Achievement Compact Advisory Committee
Oregon Education Investment Board
Discussion notes
March 5, 2012, 6 to 8 p.m. George Fox College, Portland

Committee members in attendance:

- Inge Aldersebaes, OEA Choice Trust
- Eduardo Angulo, Executive Director, Salem Keizer Coalition for Equality
- Marcy Bradley, Executive Director, Self Enhancement, Inc.
- Lindsey Capps, Assistant Executive Director, Center for Teaching and Learning, Oregon Education Association
- Ed Dodson, Clackamas Community College Board Director
- Jim Francesconi, State Board of Higher Education
- Merrily Haas, Executive Director, Oregon Association for the Education of Young Children
- Craig Hawkins, Executive Director, Confederation of Oregon School Administrators
- Andrea Henderson, Executive Director, Oregon Community College Association
- Phil Lesch, Executive Director, Portland State University-AAUP
- Mary Li, Asian Pacific American Network of Oregon
- Jim Mabbott, Executive Director, Oregon Association of ESDs
- Jeff Matsumoto, 3rd grade teacher, Oregon Education Association
- Betty Reynolds, West Linn Wilsonville School Board, Oregon School Boards Association
- David Robinson, Executive Vice Provost, OHSU
- Richard Schwarz, Executive Director, American Federation of Teachers- Oregon
- Carol Wire, Oregon PTA Executive Director

Oregon Education Investment Board members attending:

- David Rives
- Mary Spilde
- Hanna Vaandering
- Susan Castillo (ex officio)
- George Pernsteiner (ex officio)
- Cam Preus-Braley (ex officio)

Staff participating: Whitney Grubbs, Todd Jones, Margie Lowe

K-12 ACHIEVEMENT COMPACT PRESENTATION

Eduardo Angulo: I need clarification about how information will be disaggregated for subgroups. For the first time in a long time we have sunshine on some issues (under NCLB). For many years we had a blindfold on how well – or not – English language learners were doing in our schools. The same with Black, Hispanic, Native Americans, Asian Americans, and low income learners. For many people who look like me – a black, Puerto Rican, Hispanic man – advocating for families of color, this is important, and something we need to keep from NCLB. We need to know how well these students are doing.

Whitney Grubbs: All of the data would still be presented disaggregated – each individual subgroup's data – but the top page would refer to the goal setting with aggregated information.

Lindsey Capps: One of the important challenges in our schools is equity. I think I understand why we're looking for a high-level snapshot. The OEIB talks about "leverage points for reaching statewide priorities" – how do we do that without looking at inputs? How do we calibrate expectations? We need to look at how schools, community colleges, universities are faring. That's a more complex set of indicators to look at to figure out how the state is driving toward the goals. I think it's simplistic just to look at student data. It's limited. There are a number of other things we can look at. Some of them are qualitative – school climate, collaboration, leadership, policies in place – not quantitative. But they get at how students achieve.

Craig Hawkins: As we have declining investment – K12 could be lower next year – what expectations do we have for student achievement? We need to have reality, matching up investment with achievement. That might mean looking at inputs. Specific thoughts? A couple. Goal-setting for 2012-13 is difficult given that school boards won't have the current year data while setting goals for next year. Could we provide opportunity for supplemental compact in the fall? Adjustments? I'm reflecting on the four-year goal piece. It seems a little challenging. It's difficult to look four years out given the uncertain world we are in, with resources and funding. It's asking a lot of boards to do that. They will naturally look beyond next year, but perhaps the first compact should be for next year alone. We had a meeting of 100 superintendents – they liked that it was "sparse," a short list of measures. But they want to be sure they are the right measures of being on track to graduation. Rob Hess of Lebanon School District did some research and shared "7 keys to college readiness" – some are in this compact draft, some of the other ones are 5th grade math, 7th grade writing, 8th grade algebra and then a real proficiency in reading and math at the 9th grade level. Every single superintendent echoed Eduardo's comments: Where is the disaggregated data? That information is critically important.

[NOTE: Craig Hawkins emailed staff the following day to provide the "Seven Keys of College Readiness," which are based on the benchmark measures used by some of the highest performing school districts in the nation:

1) *3rd grade exceeding in reading*
2) *5th grade exceeding math*
3) *7th grade proficient in writing*
4) *8th grade Algebra with a B or higher*
5) *9th graders on track to graduate (6 credits or more)*
6) *11th graders proficient in reading, writing, math (OAKS)*
7) *College credits per graduate (college now, AP, BLHS)*

In addition, Craig noted that school leaders support emphasis on higher-order-thinking targets and measures, or "The Four C's of Creativity, Critical Thinking, Communication and Collaboration." He noted that may be too much for the first year of Achievement Compacts, but it is important that we continue to evolve the compacts, because what we measure is what we will emphasize, so it's important that we measure what we truly value.]

