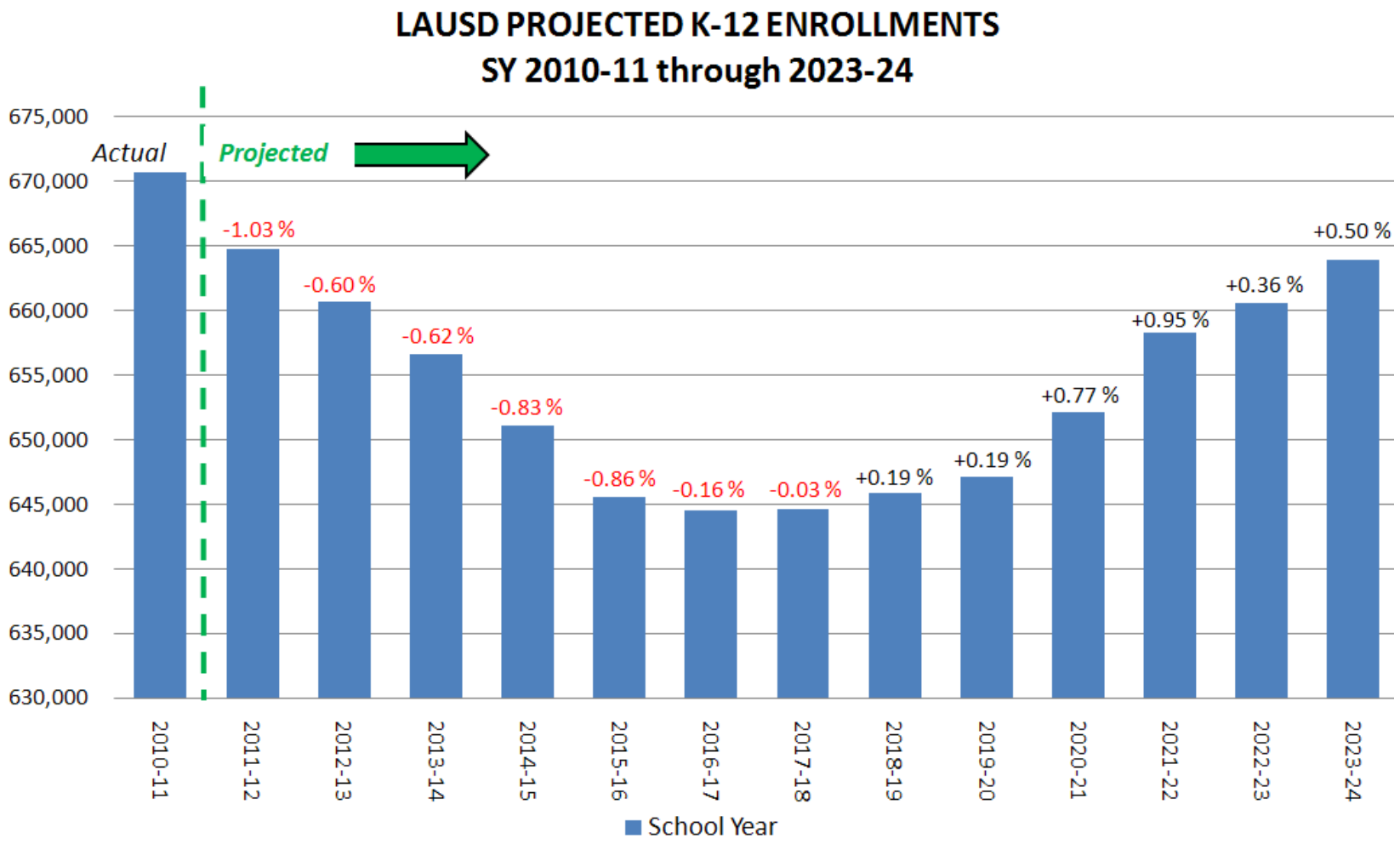
2 – How Enrollment Trends May Be Exacerbating Budgetary Problems



State of California, Department of Finance, *California Public K–12 Graded Enrollment and High School Graduate Projections by County, 2010 Series.* Sacramento, California, February 2011.

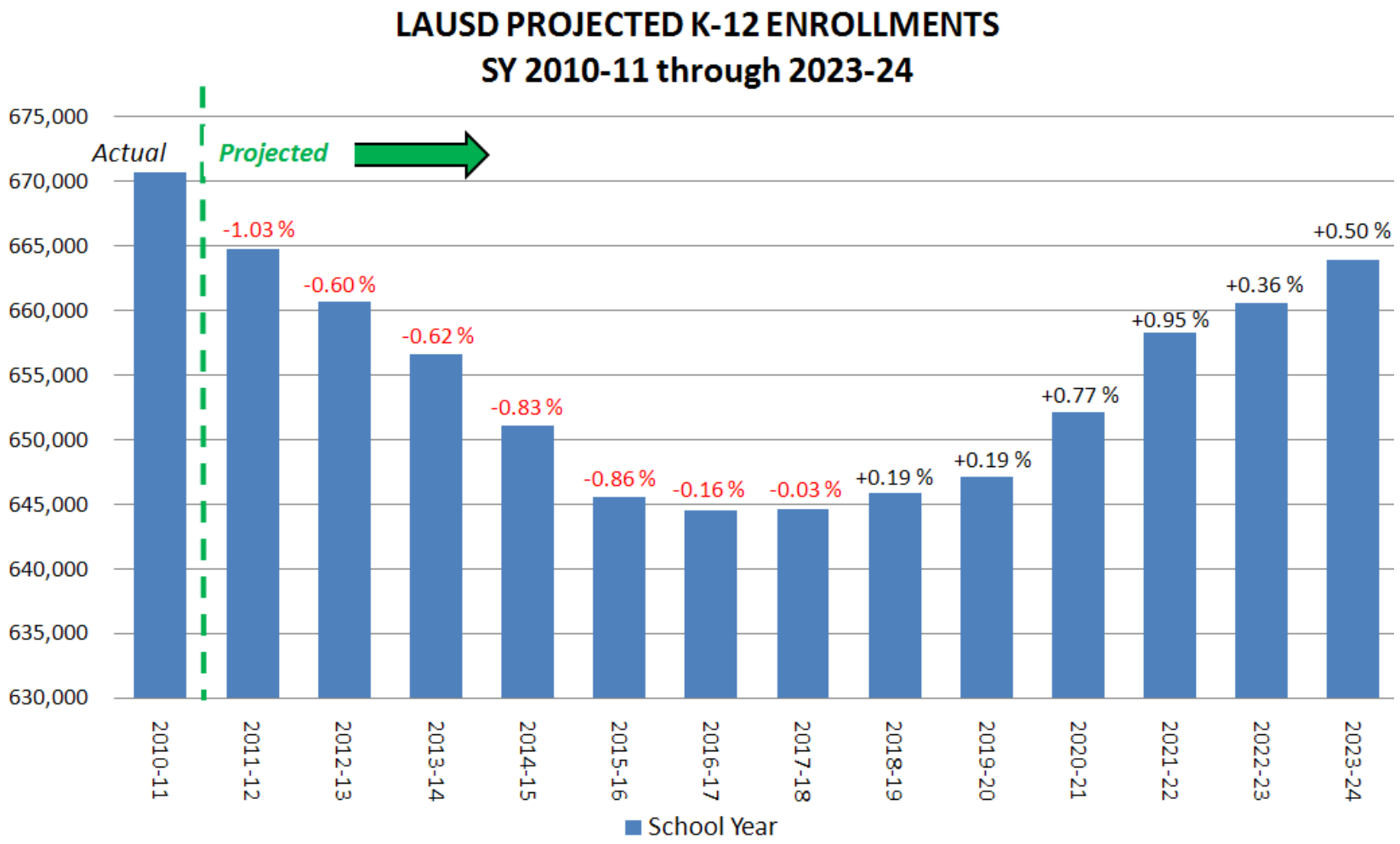
Between SY2011-12 and SY2019-20, enrollment in Los Angeles County is projected to decline 10.4%. Continuing declines in birth cohorts and the prolonged family out-migration to neighboring counties will reduce the K-12 enrollment in Los Angeles by approximately 163,300. Its proportion of the state's K-12 enrollment is projected to decline from 25% to 22%.

