

ILLINOIS STATE BOARD OF EDUCATION
STREAMLINING ILLINOIS' EDUCATIONAL DELIVERY SYSTEMS
TASK FORCE

Submitted pursuant to PA 96-798

October 2010

Illinois State Board of Education
Streamlining Illinois' Educational Delivery Systems Task Force
Recommendations

Submitted to the Governor and the Illinois General Assembly

October 2010

This report of the Streamlining Illinois' Educational Delivery Systems Task Force is respectfully submitted to the Governor and the Illinois General Assembly. The Task Force recommends that the Illinois State Board of Education (ISBE) and the regional superintendents/Intermediate Service Center Directors work collaboratively to streamline the delivery of educational services in Illinois. Specific changes are outlined in this report.

BACKGROUND

The Illinois General Assembly charged the Streamlining Illinois' Educational Delivery Systems Task Force with examining the duties of all of the educational service agencies (ESAs) in Illinois including regional offices of education, intermediate service centers, special education cooperatives, education for employment systems, learning technology centers and services provided by ISBE. During the first meeting of the Task Force, Susie Morrison, Deputy Superintendent and Chief of Staff at ISBE, provided the Task Force members with a state map that outlined the service areas for each ESA in the state. She observed that there are many overlapping service area boundaries. Mike Kelly, Superintendent of Carlinville Community Unit School District 1, illustrated how these overlapping boundaries affect his school district. Within his regional office of education (ROE) there are four special education cooperatives, and within his special education cooperative, three ROEs are represented. Because there is not an existing mechanism to coordinate services between the ROE and the special education cooperatives, it is difficult for parents and staff members to know who to call to receive services. Other Task Force members remarked that services delivered by educational service agencies may not meet the needs of districts and that the quality of services provided by ESAs varies widely across the state. These data points raised questions for the Task Force about how to ensure that ESAs align their services with statewide priorities and are held accountable for the efficient and equitable delivery of high-quality services.

The conclusions of this Task Force are consistent with the findings of the other two Task Forces that have developed recommendations on the roles and structures of educational service agencies in Illinois during the last three decades. The first Task Force published *The Future of Educational Service Regions in Illinois* in 1980. In that document, they argued that the "...multiple intermediate structures that have proliferated...are confusing, competitive and

duplicative” (p. 3). As a result, thirty years ago, the first Task Force recommended that educational service agencies should be consolidated and streamlined to reduce costs, eliminate duplication and inefficiencies, and better serve the needs of local districts.

The second Task Force report, issued in 1991, found that the system of educational service agencies did not effectively and efficiently provide services to local districts and instead was “...characterized by duplication of management, overlapping territories, flawed accountability structures, and service responsibilities which need to be more responsive to changing expectations” (p. 2). The second Task Force recommended the development of a single comprehensive intermediate delivery system that would provide services in response to the needs of local districts.

Given the history of past recommendations, the existing structures of educational service agencies, and the context of the current fiscal crisis in Illinois, Dr. Chris Koch, State Superintendent of Education in Illinois, led the Task Force in the development of recommendations that would intentionally coordinate the statewide capacity of ESAs, maximize resources, and spend money wisely to benefit students throughout the state. The Task Force was expertly facilitated by Gina Burkhardt, CEO of Learning Point Associates. In order to inform their work, the Task Force also invited leaders of educational service agencies in other states to be present during each of their three meetings. Craig Burford, Executive Director of the Ohio Educational Service Center Association, shared lessons learned from Ohio’s recent streamlining process and Ron Fielder, the Chief Administrator of the Grant Wood Area Education Agency, described the organization of educational service agencies in Iowa and presented the national perspective on behalf of the Association of Educational Service Agencies. A list of the Task Force members is available in Appendix A and the minutes of each of the three Task Force meetings appears in Appendix B.

RECOMMENDATIONS TO STREAMLINE THE DELIVERY OF EDUCATIONAL SERVICES IN ILLINOIS

Public funding for government services/schools is not likely to return to previous levels; therefore effective regionalization must be a significant “solution to tough times.” One mechanism for efficiency and excellence is to allow for the Regional Offices of Education (ROEs)/Intermediate Service Centers (ISCs) to emerge as the primary delivery system of educational support and assistance to Illinois districts and schools. The Task Force agreed that the recommendations outlined below should demonstrate the following general principles:

- Improving the coordination and alignment of the delivery of services.
- Ensuring equitable access to core services that are consistent in quality across the state.
- Being responsive to the needs of districts.

- Supporting compliance with federal and state mandates.
- Maximizing resources and increasing efficiency.
- Holding educational service agencies accountable for providing high-quality services.

To implement these principles, the Task Force supports the development of a single, coordinated system of support for districts in Illinois. The following recommendations are put forth as the foundation for Illinois to realize this goal:

Recommendation 1: Establish a statewide coordinating council: A coordinating council, to be facilitated and supported by ISBE, shall be established to bring leaders from ISBE together with representatives from regional offices and intermediate services centers, career tech centers, technology centers, special education cooperatives, LTCs and school districts on a regular basis to establish focus, monitor progress, and ensure the quality of the delivery system. The coordinating council may also include representatives from statewide agencies, other than ISBE, that provide services for young people. The State Board will set and communicate the policy direction for the delivery system, define outcomes, and ensure accountability of educational service agencies. The coordinating council will develop efficient strategies to guide the implementation of ISBE’s policy priorities throughout the state. This will be an iterative process in which the coordinating council will continually gather formative and summative data to inform and drive their work. In addition, the coordinating council will centrally coordinate communication with private school systems, ensure equitable access to core services across the state, and assess the fidelity of implementation in each region. It is important to note that although many of the services that will be coordinated are funded by state and federal dollars, the majority of the funding for these services comes from local sources.

Recommendation 2: Fund core services across the state: ISBE will work closely with district and ROE/ISC leaders to define a core set of services and supports that ROEs/ISCs shall offer to meet the needs of school districts. These services shall be defined by April 1, 2012. ISBE will seek adequate funding from the legislature to support these core services, which will be aligned with the State Board’s policy priorities, and will support compliance with federal and state laws and regulations. This may involve the decentralization of some core services, which are currently provided by ISBE, but that would be delivered by ROEs/ISCs under the new system.

Recommendation 3: Coordinate services in each region: In order to efficiently implement the State Board’s vision for the statewide system of support, ROEs/ISCs will take the lead on coordinating all educational services in their region, including those provided by EFEs, LTCs and special education cooperatives. The regional superintendent will serve as the single point of ISBE contact for each region as well as facilitating the coordination of services and improving communication about and access to services for parents and the community in the region.

As part of their efforts to coordinate services across the state, the coordinating council and the regional superintendents in each region shall consider the development of tiered services in which all regional offices would provide the first tier of core services, such as training for bus drivers and certification for teachers. In order to deliver this set of core services, ROEs/ISCs may develop partnerships with other entities. In addition, ROEs/ISCs may form cooperatives or develop entrepreneurial services beyond the required core, in areas of expertise that are specific to their agency, which will be available to districts within the region or statewide. This tiered system will maximize comparative advantage across the state, provide a wide range of high-quality services to support the needs of districts, and supplement the sustainability of the system.

Recommendation 4: Conduct an independent review of funding across the system: ISBE will commission an independent organization to assess the existing funding structures that are in place across the state and the use of all federal and state dollars to determine what funds are available, how these funding streams interact, and how these resources can be used more efficiently in the future. To enable the state to make decisions based only on the highest quality data, the independent organization shall review data from multiple sources and obtain input and feedback from the field. The external review will be complete by October 31, 2011. Findings from this review, which will be public and transparent, will help the coordinating council to identify inefficiencies and duplication, to encourage collaboration between agencies, and to leverage discretionary sources of federal and state money to improve equity and efficiency across the system.

