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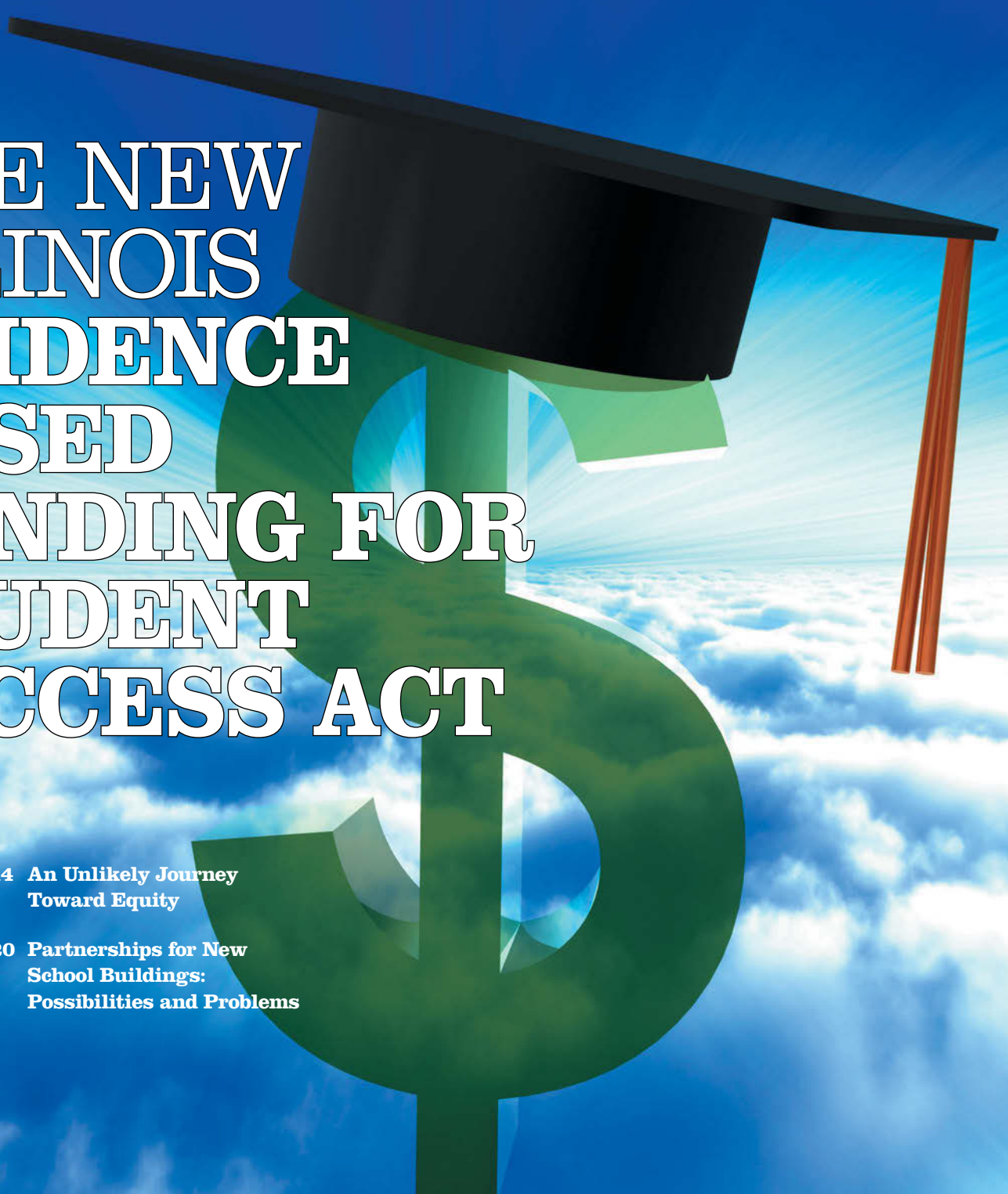
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Office: (773) 444-0206 Cell: (773) 892-2771



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The Journal of School Business Management

VOLUME 29, NO. 2, FALL/WINTER 2017



The Journal of School Business Management

is the professional journal of the Illinois Association of School Business Officials (Illinois ASBO) and is published semi-annually by the Association.

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Editorial Staff

Publisher
Michael A. Jacoby, Ed.D., SFO, CAE
mjacoby@iasbo.org

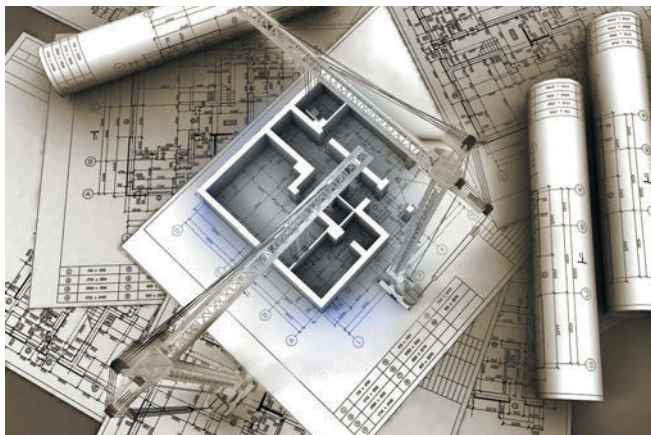
Editor
Michael A. Jacoby, Ed.D., SFO, CAE
mjacoby@iasbo.org

Production Coordinator
Rebekah Weidner
rweidner@iasbo.org

Editorial Offices
Illinois Association of School Business Officials (Illinois ASBO)
Northern Illinois University, IA-103
108 Carroll Avenue
DeKalb, IL 60115-2829
Phone: (815) 753-1276
Fax: (815) 516-0184
Website: www.iasbo.org

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Cover photo credit: Brent Walker/Shutterstock

Published by:



5950 Northwest 1st Place
Gainesville, FL 32607

Phone: (800) 369-6220, (352) 332-1252

Fax: (352) 331-3525

Website: www.naylor.com

Publisher: Jack Eller

Content Strategist: Antonya English

Project Manager: David Freeman

Publication Manager: Jamie Williams

Advertising Sales: Jamie Williams,
Krys D'Antonio, Brian Donohoe

Layout and Design: BK Publication Design

PUBLISHED NOVEMBER 2017/ISB-B0217/7681

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Editor's Page ...



Michael A. Jacoby, Ed.D., SFO, CAE

This issue of the *Journal of School Business Management (JSBM)* offers a variety of articles dealing with topics confronted by school business leaders.


I am so excited that we are leading off this issue with an in-depth article exploring the details of the new Evidence Based Funding formula in Illinois. I was privileged to be a co-architect of this historic reform with these authors and other policy experts in Illinois. This article is co-authored by Melissa Figueira and Benjamin Boer from Advance Illinois, and yours truly. This new funding formula has the potential to take Illinois from the worst and most regressive funding system in the nation, to the best and most equitable. In the article, we explore all the components as well as the policy issues behind each. If you are a district leader in Illinois, you will need to articulate how this new formula works and if you are a researcher, this new formula is something you would really want to study. As we said many times while promoting the new formula – this is a game changer for nearly two million students who are enrolled in Illinois public schools.

Second, we have another local Illinois article focused on equity in a district where you might not expect this focus. Ralph Martire, Executive Director of the Center for Tax and Budget Accountability and Board of Education President at River Forest D90 teams up with D90 Superintendent of Schools, Ed Condon, Ph.D., to describe their discovery that many of the district's African American students, Latino students, English learner and socio-economically disadvantaged students were not achieving at the same rates as their white and predominantly upper-income peers. Their solution to close that achievement equity gap is a model that can be replicated in other districts and shows how equity issues do not just exist in predominantly low-income communities.