2 – How Enrollment Trends May Be Exacerbating Budgetary Problems



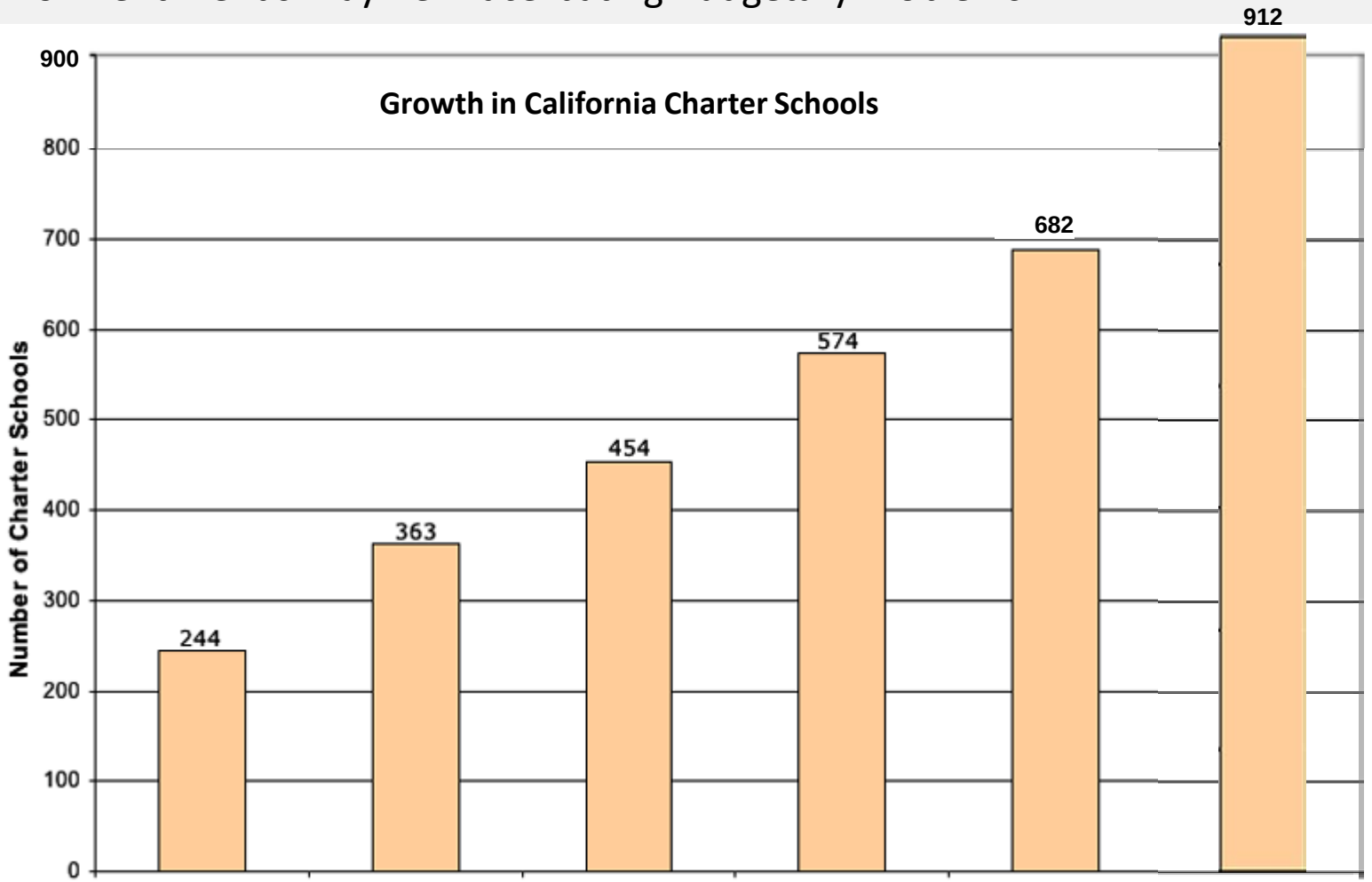
LAUSD's own projections show a similar trend with important differences. LAUSD projects that the degree of decline will be less severe (8.2%) than the DOF projects for the entire county (10%). While the DOF projects that LA county will continue to experience enrollment decline beyond SY2019-20, LAUSD projects that the decline will continue until SY2017-18 and then enrollment will begin to increase.

2 – How Enrollment Trends May Be Exacerbating Budgetary Problems



By SY2023-24, enrollments will recover to SY2011-12 levels. By SY2019-20, LAUSD will serve a greater portion of LA County's K-12 total enrollment, growing from 42% in SY 2011-12 to 44% in SY2019-20. By SY2019-20, the percentage of the State's K-12 enrollment served by LAUSD will only drop by 1%, suggesting that areas within LA County but outside of the LAUSD boundary will experience higher rates of decline.