Recommendation 5: Implement an accountability system for ROEs/ISCs: ISBE will work collaboratively with ROEs/ISCs to adopt performance standards that will guide the implementation and quality of the delivery of core services. Quality assurance standards for services will be based on industry standards for excellence. Performance agreements for school improvement may be considered as an option within the accountability system.

By August 2012, ISBE will adopt an accreditation process for ROEs/ISCs. Accreditation will be the condition for receiving state funding for the delivery of core services. In order to be fully accredited, ROEs/ISCs will be accountable for both individual and collective metrics to ensure coordination and quality across the system. An on-going and coordinated evaluation of the system will be scheduled every three years to ensure the components of the system are individually and collectively meeting performance standards.

Appendix A

Illinois State Board of Education Streamlining Illinois' Educational Delivery Systems Task Force

Task Force Members

Governor's Office Designee

Chris Koch, Chair
State Superintendent of Education
Springfield

ROE Designees (appointed by Gil Morrison)

AREA I

Darlene Ruscitti
DuPage ROE #19
Wheaton

AREA II

Rich Myers
LaSalle ROE #35
Ottawa

AREA III

Jodi Scott
Henderson/Mercer/Warren ROE #27
Monmouth

AREA IV

Kay Pangle
I-KAN ROE #32
Kankakee

AREA V

Marc Kiehna
Monroe/Randolph ROE #45
Waterloo

AREA VI

Larry Fillingim
ROE #20
Harrisburg

IASA Designee (appointed by Brent Clark)

Matthew Klosterman
Superintendent, Belleville #118
Belleville

IFT Designee (appointed by Ed Geppert)

Dan Montgomery
President, North Suburban Teachers Union, IFT Local 1274
Skokie

House Republican Designee (appointed by Tom Cross)

Roger Eddy
State Representative
Hutsonville

House Democratic Designee (appointed by Speaker Madigan)

Monique Davis
State Representative
Chicago

Senate Republican Designee (appointed by Senator Radogno)

Rebecca Woodhull
Southern Illinois University
Springfield

IL Association of Career & Technical Ed (appointed by Pres. Lance Copps)

Don Smoot
Three Rivers Education for Employment Center
Joliet

Illinois Association of School Boards Designee

Michael Johnson
Executive Director, IASB
Springfield

Illinois Association of School Business Officials Designee

Michael Jacoby
Executive Director, IASBO
Northern Illinois University
DeKalb

Member of an Intermediate Service Center (Appointed by State Superintendent)

Kay Poyner-Brown
Executive Director, Intermediate Service Center 2
Bellwood

Member of a rural school district (Appointed by State Superintendent)

Mike Kelly
Superintendent, Carlinville CUSD 1
Carlinville, Illinois 62626

Member of an urban school district (Appointed by State Superintendent)

Preston Williams
Superintendent, Urbana SD 116
Urbana

IEA Designee (appointed by Ken Swanson)

Mary Jane Morris
Director, Instructional Resource and Professional Development
Illinois Education Association
Carterville

Chicago Board of Education designee (appointed by Ron Huberman)

Eduardo Garza
Director, Government Affairs
Chicago Public Schools
Chicago

Illinois Association of Administrators of Special Education Designee

Susanne Carrescia
IAASE President
Lebanon

Appendix B

Illinois State Board of Education Streamlining Illinois' Educational Delivery Systems Task Force Meeting Minutes

- Minutes of Task Force Meeting – April 20, 2010
- Minutes of Task Force Meeting – May 17, 2010
- Minutes of Task Force Meeting – July 21, 2010

Illinois State Board of Education
Streamlining Illinois' Educational Delivery Systems Task Force

Tuesday, April 20, 2010

Minutes

At 10:04 a.m. the first meeting of the Streamlining Illinois' Educational Delivery Systems Task Force was called to order by Dr. Christopher Koch, the Illinois State Superintendent. He noted that the Illinois State Board of Education (ISBE) facilitates several Task Forces, but that the Streamlining Task Force is of particular interest and importance in the state. Given the current budget situation in Illinois, he commented that the Task Force has the opportunity to think comprehensively about how the regional system can efficiently provide school and districts throughout the state with high quality educational services. He stated that he does not have any preconceived notions about the outcomes of this Task Force and hoped that all Task Force members were entering the meeting with an open mind. He provided an overview of the work of the Task Force and the focus for each of the three meetings. The dual purposes of today's meeting are to ensure that everyone on the Task Force has a common understanding of the current composition of the state system of regional support and to begin to examine the research and data from other states. During the second meeting, the Task Force will dig deeper into the current situation in Illinois and further examine best practices from across the country. Finally, during the third meeting, the Task Force will discuss the recommendations that will be sent to the Governor and the legislature in August. The overall goal of the Task Force and the recommendations that are developed will target getting students and the schools and districts that serve them equitable access to high quality assistance that is cost efficient, of high quality and supports the overarching goals set by the ISBE and the legislature.

Dr. Koch introduced Gina Burkhardt, the CEO of Learning Point Associates, who will serve as a facilitator. Ms. Burkhardt welcomed the group and facilitated the introductions of the Task Force members. Eighteen members were present or represented by a designee and three members were absent, two of whom are legislators who were in session. Ms. Burkhardt opened the Task Force's discussion of the current situation in Illinois by asking the members to provide feedback and to comment on the accuracy on the information in the matrix that ISBE prepared for the Task Force. Susie Morrison, Deputy Superintendent and Chief of Staff at ISBE, noted that matrix provided information across the system of all educational service agencies (ESAs) in the state. The Task Force members received copies of the school code sections related to ESAs and a state map that outlined the service areas for each ESA. Ms. Morrison observed that her takeaway from the map was that there are many overlapping service area boundaries. She opened

the conversation about the matrix by asking the representatives from the Regional Offices of Education (ROEs) to comment.

Darlene Ruscitti of Area I remarked that the mission of the Task Force should be to consider a systems approach so that ESAs throughout the state are adding value to the classroom. She further commented that consistency of services throughout the state is more important than each ROE striving to protect its territory. Instead of competing with other ESAs to offer similar services, she would like to explore how the ESAs in Area I can best work together to serve schools and districts. She added a description of the variety of services that her ROE offers, ranging from compliance, to school safety, to working with parents and the community.

Kay Pangle of Area 4 described how her ROE develops school improvement plans every year that are linked to her staff's analysis of state report card data and the needs of stakeholders in the region. Her team identifies areas in which schools and districts need support and develop professional development programs and services that are aligned with those needs. In addition, one of the most labor intensive areas of service for her office is related to teaching certification. Teachers in the region submit their renewal requests to the ROE. ROE staff members then review the statements of assurance of completed professional development, follow up with teachers if necessary, certify the quality of the statements, and forward the renewal requests to ISBE for their final approval. Area 4 also runs alternative programs for students.

Preston Williams, Superintendent of Urbana School District 116, remarked that an important role for the ROE is to serve as a liaison between the school district and ISBE. His ROE is quite helpful in this regard. Marc Kiehna of Area 5 added that ROEs are often not limited to K-12 education, but also provide adult education services and education programs in the prison system. Dr. Koch commented that ESAs could provide some support for the Department of Corrections, which is a school district, because they are engaged in very complex work, but do not currently have the appropriate resources to serve all of the needs of incarcerated youth. The Governor is also interested in looking at the glaring need in Illinois to provide more appropriate services for these young people. Ms. Ruscitti noted that through safe schools, ROEs can work with districts to provide support and services for these students as they make the difficult transition back to traditional schools. Dr. Koch agreed that ESAs certainly have a role to play in helping to serve the complex needs of these students through social/emotional and special education services.