Carol Wire: We have had decades of education reform efforts, including benchmarks. These look like the benchmarks – with a hammer attached. How is this different? What has changed? If we accomplish these goals will we get what we want: an accomplished, educated populace? We should be thinking a little bit bigger – what our students need to be the leaders in the new economy, social and political thought. Some of the inputs should take into account how children learn right now (technology, not just one teacher/30 kids). Also, it may not be possible to reach 100 percent graduation by 2025 – I am concerned about holding educators responsible for an impossible goal.

Inge Aldersebaes: I'd like have health indicators to roll up into a high level – help inform the true picture. Are they nourished, do they have healthy foods, did they eat breakfast. Chronic absenteeism. Those all require more complex, bigger, broader thinking about how children learn and the supports they need.

Mary Li: We can use outcomes to measure what's going on. We can also use the indicators to try to drive people toward certain things – the things we care about. We're missing an opportunity if we simply measure what we are doing now rather than pushing the kind of reform that measures the whole child, the whole community. I'm not sure why disaggregated data doesn't go all the way through (referring to chart handed out). Even including all Asian-Pacific Islanders doesn't reflect differences with immigrants and others. The work of the Communities of Color coalition has called this out. The "underserved students" category will mask what's really going on. We need to disaggregate data at every opportunity. We need to measure whether students are thinking critically, being active citizens, globally aware – not just math and reading. We also should measure parent and community involvement, a critical factor

in success in school. Bilingual dual immersion is a key measure. Finally in terms of money, I would like to see accountability for how the money that comes for ELL students and how it is all spent, how different groups of students are able to access opportunities (e.g. AP classes). Need to disaggregate data and tie it to funding.

Jim Francesconi: I chair the academic strategies team for the Oregon University System. I'm not familiar with the K12 achievement compact. I think you have to disaggregate the data (based on his experience in a "previous life"). At OUS we targeted different ethnic/racial groups, rural Oregonians. I like the idea of putting some funding measures in the community colleges and university compacts – as the QEM offers in the K12 compact. The university presidents asked for this: How does funding relate to the compacts, and how we get to 40/40/20? It's got to be about continuous improvement. How are the measures going to be linked over time?

Todd Jones: Right now achievement compacts do not impact funding directly. Some OEIB members have indicated that in the future they want to consider different funding systems based on what they learn through achievement compacts.

Phil Lesch: A big problem over time: A greater number of students who come to the university system don't come ready for college work. They can't write. Students need remedial work; it's a real issue. The conversation is missing an important component. It's worth talking about.

Jeff Matsumoto: As a classroom teacher, I want to see something about our kids -- whether they are creative, collaborative problem solvers, their love of learning, how do they see themselves in the future and their place in the world. As a classroom teacher, those are the things we look at. And if we have that impact on our kids, we've accomplished a great deal. Compacts are described as "a tool for focusing attention on schools that are higher or lower performing." So what next? Being in the classroom, what's the next step and how does that impact me and my colleagues in the classroom? And finally, in all of this, where is the teacher voice? Where are my colleagues in terms of doing this work?

Jim Mabbott: 1) Materials talk about a trajectory to get to 40/40/20 – we need a funding trajectory as well. You don't just set that thing out there that far in the future without understanding there will be some pitfalls and you have to adjust. We need to build BOTH trajectories in parallel. 2) Early on I helped draft some compacts, which were more complex. Now it's March and we hope to get compacts out to districts and ESDs April 1. I believe right now this is the way to go, and we need to be simple. But as we move along, we can adjust the compacts. If we start too complex, the whole thing will collapse and fail. If I had my way, career-technical education would be in there, but for now we need to be simple. 3) I don't believe the state has info on 9th grade credit accumulation to populate that chart. You may have reliability issues as districts start filling it in. I also heard from my colleagues that high

school students earning 6+ college credits is low – the average is already above that. 4) A school district isn't going to be able to fill out the QEM boxes at the bottom; the State needs to fill these boxes on the compacts. 5) I agree with tight/loose. If you start getting too specific about indicators going in, inputs, you start to muddy the waters. If you have the correct disaggregated data you can dig deeper when districts aren't meeting their targets. 6) ESD superintendents will need support to fill this out; ideally we'll partner with school districts. Try to keep it simple. This one looks like one I could adapt to be a regional (ESD and local districts) compact. ESDs can work with ODE to offer a regional support network to help districts meet their goals.