2 – How Enrollment Trends May Be Exacerbating Budgetary Problems

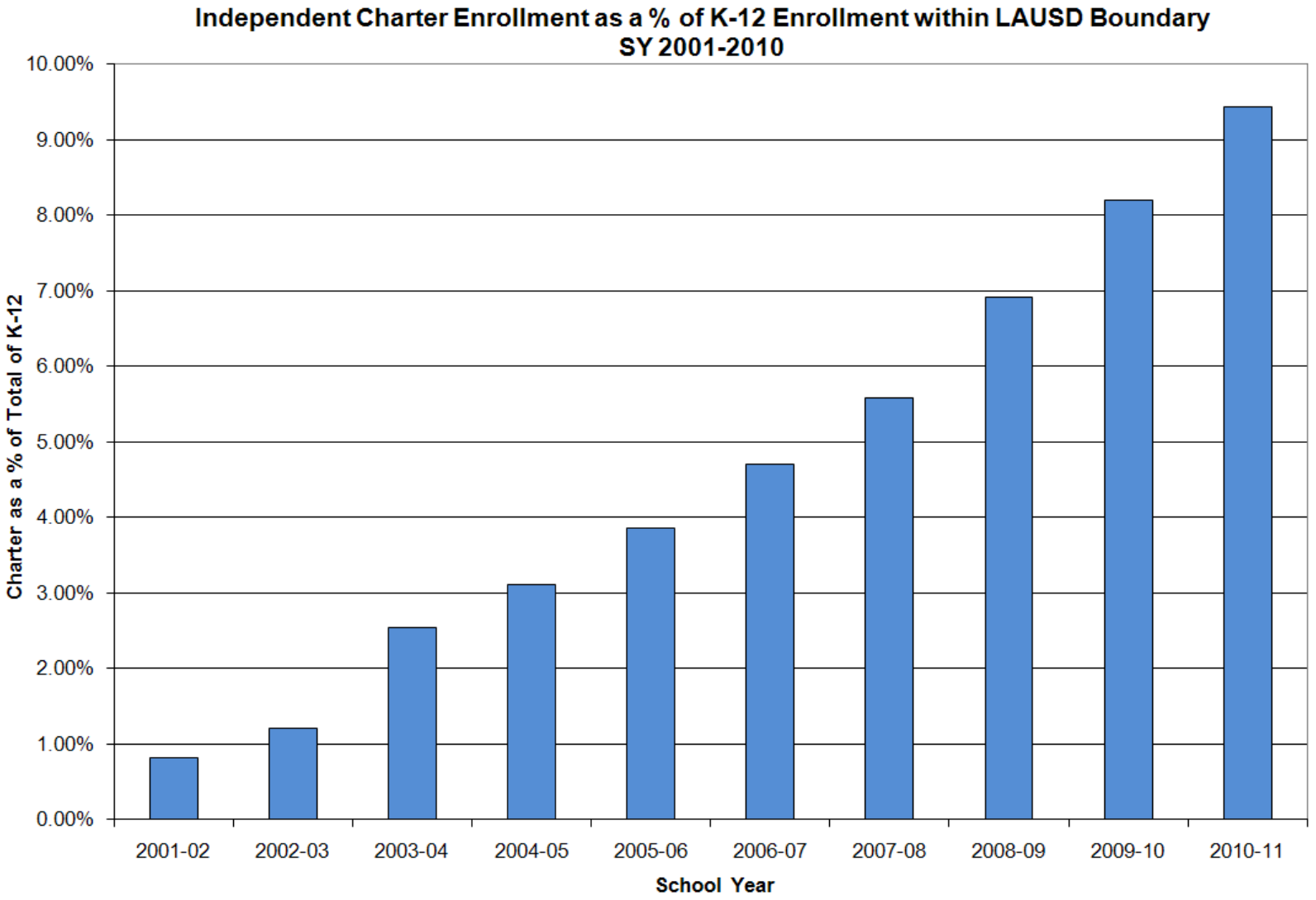


Academic Year	1999-00	2001-02	2003-04	2005-06	2007-08	2010-11
Enrollment*	98,355	132,486	167,422	202,683	252,645	
Percent of State's Enrollment	1.7%	2.2%	2.7%	3.2%	4.0%	

* Enrollment data are not available for a few schools each year. Data: California Department of Education (CDE) EdSource 6/09

In SY1999-00, 244 charter schools operated throughout the state. In SY2010-11, 115 new charters opened, bringing the total to 912. That was the highest one-year charter school growth in the nation's history. Every major CA county also experienced significant growth, with LA county the highest at 31 new charters. That brought LA County's total to 242, the highest number of charter schools in any county in the U.S.

2 – How Enrollment Trends May Be Exacerbating Budgetary Problems



LAUSD's budget challenges are exacerbated by a greater share of students enrolling in independent charter schools. Whereas in SY2009-10 about 4% of public school students were enrolled in charter schools statewide, in LAUSD over 8% of students were enrolled in charter schools. That proportion has grown to almost 9.5% as of SY 2010-11.

The 'New Normal" for Los Angeles Unified School District

Since 2009-2010:

- LAUSD has cut **$1.5 billion** from its budget

Over last five years:

- Central office budget cut 53%
- Local District budgets cut 58%

Over last three years:

- 5,900 teacher, counselor, nurse, librarian and administrative positions cut
- 2,700 teachers laid off
- 4,900 classified and certificated employees laid off
- 68,000 employees have taken furlough days
- 10,700 positions reduced pay, work hours, lower paying position or laid off
- Summer school eliminated for elementary and middle school students
- Arts program funding reduced 80%
- Student: Teacher ratio increasing from 20:1 to 29:1

Since 2009-2010, LAUSD has cut $1.5 billion from its budget. Over the last three years, 5,900 positions have been cut, and 2,700 teachers and 4,900 classified and certificated employees have been laid off. Almost 80,000 employees have taken furlough days and/or have had their pay or hours reduced. Summer school programs have been eliminated. Arts program funding has been reduced 80% and class size has increased from 20:1 to 29:1.

3 – What Does the 'New Normal' Look Like for Public School Districts?

Comparing the 'New Normal" Across Selected California School Districts

	Long Beach Unified	Oakland Unified	Pasadena Unified	Sacramento	San Diego	San Francisco	San Jose Unified	Los Angeles Unified
Increased Student:Teacher Ratios	X		X	X		X	X	X
Reduced Programmatic Staff	X		X		X			X
Reduced Administrative Staff and Central Services	X	X	X	X				X
Cut Program			X		X			X
Shortened School Year					X		X	
Reduced or Eliminated Summer School			X			X		X
Reduced or Eliminated Maintenance Funding			X					
Closed Schools			X					
Cut or Eliminated School Transportation			X		X	X		
Reduced Employee Benefits and Salaries				X	X	X		X

Here are some of the cuts other school districts are considering or have approved: Long Beach- increasing K-3 class size from 20:1 to 30:1, reductions to central office and special education resources, reductions in traveling music teachers, librarians, nurses, counselors, recreation aides, APs, social workers, psychologists and teachers on special assignment.

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Comparing the 'New Normal" Across Selected California School Districts

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Increased Student:Teacher Ratios	X		X	X		X	X	X
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Reduced Administrative Staff and Central Services	X	X	X	X				X
Cut Program			X		X			X
Shortened School Year					X		X	
Reduced or Eliminated Summer School			X			X		X
Reduced or Eliminated Maintenance Funding			X					
Closed Schools			X					
Cut or Eliminated School Transportation			X		X	X		
Reduced Employee Benefits and Salaries				X	X	X		X

Oakland Unified: An 11% reduction to central offices, approximately 20% in reductions to central services, a 7.2% reduction to school funding.

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Reduced Administrative Staff and Central Services	X	X	X	X				X
Cut Program			X		X			X
Shortened School Year					X		X	
Reduced or Eliminated Summer School			X			X		X
Reduced or Eliminated Maintenance Funding			X					
Closed Schools			X					
Cut or Eliminated School Transportation			X		X	X		
Reduced Employee Benefits and Salaries				X	X	X		X

Pasadena Unified: Reducing counselors, after-school programs, nurses, art, music and SPED services; increasing K-3 class size from 22 to 31; eliminating GR9 Class Size Reduction; eliminating all library staff and libraries; cutting security personnel by 50%, custodial staff by 17%, athletics by 50% and student transportation by 50%; eliminating summer school and deferred maintenance funding; and closing 3 elementary schools.