Marc Kiehna observed that although there are overlapping boundaries in many areas of the state, in his region, the boundaries for the different types of ESAs are almost identical. This facilitates cooperation and collaboration among the agencies. His active participation on the Boards of other ESAs enables his office to coordinate resources. For example with a recent RTI initiative, the special education cooperative worked collaboratively with the ROE in order to provide professional development about RTI for all teachers, not just for special education teachers. Larry Fillingim of Area 6 agreed that collaboration was critical. In his region, the directors of

the ROE, EFE, and special education cooperative meet monthly with school district superintendents to coordinate efforts so that they can maximize the resources they have to benefit the schools and students in their region.

Kay Pangle commented that the ROEs and the Intermediate Service Centers should be separate rows on the ISBE matrix. Kay Poyner-Brown, of Intermediate Service Center 2, agreed and elaborated with a description of her intermediate service agency. Her organization has some parallel responsibilities with ROEs, but they also provide different services. The three Intermediate Service Centers in suburban Cook County collectively serve as many students as Chicago Public Schools. Under the guidance of a governing board of constituents and stakeholders, her organization provides services including professional development, Regional System of Support Provider (RESPRO) services for schools in academic status, Reading First delivery, and safe schools.

Susie Morrison then asked the Task Force members about their funding sources. The members reported that most of them support their work by combining funding streams from the federal government (particularly for EFEs and special education cooperatives), state funding for professional development, and revenue received from conferences or workshops. Ms. Morrison commented that, on average, federal funds comprise less than 10 percent of ROE budgets.

Kay Pangle, Darlene Ruscitti, and Rich Myers observed that their organizations do not begin with the funding stream. Instead their work begins with the needs of their clients and then they pursue funding to meet the needs of their clients. Ms. Ruscitti further commented that she will often work collaboratively with districts in her region to explore funding opportunities, but she will never compete with them.

Ms. Morrison then transitioned the discussion to learn more about the special education cooperatives in the state. Gineen O'Neil, Susanne Carrescia's designee to represent the Illinois Association of Administrators of Special Education, mentioned that the cooperatives are all quite different, but do have some similar basic components. IDEA funds flow through all of the cooperatives, they are all evaluated and accountable in the same way as school districts, they all strive to deliver cost-effective and high-quality services, and provide professional development for their member districts based on the districts' needs. The goal of the cooperatives is to support districts and build their capacity to serve students more effectively. She noted that although ROEs serve all districts throughout the state, cooperatives do not because districts choose to be members of cooperatives. Dr. Koch observed that the recent trend was for districts to withdraw from their cooperative and provide services through the district's central office.

Mike Kelly, Superintendent of Carlinville School District, pointed out that for small districts, special education cooperatives were not voluntary because they provide essential services. Michael Jacoby, of the Illinois Association of School Business Officials, observed that this aspect of voluntary participation in the ESA might be a criterion for the Task Force to consider

in their recommendations. Mike Kelly further commented that there is not an existing mechanism to coordinate services between the ROE and the special education cooperatives. In his ROE there are four special education cooperatives, and in his special education cooperative, three ROEs are represented. As a result, it is difficult for his staff members to know who to call to receive services. While he does not question the commitment of ESAs in Illinois, he contended that districts need a more efficient delivery of services. Matt Klosterman, representing the Illinois Association of School Administrators, added that equity is also an important concern for the Task Force to address because ROEs are challenged to meet the varied needs of districts. Thus, the state should ensure that all districts are served equitably, particularly when resources are scarce.

Ms. Morrison then transitioned to a discussion of the Education for Employment System (EFEs) in Illinois. Don Smoot, representing the Illinois Association of Career and Technical Education, remarked that the EFEs were created as requirement for receiving Perkins funding. This federal requirement for a statewide regional delivery system for Career and Technical Education (CTE) remains in effect. The original intent was to have EFEs aligned with community college boundaries, but it didn't work out quite that way over time. The main purpose of the EFE is to administer state and federal CTE grants. EFEs also uphold CTE statutes. There are 57 EFEs, but all of them meet the needs of their region in different ways. In terms of evaluation and accountability, there are annual audits, local evaluations, federal monitoring visits, and annual assessments on Perkins performance measures.

Ms. Morrison thanked the group for providing so much input into the matrix. She reflected on the comments that Illinois received after the first round of Race to the Top in which one of the themes was that Illinois has a demonstrated lack of capacity to carry out the plans in their proposal. She noted that Illinois needs to coordinate the statewide capacity of ESAs intentionally, maximize resources, and spend money wisely to benefit students throughout the state. Dr. Andrea Brown, a member of the Illinois State Board of Education, remarked that the ESAs in Illinois would be critical to bringing best practices to scale across the state.

Several Task Force members commented on the morning discussion. Mike Kelly observed that the public is not informed about the ESA system that they are currently funding in Illinois and they would probably not consider the current system a good use of their tax dollars. Mike Jacoby remarked that what he hears from his members is that the quality of services provided by ESAs varies widely across the state. He argued that the Task Force should recommend that there is a statewide need for more equity and accountability for ESAs. If ESAs are not providing high-quality service to districts, they should no longer be in business. Mary Jane Morris, of the Illinois Education Association, finds the ROEs that she works with across the state to be collaborative. In addition, she noted that several ROEs have strong expertise in particular specialty areas, but that expertise is inconsistent across the system. Thus, the Task Force should explore ways to share that expertise more consistently throughout the state. Darlene Ruscitti pointed out that change can be difficult, but the Task Force should have the political will to do what makes sense

for schools and districts. Dr. Michael Johnson, of the Illinois Association of School Boards, argued that because the regional superintendents are currently elected to their offices, the state will need to fully fund the ESA system if state leaders want the regional superintendents to be accountable to ISBE rather than to the voters. Dr. Ron Fielder, of the Grant Wood AEA in Iowa, noted that this system of elected ESA leaders is becoming more unusual as such a system now exists in only three states, Montana, Arizona, and Illinois.

Gina Burkhart summarized the wide ranging morning discussion by noting that the Task Force members had discussed funding, collaboration, communication, leveraging efforts, quality assurance, accountability, boundaries, formal and informal structures, governance, oversight and equity of services. During the lunch break, she encouraged the members to consider how to define and measure impact, to think about what success should look like, and to outline outcomes that can help the group to frame the conversation moving forward.

After the break, Ron Fielder presented the national perspective on behalf of the Association of Educational Service Agencies. He reviewed the legal definitions of ESAs, their geographic spread throughout the country, the services and supports that ESAs provide, funding sources for ESAs, Board composition, clients, and accountability measures. He observed that ESAs are needed now more than ever as support for change and growth. ESAs can be a solution in tough times, but increased visibility also means increased scrutiny. He remarked that Ohio and Georgia are currently rethinking their systems of ESAs and Michigan is considering consolidating their ESAs because of the lack of resources in that state. Nationally, an emerging trend is that more and more states are considering how ESAs can function as a comprehensive and coordinated statewide system.

After providing the national context, Dr. Fielder then went on to describe the system of ESAs in Iowa. In 1975, 15 Area Education Agencies (AEAs) and 15 community colleges were created at same time and with the same boundaries. The community colleges provide the region with services related to CTE while the AEAs provide services related to special education, professional development, technology, curriculum, and instruction. Dr. Fielder observed that the delivery of professional development has shifted dramatically over time from the central delivery mechanism 10 years ago being conferences or workshops at the AEA to AEA staff now much more frequently traveling to schools to provide teachers with job-embedded professional development. The delivery of professional development continues to evolve as more and more teachers are demanding online professional development that they can access at any time during the day or night at their convenience.

