

Inside this Issue:

- ✧ **Myths in school finance**
- ✧ **Accountability and equity**
- ✧ **Early childhood educators institute**
- ✧ **IDRA Classnotes podcast series**



Equalizing Funding of Texas School Facilities A Long-Standing, Long-Neglected Need

by Albert Cortez, Ph.D.

In his 1997 book, *Texas School Finance Reform: An IDRA Perspective*, Dr. José A. Cárdenas, IDRA's founder and director emeritus, summarized state legislation related to school funding between 1973 and 1984. 1973 was the year in which Texans for Educational Excellence began and later became IDRA. 1984 was the year in which the state of Texas adopted HB 72, then the most sweeping change in Texas school finance ever adopted.

In his summary, Dr. Cárdenas describes some of the salient characteristics of the 22-year legislative era that collectively had created increased pressure for school finance reform. Describing developments surrounding the legislative session in 1973, he offers a litany of reasons it seemed unlikely that Texas would continue "to hold school districts responsible for providing school facilities entirely at local expense" (1994).

Explanations for why the state would be expected to move forward on this issue included the following: there was growing recognition and

acceptance that education was a state responsibility; there was growing consensus among legal scholars that a system where the state was a non-participant in school facilities funding would likely not stand up to a new legal challenge; the local property tax was too narrow a tax base to continue supporting the cost of school construction – especially in low property wealth school districts; the cost of constructing school facilities was increasing at a faster rate than the taxing ability of many school systems; the bonded debt of Texas school districts was growing at a rapid rate; and many students were attending Texas public schools that had inadequate facilities.

Like many of his contemporaries, Dr. Cárdenas and other school finance experts recognized that continuing reliance on local property taxes that were applied to greatly unequal property tax bases among Texas districts (wealth ranging from over \$1 million per student in the state's wealthiest school districts to less than \$6,000 per student in the poorest districts) was one of the weakest features of the state public school funding method.

There were hopes that the 1973

Equalizing Funding – continued on Page 2

legislature would provide a solution since it was shaken by the narrow federal ruling regarding the inequities in the Texas school system (*Rodríguez vs. San Antonio Independent School District*). But the funding provided was far less than was needed to begin to address facilities needs.

And the issue was subsequently ignored for the next 20 years.

Eventually, a district court ruling challenged the inequities of the Texas funding system. The court agreed that the inequities created by the state's failure to provide equalized return for facilities-related tax effort deemed the system unconstitutional. Later Texas Supreme Court decrees, however, set aside the lower court ruling, thereby allowing for the existing inequities to continue.

In a 1994 Texas Supreme Court ruling, the court did note: "We acknowledge, and the state concedes that, if the cost of providing for a general diffusion of knowledge rises to the point that a district cannot meet its operations and facilities needs

To help fund state support for local district facilities, to provide greater equity in facilities resources and to contain some state costs, some level of recapture should be instituted for facility-related tax efforts.

[emphasis added] within the equalized program, the state will at that time have abdicated its constitutional duty to provide for an efficient system... From the evidence, it appears that this point is near" (1995).

The constitutionality of the Texas school finance system was again challenged in a 2003 suit filed by a combination of wealthy and poor school districts that alleged the state's failure to provide sufficient funding – including inadequate and inequitable funding for facilities – in tandem with limits on local school property taxes prevented districts from meeting their obligation of providing for a general diffusion of knowledge as required by state law (*West Orange Cove vs. Neeley*, 2005). The Texas Supreme Court ruled that the existing system, though

meeting requirements regarding providing an efficient education for all Texas students, failed to provide local districts sufficient "meaningful discretion" to supplement the state-funded program. The Supreme Court in essence ducked the questions regarding the constitutionality of the inequities in the school facilities portion of the state funding system by ruling that the plaintiff districts had not provided sufficient evidence to enable it to rule on that aspect of the system.

With the pressure to provide some level of equalized funding diminished by the court's ruling, the 2005 and subsequent special Texas legislative sessions paid little attention to facility funding needs.

Recognizing the need for updated
Equalizing Funding – continued on Page 9

In This Issue...

3 Accountability and Equity in our Schools

5 Myths in School Finance

6 Tools for Action

10 In Memoriam

11 Early Childhood Educators Institute

15 Highlights of Recent IDRA Activities

The Intercultural Development Research Association (IDRA) is a non-profit organization with a 501(c)(3) tax exempt status. The purpose of the organization is to disseminate information concerning equality of educational opportunity.

The *IDRA Newsletter* (ISSN 1069-5672, © 2007) serves as a vehicle for communication with educators, school board members, decision-makers, parents, and the general public concerning the educational needs of all children in Texas and across the United States.