Finally, Dr. Glen I. Earthman from Virginia Tech University explores the benefits and pitfalls of public/private partnerships utilized to build new or expand existing school facilities. Sometimes a partnership seems too good to be true, but often a partnership creates competing priorities and school districts that are not experts in developing healthy relationships and agreements, may find they have saved some money by partnering, but lost sight of the needs of their students. Since most educational facilities can last for generations – a mistake can be a permanent blight on a local school district.

Your comments on any of the above are solicited and can be made directly to: Dr. Michael A. Jacoby, Editor, *Journal of School Business Management*, Northern Illinois University, Illinois ASBO, 108 Carroll, DeKalb, IL 60115 or by e-mail to: mjacoby@iasbo.org.

Michael A. Jacoby, Ed.D., SFO, CAE



**THE NEW
ILLINOIS
EVIDENCE
BASED
FUNDING
FOR
STUDENT
SUCCESS
ACT**



By **Melissa Figueira**,
Policy Associate, Advance Illinois

Benjamin Boer,
Deputy Director, Advance Illinois
and **Michael Jacoby, Ed.D.**,
SFO, CAE, Executive Director/CEO,
Illinois Association of
School Business Officials

OVERVIEW

This August, decades of advocacy efforts culminated in the passage of legislation that overhauls Illinois' historically regressive education funding system. Senate Bill 1947, signed into law on August 31, 2017, put in place a formula that prioritizes equity and allocates state funding to school districts based on student need. The Evidence Based Model (EBM), developed by national researchers Allan Odden and Lawrence Picus, calculates the cost of a high quality and highly effective education comprised of interventions that have a proven impact on student progress. This has been used as the basis of funding formulas in at least six states throughout the country. Illinois uses the EBM as the backbone for its funding formula, providing a funding target that more accurately captures necessary funding from both state and local sources.

This overview provides a description of the components of the adequacy and distribution methodologies developed for Illinois based on the EBM and will now be referred to as the Evidence Based Formula (EBF).

The following goals guided development of the formula:

RECOGNIZE INDIVIDUAL STUDENT NEEDS

The EBM accounts for the diverse needs of students, including English learners and students from low-income households who require additional resources.

ACCOUNT FOR DIFFERENCES IN LOCAL RESOURCES

Vast disparities in property wealth mean that some districts are better equipped to provide funding for schools from property taxes than others. The formula accounts for these differences in a calculation of local capacity.

CLOSE FUNDING GAPS

A key goal for equity, the formula is designed to ensure that over time, all schools are adequately funded and gaps are closed between schools in low-income and property poor areas and their wealthy counterparts.

PROVIDE A STABLE, SUSTAINABLE SYSTEM

Rather than the stop-gap budget measures of the past few years, schools need a stable and predictable system in order to plan effectively and ensure the best use of resources.

ENSURE THAT NO SCHOOLS LOSE STATE FUNDING

In Illinois, districts receive relatively little state funding and rely heavily on local funding. The formula maintains a Base Funding Minimum (BFM) for all districts based on their prior year funding, ensuring that schools will not lose dollars. This requires that new dollars are added to the system in order to achieve equity.

PROVIDE FOR NORMALIZATION OF TAX RATES

Illinois' tax system has highly varied rates. The formula has been developed to allow districts to consider reduction of their reliance on local property taxes over time and ensure that taxing effort in the formula is aligned with districts' capacity for taxing and the needs of the district.

There are four major components to the formula:

1. First, a unique **adequacy target** is calculated for each school district in the state representing the amount of local and state funding students need to receive a high-quality education.
2. Second, each district's **local capacity** is calculated, representing the amount each district can contribute toward its adequacy target from local resources. This is a combination of a calculated contribution target and a proportion of the amount that the district currently raises above their contribution target.
3. Third, the formula determines how adequately funded a district currently is from state and local funding, or its **percent of adequacy**.
4. Finally, the **distribution method** drives equity by pushing new state dollars to those districts that are calculated to be the least adequately funded.

The following sections will explore each of these concepts in more depth.

CALCULATING THE ADEQUACY TARGET

The EBF calculates a funding target for each district based on the overall cost of providing a set of research-based interventions, or "essential elements," proven to positively impact student learning. The costs of staffing and programming for these elements are applied to each district based on demographics to determine a district-specific adequacy target that reflects unique student needs.¹ This adequacy target provides a foundation for the way state funding is appropriated and distributed.

The list of essential elements is derived from the Evidence Based Adequacy Model developed by Odden and Picus. The responsibility for regularly tailoring these elements to Illinois and determining future costs of delivering programming lies with a professional review panel composed of educators,

WHAT ABOUT DISTRICTS LIMITED BY PTELL?

PTELL is a tax cap that limits districts' ability to increase local revenues each year by the lesser of the inflation or five percent. General State Aid made an adjustment for PTELL by recognizing that the district is not able to capture tax revenue on all of its EAV because of the cap, resulting in a higher state payment to the district. The formula considers PTELL EAV in its calculation of local capacity when that EAV is lower than the district's adjusted EAV.

the Illinois State Board of Education, and members of state educational associations and the general assembly. The 26 essential elements for the Illinois formula currently include interventions such as reduced class size, instructional coaches, instructional facilitators, teacher training, and programming for English learners.²

In the process of calculating each district's adequacy target, the model accounts for regional variation in cost through the application of a regionalization factor to each district's calculated raw costs for staffing and programming. This factor is based on the Comparable Wage Index (CWI), which reflects systematic variations in the salaries of college-educated workers who are not educators.³ The application of such an index reflects the differences in competitive wages across geographical units and across time. The CWI for Illinois is normalized for each year using the average weighted index (weighted by Average Student Enrollment, or ASE) for the state.

To adjust for dramatic differences in wages between neighboring counties, the formula calculates the regionalization factor for each district using the greater of a county's actual CWI value and the weighted average of the county's CWI and those of its adjacent counties. Additionally, the regionalization factor has a floor of 0.9. While regionalizing the adequacy target ensures educators can compete with members of other professions within their county, it was critical to include a lower boundary to allow counties to compete with other areas across the state to hire and retain high-quality educators.

CALCULATING PERCENT OF ADEQUACY

Once the adequacy target has been calculated for each district, the next step to distributing funds is to calculate how well funded each district currently is, including both the amount of revenue a district can

raise in local funds and the amount the district currently receives in state funding.

DETERMINING LOCAL CAPACITY

Across Illinois, dramatic variations in property wealth contribute to educational inequities, as property-wealthy districts have greater capacity to contribute to education than their property-poor counterparts. Under the current system, local contributions to education are approximated by calculating the amount a school district could generate if it taxed at an assumed property tax rate. In reality, however, a district may collect more or less than that assumed amount. This methodology therefore created a misleading picture of both available local resources and of the amount of state funding districts really need. The calculation of local capacity in the new EBF is intended to more accurately account for the amount districts can and do contribute.

Additionally, in the face of budget crises, chronic underfunding, and years of proration, many districts have had to raise property tax rates to make up for the lack of reliable and sufficient education funding from the state. The state of Illinois contributes 26 percent of education funding, while local taxes make up 66 percent of education funding.⁴ The national average for state contribution to education is closer to 50 percent. The formula aims to gradually shift the dynamic in Illinois over time to a greater reliance on state funding to align Illinois more closely with the national average.