Dr. Fielder noted that the AEAs in Iowa receive the highest level of subsidies in the nation. They receive funding from the federal government (e.g. IDEA dollars), state funding, and revenue from state and local property taxes. State leaders decided that it was important for the government to provide this subsidy because they value equity and consistency of services across the state. In exchange for this financial support, Iowa set up a system of quality assurance. In

fact, Iowa is the only state in the country with a mandatory accreditation process for ESAs. Five to eight other states are considering voluntary accreditation processes, but the process in Iowa is mandatory. Each AEA must document how the agency fulfills the nine standards that are required by state law. Each AEA must annually submit a budget and a progress report to the Iowa Department of Education. Every five years their accreditation status is reviewed. Dr. Fielder has welcomed feedback from the accreditation process because it helped his AEA to improve. In Iowa, this process has improved the quality of service and provided more uniform access to services across the state. It is interesting to note that AEAs in Iowa are the only form of government that voluntarily downsized. Some AEAs realized they could not provide high-quality services on all of the nine standards. As a result, they merged with other AEAs and saved the state, on average, \$650,000 annually in senior administrator salaries. Dr. Andrea Brown asked if this comprehensive system in Iowa is coordinated by an executive director. Dr. Fielder responded that they were able to hire the former speaker of the House for this position, a leader who was highly respected on both sides of the aisle, to make connections between the AEAs and ensure that services are delivered equitably across the state.

Dr. Fielder went on to discuss two trends for ESAs national nationwide. First, many ESAs are beginning to specialize in particular areas where they have comparative advantage and then market this service or product statewide. For example, Dr. Fielder's AEA developed an exemplary bundle of products and services related to a science curriculum. Rather than create a new curriculum for clients in their region, four other AEAs in Iowa purchase the exemplary services from Grant Wood AEA. Rich Myers found this to be an appealing idea. The challenge would still be to ensure equal access, but with available technology, ROEs can focus more on areas of expertise because they no longer need to be spatially close to the client. Second, partly as a result of declining state funding and partly as a result of a lack of consumer satisfaction, Dr. Fielder observed that many ESAs are becoming more entrepreneurial. For example, when ESAs in Minnesota experienced state funding decreases, they developed health insurance cooperatives. Because of their purchasing power, they were able to make a profit on this line of service at the same time that they were able to offer districts better rates than they could negotiate individually. This profit is then invested into funding educational services for districts in the region. ESAs are in a good position to run these types of cooperatives that provide districts with cost savings, promote efficiency throughout the region, and enable the ESA to invest in the development of educational services that will meet the needs of districts. ESAs throughout the country are running cooperatives for a range of services that include health insurance, food services, online application processes for district staff, legal services, sports referees, etc. The advantage of this type of entrepreneurial activity is that ESAs can be more responsive to district needs; however, the disadvantage is that there might be less equity statewide for districts that cannot afford to purchase any services. Hybrid models are emerging and this might be an avenue that Illinois would like to explore. Dr. Fielder asked the Task Force to consider if they want to play in the open market or if they would prefer to build a system that is focused on equity and uniformity of

services. Dan Montgomery, representing IFT, cautioned that ESAs in Illinois should keep education as their primary focus and business support secondary.

Dr. Fielder noted that Iowa is more homogenous in nature than Illinois. The Iowa model might not transfer easily, but there are some lessons that Illinois can learn from Iowa and some principles that could inform the coordination of ESAs in Illinois. He encouraged the Task Force members to consider what criteria would be critical if they redesigned the system from scratch and to use those criteria as they begin to discuss how to best coordinate services across the state. He also urged them to get wide consensus on these criteria before making a decision about recommendations to the legislature and the Governor.

Dr. Fielder then opened the floor to questions. Don Smoot noted that local control was an important tradition in Illinois and that ESA superintendents are elected by local voters. He asked how local interests are represented in Iowa. Michael Johnson agreed that a change to accountability in Illinois from elected officials to customer satisfaction surveys concerned him. Dr. Fielder responded that he meets regularly with the district superintendents in his region. He noted that there might be different levels of accountability, but it would be just as logical for his Board to dismiss him if the superintendents in his region were not satisfied as for the voters to not return a superintendent to his or her office. In fact, the districts in his region see the AEA as providing valuable support and services that allow them to operate with the limited resources that they have available. He pointed out that his job is to provide districts with resources, services and research-based innovations that are on the cutting edge, like instructional coaches and professional development to implement the formative assessment process. Rebecca Woodhull, Director of the Illinois Office of Educational Services, asked about the role of the Iowa Department of Education. Dr. Fielder responded that the State Board sets the strategic direction for the state and approves the budget for the AEAs. Then the AEAs work with the state education agency and districts to implement the programs and policies that have been defined by the Board.

The Task Force members then began to consider possible directions for their recommendations. Darlene Ruscitti commented that the Task Force should begin to define what services every district in Illinois deserved to receive and how to measure the quality of those services. Mike Kelly encouraged the Task Force to consider giving funds directly to districts so that ESAs can develop a menu of service options that are based on district needs rather than on what the ROEs would like to provide. He also urged the state to consider a system in which struggling districts can receive support, but incentives can also be provided for districts that meet targets for student achievement so that districts do not receive additional funding only when they fail to meet AYP.

Gina Burkhardt concluded the meeting by observing that the conversation had far exceeded her expectations. She pointed out that next meeting would take place on May 17, 2010 from 10 a.m.

– 3 p.m. at the Parke Hotel in Bloomington. Chris Koch stated that the purpose of the next meeting would be to come to a consensus on criteria that the Task Force should consider as they develop recommendations to streamline ESAs in Illinois. Kay Poyner-Brown remarked that the Task Force has to recognize where Illinois currently is, where silos exist, and then begin from that starting point. She also asked for a deeper examination of how federal and state policies (e.g. with turnaround schools) might play into the Task Force’s recommendations. Mary Jane Morris asked for clarification about whether the Task Force’s recommendations would include Chicago. Dr. Koch agreed that if the Task Force is to examine how to provide services equitably throughout the state, it makes sense to include Chicago. Gina Burkhardt remarked that ISBE would put appropriate parameters around the work of the Task Force at the next meeting. She adjourned the meeting at 2:58 p.m.

Illinois State Board of Education
Streamlining Illinois' Educational Delivery Systems Task Force

Monday, May 17, 2010

Minutes

At 10:04 a.m. the second meeting of the Streamlining Illinois' Educational Delivery Systems Task Force was called to order by Gina Burkhardt, the CEO of Learning Point Associates, who is facilitating the Task Force. Ms. Burkhardt welcomed the group, reviewed the agenda for the day, and noted that Dr. Ron Fielder, of the Grant Wood AEA in Iowa, is returning to serve as a critical friend and external expert on educational service agencies during the Task Force's working session. She then facilitated the introductions of the Task Force members. Sixteen members were present or represented by a designee and five members were absent. One guest was in attendance.

Dr. Christopher Koch, the Illinois State Superintendent, observed that the overarching purpose of the Task Force is to better serve districts and students in Illinois. During their work today, he asked the Task Force members to continually reflect on the underlying goal of the Task Force to consider how to develop efficient regional systems of supports for students, schools, and districts that are equitable across the state. He noted that there is some interest among Task Force members in the role of ISBE and the overlap between the role of ISBE and the ROEs. In the interest of using time efficiently, he invited the ROE representatives to a separate meeting to examine this issue and report back to the larger group in July during the final meeting of the Task Force.