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Reduced Programmatic Staff	X		X		X			X
Reduced Administrative Staff and Central Services	X	X	X	X				X
Cut Program			X		X			X
Shortened School Year					X		X	
Reduced or Eliminated Summer School			X			X		X
Reduced or Eliminated Maintenance Funding			X					
Closed Schools			X					
Cut or Eliminated School Transportation			X		X	X		
Reduced Employee Benefits and Salaries				X	X	X		X

Sacramento: Increasing K-3 class size from 25 to 30; asking unions to agree to a $50/month insurance premium and 3 furlough days; cut central office staff 10% (125 workers).

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Comparing the 'New Normal" Across Selected California School Districts

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Reduced Administrative Staff and Central Services	X	X	X	X				X
Cut Program			X		X			X
Shortened School Year					X		X	
Reduced or Eliminated Summer School			X			X		X
Reduced or Eliminated Maintenance Funding			X					
Closed Schools			X					
Cut or Eliminated School Transportation			X		X	X		
Reduced Employee Benefits and Salaries				X	X	X		X

San Diego: Shortening school year by 5+ days; doubling health insurance co-payments from $5 to $10 per visit; eliminating dozens of programs, including free school bus transportation for some families; canceling a proposed increase to special-education services.

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Comparing the 'New Normal" Across Selected California School Districts

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Shortened School Year					X		X	
Reduced or Eliminated Summer School			X			X		X
Reduced or Eliminated Maintenance Funding			X					
Closed Schools			X					
Cut or Eliminated School Transportation			X		X	X		
Reduced Employee Benefits and Salaries				X	X	X		X

San Francisco: Minimal summer school; reducing general education transportation; increasing class sizes; suspending sabbaticals; freezing step & column increases; furloughs.

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Reduced or Eliminated Summer School			X			X		X
Reduced or Eliminated Maintenance Funding			X					
Closed Schools			X					
Cut or Eliminated School Transportation			X		X	X		
Reduced Employee Benefits and Salaries				X	X	X		X

San Jose Unified: Shortening the school year by 5 days; increased K-3 class size from 20:1 to 30:1.

4 – Challenges to Measuring the ‘New Normal’

The ‘New Normal’ is more dependent on the need to better understand state and local enrollment ebbs and flows among students. But the new norm continues an old norm practice of not supplying the full transparency we need as analysts.

4 – Challenges to Measuring the ‘New Normal’

Black-Boxed Student Data is Problematic

- Local Educational Agencies (LEAs) can only view information about currently enrolled students

‘Black boxed’ student data is problematic for estimating and measuring the new norms. The first problem: LEAs can only access student data for currently enrolled students. When a student is no longer enrolled in a LEA’s school, the student disappears from the LEA’s data view. As a result, that student’s data cannot be used to inform current and future planning, and the accuracy of outcomes can be compromised.

4 – Challenges to Measuring the 'New Normal'

Black-Boxed Student Data is Problematic

- Local Educational Agencies (LEAs) can only view information about currently enrolled students
- Charter schools can opt to report individual directly to the state

The second problem is that charter schools can (and do) opt to report individual student record data directly to the state, by-passing the LEAs. The lack of a complete set of student-level data compromises a LEA's ability to produce accurate data-driven outcomes.

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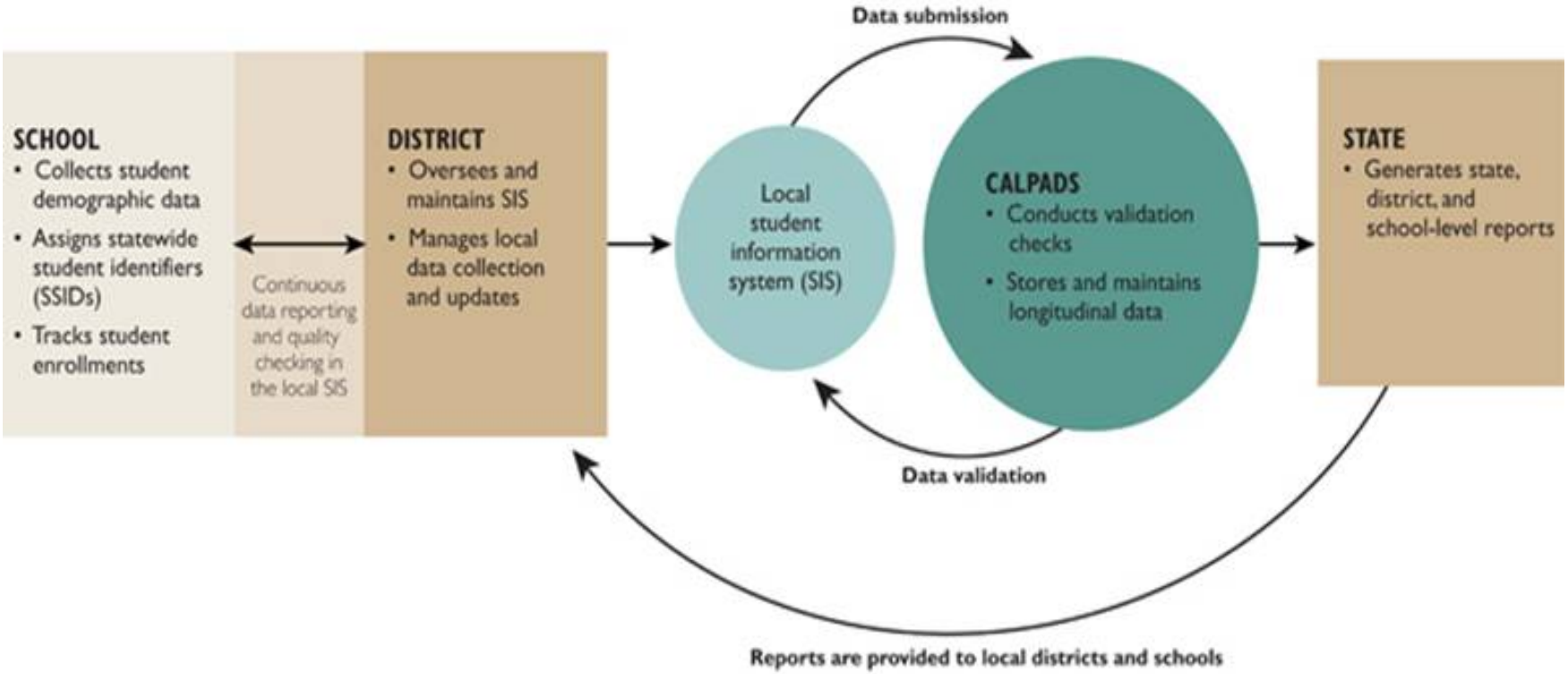
CALPADS As Future Data Source

- NCLB funding based partially on states implementing state-wide individual student data collection / longitudinal data collection (CALPADS)

California has been developing a state-wide data reporting and collection system, known as CALPADS (California Longitudinal Pupil Achievement Data System). All public schools are required to report individual student data using the CALPADS system. NCLB funding is partly based on compliance with CALPADS requirements. This makes CALPADS promising as a transparent, comprehensive data repository.