The new formula calculates local funding based on both an ideal for each district's local contribution, called the Local Capacity Target (LCT), and the actual amount each district currently collects in local tax revenues (Real Receipts).⁵ The goal of employing a target for calculating local contribution is to work to normalize local contribution across the state. The LCT for each district is calculated as follows:

- The formula first creates a Local Capacity Ratio, which is the ratio of a district's Adjusted Equalized Assessed Valuation (AEAV)⁶ to the district's adequacy target. The Local Capacity Ratio acknowledges both local need and ability to pay. The higher a district's EAV, the higher its ratio; conversely, the larger a district's adequacy target, the smaller its ratio will be.
- In order to standardize the Local Capacity Ratio across school district types⁷, the ratio is adjusted to reflect the number of grades a district serves. Unit districts serve 13 grades, elementary districts serve nine grades, and high school districts serve four grades. To standardize across types, the ratio is therefore multiplied by 9/13 for elementary districts and 4/13 for high school districts.
- To translate the district's Local Capacity Ratio into the percent of adequacy to be funded locally, districts' ratios are then placed on a normal distribution. The normal distribution is calculated based on the weighted average and weighted standard deviation of the adjusted Local Capacity Ratio for all districts.⁸ Placing the Local Capacity Ratio on a normal curve allows for the calculation of the percentile of the ratio for each district. For example, a district that has a Local Capacity Ratio one standard deviation below the mean will fall in the 16th percentile of expected local contribution, while a district that has ratio one standard deviation above the mean will fall in the 84th percentile of expected local contribution.
- The Local Capacity Percentage yielded by placing districts' ratio on the normal curve is then multiplied by the district's adequacy target to produce the district's LCT.

Using a calculated LCT provides a goal for local contribution that works toward normalizing tax rates in the state. However, the primary goal of the formula is to ensure that funding flows to those districts that are *currently* the least adequately funded. For this reason, the LCT is adjusted to consider the amount a district currently receives in local funding, and the LCT is treated as exactly that: a target or goal that districts can work

To Recap, Local Capacity =

A. Local Capacity Target (LCT), if Real Receipts < LCT

OR

B. Adjusted Local Capacity (ALC), if Real Receipts > LCT

Local Capacity Target (LCT) = Adequacy Target* **Local Capacity Percentage**
Local Capacity Percentage = Conversion of **Local Capacity Ratio** into normal curve equivalent score

Local Capacity Ratio = (Adjusted EAV / Adequacy Target)* grade level adjustment

Real Receipts Adjustment = (Real Receipts – LCT)* **Local Capacity Percentage**

Adjusted Local Capacity (ALC) = LCT + **Real Receipts Adjustment**

ACCOUNTING FOR CONCENTRATED POVERTY

In the Adequacy Calculation

In the calculation of adequacy, a degree of recognition of the additional costs associated with concentrated poverty is included in the essential element of “class size.” When calculating the cost of this element, the formula accounts for smaller class sizes based on a district's low-income percent (For K-3, one Full Time Equivalent (FTE) per 15 low-income students and one FTE for every 20 non-low-income students; for 4-12, one FTE for every 20 low-income students and one FTE for every 25 non-low-income students).

In the Base Funding Minimum

The calculation of prior year allocation of state funds used to determine a district's Base Funding Minimum includes funds previously distributed to districts through the poverty supplemental grant. In order to avoid penalizing low-income districts when the system is not adequately funded, the poverty supplemental is discounted when used in the formula by the degree to which the district is adequately funded. This reduces the amount of state funding recognized by the formula and therefore provides more dollars to low-income districts.

toward over time. For those that collect Real Receipts below their target, the formula uses their LCT. For those districts that collect Real Receipts above their LCT, their Real Receipts are adjusted downward, toward their target, to create an Adjusted Local Capacity (ALC).

The implication of this adjustment of local capacity is that high tax, low spending districts would have the potential to lower their tax levy to more closely reflect the rates expected by the formula. This potential reduction in tax levy is enhanced through the inclusion of a property tax relief fund that provides grants to districts that lower

their tax levy. At the same time, districts that tax below their LCT would be able to raise their taxes to the calculated amount without impacting their allocation of new state dollars.

The formula makes the adjustment to the LCT in the following manner:

- Calculates the difference between each district's Real Receipts and their LCT.
- Multiplies gap between Real Receipts and LCT by district's Local Capacity Percentage.
- Adds that product to district's LCT to yield the ALC.

This dynamic approach to local capacity allows for a more realistic assessment of the ideal funds that could come from local property taxes, but at the same time, recognizes a portion of the receipts that are already available to fund a district's adequacy target.

Chicago Pension and Local Capacity (CPS) is currently the only district that must pay its own legacy pensions costs, or “unfunded liability.” The formula accounts for this by crediting the local capacity target for the amount it must pay.

Also included in the sum of a district's existing local resources is Corporate Personal Property Replacement Tax (CPPRT). CPPRT is considered local revenue and is based on the corporate personal property tax the district received prior to the elimination of the personal property tax in 1979. For purposes of the funding formula, the prior year CPPRT distribution from the Illinois Department of Revenue is utilized.

ESTABLISHING THE BASE FUNDING MINIMUM

The next calculation the formula requires is to determine the amount a district currently receives in state funding. Built into the proposed funding formula is a provision that no district will receive less state funding than it received in the immediately preceding fiscal year. This amount is referred to as a district's Base Funding Minimum. State revenues per district from the following sources comprise the Base Funding Minimum: General State Aid (all components), Bilingual or ELL, Special Ed Personnel, Funding for Pupils Requiring Special Ed Services (Child Funding), and Special Ed Summer School. The Base Funding Minimum acts as a guarantee that every district will receive at least the same amount in state funds as it received the preceding fiscal year. Additional state funding (beyond the Base Funding Minimum) is allocated from the formula in year 1 based on need. The next year, the same calculation is done, but the Base Funding Minimum

for year 2 will also include the new funds distributed in year 1. This means that no district will ever lose money from the state.

It is important to note that the Base Funding Minimum is per district, not a per pupil hold-harmless based on enrollment. Declines in enrollment will still be taken into account in the calculation of a district's adequacy target, but a district level hold-harmless protects districts with declining enrollment from seeing dramatic declines in state funding even if they are still far from reaching adequacy.

Percent of Adequacy

By summing a district's local capacity, CPPRT, and its Base Funding Minimum, (in other words, by adding together a district's expected local resources and current state funding to find its total amount of Preliminary Resources) each district's distance from its adequacy target, or its Percent of Adequacy, can be calculated. This is done by dividing the district's Preliminary Resources by its adequacy target. Districts with a low Percent of Adequacy are the least well-funded, or the farthest away from their adequacy target. The closer a district's Percent of Adequacy is to 100 percent, the more adequately funded a district is.

A DYNAMIC DISTRIBUTION METHODOLOGY

The Percent of Adequacy forms the basis for the distribution methodology, which is designed to reduce the gap between current

spending and adequacy for all districts over a period of several years. Those districts that are the least adequately funded (those that have the lowest Percent of Adequacy) receive the majority of new state funds. The amount of time it takes to bring all districts to adequate funding levels is dependent on the amount of new revenue appropriated for education each year.

Based on its Percent of Adequacy, each district is assigned to one of four tiers for funding. A fixed percentage of all new state funds is allocated to each of these four funding tiers. According to the tier into which a district is placed, it then receives funding at a certain percent of its funding gap. A district's funding gap is equal to the district's assigned tier's target ratio times the district's adequacy target minus the district's preliminary resources. The percent of each tier's funding gap that is to be filled through the distribution formula is referred to as the tier's "allocation rate." The amount of new funding distributed to each tier is equal to the tier's funding gap multiplied by its allocation rate. It is important to note that the funding gap is different for each tier. For example, a district in Tier 1 will have a funding gap based on the distance between its funding level and the Tier 1 target ratio and will have another gap between its funding level and 90 percent of its adequacy target (90 percent being the target ratio of Tier 2). The criteria for placement into each of these tiers as well as the allocation methodology for each is described below:

	PLACEMENT CRITERIA	ALLOCATION
TIER 1	Includes districts that are the least well-funded. These are all districts below the Tier 1 target ratio. This ratio is set dynamically and is based on expending all Tier 1 dollars to close the Funding Gap by each district by 30 percent. Since determining this value requires calculating the gap closing for each district, it uses an approach called Goal Seek, which tries different values for the target ratio and then sets the target ratio based on that value that uses all the Tier 1 funds.	Tier 1 districts receive 50 percent of new state dollars. Since these districts are the least well-funded, they receive the greatest amount of new state funding.
TIER 2	Includes all districts with an adequacy level below 90 percent (which means it also includes all Tier 1 districts).	Tier 2 districts receive 49 percent of new state dollars.
TIER 3	Includes districts with an adequacy level between 90 and 100 percent.	Tier 3 districts receive 0.9 percent of new state dollars.
TIER 4	Includes districts with an adequacy level above 100 percent.	Tier 4 districts receive 0.1 percent of new state dollars.