Whitney Grubbs: To clarify, the recommendation was that an ESD compact look like the K-12 district compact.

Andrea Henderson: In community colleges, we struggled with the notion of "quality" and decided to rename ours "progression." We should keep those notions separate.

Richard Schwarz: If tight/loose is the model, everything people are saying is important when it comes to implementation. But I see this as collecting strategic objectives from every district. Everything doesn't have to be in place except the strategic goal – which helps identify the resource needs, missing resources, reallocated resources to help meet those goals. That's the loose part. Not quite getting there isn't necessarily a bad thing – maybe you reassess what you do, how to get there, maybe you bit off more than you can chew. To really make this work, the real outcomes are going to take some time and come along the way. If anything I would suggest the compacts have longer-term goals than 4 years.

Betty Reynolds: School boards are interested in the long-term vision, stable and adequate funding. "Other funding" might need additional definition. Does it include local option? Bond levies? We need to make sure the inclusion doesn't provide a disincentive for local funding. "Pilot" project or measures implies "untested." Perhaps "negotiated" measures at the local level or district-specific outcomes are better terms. Are there qualitative measurements? Can we measure creativity, collaboration?

POST-SECONDARY COMPACTS PRESENTATION

Ed Dodson: I like the compacts, and I don't think we'll get where we need to be without measures of knowledge and skills, completion and connection. I even support a higher number of specifics, but I'm not troubled that they're not there. These are compacts, not contracts. I'm not looking at this as a hammer or something I'm going to be punished for. Achievement

compacts will evolve. As you're thinking about finances, poverty is significantly impacting, and we need to keep that in mind.

Jim Mabbott: I'm hoping sections A-F don't get lost in the raw numbers. Percentages might mean more. Why is it important for someone outside the institution to know how many students pass a national licensure exam?

Margie Lowe: It's a national validation of our programs – say, are our nursing program graduates making it?

Jim Mabbott: I like the dual enrollment on the community college compact; we should add it to the K-12 compact. It's kind of there, but not really.

Margie Lowe: We left it more open on K12 because different schools and districts use AP, IB, dual enrollment.

Mary Li: Fidelity scale system or model – is there an ideal program envisioned? A fidelity scale toward model program? So folks are able to say I'm at 0 fidelity with model, or higher level (usually 5-box scale). That's a way in which we can measure the progress, articulate what a really strong model looks like. Where is my organization in comparison with a model? Offer a rubric. Over time we could articulate the key components with the model. . . and what does fidelity to that model look like? Part of the conversation annually might be moving from 2 to 3 with certain steps. It could include self-assessments and third-party assessments.

Richard Schwartz: In Post Secondary Quality Commission, I struggled with the middle 40 (associate's degree or technical certificate students in 40/40/20). If someone enrolled in welding school and ended up getting the job (without completing the program), they are a success. The fidelity scale if I understand it, that goes to the tight/loose concept. If the community college wanted to adopt that model, it might work, but someone else might want a different model. On the university compact, I'm not sure the "quality" measures have anything to do with quality – for example, the employment rate is more indicator of the economy. I'm not sure how you measure employer satisfaction. People will have 10 or 12 different jobs. Are we measuring satisfaction by the first employer, second, third, fourth? You have higher expectations at later jobs. I don't equate the university system with being the farm team for employers. That undercuts the purpose of education.

Margie Lowe: Employer satisfaction component would be an in-depth survey of different sectors of the economy in different years (technology, retail, education, etc). That would offer more specific feedback.

Phil Lesch: I share Richard's reservations. Employer satisfaction is not so reliable an indicator, and not comparable year to year if you are surveying different sectors of employers. There's not a single way to measure quality; it's elusive. There's no silver bullet to measuring quality. When you get close to it you can smell it, but it's difficult to measure. And you need to measure all aspects of the education experience. Employer or alumni satisfaction not the way you want to fund the education system. I like how the community college system moved their conversation from "quality" to "progression." I didn't get to be involved in anything like that. Quality is something faculty like to debate. We feel the pressure to push more students through the system faster with less money. Ending fund balance is going to zero by 2014. We need to measure the consequences on students of a decline in funding. We would like to look at measures from class size to support to funding per class – something closer to the student experience.