4 – Challenges to Measuring the 'New Normal'



In CALPADS, students are issued a unique student ID that is designed to travel with them throughout their K-14 tenure. The State collects, analyzes, and reports on the data it receives. A child's educational achievement is tracked over time, allowing teachers and educational staff to see a student's educational progress over time and to make early interventions as appropriate.

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- NCLB funding based partially on states implementing state-wide individual student data collection / longitudinal data collection (CALPADS)
- CALPADS has had rocky development history – expansion funding is suspended

But CALPADS has had a rocky development history. It has suffered from design problems, and its funding for expansion is currently suspended (as per May revision).

4 – Challenges to Measuring the 'New Normal'

Black-Boxed Student Data is Problematic

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- CALPADS has had rocky development history – expansion funding is suspended
- CALPADS is designed to "black box" data non-LEA students

Another difficulty is that CALPADS is designed to "black box" student data for students who left a LEA, thus only allowing the state to analyze state-wide student data. For LAUSD this means that charter school students still disappear from our view. Complete, high-quality student data collection and management is crucial to data-driven analysis and outcomes.

5 – The Paradox: Do More With Less

- Despite deep cuts, mandate = DO MORE WITH LESS
- Budget crisis drives greater data accuracy & accountability

Despite all the deep staff, teacher & program cuts, districts are being given the mandate to do more with less. Paradoxically, a budget crisis drives the need for greater data accuracy and accountability. Because there is less room for waste and error, the value of every dollar spent must be maximized.

5 – The Paradox: Do More With Less

- Despite deep cuts, mandate = DO MORE WITH LESS
- Budget crisis drives greater data accuracy & accountability
- The Silver Lining:
  - Opportunity to dislodge obsolete business practices
  - Receptivity to new technologies
  - Willingness to change operational methods

From an operational perspective, the crisis creates an opportunity to dislodge old, inefficient business practices and to bring in new technologies and methods that the district's leadership may not have been willing to consider before. The stakes have become so high that there emerges a willingness to take risks and change the status quo.

E-CAST: Innovation Flourishing in a Crisis

- LAUSD's annual school forecasts = foundation for staffing & resource allocations

One of the key ways that LAUSD has been responding to the mandate to do more with less is to implement E-CAST, the Electronic School Enrollment Forecast Process. Producing LAUSD's annual enrollment forecasts is a high-stakes process. Individual school enrollment forecasts are the foundation of LAUSD's budget development, determining the staffing and resource allocations made for each school.

E-CAST: Innovation Flourishing in a Crisis

- LAUSD's annual school forecasts = foundation for staffing & resource allocations
- Roadshow (1986-2008): Annual enrollment forecast review process
  - LAUSD policy: Principals entitled to review school's forecast and give input
  - Over 1000 Principals and school-based staff attended
  - Over 700 schools participated
  - About 16 central administrators staffed Roadshow daily
  - Roadshow ran for up to six weeks per year
  - Roadshow covered all of LAUSD's 710 square miles

Between 1986 and 2008, LAUSD's school forecast review process was conducted at the annual event known as "Roadshow." LAUSD policy entitles every Principal to review their school's forecasts and give input, and Roadshow was the venue where Principals met in-person with central staff to discuss and come to agreement on their annual forecasts. Over 700 schools, 1000 school administrators and 16 central administrators participated. Roadshow typically ran for six weeks each year.

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  - Over 1000 Principals and school-based staff attended
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  - About 16 central administrators staffed Roadshow daily
  - Roadshow ran for up to six weeks per year
  - Roadshow covered all of LAUSD's 710 square miles
- Roadshow's six-week timetable compromised LAUSD's Budget development
- In 2005, proposal for electronic Roadshow alternative was REJECTED

Not only was Roadshow labor-intensive and disruptive for school and central administrators, its six-week time frame continually compromised the District's ability to meet the Budget Office's development deadlines. In 2005, in response to these chronic problems, Master Planning and Demographics (MPD) proposed that Roadshow be replaced by E-CAST, an electronic, web-based forecast review system. The proposal was rejected.

ANNUAL RESOURCES USED: ROADSHOW

	ROADSHOW
Annual Estimated Cost:	$406,035
Annual HOURS Spent by:	
School- Based Staff	2,699
LD Directors	245
Central Staff	5,761
ALL STAFF:	***8,705***
Annual Reimbursable MILES Traveled by:	
School- Based Staff	6,748
Central Staff	10,185
ALL STAFF:	***16,933***
Annual Paper-Based DOCUMENT Production:	
Units of Paper, Envelopes and Folders	51,196
Units of Paper, Multi-page Data Collection Forms	1,000
UNITS OF PAPER:	***52,196***

All costs in 2008 dollars.

But Roadshow was also expensive. By 2008, LAUSD was in the grip of a severe budget crisis. In 2009, MPD estimated that Roadshow was consuming about 8,700 staff hours, 17,000 reimbursable travel miles and 52,000 units of paper every year, at an annual cost of over $400,000.