A Distribution Method that Prioritizes Equity

Under this formula education funding could be distributed in one of two ways: either each district could receive funding at a certain percent of their gap to reaching a funding target, or funding could be prioritized to those districts furthest from their target amount by flowing dollars to those districts furthest from adequacy first (basically, filling from the bottom). The method in the Illinois Evidence Based Formula is actually a combination of these two approaches. Since the state bears the responsibility for ensuring that all districts are supported in progressing toward adequacy, Districts in Tiers 3 and 4 receive funding at a certain percent of their adequacy target, while districts in Tier 2 receive funding based on their gap to 90 percent of adequacy. But since Illinois is notorious for having the least equitable education funding system in the nation, the formula uses a “fill from the bottom” approach for districts in Tier 1, so that districts furthest from their adequacy target receive funding to fill a greater proportion of their gap.

MINIMUM FUNDING LEVEL AND UNDER-APPROPRIATION

The Minimum Funding Level serves as a mechanism to ensure that the least well-funded districts are receiving the most funding. In a scenario where there is only a small amount of new dollars appropriated, those dollars will be directed to the least well-funded districts. The Minimum Funding Level is set by the legislation at \$350 million per year. Failure on the part of the state to provide this minimum amount triggers an adaptation to the distribution formula, which protects Tier 1 dollars and broadens the set of districts in Tier 1. The Tier 1 allocation rate is adjusted, in this case, to 30 percent multiplied by the ratio calculated by dividing the New State Funds by the Minimum Funding Level.

The formula also adjusts if the appropriation made is less than the amount necessary to fund the Base Funding Minimum. In this case districts in Tier 3 and 4 have their funding reduced to the FY17 level (if required). If funding needs to be reduced further it is done on a per-pupil basis across all districts.

CONCLUSION

It is a widely accepted premise that the quality of a child’s education should not be

determined by zip code. And yet, in a system so heavily dependent on property taxes, it is almost inevitable. The solution would appear to be transitioning to a state-based system of funding — yet where this has been tried, lack of local investment has often actually led to an under-funding of education. Therefore, a balance must be struck between local and state funding. We believe that the EBF provides a new path forward for integrating state and local funding to enable all school districts to reach adequacy. And by using the current amount of state funding as a base, the formula will end the injurious practice of reallocating funds from one district to another, regardless of their funding level.

In recent years, there have been many attempts at funding reform across the country, many of which have been the result of court-ordered school finance equalization. Illinois is unique in that it has taken this step forward proactively, and not as a result of judicial activism. It will take time to assess whether Illinois’ new system will function as desired. Nonetheless, we believe that this step represents a sea change in the approach to education funding that simultaneously attempts to create an equitable state system of funding and retain local control. If implemented and funded appropriately, we believe that the new formula will allow Illinois to realize the dream that a child’s education is not simply dependent on their zip code and will help all Illinois’ students succeed. ■

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¹ Michelle Turner Mangan, Ted Purinton, Anabel Aportela, “Illinois School Finance Adequacy Study – Part I: A Comparison of Statewide Simulation of Adequate Funds to Current Revenues”, (March, 2010)

² A complete list of the 27 elements currently included in the EBM can be found in Appendix A.

³ Taylor, L.L., and Fowler W.J., Jr. (2006). A Comparable Wage Approach to Geographic Cost Adjustment (NCES 2006-321). U.S. Department of Education. Washington, DC: National Center for Education Statistics.

⁴ NCES, Digest of Education Statistics 2016: “Revenues for public elementary and secondary schools, by source of funds and state or jurisdiction: 2013-14”, https://nces.ed.gov/programs/digest/d16/tables/dt16_235.20.asp

⁵ Real Receipts = Applicable Tax Rate (ATR) * AEA, ATR = Operating Tax Rate (OTR) where OTR is prior year OTR, less transportation

⁶ AEA = 3-year average EAV, or prior EAV if prior has declined by 10 percent or more compared to 3-year average

⁷ Illinois has three different types of school districts, elementary, high school, and unit, which serve different grade configurations. *Elementary district* means a

school district organized and established for purposes of providing instruction up to and including grade 8; *High school district* means a school district organized and established for purposes of providing instruction in grades 9 through 12; *Unit districts* serve grades K-12.

⁸ Both the weighted average and weighted standard deviation are calculated by weighting the districts’ Effort Index by enrollment.

ABOUT THE AUTHORS:

Melissa Figueira is a Policy Associate who works on equitable funding reform and other initiatives to improve educational outcomes as a member of the team at Advance Illinois, a statewide education policy advocacy organization. She earned her master’s degree in education policy from Teachers College at Columbia University, with a focus on K-12 education. Prior to joining Advance Illinois, Melissa worked with the Research and Policy Support Group at the New York City Department of Education.

Benjamin Boer has been with Advance Illinois since 2008. He takes a leadership role in policy development and forming partnerships with stakeholder organizations. He sits on the Performance Evaluation Advisory Council for the Illinois State Board of Education and supports the work of a number of Illinois P-20 Council committees. Ben was born in the Netherlands and went to school both there and New Jersey. He earned both a bachelor’s and masters of science in computer science from Brown University and a masters of public policy from the Harris School at the University of Chicago. He is married and has two young daughters, both of whom attend a local Chicago public school.

Michael Jacoby, Ed.D., SFO, CAE, has been an educator for 38 years, serving as a teacher, school business official and superintendent of schools. He is now serving in his 12th year as the Executive Director/CEO of the Illinois Association of School Business Officials (Illinois ASBO). Dr. Jacoby is the current Editor of The Journal of School Business Management. He has a bachelors degree in music education from The University of Iowa (1980), a masters degree in educational administration from Illinois State University (1985) and obtained his doctorate from Northern Illinois University (1993). Recent awards include the Greschem Outstanding Alumni Award from NIU, the Ben C. Hubbard Leadership Award from ISU and the Outstanding Leadership award from CTBA. He is married to his college sweetheart and has three adult children and twin grandsons born in 2017.