Permission to reproduce material contained herein is granted provided the article or item is reprinted in its entirety and proper credit is given to IDRA and the author. Please send a copy of the material in its reprinted form to the *IDRA Newsletter* production offices. Editorial submissions, news releases, subscription requests, and change-of-address data should be submitted in writing to the *IDRA Newsletter* production editor. The *IDRA Newsletter* staff welcomes your comments on editorial material.

Portions of the contents of this newsletter were developed under a grant from the U.S. Department of Education. However, those contents do not necessarily represent the policy of the Department of Education, and endorsement by the federal government should not be assumed.

Publication offices:

5835 Callaghan Road, Suite 350
San Antonio, Texas 78228-1190
210/444-1710; Fax 210/444-1714
www.idra.org contact@idra.org

María Robledo Montecel, Ph.D.
IDRA Executive Director
Newsletter Executive Editor

Christie L. Goodman, APR
IDRA Communications Manager
Newsletter Production Editor

Sarah H. Aleman
IDRA Data Entry Clerk
Newsletter Typesetter

Accountability and Equity in our Schools

by Aurelio M. Montemayor, M.Ed.

Accountability means answerability, responsibility and liability. *Equity* means being just and fair and not having a bias or showing favoritism.

The federal *No Child Left Behind Act* gives significant leverage to parents of children in schools that receive federal funds. Yet there is no stronger lever for parents than each state's constitutional responsibility to provide an excellent education to all children. For example, the Texas state constitution defines tremendous rights for parents in the education of their children.

NCLB Accountability

Funding education is fundamentally a state responsibility. This is why schools may supplement but not supplant the state responsibilities with federal resources. As outlined in the January 2007 issue of the *IDRA Newsletter*, NCLB includes six key elements, or levers, for parents. The strength of these levers are premised on states providing the fundamental equitable funding needed as a foundation:

- *A School Parent Involvement Policy*. Such a policy requires certain resources to be carried out.

Parents must remind decision-makers that all children in the state merit an excellent education, and it should not matter where the child lives and goes to school for him or her to get a good education.

- *A School-Parent Compact*. Without the appropriate resources, these compact agreements cannot have meaningful impact.
- *Parent Involvement Districtwide Policy*. Effective parent involvement

requires investment to focus on engagement of families that impacts student success rather than on “punch and cookie” events to no effect.

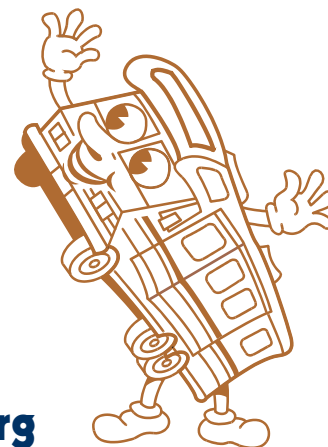
- *School Report Cards* are only useful if the school has the appropriate resources to support the academic achievement of all students.
- *Public School Choice and Supplemental Educational Services*. Underfunding of schools is a major cause of the conditions that lead some parents to seek these alternatives.
- *State Review of Parent Involvement Compliance*. Preceding states' responsibility to monitor the quality

Accountability and Equity – continued on Page 4

Take the IDRA Newsletter Field Trip!

On IDRA's Web Site

- ✧ Read related *IDRA Newsletter* articles from 1996 to the present
- ✧ Access statistics, definitions, etc.
- ✧ Learn about Internet resources
- ✧ Find extensive useful Internet links
- ✧ Use IDRA's topical index to find what you are looking for



www.idra.org

of the education children are receiving is the states' responsibility to fund all schools equitably.

The strong levers that NCLB gives to parents are seriously weakened if there is a condition of inequity in funding. Fair funding is a necessary foundation for a system that truly leaves no child behind.

State Responsibility

Just over a decade ago, the Texas legislature finally took steps to reduce inequity in funding between property wealthy and property poor school districts. This was the result of public information, the creation of a public will for fair funding of all schools, litigation and legislation. Unfortunately, several months ago, the legislature returned Texas to the time of high contrast between resource-rich and resource-poor schools (see box on Page 9).

School districts teaching 91 percent of Texas students are having to raise taxes, cut programs for children and lay off teachers. Children with unique needs being served by special education, bilingual education, and gifted and talented programs are being poorly served.

Money is a central answer, though obviously not the only one. Visualize color-coded stick pins on a state map. The red pins represent resource-poor schools and green pins represent resource-rich schools. The map would be a sea of red with a few tiny islands of green. That's inequity.

Keep Your Eye on the Prize (Price)

For the power of the NCLB federal law to result in academic success for all students and for there to be a guaranteed graduation (which is the spirit of NCLB), there has to be equitable funding of schools. It is illogical to hold neighborhood public schools responsible for providing an

Speaking About Fair Funding for Education of All Students

"The core of our dream must value young people – all young people. We cannot afford to value some schools and not others, some neighborhoods and not others, some ethnic or racial group and not others, some families and not others."