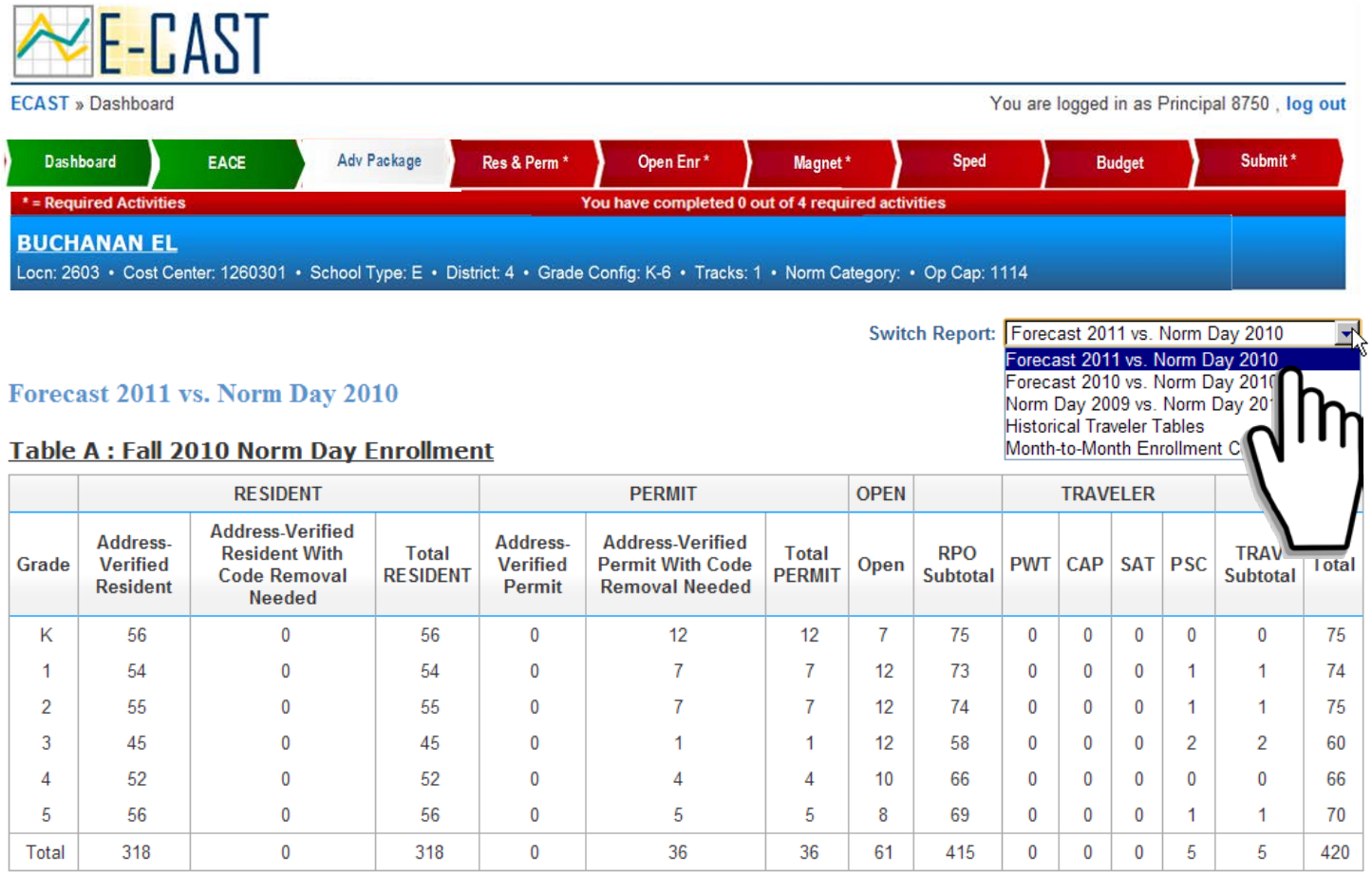
ANNUAL RESOURCES USED: ROADSHOW vs. E-CAST

	ROADSHOW	E-CAST	SAVINGS	% SAVINGS
Annual Estimated Cost:	$406,035	$119,213	$286,822	71%
Annual HOURS Spent by:				
School- Based Staff	2,699	968	1,732	64%
LD Directors	245	28	217	89%
Central Staff	5,761	1,460	4,301	75%
ALL STAFF:	***8,705***	***2,456***	***6,249***	72%
Annual Reimbursable MILES Traveled by:				
School- Based Staff	6,748	0	6,748	
Central Staff	10,185	0	10,185	
ALL STAFF:	***16,933***	***0***	***16,933***	100%
Annual Paper-Based DOCUMENT Production:				
Units of Paper, Envelopes and Folders	51,196	0	51,196	
Units of Paper, Multi-page Data Collection Forms	1,000	0	1,000	
UNITS OF PAPER:	***52,196***	***0***	***52,196***	100%

All costs in 2008 dollars.

MPD estimated that E-CAST could be conducted in 72% less time, for a savings of about 6200 staff-hours; without taking any Principals off-campus and without any reimbursable off-site travel miles; and without any of the paper, postage or forms mailed to Principals or used at Roadshow, saving over 52,000 units of paper. The overall annual savings would be about 71%, or $287,000.

Dashboard



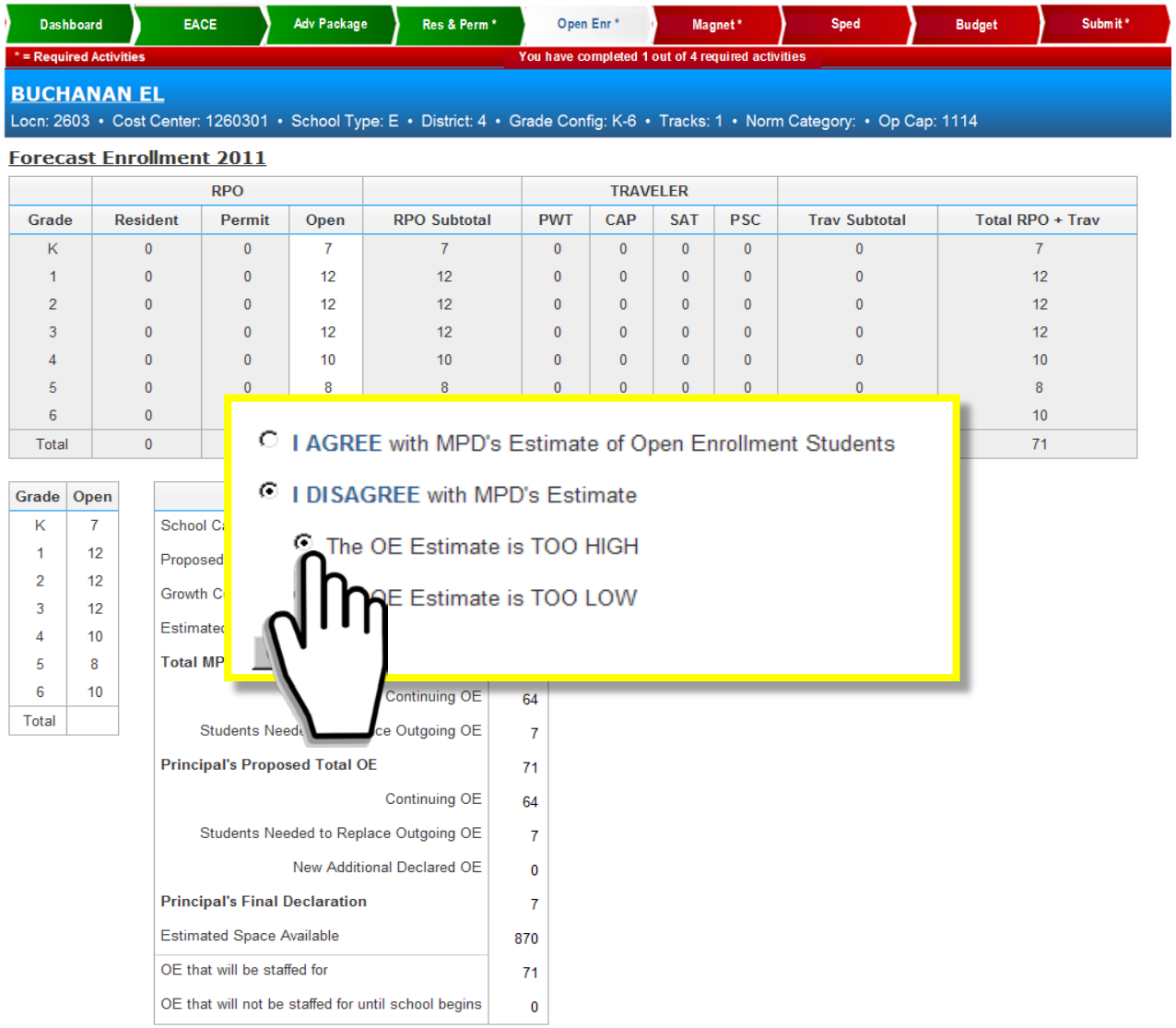
	RESIDENT			PERMIT			OPEN		TRAVELER					
Grade	Address-Verified Resident	Address-Verified Resident With Code Removal Needed	Total RESIDENT	Address-Verified Permit	Address-Verified Permit With Code Removal Needed	Total PERMIT	Open	RPO Subtotal	PWT	CAP	SAT	PSC	TRAV Subtotal	Total
K	56	0	56	0	12	12	7	75	0	0	0	0	0	75
1	54	0	54	0	7	7	12	73	0	0	0	1	1	74
2	55	0	55	0	7	7	12	74	0	0	0	1	1	75
3	45	0	45	0	1	1	12	58	0	0	0	2	2	60
4	52	0	52	0	4	4	10	66	0	0	0	0	0	66
5	56	0	56	0	5	5	8	69	0	0	0	1	1	70
Total	318	0	318	0	36	36	61	415	0	0	0	5	5	420