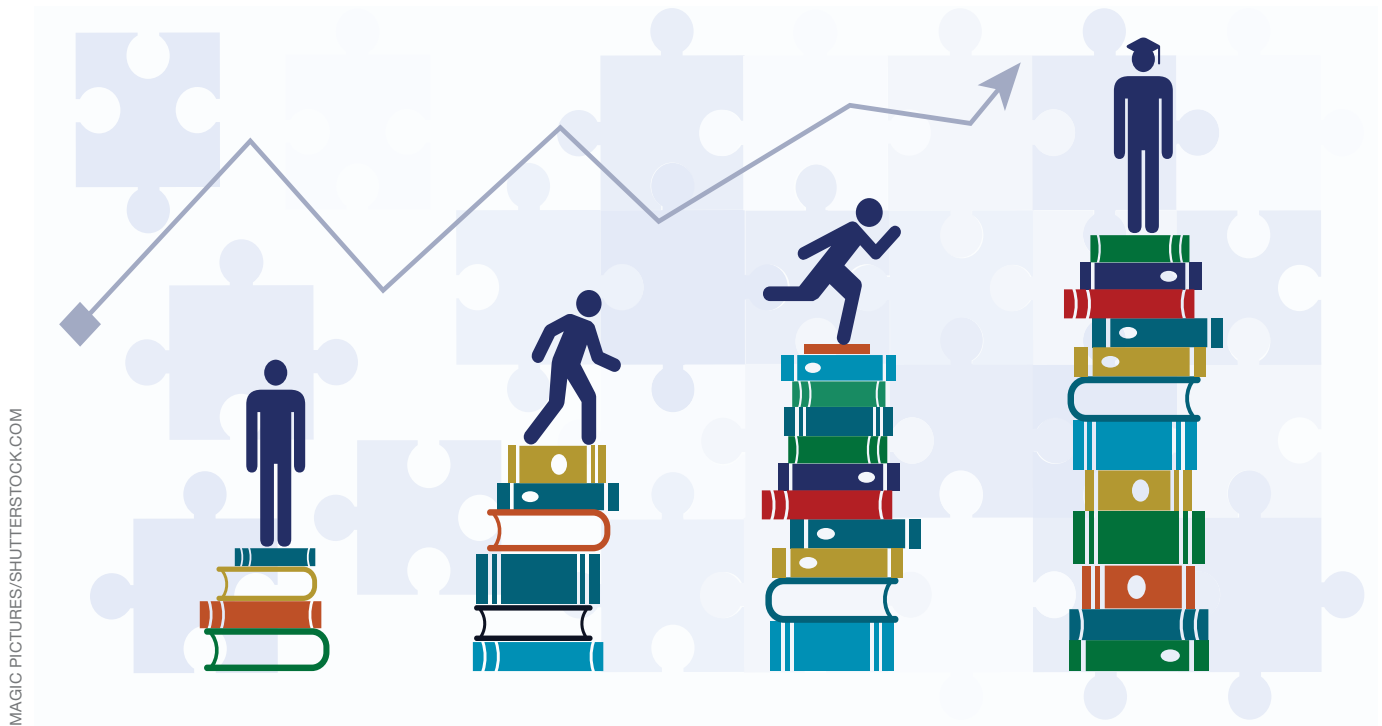
AN UNLIKELY JOURNEY TOWARD EQUITY

By **Ralph Martire**,

Executive Director, Center for Tax and Budget Accountability and Board of Education President, River Forest District 90

and **Ed Condon, Ph.D.**,

Superintendent of Schools, River Forest District 90



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THE BOTTOM LINE: Because of inequitable resource availability and distribution in Illinois, traditionally disadvantaged students often progress through school on different — and frankly lower — trajectories than what could be attained in a more equitably resourced system.

There is no issue more difficult to resolve than that of attaining actual “equity” in public education. While outside the profession many confuse “equity” with being “equal,” practitioners have always understood that an “equitable” education means one that meets the specific needs of the students being served — and those needs never have been, nor will be, “equal.” To date, the evidence makes it clear Illinois has largely struggled to provide an “equitable” educational experience to all students. According to data from the Illinois State Board

of Education (ISBE), not only are there meaningful achievement gaps by race and income in Illinois, but there is also a material overlap between schools with significant low-income and significant minority populations. In fact, ISBE’s 2015-16 Report Card data show that 84.5 percent of all African American and 73.4 percent of all Latino children in Illinois attend school districts where the low-income concentration is north of 50 percent.

Given that minority students are concentrated in majority low-income school districts, there’s no question Illinois’

historically unfair and inadequate education funding system has contributed materially to the state’s achievement gaps. Indeed, it is because Illinois lawmakers have consistently chosen to underfund K-12 education from state-based revenue that Illinois is so over-reliant on local property taxes to fund schools. This has effectively tied the quality of education a child receives to the local property wealth of the community in which that child lives. The bottom line: because of inequitable resource availability and distribution in Illinois, traditionally disadvantaged

students often progress through school on different — and frankly lower — trajectories than what could be attained in a more equitably resourced system.

Fortunately, the winds of change — positive change — are blowing. With the enactment of SB1947 — which implements the Evidence Based Model (EBM) of school funding, Illinois now has a school funding formula that's designed to provide every district the resources it needs to educate the students it serves. Which is great. However, actually getting state-based education funding up to adequate levels will take some time, given the EBM shows Illinois' overall investment in K-12 education is over \$6 billion short of what the evidence indicates is necessary, and state government has an accumulated deficit in excess of \$15 billion in its General Fund. That means school districts will have to find ways to cope with the legacy of Illinois' historically inequitable education funding system for at least the next few years, until such time as the state's fiscal issues are mostly resolved and the EBM is fully funded.

Due to the state's education funding shortcomings, most of the concern about issues involving equity in educational opportunity in Illinois has focused on school districts that serve a disproportionately high number of disadvantaged students — read that as low-income and/or minority students — to educate. Little of the equity discussion has involved districts which already have adequate resources to educate the children they serve, because their students generally tend to be high performing overall, and not, for the most part, either low-income or minority. Our school district, River Forest District 90, fits that latter description.

D90 is a small, relatively affluent district with approximately 1,400 students in west Cook County. We have a history of strong academic achievement, with two of our three schools having recently been awarded National Blue Ribbon status (2012, 2015). Due to a strong local tax base, D90 has sufficient financial resources to provide a very high quality education. Yet despite its overall success, D90's Board of Education recently noted a troubling student achievement trend: many of the district's African American students, Latino students, English learners, and socio-economically disadvantaged students were not achieving at the same rates as their white and predominantly upper-income peers.

Raising even more concern, the data showed that the academic achievement gap of roughly 20 percentage points between D90's white and African American students, actually increases over time. And while D90's student population is predominantly white — currently 72.1 percent White, 9.4 percent Hispanic, 6.7 percent Black, 5 percent Asian, .1 percent American Indian/Pacific Islander and 6.7 percent Multiracial — the stubborn and growing achievement gaps by race and ethnicity were something neither school administrators nor the board were willing to ignore.

River Forest District 90 is not the type of school district that is normally highlighted as one facing a meaningful challenge in providing a truly equitable educational experience for all of its students. Yet, in 2014 District 90's board and administration embarked upon a campaign to address, and hopefully eliminate, any institutional barriers contributing to inequitable educational experiences within its schools. Though this work is just beginning, and will require substantial commitment over time. The district is pursuing a strategic, systems-based approach to the challenges, which targets both specific concerns like how best to redress achievement gaps, as well as broader issues of inclusiveness. D90's goals are simple to delineate and yet difficult to attain:

- First, D90 wants to eliminate any statistically meaningful correlation between educational attainment in the district and a student's race or income level over time; and
 - Second, the district wants to create the type of inclusive environment that ensures every child attending our schools develops a lifelong love of learning, has an educational experience that meets her or his needs, and has an overall experience that is welcoming to both the student and his or her family.
- Hey, dream no small dreams.

ASSESS COMMUNITY SUPPORT FOR EQUITY

One of District 90's strengths is a long established, organizational culture that celebrates learning, values students and maintains an expectation of excellence. For the most part, those values are shared by the River Forest community at-large — especially the expectation of excellence. Historically, there has been a great deal of

consensus about values, given how homogeneous the village has been from a demographic standpoint — predominantly white and upper income. That is changing, with the diversity of D90's student body growing by 68 percent since 2000.

Those changing demographics made it essential to confirm to the community at-large that D90's historic expectation of excellence had to embrace all children — regardless of race, ethnicity or income status. How could the district or village truly claim to be faithful to that core value, if the data show specific, identifiable groups of students were being left behind? So, the strategic planning team decided to revise D90's mission statement using an equity lens. A deliberate emphasis was placed on language that confirms the commitment to ensure excellence for *every* child. The language states:

"We believe in equity and inclusivity for all. We will ensure that every student feels empowered to achieve to his or her full potential, commit to provide equitable opportunities for all learners, grow an inclusive school community, and demonstrate we value diversity."

The strategic plan also identified specific, aligned and actionable goals that are time-bound and measurable (SMART goals), the resources needed to implement them, the individuals/entities responsible to lead them, and the indicators for measuring progress.