Ms. Burkhardt noted that a slightly revised matrix was sent to the Task Force in advance of this meeting. She asked the members to send any revisions they recommend to Peggie Garcia who will capture this information and update the matrix for next meeting. Michael Johnson, of the Illinois Association of School Boards, observed that in the funding category on the matrix, local dollars were not included. However, most of the funding that educational service agencies receive is local and not from federal or state dollars.

Ms. Burkhardt observed that funding would be an important category to consider during the Task Force's first work session. She asked the Task Force to break into three groups to explore the following three issues: context, customers, and services. She directed the Task Force members to consider the following questions:

- What is the environment within which you are working now (federal, state and local)?

- How will that environment change over the next three to five years? For example, how might the environment change as a result of the availability of funding through 1003(g) school improvement grants and the kinds of supports that those schools will need?
- Who are your customers and what types of services will meet their needs?
- Rather than focusing on past experience, what needs to happen to best support the needs of students and districts in Illinois in the future?

Dr. Fielder asked the members to consider in their small group discussions about context, what are the opportunities and threats? As you look at the next five to eight years, what are the services that ESAs in Illinois need to provide for students and districts? Regardless of who the provider is, what are the services that school districts and communities need?

After the Task Force members met in small groups, Ms. Burkhardt and Dr. Fielder presented the patterns that they captured, identified common themes, and asked the Task Force members to react to the summary and provide their feedback.

Within the context piece there were three major categories of responses – funding, policies, and other. In terms of funding, the task force expressed uncertainty about what funds are available and from what sources, particularly as ISBE continues to face historic funding challenges. There is also a stronger emphasis on competition for limited dollars and some thinking about using Race to the Top funding and other ARRA dollars to support educational service agencies.

In terms of policies, there was a great deal of discussion about the changing policy environment that includes an ever increasing focus on accountability, student achievement, college and career readiness and on all aspects of educator quality (e.g. mentoring, induction, leadership, certification, evaluation, etc.). The members are also interested in what ESEA reauthorization will look like on the federal level and how will it be implemented at the state and district levels. In addition, the members are unsure about how the new common core standards and assessments will be implemented and what their role will be in rolling out the new standards. The policy context related to special education is also changing and there is a greater emphasis on RTI.

Within the “other” category, Task Force members mentioned several topics including: systems accountability, the tradition of local control in Illinois, technology, district consolidation, changes on the horizon for ISBE and the statewide system of support, efficiency of services, support for public and private schooling, and a frustration with the slow pace of research that does not keep up with the needs of schools and districts. The field needs more information, more quickly, about what works to improve student achievement.

In their discussion of customers, the small groups generated five categories:

- *district and school stakeholders* (e.g. superintendents, teachers, administrators)
- *policymakers* (e.g. state legislators and leaders at ISBE)
- *stakeholders from the community* (e.g. voters, advocates, non-voters, media)

- *parents and students* (e.g. customers for services related to adult education and programs for truants and dropouts)
- *other* (e.g. representatives from organizations that serve the homeless, mentally ill, incarcerated youth, senior citizens, or provide emergency services or health services).

Ms. Burkhardt asked the Task Force members which of these stakeholder groups are their primary customers and how they distinguish primary from secondary? She further asked them to consider how resources are targeted now and how might they be better targeted in the future.

For the final section of the morning work session, the Task Force members generated four categories of services that they provide:

- *district and school-based services* (e.g. private placements, educational programs, summer and extended learning, special education, ELL, transition services, pre-school, early intervention, kindergarten readiness, professional development, school improvement, supplemental services, technology, industry certification)
- *compliance* (e.g. school records, 504/ADA, certification renewal, compliance with the Freedom of Information Act, accreditation, 403(b) plans)
- *adult education and GED programs*
- *other support services* (e.g. substitute teachers, workforce development, custodians, food services, transportation, school based health services, school construction, and safe schools).

The Task Force members also outlined issues that will affect their future work including: data collection, communication, curriculum alignment, new evaluation system for teachers, legal obligations, and levels of delivery. Ms. Burkhardt asked the Task Force to consider which of these services are most important? How do they tie to the context and the customers? Which services provide the best return on investment and have the greatest impact? When the Task Force members begin to design their ideal system, they should determine who should best deliver all of these services and how to deliver them as efficiently as possible. Dr. Fielder agreed that the Task Force should be thoughtful about identifying their core services and asked them to further consider which services should be or are subsidized by state/federal dollars and which should be more entrepreneurial.

The Task Force then provided feedback to the facilitators about the categories of context, customers and services. Darlene Ruscitti, of Area 1, remarked that it is essential to examine the context piece as connected to the customers to determine who is driving much of what is going on. She commented that the services that ROEs provide are often delivered in partnership with other organizations and facilitating these relationships is an important role of the ROEs. Jodi Scott, of Area 3, commented that the first consideration of what services to provide is often what is legally mandated. Beyond that, it should be services that impact teaching and learning. Rebecca Woodhull agreed with that assessment, remarking that the Task Force should begin with the end goal in mind, which is student improvement, and then all of the ESA's services and resources should be aligned with that end goal. Dr. Ruscitti supported that goal and urged the

Task Force members to examine the context of students that are now in the system (e.g. technology-driven, post-9/11) and to think about how ESAs in the state can help to educate the next great generation of students. What services can the ESAs provide to ensure that these students will be successful? Ms. Burkhardt asked the Task Force if they are directly or indirectly impacting teaching and learning through their core services. Gineen O’Neil, Susanne Carrescia’s designee to represent the Illinois Association of Administrators of Special Education, clarified that some ESAs, particularly EFEs and special education cooperatives, do provide direct services to students.

Ms. Burkhardt thanked the Task Force members for the information they generated during the morning session and commented that this foundation will help the group to create the ideal framework for ESAs in the state during the afternoon session. Before moving on to the development of an ideal system, she asked the Task Force to develop criteria against which they will benchmark the ideal systems that they create. Dr. Fielder then introduced the discussion of criteria with two practical examples: purchasing a television and investigating living options for aging parents. He encouraged the Task Force to consider criteria that currently exist in legislation or other documents that describe mandated service as well as criteria related to collaboration between educational service agencies, increasing the efficiency and effectiveness of services, improving the alignment of services, equity, on-time delivery, affordability, fairness, meeting both urban and rural needs, 21st century delivery systems, quality of service, and political feasibility. Dr. Fielder directed the Task Force to brainstorm a number of criteria and then come to consensus on the five primary criteria on which they would like to judge their ideal systems.

In their small groups, the Task Force identified five general themes for their criteria:

- *coordination and alignment* (e.g. avoid duplication, create clear communication channels, develop a central point of contact for districts, work in partnership with ISBE)
- *funding* (e.g. improving the efficiency and effectiveness of services, leveraging other sources of funding, ensuring services are both cost-effective and research-based with a proven record of success)
- *needs and mandates* (providing services that meet the needs of local districts and support compliance)
- *access and consistency* (e.g. equal access to core services across the state, consistent quality access across state, equity vs. adequacy)
- *accountability* (e.g. analyzing outcomes, ensuring quality across the state, ESAs holding themselves accountable).