Jim Francesconi: I like the community college notion of "progression" rather than "quality." We should take that back to the Higher Education board for discussion. Alumni satisfaction is a customer survey – I don't see anything wrong with that. But it's not sufficient. Our parents paying tuition are paying $22,000 a year. They do want the graduates to get a job. Don't drop the measure of percentages of graduates unemployed. Employer satisfaction, I see your point. I'd like to talk with other board members and get back to you.

Carol Wire PTA: "Oregonians" what does that mean in this context?

Margie Lowe: The university system wants to focus on resident students, in-state.

Merrily Haas: Measuring percentages at community college throws every statistic off, since the student body is so fluid (some taking just one course, others fulltime, pursuing associate's degree). Also there should be connection with early learning spectrum – who is leading these programs, teacher/early learning instructor preparation? How does it connect to K-12 goals and beyond?

David Robinson: Employer satisfaction is a measure of whether graduates are career-ready. Quality is hard to measure, a very wet fish that's hard to get your hands on. Of course employees are not all the university system is aimed at producing – we want graduates to be lifelong learners, etc. But are we producing students who are able to work? That's an important question. (Students are paying an awful lot of money now.) How you ask that question is important, too.

IMPLEMENTATION PRESENTATION

Todd Jones: How prescriptive do you want the OEIB to be with methodology for developing targets and/or target trajectories?

Andrea Henderson: For community colleges, the most flexibility possible in setting goals is necessary. We have a broad mix of programs. Some are 50% transfer, some 50% technical.

Jim Mabbott: We've been telling our districts for months about tight/loose – more prescription about how to set targets would undermine OEIB's credibility. Pre-setting those targets would be a big mistake. After a year re-visit with districts that didn't meet their targets or set low targets, as you suggest under #9 in the implementation document.

Craig Hawkins: Agree with Jim. We have to acknowledge the challenge of setting four-year goals with unknown funding. A trajectory makes sense for targets AND funding. This is a two-way compact; one of the challenges for the state is set a trajectory for funding.

Marcy Bradley: The challenge for children in families we serve is that we are in crisis. In Multnomah County, we have students of color graduating at 35%. There ought to be some formula to demand growth and progress. Sometimes the pendulum swings the opposite way after a bad experience (from top-down goal setting of NCLB). I'm worried that traditionally underserved populations will fall through the cracks. There will be some losers in this.

Mary Li: We should be describing the "what" and leave the "how" to the greatest extent possible should be pushed down locally. There is a challenge to describing the "what" – but it should be crystal clear and standard for everyone. The "how" can be localized.

Jeff Matsumoto: I would echo what Mary just said. We've had 10 years of NCLB at the K12 level, but one thing that we didn't learn from it is that, aspirationally, 100% is lofty and not attainable. Statistically I don't think it is. My concern then is that what are we going to do for kids that don't make it? What's the net that addresses the population that is not going to meet the 40/40/20 success rate?

Jim Francesconi: If the investment board is just going to delegate the responsibility for setting goals forever, that doesn't make sense. But if we become like the federal government, an outside agency setting goals, that won't work. We need to engage the institutions in a deep meaningful way to set targets. Timing-wise, that's difficult. You can't engage in that kind of deep conversation so quickly, so for now you need to defer to the institutions.

Eduardo Angulo: The question is how are we going to close the achievement gap? African American graduation rates are 50%, English language learners have a 50% graduation rate. Are we going to have a trajectory, moving the students forward and closing the gap? That's a leap

of faith. We are hoping the system will be a benign bureaucracy. We are moving the posts. Our teachers work very hard. We have research-based programs we didn't have 10 years ago. I do recognize as a longtime advocate there has been a lot of progress. . . . but we need to stop moving the mileposts. Let's get to something and hold ourselves accountable for meeting the needs of the students who are falling through the cracks. I appreciate that we are at the table and having this conversation.

Inge Aldersebaes: I'm concerned about the pace of implementation. It would be dangerous to move forward without the deep engagement of our teachers, our community, our families. I have heard conversation about looking at student readiness and the whole child. We might lose that if we move too quickly. I am also worried about capacity – ability to provide tools and resources for districts to implement. This is an opportunity to think big and make a difference – I would hate to tarnish that by moving too quickly to get compacts in place July 1.

Jim Mabbott: If you have the buy-in from 197 school districts, we have the opportunity to build in a progression. We have the opportunity to go slow, start with simple compacts, move forward, eventually connect funding to compacts. It's a progression.

These notes prepared by Sarah Carlin Ames and reviewed by Todd Jones, Whitney Grubbs and Margie Lowe.