And while this may not sound like a big deal — "oh great, you added language to your strategic plan, blah, blah" — in our community it was essential to help build broad stakeholder support. That is because River Forest remains a relatively conservative place overall. Many community members have never had to grapple personally with issues of equity. Indeed, there is a contingent that believes achievement gaps are effectively the consequence of individual student diligence and/or different "family values," rather than stemming from any educational systems' shortcomings. Moreover, D90 is over 90 percent funded by local property taxes. So spending resources on equity means spending local taxpayer dollars on equity, which makes community support crucial.

To have the basis for building both a positive conversation with the stakeholders who fund our schools, and broad political buy-in, D90 needed its strategic plan to incorporate an unambiguous equity lens.

IDENTIFY PROCESSES TO PROMOTE INTERNAL, SYSTEMS CHANGE AND BROAD STAKEHOLDER/ COMMUNITY BUY-IN

To become truly sustainable for the long haul, equity initiatives require establishing both an internal process for strategic, intentional systems change in the district itself, and broad community and political support. D90 tackled these twin challenges through a process that embraced both including community members in the institutional entities the district created to guide its

equity initiative, and making far more extensive outreach to the village at-large. For its internal systems-change work, D90 established two separate working groups charged with addressing distinct aspects of the equity initiative. The first, dubbed the Inclusiveness Advisory Board (IAB), deals with equity/inclusivity issues writ large. The second, the Equity Committee, was given the much narrower and more specific charge of identifying recommendations to eliminate achievement gaps based on race, ethnicity and/or income. To avoid any potential communications problems,

D90 cross-pollinated the IAB and Equity Committee teams with a few key members. This ensured information was not only regularly shared between the groups, but that their efforts were both coordinated and strategic.

D90 also decided to engage the community in a new, more interactive way. This took the form of the D90 Board holding three of its regular meetings per year as “town hall” forums. These forums depart from traditional board meetings in one crucial way—the standard, three-minute time period given for public comment is waived, and community members are encouraged to engage in direct dialogue with board members and administrators alike. While such a format is challenging, it allows for more meaningful and rich discussions that both inform the community about, and engage the community in, the district’s equity agenda. Through this process, it is hoped that respectful and transparent communications will build trust with the community, and serve as a buffer against individuals with opposing viewpoints who question the district’s motives or actions.

D90 also decided to collaborate officially with both Oak Park and River Forest High School District 200, and Oak Park Elementary District 97, since the students from Districts 90 and 97 attend high school together in District 200. To this end, D90 hosted an official tri-board meeting of all three districts last spring. That meeting was devoted to identifying each district’s equity challenges, as well as each district’s current strategies related thereto. This tri-board meeting was held in the “town hall” forum format D90 recently implemented.

The meeting generated substantial interest in both Oak Park and River Forest, as evidenced by the standing-room only crowd that attended. Each of the three boards passed a formal resolution at the meeting to collaborate officially on ongoing equity initiatives by establishing a Tri-Board Equity Committee, which has board-level representation from each district.

In addition, District 90 continues to deepen its community ties and reinforce its equity initiatives by serving as a member of the Oak Park – River Forest Community Foundation “Success for All Youth” committee, coordinating community efforts to provide support to children from cradle to career, and by partnering with other external

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partners such as the Park District, Public Library, Township, Community Center, and the West Cook YMCA.

Desiring a unifying experience for the larger community, the district is also launching a “One District, One Book” initiative centered on *Mindset, the New Psychology of Success* by Carol Dweck, Ph.D. The main theme of this book is that the views we adopt of ourselves and others profoundly affect the way we lead our lives. Those with a fixed mindset tend to believe that many attributes are carved in stone and generally immutable. However, those with a “growth mindset” generally perceive that basic qualities can be cultivated and improved through effort and persistence. The fact that bias plays a role in expectations we hold for others and ourselves is a theme that has very significant community-wide implications in River Forest. D90 hopes this experience will have a unifying impact and grow collective awareness.

THE INCLUSIVENESS ADVISORY BOARD

The Inclusiveness Advisory Board (IAB) was tasked with promoting a welcoming

culture throughout the organization, one that embraces the diversity of our students and their families. The IAB is comprised of approximately 30 teachers, parents, school administrators, and community members, and is presently considering the possibility of adding student liaisons. The IAB serves as a superintendent’s advisory council and reports indirectly to the board, though it does not have any formal authority. However, it has been instrumental in recommending changes in policies and procedures, providing insight about stakeholder perspectives, identifying and promoting community training/learning experiences, and building political support for D90’s equity work.

One key initiative D90 implemented at the insistence of the IAB is the administration of surveys that glean the perception of students, faculty, and parents on a range of issues covering the degree to which the district is — or isn’t — inclusive in practice. The district has conducted the survey twice, and is hopeful it will soon generate longitudinal data that shows positive trends in perception among our various core stakeholders.

THE EQUITY COMMITTEE

The Equity Committee is focused like a laser on eliminating achievement gaps between white students and students of color in D90. Given this charge, the Equity Committee is lean by design. Its membership consists of two board members, two faculty members, two parents, and two district administrators. The Equity Committee makes policy recommendations directly to D90’s Board.

Establishing an Equity Committee was a good start, but unless it developed actionable items to help move the district forward — and created a student performance matrix for holding the District accountable for showing progress — it would be easy to dismiss as window dressing. At its initial meetings, the Equity Committee accomplished two primary tasks. First, it clarified the essential outcome it hoped to attain: eliminating any statistically meaningful correlation between a student’s race and his or her projected academic performance in D90. Second, it immersed committee members in scholarly journals, research in culturally relevant pedagogy by preeminent academics like Gloria Ladson-Billings,

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relevant articles, and even books on how best to overcome/eliminate achievement gaps. Based on this research, and input from the D90 faculty and administration, the Equity Committee made numerous specific recommendations to the D90 Board, involving everything from pedagogy to accountability, all of which the Board ultimately approved by unanimous vote.

Key among these recommendations were that:

- D90 administrators investigate and pursue implementation of instructional models that have predictive success for

narrowing the achievement gap (such as project based learning, co-teaching, and Universal Design for Learning (UDL);

- D90 implement professional development activities focused on identifying implicit bias and improving cultural sensitivity;
- D90 broaden and improve recruiting and hiring practices to enhance the diversity of employment candidates; and
- The Board establish the Equity Committee as a permanent Board Committee to provide oversight and monitor progress over time.

Those recommendations were made in April of 2016. Since then, each recommendation has been implemented in a meaningful way. D90's administration immediately began exploring pedagogy that the research shows benefits traditionally disenfranchised learners and is rooted in strong teacher/student relationships. This has led to D90 taking the initial steps to implement, thoughtfully and strategically, with appropriate professional development, each of the recommended instructional practices: UDL, Project-Based Learning and co-teaching.

Of course, getting faculty and staff buy-in for difficult systems changes in pedagogy requires broad acknowledgement that said changes are needed. Hence, the importance of the second recommendation of the Equity Committee regarding professional development addressing implicit bias specifically and cultural sensitivity in general. The IAB played an instrumental role in helping with this task by identifying the National Equity Project (NEP) as a potential provider of such professional development. The NEP has fostered administrative leadership capacity for equity, provided training experiences for the board of education and community members, and worked extensively with faculty and staff on understanding implicit bias and being cognizant of unintentional lack of cultural awareness. Seeking to leverage this professional learning throughout the community, the D90 Board invited River Forest Village Trustees to attend the board's NEP trainings, free of charge.

In the case of recruiting and hiring, the district identified the need to improve faculty diversity to build the effectiveness of its work force. The review process included an inspection of human resources procedures, collection of key data, use of focus groups, and adoption of several new HR practices. Early results are promising, as D90 has recently hired several excellent teachers with diverse backgrounds.

Agreeing on the need to institutionalize the equity effort, the board has made the Equity Committee a standing committee, which is now in the process of developing measurable metrics for oversight and accountability.