After lunch, Ms. Burkhardt remarked that the outcomes of the afternoon activity will be the driving force behind the recommendations that the Task Force makes to the Governor and the state legislature. She asked the members to propose what the statewide systems of ESAs should look like in the future, based on the context, customers and services that they discussed in the morning. She requested that they base their ideal design in reality, but work to design the system

that will best serve the state of Illinois moving forward. In designing their systems, she urged the Task Force members to keep in mind both challenges related to context and funding and the system of criteria that they proposed in the morning.

After discussing their ideal designs, the small groups then shared the highlights from their conversation. Dr. Woodhull's group proposed that ISBE should hold regional units accountable (through a third party), provide funding for core services, set minimums for delivery of core services, develop a communication system utilizing technology to facilitate better communication between ROEs that includes an ISBE point person for ROEs, and reduce the number of competitive grants in favor of providing more formula grants. Michael Johnson commented that the state should only set standards for services that they are willing to fund. In response to a question about whether these proposed regional units would be based on geography or responsibility, Dr. Woodhull indicated that the units should be based on geography and student population.

The group also proposed that ROEs should consolidate whenever possible and formalize locally designed collaborative systems through intergovernmental agreements in order to share services and reduce duplication. For example, a special education cooperative might coordinate services with the three districts with which they work. Representative Roger Eddy noted that he supported the vision for local participation in inter-governmental agreements because this model allows for local decision making. Because of a lack of funding for mandates, much of the funding that supports ESAs is local. He argued that his school board would say, "this is our money, are we still going to receive services?" He further urged the Task Force members to think about one of the missions of the Task Force being to eliminate duplication and to consider how to eliminate services that are obsolete or duplicated. As just one example, both ROEs and ISBE deal with teacher recertification. He recommended the implementation of an appeals process to replace the current system in which multiple people handle the same recertification request.

In response to a question about which services the group considered to be core, Dr. Woodhull responded that these services were those that were legally mandated including professional development, school improvement planning, safety, and alternative programs. Rich Myers, of Area 2, suggested that a good core service might be for ROEs to help districts connect school improvement plans to recertification plans. Kay Poyner-Brown, of Intermediate Service Center 2, agreed that school improvement plans should be driving the structure of services provided by ESAs. Ms. Burkhardt and Dr. Andrea Brown urged caution with this approach as researchers often find that school improvement plans are pieces of paper that are not connected to implementation of improvement efforts, the delivery of services, or outcome-based accountability systems.

In presenting his group's proposal, Larry Fillingim, of Area 6, encouraged the Task Force to consider reorganizing current boundaries to align services provided by ROEs, EFEs, LTCs, and

special education cooperatives. He also recommended that ESAs in Illinois explore the cooperative purchasing structure that has been successful in Iowa. In order to provide services in a cost-effective manner, ESAs will have to consolidate staff, reduce the number of jobs and the size of the payroll, and improve technology and reporting capabilities. As with the first group, they agreed that their core services should be those that are legally mandated. Finally, they believe that ISBE should hold ESAs accountable.

The discussion digressed for a short conversation about the role of EFEs in the future. Marc Kiehna, of Area 5, noted that districts in his region will now be entering their own codes into the Illinois Student Information System. However, the EFE used to take responsibility for that task, but now their role is being downsized through technology. He commented that more part-timers are taking positions as directors of EFEs because of the reduction of duties for directors. He asked the group about the future best role for EFEs. Don Smoot, representing the Illinois Association of Career and Technical Education, responded that the role of the EFE should return to the role that was originally intended, to assist schools and districts with curriculum development and to supervise alignment of the curriculum with standards. Over time, the EFEs have become so administrative in nature and so focused on grant administration that they no longer serve their original purpose.

Dr. Ruscitti presented the final proposal for her group. She argued that they are looking at a new framework that would call for radical efficiencies. In terms of criteria, her group discussed different (to serve the next generation), better (higher standards), and cheaper (what can ESAs do more cost-effectively). She remarked that ESAs statewide need to embrace a systems approach, develop a streamlined delivery system that is focused on best practices, and build local and regional capacity to ensure sustainability of the system statewide. In their group's vision, ISBE would be at the core and supported by the surrounding ROEs. ISBE would define the core services and each region would provide those core services within their regions. In addition to these basic services, ROEs might collaborate to deliver non-essential services, like gifted education, or ROEs might develop specialty services that they could market statewide. Her group envisions a system in which all of the ESAs work together to support schools and to help every child be successful. Finally, the group discussed a system that would allow for both accountability and flexibility and for both core values as well as core services. For example, ISBE might develop a rating system for regional superintendents to be rated in the same way that judges and lawyers are currently rated. The group did not have time to explore these questions, but wanted to raise them for the Task Force: where does Chicago fit in this statewide system of ESAs and what pieces of the system are driven by the federal government?

Mike Kelly, Superintendent of Carlinville Community Unit School District 1, added to his group's proposal that the governor and legislature, advised by ISBE, should create state policy informed by research and the ROEs should implement this policy statewide through their leadership and coordination. Regional superintendents also need to be accountable, either through political accountability to boards that are elected (rather than superintendents) or through

third party, external evaluations conducted by groups like North Central. Regional superintendents should want to prove that they are delivering for their constituents and have a strong report card. Finally, he observed that there is too much inefficiency in the system now. Each region needs to have experts on special education and technology, but this expertise does not have to reside in a regional superintendent. As a result, boundaries need to be changed to facilitate a more efficient and effective system.

Mark Kiehna was intrigued by the research and development focus in this proposal and commented that it was much like the Center for School Improvement and Research Collaborative that is part of the updated version of Illinois' Race to the Top application. Representative Eddy remarked that research is important, but implementation is more important. Consequently, universities should not be involved in school reform unless they are on the ground and understand the realities of schools and districts. Ms. Burkhardt added that there is a place for academics who are conducting rigorous research, but that research is not typically tied to a system of application and accountability. Thus, ISBE or organizations working in partnership with ISBE should help navigate the application of academic research to practice in schools and districts. Dr. Woodhull spoke on behalf of universities and urged the Task Force to tap into the national research expertise and research-base about what works when making decisions about education.

Dan Montgomery, representing IFT, observed that the Task Force's discussion has been fairly heavy on accountability and fairly light on support. He heard a great deal during the last meeting about how starved ISBE and the ROEs are for funding, but with the absence of funding, ISBE and the ROEs will have a limited ability to support change in schools and districts throughout the state.

Ms. Burkhardt thanked the group for their efforts. The facilitators and ISBE will take what the Task Force members have provided and craft one or more scenarios to explore at the next meeting. Dr. Koch observed that he will host a separate meeting with the ROEs to discuss ISBE's role. He observed that ISBE is the ROE for Chicago, so this will have to be incorporated into the final recommendations. He commented that the funding piece will be an important challenge to address because ISBE cannot delegate services if there is no funding to support it. The state's Race to the Top proposal outlines a more efficient delivery of some services, but the state needs to do more to link services to needs, to build capacity, and to streamline the delivery of services across the state.

The meeting was adjourned by Ms. Burkhardt at 2:49 p.m.

Illinois State Board of Education
Streamlining Illinois' Educational Delivery Systems Task Force

Wednesday, July 21, 2010

Minutes

At 10:08 a.m. the third meeting of the Streamlining Illinois' Educational Delivery Systems Task Force was called to order by Gina Burkhardt, the CEO of Learning Point Associates, who is facilitating the Task Force. Ms. Burkhardt welcomed the group, reviewed the agenda for the day, and noted that Craig Burford, Executive Director of the Ohio Educational Service Center Association (OESCA), would share lessons learned from Ohio's recent streamlining process and serve as a critical friend and external expert on educational service agencies during the meeting. She then facilitated the introductions of the Task Force members.