E-CAST was approved in 2009, and went online in 2010. The E-CAST online system has enabled Principals to conduct their forecast review electronically, from any computer with an internet connection. It provides them with an immediate view of their forecasts, as well as with historical data tables and reports.

5 – The Paradox: Do More With Less

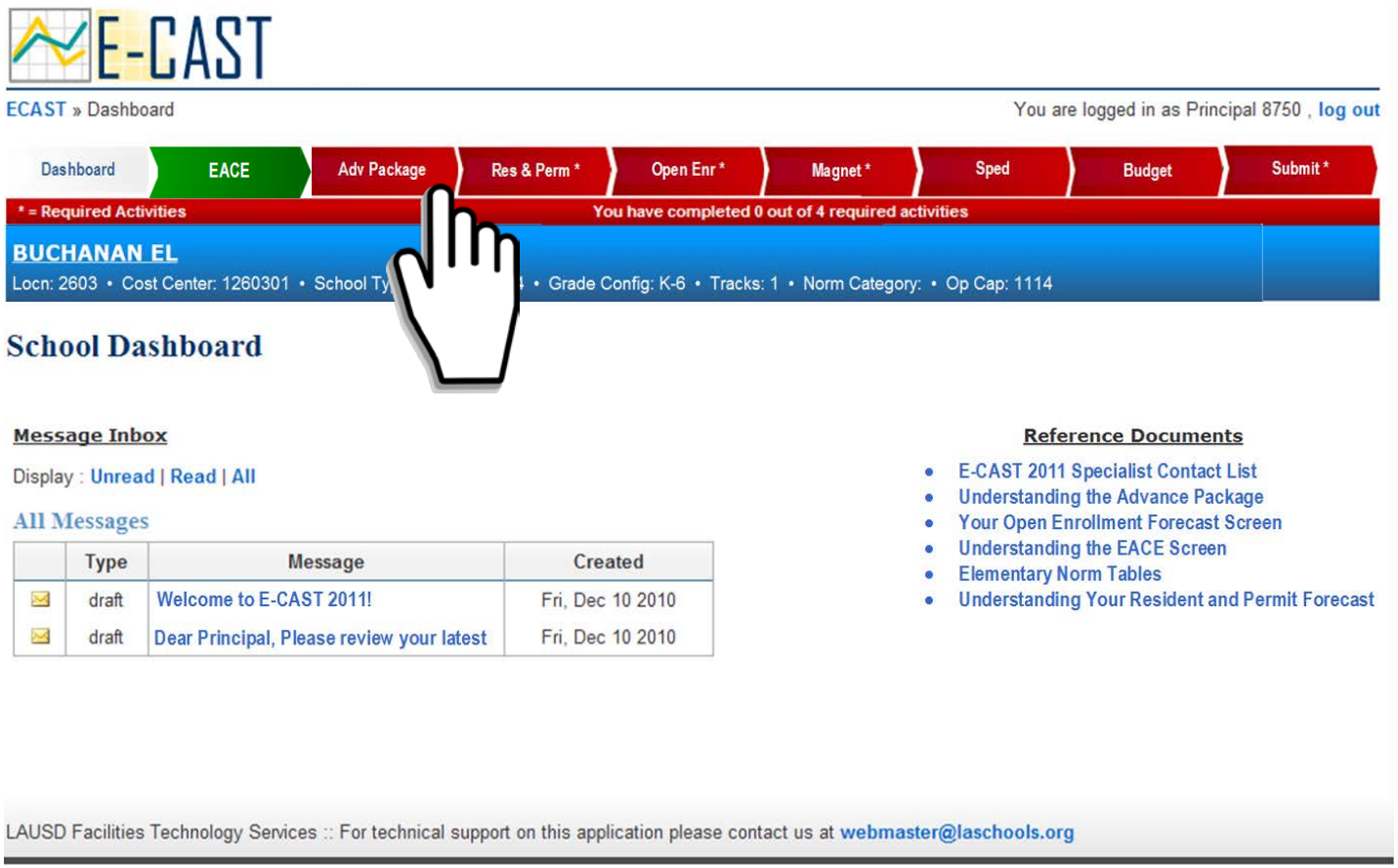
Principals have a Dashboard where their message inbox is located. This is where they receive communications from E-CAST operators concerning the status of their applications. The Dashboard is also where all of E-CAST's pre-requisite reference documents are posted. These reference documents provide detailed explanations for the data and comparative tables found on various E-CAST screens.