THE ROAD AHEAD

One of the greatest challenges to long-term initiatives is that immediate results are not often achieved. This is particularly



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true when considering issues of equity, since efforts to “move the needle” are adaptive in nature and require shifts in culture, practice, and understanding. In other words, they take time. So, even with strategic and systems-based safeguards in place, the real danger exists in that equity initiatives could be abandoned due to lack of momentum. This is particularly true when organizations are faced with an implementation dip, which is defined by Michael Fullan (2001) as “a dip in performance and confidence as one encounters an innovation that requires new skills and new understandings.” To combat this challenge, D90 is working to promote “growth mindset” thinking in the community, as well as among faculty and staff. Success cannot be defined solely as full attainment of all goals. Incremental successes must be identified and publicized for the final effort to succeed.

District 90 has identified numerous “next steps” to pursue so the effort toward equity continues on an upward trajectory. Staff training and professional development supporting successful large-scale classroom implementation of UDL, Project Based

Learning, and co-teaching will be vital. Investigations into the way students qualify for accelerated courses will likely result in re-vamped procedures. An equity-based audit of classroom and library materials is ongoing. Clearly, the queue is lengthy and the work substantial. Yet, unlike most districts facing equity concerns, D90 has the resources to address the issue. The real challenges will be effectively embedding an equity lens in our systems — and fostering the collective support to make that happen. ■

ABOUT THE AUTHORS:

Ralph Martire is executive director of the Center for Tax and Budget Accountability. In February 2011, he was appointed to serve on the U.S. Department of Education Equity and Excellence Commission. He is a distinguished lecturer on public policy for Roosevelt University and has taught fiscal policy seminars for various universities and the International Fulbright Scholar Program.

Ralph has received numerous awards for his work on education policy reform, including the 2007 Champion of Freedom Award, presented by the Rainbow PUSH Coalition to individuals whose professional

work embodies Dr. Martin Luther King, Jr.’s, commitment to equal educational opportunities, and the Ben C. Hubbard Leadership Award given by Illinois State University to individuals who have greatly benefited education in Illinois. He also received the Adlai Stevenson Award for Public Service presented by the American Society for Public Administration to honor one individual with a connection to the Chicago area that has made outstanding contributions to government and public administration over an extended period of time. He was elected to serve on the School Board of River Forest District 90, where he still serves. Ralph is also a regular columnist on education, fiscal and economic policy for the State Journal Register and Daily Herald.

He received his B.A. in history with highest honors from Indiana University, and his J.D. from the University of Michigan.

Dr. Ed Condon has served as superintendent for River Forest District 90 Schools in River Forest, Illinois for the last six years. He has previously served in the roles of middle school/junior high school principal, high school assistant principal, and social studies teacher in both Virginia and Illinois.

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PARTNERSHIPS FOR NEW SCHOOL BUILDINGS: **POSSIBILITIES AND PROBLEMS**

By *Dr. Glen I. Earthman, Virginia Tech University*



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INTRODUCTION

Almost every governmental agency must obtain specialized services and expertise for the planning, design and construction of new facilities, or the renovation of existing buildings. The reason for this is because these governmental units and agencies normally do not employ the specialized expertise needed to complete the tasks of planning, designing and constructing facilities. It is deemed too expensive to employ such specialized expertise when it can be secured from outside the organization at reasonable cost, especially when the need is not constant. Most governmental agencies do not have a constant need to complete new or renovated space; consequently they do not have the need for such expertise on regular demand.

This same situation applies to almost all school systems in the country. The exception is the very large school systems that must address the reoccurring need for additional facilities. For the vast majority of the school systems in the country, however, it is necessary to obtain specialized services from the outside when the need for either new facilities or the renovation of existing facilities arises (Earthman 2013). These school systems are not faced with the constant need for new facilities or the renovation of existing facilities and therefore would not need to employ such services on the staff on a daily basis.

PROCUREMENT PROCESS

The system of obtaining outside expertise is normally called the procurement system. The procurement system is a process whereby the school system puts out an advertisement in the newspaper and on the web page of the school system asking for certain services. Private agencies and firms that possess the required expertise respond to the request stating their availability to provide the needed services at a given price. The school system then selects the private agency that best fits their need. In this manner school systems can obtain needed specialized expertise in a logical and legal manner.

The procurement process as used today consists of several steps that are controlled by the local school board to ensure fidelity in the services needed and selecting the best purveyor of the services (Earthman, 2013). The aspect of controlling the processes is very important to the school board to ensure all of the legal restrictions and processes are followed correctly. The steps in procuring

services to plan, design and construct a facility may vary depending upon the circumstances and resources of the school system, but are normally described as being outside the expertise of the staff of the organization. The basic steps usually required are: a detailed description of the needs of the educator in the building; capability to put these needs into actual designs; bidding of the project and construction of the building itself (Earthman, 2013).

These steps are controlled by the school board according to when such needs are articulated, how they are conducted and the selection of the private firm or agency. These processes are controlled by the legal structure of the state in which the school system is located and the school board must adhere to legal requirements. There are considerable similarities throughout the country in how the processes are conducted. The procurement processes has served local school systems very well and efficiently for centuries, not only in the United States, but also throughout the world.

ALTERNATIVE METHODS

In recent years there have been a number of alternative methods of securing needed expertise to facilitate new or renovated facilities available to school boards. These methods are designed to simplify and/or consolidate the processes ostensibly to help the school board and staff in completing the project. However, most of these alternatives either relieve the school staff of some responsibilities or place more responsibilities on the outside professional, depending upon the alternative chosen. Some of the alternatives that are used are Design/Bid, Design/Build, Turnkey Operation, Public/Private Partnership (PPP) and A+B Bidding (Washington SDOT, n.d.).

PRIVATE/PUBLIC PARTNERSHIPS

The Public/Private Partnership has been a recent development in the field of education, but the PPP has been used longer by various governmental agencies worldwide (Lea, December 4, 2016). The partnership is designed to secure all of the specialized services needed to complete a building project. In essence, the PPP relieves the school system of all responsibilities in planning, designing and constructing either a new building or renovating an existing building. This process could also relieve the school system of even financing the project. In essence this is a turnkey operation in the true sense of the word. The PPP permits

the private partner to do all of the planning, designing and constructing of the capital project (Virginia Legislative Code, 2009).

To activate the PPP process, the school board determines the needs of the school system in terms of the educational program. This written description is embodied in a Request for Proposal that is used to secure the services of a private entity. The RFP describes the project in detail listing the location of the project, the size and scope of the project and other details necessary for the private entity to submit a competitive bid for the complete project. Once the bids by private entities are received by the school board, it is the responsibility of that body to evaluate the proposals. This evaluation is not an easy process because of the enormity of the project for a new school building. The school board must ensure that the proposal covers all of the processes needed to complete the project and within the budget established by the school board (Virginia Public School Authority, 2008).

The evaluation should also determine the extent of compliance the proposal has to the educational needs of the faculty. Once assured that the proposal meets the needs and budget of the school system, the school board issues a contract to the private entity thereby giving the private entity the authority to proceed with the work. Once the contract is signed, the private entity has complete control of all of the processes necessary for completion of the project. This could include securing the actual site for the new building. The design of the building is the responsibility of the private entity and can either involve or not involve the faculty of the school in a review of the design.

Partnership Benefits

There are several benefits accruing to the school system in using the PPP process. These benefits are financial, better time delivery of the school building, and perhaps some economies. The financial benefit to the school system is that the private entity finances the entire project relieving the school system of going into debt to raise the necessary funds (Stainback & Donahoue, 2005). Not only does the school system not have to go into debt, but it does not have any debt to affect its credit rating. The school system normally leases the school building from the private entity until the debt is paid in full.

The other two benefits may or may not accrue to the school system; nevertheless the possibility of obtaining use of the school

earlier is there. The benefit of some economies are there, but cannot be guaranteed. Perhaps the private entity can construct the school more economically than through other means of building it, but this again is not guaranteed and should not be used as a reason for selecting a private entity (Secondary Heads Association, 2007).