Dr. Christopher Koch, the Illinois State Superintendent, reviewed the work of the Task Force to date. He noted that the Task Force has begun to examine structures for educational services agencies in other states and has generally agreed that Illinois currently has a disjointed system that is not as efficient as it could be in serving students in the state. Dr. Koch also met with some regional superintendents separately before this larger meeting to discuss a proposal that they put forward to streamline the delivery of services that are currently provided by ISBE. ISBE will be examining that proposal more closely soon. Dr. Koch remarked that the state will need to complete a careful study of the resources they have and determine the most efficient way to distribute those resources. In addition, it will also be important to move in the direction of higher standards for the work that regional offices of education do to ensure that they are doing the job well.

Dr. Koch then introduced Craig Burford, of the Ohio Educational Service Center Association, who provided an overview of the structure of the system of educational service agencies in Ohio and described their attempts to streamline their system. There are 612 school districts in Ohio that serve 1.8 million students. There are 56 Educational Service Centers (ESCs), which are closely aligned with the Ohio Department of Education (ODE). Although the previous state superintendent wanted the state agency to deliver services directly to the field, the current superintendent's vision is to build relationships with ESCs to deliver services to districts through state support teams. The model is now one in which ODE designs the state initiatives and ESCs implement them. ESCs have typically focused on districts as their primary customers, but now see themselves as also adding value to the state and their larger reform efforts. Through regional councils, ODE works collaboratively with the ESCs to identify needs, set priorities, and coordinate the implementation of services for districts to ensure that they are aligned with state strategic priorities and maximize resources. In order to coordinate this system, it is essential to

assign a senior person at the state education agency who will work collaboratively with the ESCs across the state to align resources with both the state's policy priorities and the needs of districts. Under this system, ESCs are viewed as an asset to ODE, but they must also demonstrate, in return, that they are providing the highest quality services possible in exchange for the state's investment in their work.

In Ohio, ESCs provides services for schools and districts throughout the state, except those in the eight largest urban districts. ESCs provide a range of services, the most common of which are professional development, dropout programs, and services for students with disabilities. The majority of funding that ESCs receive is local funding, but they also receive funding from state, federal, and other sources. Although ESCs no longer have to submit a comprehensive budget to the state education agency because ODE does not have the capacity to review these budgets, the state legislature does have to commit to funding the ESCs. ESCs receive funding through a formula based on district enrollment numbers and are not paid until the state verifies those numbers.

In response to a question from Dr. Koch, Mr. Burford replied that state funding has been insufficient in the past when the state has been in a deficit situation, which can result in a difficult mid-year adjustment that involves a significant loss of revenue for the ESC. Mr. Burford then replied to a question from Darlene Ruscitti, of Area 1, about caps for fees that are charged for services, by stating that ESCs charge whatever the market will bear. In fact, for every \$1 of services funded by the state, ESCs in Ohio provide approximately \$24 of services for a fee. Prices for fees are reasonable, in part, because most of the staff who work for ESCs receive salaries that are comparable or lower than the average district salary in the region because most of the employees are not represented by a collective bargaining unit. Although the salaries are often lower, educators often prefer to work for an ESC because they can work with multiple districts, have more flexibility in their schedules, and prefer the work environment. In response to a question from Representative Roger Eddy question about the percentage of services that are mandated, Mr. Burford responded that a systematic analysis has not been conducted, but in many districts state funding does not cover mandated services. ESCs also provide entrepreneurial services, including cooperative purchasing programs, such as an insurance cooperative that supports not only school district employees, but other government employees as well.

The traditional county board is now also the ESC board, which is elected by the general public, but not in a partisan election. Some districts within the ESC might not be represented on the board, but that will be changing soon to ensure that each district is represented. The requirements for board members are the same as for district superintendents. ESCs are not taxing authorities, nor can they borrow money through bonds.

At one time there were 88 ESCs, but they have consolidated over time, with some mergers being voluntary and some mandated by the state. In Ohio, ESCs traditionally serve school districts within their boundaries. However, districts in Ohio can transfer to another ESC if they are not

satisfied with the service provided by the ESC in its region. ESCs are required to accept all of the districts that select it. Rather than forcing mergers between ESCs, this choice process enables voluntary consolidation as those ESCs that are not competitive are forced out of business. This streamlining of services over time has reduced the duplication of services, improved efficiency, and increased the quality of services that districts receive.

ESCs in Ohio are the central points of contact to provide professional development and deliver special education services. Districts in the state can choose where state dollars are directed. For example, state funding for special education services may flow directly to the district or, alternatively, districts may choose to have the dollars flow to the ESC so the ESC will take responsibility for providing those services. When several districts utilize the services of the ESC, it allows the ESCs to leverage resources and to create economies of scale across multiple school districts.

In response to a question from Dr. Koch about special education funding, Mr. Burford responded that, in Ohio, funding for special education services is weighted by disability, as low-incidence disabilities are linked to more funding. This funding formula, which takes into account costs related to personnel and caseload ratios, was created by a parent advocacy group and then adopted by ODE. Although these dollars flow to the districts, districts typically ask ESCs to provide these services to students because of the expertise that ESCs have demonstrated over time. Districts will hire some special education personnel directly and the ESCs will hire other special educators who serve multiple districts. In response to a question from Preston Williams about cross-district collaborations, Mr. Burford responded that ESCs employ economies of scale and may have students from multiple districts attend regional centers for particular services. However, although the ESC provides services, ultimately the district is responsible for ensuring that all students meet proficiency. Thus, students with special needs, regardless of where they receive services, are counted as a student in their district of residence.

In addition to weights for special education funding, per-pupil funding for general education is also weighted in Ohio on the basis of state-defined education challenge factors for communities including: the median income of the district, the percentage of students who receive free or reduced lunch, and the educational attainment level of parents in the district. Thus, some districts will receive more funding than others for mandatory services because the state's expectation is that wealthier districts will be able to supplement state funds with local property tax dollars. On average, 51% of local funding is state funding, but this varies widely across the state.

In response to a question from Rebecca Woodhull about services related to career and technical education (CTE), Mr. Burford commented that, in Ohio, these services are not provided by ESCs, but are embedded within high schools, joint vocational districts, or CTE centers. That system in Ohio is currently under review for duplication of services and a lack of alignment. Students apply to attend schools in joint vocational districts. When students attend these schools, the joint vocational districts take responsibility for the accountability associated with student

achievement, and in return, receive per-pupil funding, plus a weight for CTE. As a result, there is some tension in Ohio between these CTE districts and other school districts because districts of residence often claim that the CTE districts are creaming high-performing students.

In terms of accountability, all ESCs have performance agreements with districts that outline their scope of work. Thus, ESCs are evaluated on how they meet these outcomes. Many ESCs also conduct program service evaluations or customer satisfaction surveys. Some ESCs use a voluntary accreditation process, designed by AdvancED. The ESCs in Ohio are currently working collectively to define what their core set of services should be and how their performance in delivering those services should be measured.

What were the lessons learned in Ohio over time? First, it is essential to have the commitment of state leadership to the system of educational service agencies, not just a statute from the legislature, to effectively streamline services. Second, state education funding policy must be aligned with the state's policy about service delivery. Third, regional service providers charged with deploying and implementing work on behalf of the state need to be part of any statewide design team. However, in exchange for this relationship with ODE, ESCs must effectively deliver services, as measured against performance standards. Fourth, it is critical to engage stakeholders. The regional system should be expanded to include all state agencies and entities that work with youth. ESCs are well-positioned to support this engagement process. Fifth, ESCs should work to improve their performance as data-driven learning organizations that will continually adapt in order to use available resources to provide the highest quality services possible. Finally, ESCs need to maintain their ability to offer local entrepreneurial services to ensure that they are serving the needs of districts that are not funded by ODE.