5 – The Paradox: Do More With Less



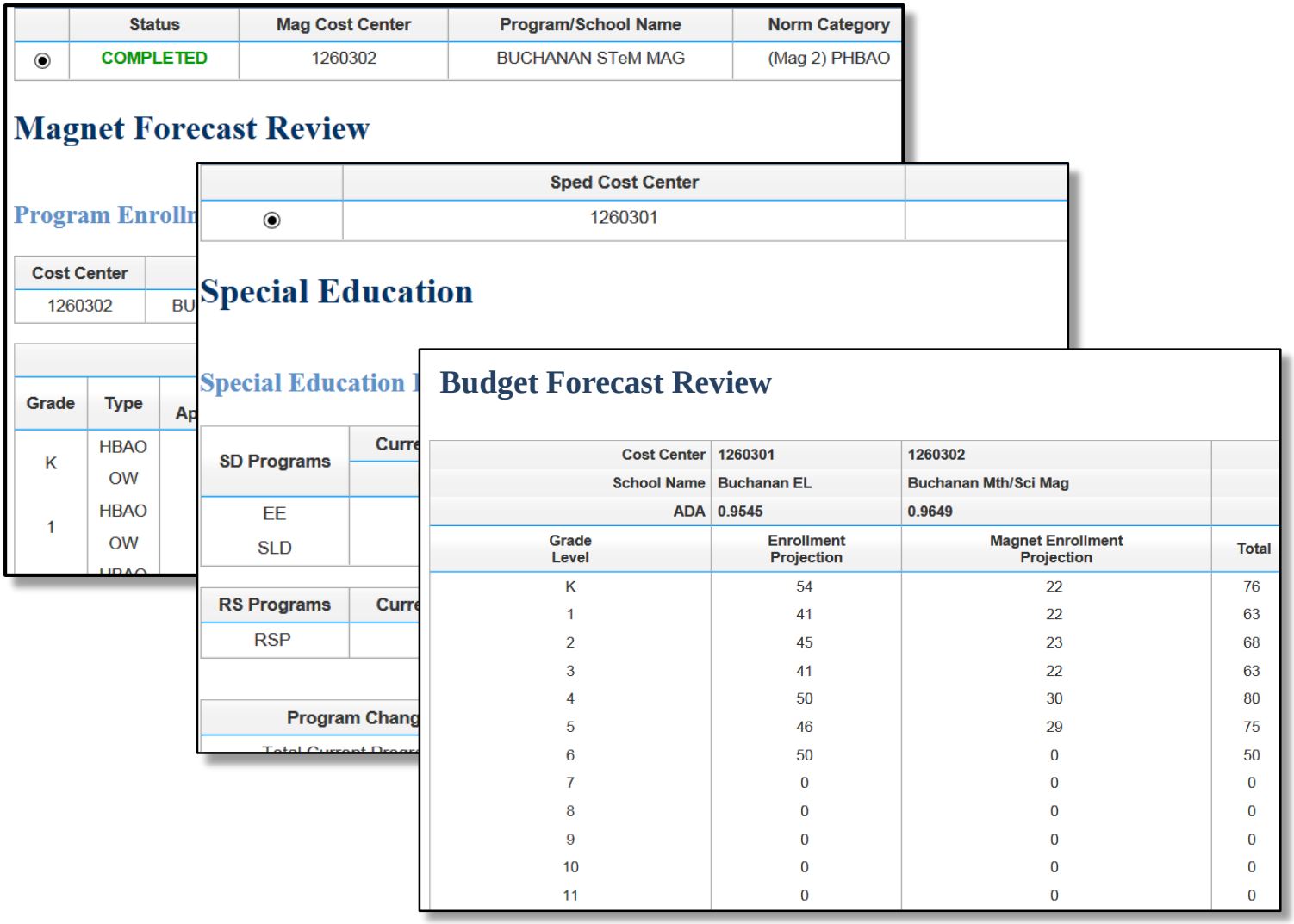
Principals review their school's forecasts online and respond to their forecasts right from their own desktops, using simple, easy-to-use input screens.

5 – The Paradox: Do More With Less



E-CAST was designed using the feedback collected from Principals during focus groups and from user surveys. E-CAST's user-friendly design allows Principals to move from screen to screen using a color-coded navigation bar. A tab that is red indicates that the screen's activities haven't been completed. A tab that is green indicates that the screen's activities are finished.

5 – The Paradox: Do More With Less



	Status	Mag Cost Center	Program/School Name	Norm Category
◉	COMPLETED	1260302	BUCHANAN STeM MAG	(Mag 2) PHBAO

Magnet Forecast Review

Program Enrolln

Cost Center	
1260302	BU

Grade	Type	Ap
K	HBAO	
	OW	
1	HBAO	
	OW	

	Sped Cost Center	
◉	1260301	

Special Education

Special Education I

SD Programs	Curre
EE	
SLD	

RS Programs	Curre
RSP	

Program Chang

Budget Forecast Review

Cost Center	1260301	1260302	
School Name	Buchanan EL	Buchanan Mth/Sci Mag	
ADA	0.9545	0.9649	
Grade Level	**Enrollment Projection**	**Magnet Enrollment Projection**	**Total**
K	54	22	76
1	41	22	63
2	45	23	68
3	41	22	63
4	50	30	80
5	46	29	75
6	50	0	50
7	0	0	0
8	0	0	0
9	0	0	0
10	0	0	0
11	0	0	0

In 2011, E-CAST expanded to include LAUSD's Magnet, SPED and Budget offices, each of which now have their own E-CAST screens that display their data and accommodate review and response from Principals. In 2012, E-CAST will go year-round with expanded Budget functionalities. In 2013, it is expected that E-CAST will expand further to include school capacity assessments.

The Los Angeles Unified School District:

- Enrolled 678,441 students in grades K-12 in SY10-11
- Is second only to New York City Public Schools in size (within the U.S.A.)
- Covers 710 square miles
- Serves all or part of 28 cities and multiple unincorporated areas
- Serves over 40% of LA County's general & school-aged populations
- Had a $5.1 billion General Fund, Regular Program Budget in SY10-11
- Has a $20.1 billion new school construction and repair program, the largest in U.S. history, with 94 new schools constructed and 41 remaining to be built
- In SY10-11, was composed of:
  - 1,065 K-12 Schools and Centers
  - 208 Adult, Special and Occupational Schools and Centers
  - 31,656 Teachers
  - 37,118 Administrators, Support and Classified Staff

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Los Angeles Unified School District

John Deasy, Superintendent

Rena Perez, Director, Master Planning and Demographics

About the Master Planning and Demographics Unit

The Los Angeles Unified School District is the nation's second largest public school system, serving approximately 680,000 children in grades K-12. The Master Planning and Demographics Unit supports the Los Angeles Unified School District's mission to educate students through its dedication to the research and analysis utilized in the planning for the optimal utilization of existing schools and determining the need for new school facilities. For more information, please visit us on the web at www.lausd.net or www.laschools.org/employee/mpd/.

About the Authors

Valerie Edwards, Chief Enrollment Analysis Coordinator

Ms. Edwards leads strategic planning and coordination of demographic analysis, enrollment projections, and initiatives that improve data analysis and operational processing. She heads ***E-CAST***, LAUSD's online school forecasting review application, that successfully migrated the District's enrollment forecast review process from the annual on-site event known as "Roadshow" to an electronic web-based process in 2010, reducing Principals' forecast review time and corresponding District costs by over 70%. Ms. Edwards has extensive experience with school choice modeling. With her team at LAUSD, she developed the SABR (*School Assignment By Record*) Engine, which determines students' resident school assignments by using an algorithm that simulates school choice behavior for every student living in an option area. She holds a Master's degree in city planning from the Massachusetts Institute of Technology.

Mary Ehrenthal Prichard, Demographic Research and Planning Analyst II

Ms. Prichard's work has involved strategic planning for demographic analysis and student enrollment projections; production of short and long range enrollment forecasts for the District's 600+ schools; planning for and production of specialized demographic research and analysis, including analysis of internal LAUSD trends relative to general demographic trends. She has worked extensively with spatially referenced U.S. Census data within a GIS environment. She is responsible for obtaining confidential data, including individual birth records and state-wide student-level data. She is currently designing research intended to detail enrollment choices and trends among students entering and exiting the LAUSD. She is also involved with efforts to develop District-wide approaches aimed at improving student data collection and management. She holds B.A. and M.A. degrees in the field of Geography (Cal State, LA, 2001).