Partnership Disadvantages

The disadvantage of the PPP process is simply that the school system may not get what it wanted in the final analysis. If the educators are not fully engaged in the review of the educational needs of the school system

in the initial documents, and in a systematic review of the plans before they are put into mortar and stone, the possibility of not getting exactly what is wanted is very high (Barber, 2015; Bradley-Levine, 2008). This is the biggest disadvantage of this process.

PPP SATISFACTION

In a research study designed to determine if the educators who experienced the PPP process were satisfied with the new school building, the research questions were: Were the instructional and organizational needs of educators fully met in a building constructed through the provisions of a public/private

partnership, and was there user engagement and input into the planning and design development processes? (Barber, 2015, p 3). The researcher has indicated a variety of experiences by educators when PPP was employed to construct a school building. Of the respondents, approximately 77 percent stated the new school building was a definite asset to the community. Yet in some school systems about 40 percent stated they did not have adequate input into the design of the building. Approximately 35 percent of the respondents stated they did not believe the educational specifications reflected their needs. While the majority of participants (52 percent) strongly agreed or agreed that the PPP process provided feedback during the planning meetings that helped the team make decisions, almost half of the participants indicated they were without any direct acknowledgement that the PPP process impacted the planning stages in a positive way (Barber, 2015).

The researcher found that the highest degree of dissatisfaction with the PPP process was found in those school systems where teachers and principals were not actively engaged in the review process. A large percent of these respondents indicated they did not know about any meetings to review plans or were not knowledgeable about meetings being scheduled. This indicates that the superintendent was not active in encouraging teachers and principals to become engaged in the process and leads to the admonition that superintendents must take an active role in scheduling review meetings and then encouraging teachers and principals to attend such meetings. The leaders of the school must set the example of engaging in a review process to insure the building reflects the needs of educators in the school system.

LEADERSHIP IN SCHOOLS

The leaders of the school system need to recognize that in the long run, a school building that meets the needs of the users of the building will result in a much more responsive building and a much more effective faculty. The one person in the school system who has the best knowledge of what is needed in a school building is the principal (Brannon, 2000). The principal should be involved in every review of the plans for the school because of the knowledge of how the school operates is nested in that person (Trosper, 2017). These individuals are the most knowledgeable about the safety concerns the building may present and what



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needs to be done to ameliorate any safety or circulation problems or areas. Involvement of this individual is crucial to the success of a school building project.

Positive leadership on the part of the superintendent and staff is crucial to the effective engagement of the users of the school building to present their needs for a capital project and to then ensure their needs are articulated in the final plans of the building (Clark, 2002). The superintendent must guarantee that meetings where the needs of the school system are discussed are well advertised and attended by the faculty and principals. In addition, the superintendent must provide the means for the users of the building to provide input into the final design plans of the project. Of course, the school board also has the responsibility to make certain the superintendent and central administration actively engage the faculty and administrators in the initial Only in this way will the users of the building be assured their needs are met satisfactorily in the new building or renovated building. ■

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ABOUT THE AUTHOR:

Dr. Glen I. Earthman has forty years of experience in the field of education at all levels and thirty years of specialized experience in the educational facilities planning arena at Virginia Polytechnic Institute and State University. He has authored six books on the subject of educational facilities and served as the first Director of the National Clearinghouse for Educational Facilities. He continues a schedule of teaching and research in the field of school facilities specializing in the relationship between school building condition and student and teacher health and performance.

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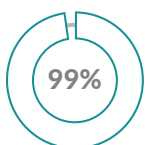
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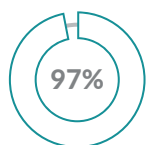
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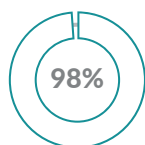
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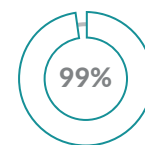
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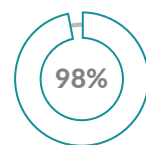
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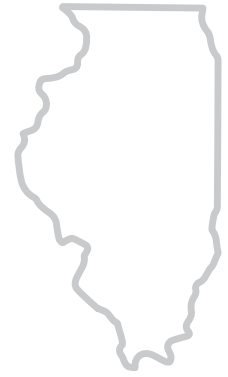
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3 Ways a CM Can De-Stress the Construction Process

Your architect has wrapped up the construction documents, trade contractor bids have come in and shovels are ready to meet the dirt. Keep these three expectations of your CM in mind in order to alleviate the burden of construction.

Capital improvement projects are both exciting and daunting times for district administration. Your normal duties become compounded by the burden of delivering enhancements to the students' educational environment. Any type of capital improvement can also be filled with unknowns, anxiety and apprehension. Most likely, your construction management (CM) partner has made statements indicating they will "keep the project on schedule" and "maximize the budget". These broad-based statements are certainly reassuring, but they don't provide enough detail on what to expect from a CM on a day-to-day basis during construction. To fill the information gap, ICI has identified three areas where your chosen CM must assist district administration, lighten your

burdens and ultimately allay the school board's construction concerns. So as your architect wraps up the construction documents, trade contractor bids come in and shovels are ready to meet the dirt, keep these three expectations of your CM in mind:

1. Setting Realistic Expectations

Early on in the design phase the CM must begin to prepare principals and staff for any impacts to the learning environment during construction. Setting early and realistic expectations mitigates frustration and unwanted surprises as construction activity begins. Educators must be aware of construction impacts well in advance on both a building-wide



and classroom-specific level. Noise levels, loss of windows, temporary parking lots, relocated entrances or restricted areas are just a few of the items your CM should take the lead on overseeing. Early meetings among the entire project team should highlight to the administration and faculty that short-term drawbacks will lead to long-term benefits.

2. Taking the Heat!

A construction problem arises – now what do you do? The answer: nothing more than breathe a sigh of relief that the district hired a CM. Why? Because it is the CM’s responsibility to solve the construction problem and, equally importantly, present the solution to the school board. The rationale for the CM “taking the heat” is twofold. Your CM leaders are experts in K-12 construction and will be well-versed in addressing board and community concerns. CM leadership is responsible for accuracy of information and for fielding any resulting questions. They should deliver the message to the school board. Second, the basis is simply that a CM is paid to “take the heat.” Your CM becomes the first line in diffusing matters with the school board; not you.

3. Satisfying the District’s Communication Needs

The golden days of a weekly construction progress report sent via email as a means of project communication are long gone. Our data-hungry, technology-savvy culture has driven the demand for construction progress updates to be provided in multiple ways and based on unique district preferences. Your CM should generate standard items such as board reports, but they should also embrace the use of technology to communicate updates to a far broader range of interested parties.

Your CM should have a live-feed webcam of the construction site posted to multiple websites for access by board members, administration, the community and students. Drone videos provide compelling construction footage and create anticipation and support among stakeholders. Virtual Reality (VR) technology is perhaps the most impactful means of all for a CM to employ in order to communicate construction progress. VR is as close as an individual can get to feeling like they are on the job site without the safety risks of public tours.

How can all this information and footage be easily dispersed to the board, administration, faculty, staff and students? Social Media! Twitter, Facebook and YouTube are exceptional communication tools and your CM should be active on these platforms.

Seventy-six percent of teens say they use social media¹. Districts can create a real sense of community during construction by relying on their CM to use social media communication tools. For example, ICI recently produced a 360° construction progress tour at West Leyden High School and uploaded it to YouTube. Within days, it had more than 1,700 views!

¹Lenhart, A. (2015, April 9) *Mobile Access Shifts Social Media Use and Other Online Activities*
<http://www.pewinternet.org/2015/04/09/mobile-access-shifts-social-media-use-and-other-online-activities/>

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Director of K-12 Education
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Marc Poskin, CPE, LEED AP BD+C
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