Dr. Koch thanked Mr. Burford and commented that he was particularly intrigued by the Ohio practice of allowing districts to choose their service provider. Districts in Illinois currently are accountable for student performance, but if educational service agencies are out of touch with the needs of districts, there should be a way to hold them accountable. Darren Reisberg, Deputy Superintendent and General Counsel of ISBE, also asked the Task Force to consider those instances in which the regional office is not serving their clients, but ISBE does not have the legislative authority to fix the problem. How might the Task Force develop accountability measures to avoid situations like this in the future? Dr. Koch also noted that in the state's Race to the Top application, he was counting on regional offices of education to help the state implement ISBE's reform agenda in much the same way that ODE works with their ESCs. Finally, he remarked that there is another task force working on special education funding and he would share the Ohio example with them as an interesting model.

After lunch Ms. Burkhardt reviewed several recommendations that ISBE drafted for the Task Force to consider and asked the Task Force members to reflect on the recommendations. Task force members worked in two groups and then returned with feedback.

For the first recommendation related to establishing a statewide coordinating council, the Task Force suggested explicitly including not just regional superintendents and ISBE, but also representatives from EFEs, special education cooperatives, and school districts. Mr. Burford remarked that the purpose of this coordinating council should be to focus on how the work of the educational service agencies in Illinois should be aligned with ISBE's policy priorities and outcomes. He further commented that in Ohio the ESC coordinating council members are trained by the state and then those regional leaders deliver training to districts. Dr. Koch remarked that the coordinating council could help ISBE determine the best way to provide services in Chicago and to coordinate services provided by LTCs. Representative Eddy agreed with Mr. Burford's recommendation to include several state agencies on the coordinating council because, for example with birth-3 programs, similar services may be provided by educational service agencies and health and human service agencies. Dr. Koch noted that the Governor's office currently has a commission examining exactly that question. Dr. Woodhull remarked that she agreed with Mr. Burford's steering vs. rowing analogy because the state board should focus on policy, funding, evaluation, and accountability while the educational service agencies should focus on implementation of the state's vision. The Task Force also recommended that one way to strengthen this recommendation would be to incorporate a system of ongoing learning and evaluation.

The second recommendation called for the coordination of services in each region, with the regional superintendent serving as the single point of contact to facilitate this coordination. The Task Force suggested explicitly mentioning services provided by EFEs and special education cooperatives and noted that a liaison at ISBE to facilitate this coordination would also be ideal. They also agreed that adding an example, such as the aligned system that Marc Kiehna has developed in ROE V, would help legislators understand the intent of the recommendation. Matt Klosterman, representing the Illinois Association of School Administrators, supported a single point of contact because parents in his region don't know how to access services because there are so many different points of contact that they get lost in the process. He remarked that a single point of contact will go a long way toward improving communication about and access to services for parents and the community.

Mr. Burford observed that each regional office does not need to be all things to all people. In Ohio, the ESC is the single point of contact, but they often subcontract with other organizations that specialize in a particular area or have developed relationships in a particular region. The regional superintendents in each region, and the statewide coordinating council, can also work collaboratively to identify ways in which educational service agencies can specialize in particular services. Darlene Ruscitti, of Area I, suggested strengthening the second recommendation to incorporate the idea of tiers of services. All regional offices would provide some services, such as training for bus drivers and certification for teachers, but then regional office could also specialize in developing entrepreneurial services in which their agencies have special expertise. These services can be marketed either within the region or statewide.

For the third recommendation, focused on funding core services, Mr. Burford reiterated the importance of aligning funding with state priorities and implementation of those priorities. The Task Force also emphasized that the definition of core services could help to relieve the state of some of their burden as regional offices could begin to deliver some of the services that are currently provided by ISBE. Kay Poyner Brown argued that core services not be “flavor of the month” services, but rather big picture services that extend over longer periods, with the understanding that appropriate funding will follow.

The fourth recommendation was related to conducting an independent review of all existing funding structures that are in place across the state and the use of all federal and state dollars to determine what funds are available, how these funding streams interact, and how these funds can be used more efficiently in the future. Kay Pangle, of Area IV, recommended that ISBE conduct this review internally. However, several Task Force members countered that ISBE could not conduct an independent review of their own organization and welcomed the objectivity an external reviewer would bring to the process. Ms. Burkhardt remarked that it would be important to have an independent organization review data from multiple sources, obtain input and feedback from the field, and then enable the state to make decisions based upon the highest quality data. Task Force members also suggested that this recommendation include a target date for completion.

The final recommendation was related to implementing an accountability system for educational service agencies in Illinois. The Task Force suggested that ISBE work collaboratively with the regional offices to develop the performance standards for this accountability system. Kay Pangle noted that the annual audit could serve as the beginning of the development of the accountability system. Michael Johnson, representing the Illinois Association of School Boards, argued that these standards should also apply to ISBE when services were provided by the state agency. Marc Kiehna, of Area V, agreed that it makes sense to shine a light on the work of the regional offices and allow them to be judged in the court of public opinion. He welcomes a public and transparent report that outlines the strengths and weaknesses of his office. Larry Fillingim, of Area VI, remarked that regional superintendents who are not doing their job harm the reputation of the entire system of regional offices. Thus, he supports recommendations “with teeth” to remove leaders who are not performing. Representative Eddy mentioned the importance of training people in the regional offices about the standards for services that will be developed and the rubrics that will be used to evaluate those services.

Representative Eddy commented that, overall, these recommendations did not tackle the original intent of the legislation to improve communication with private schools and increase the efficiency of the delivery of services provided by educational service agencies within a particular region. Ms. Burkhardt agreed that the private schools piece could be added to the communication recommendation. However, she countered that to get to the end result of a more efficient system, the independent review of funding would be an essential first step.

Gineen O'Neil, Susanne Carrescia's designee to represent the Illinois Association of Administrators of Special Education, and Don Smoot, representing the Illinois Association of Career and Technical Education, remarked that they have to report back to their constituents, who are concerned that special education cooperatives and EFEs will be dissolved. Dr. Koch responded that it would be important, during the independent review, to examine the funding streams and identify inefficiencies. He noted that even if special education is funded differently, there is still a role for the special education cooperatives to play. The structures may evolve, but the same services will still need to be provided to support students with special needs. He recommended that Dr. O'Neil report to her board that the system is changing, regardless of how the legislature acts on the Task Force's recommendations, because an increasing number of districts are withdrawing from special education cooperatives. Those cooperatives that are responsive to the needs of districts are well-positioned for the future, but the others will have to work harder to be more responsive. Preston Williams, Superintendent of Urbana School District 116, remarked that several smaller districts purchase services from his district because they are not getting the services they need from the cooperatives. Representative Eddy observed that restructuring doesn't mean that students would not receive services, but only that cooperatives might not provide all of those services in the future. Matt Klosterman agreed, noting that, of course, districts will look for the most efficient way to serve kids, especially as they receive less funding every year.

Ms. Burkhardt began to wrap the meeting up by remarking that ISBE will take what they heard today to recraft the recommendations and then circulate those revised recommendations to the group before submitting them to the legislature and the Governor. Marc Kiehna encouraged Dr. Koch to share this vision with every ISBE employee and all of the regional offices of education. He commented that much of this vision can be implemented before any legislation is passed if everyone at ISBE and the educational service agencies share the same vision and work collaboratively to pull the wagon in the same direction.

The meeting was adjourned by Ms. Burkhardt.