– Dr. María "Cuca" Robledo Montecel,
IDRA Executive Director,
February 15, 2002



"We must ensure that any new funding plan provides equitable access to excellent education (to high quality curricula, good teaching, support services, and facilities) for all students in all school districts."

– Dr. María "Cuca" Robledo Montecel,
IDRA Executive Director,
March 10, 2004

"I believe it is time to dream together – to dream about education not for a lucky few but for all. And it is time to make the dream of education for all become fact."

– Dr. María "Cuca" Robledo Montecel,
IDRA Executive Director,
February 15, 2002

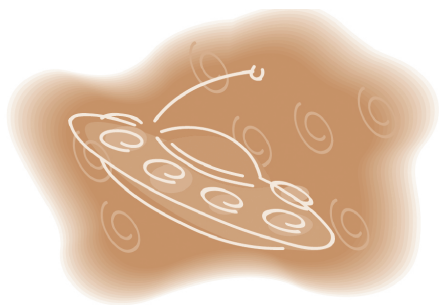
excellent education to all children while having them operate with the huge handicap of underfunding. Annual yearly progress necessitates appropriate and fair funding.

This allows for competitive salaries for teachers and staff. It provides the fundamental source for well-stocked libraries and good physical plants. It keeps and increases resources in neighborhood schools, which are central to healthy neighborhoods and communities. Equitable funding enables neighborhood schools to serve all children with appropriate and excellent instruction.

Parents must remind decision-makers that all children in the state merit

an excellent education, and it should not matter where the child lives and goes to school for him or her to get a good education. It is unconstitutional, unethical and counter-productive to allow serious inequity in the basic resources made available to children. As long as there are preferred public school districts, all districts will be affected negatively. The economic future of the community, the state and the nation suffers as a result.

Aurelio M. Montemayor, M.Ed, is an IDRA senior education associate and director of the Texas IDRA Parent Information and Resource Center. Comments and questions may be directed to him via e-mail at comment@idra.org.



Myths in School Finance

by José A. Cárdenas, Ed.D.

Editor's Note: The following is an excerpt from Texas School Finance Reform: An IDRA Perspective (San Antonio, Texas: IDRA, 1997; pp. 6-15) by Dr. José A. Cárdenas, IDRA founder and director emeritus.

Considering the lack of data and public information about school finance, it is not surprising that during the years that IDRA has been active as an advocate for the creation of an equitable program in Texas, our advocacy has been continuously hampered by erroneous public perceptions of the nature of the problem and the feasibility and desirability of solutions. Even today, the general public has a poor understanding of the current school finance system and its past and present flaws.

The following is a random listing of some of the myths of school finance that have surfaced repeatedly and are still widely perceived as reality by the general population.

Myth #1 Only the Privileged Care for Their Children

This misconception is not exclusive to school finance or education. Our entire society and its dysfunctional responses to societal prob-

lems is based on the myth that the rich and privileged have an interest and concern for their well-being and their children's well-being that is not shared by the general population. The rich are able to do a great deal for their children because they have the time, the money and the power to do so. The disadvantaged seldom have the resources or the skills for the manipulation of social institutions.

It is erroneous to conclude that educational benefits accrue to the children of one economic level and not to the children of other economic levels because of concern and care. In many cases, social institutions, including the schools, tend to create more problems for the child and his or her family than they attempt to solve.

I also have found a strong sentiment that the children of the rich are entitled to a better public educational opportunity. I find this attitude, which is so contrary to our democratic principles, very pervasive at all social and economic levels, and it may be one of the fundamental reasons for a general lack of support for school finance reform over the years.

Myth #2 The Privileged Have Better Schools

Because They Pay Higher Taxes

For decades we have heard a justification for the disparities in available educational resources based on the argument that schools for children of privileged families are better because their parents are willing to make the necessary financial sacrifices to provide better schooling through higher taxes. This myth persists in spite of years of school finance data that show that residents of low wealth districts make a much higher tax effort than residents of high wealth districts. The analysis of these data indicated early on the tax rates in the poorest school districts were commonly 50 times higher than the tax rates in the wealthiest districts.

Even after several years of court-ordered equalization, there remains a negative correlation between wealth and tax rates. The higher the wealth, the lower the tax rate; the lower the wealth, the higher the tax rate.

Myth #3 Expenditures in High Wealth Districts Have Little Effect on Low Wealth Districts

Myths School Finance – continued on Page 6

I believed then, and I believe now, that the effect of wealth disparities between school districts did not receive the attention it deserved during the entire reform period from the defendants, the courts, educators, the media, the general public or even the plaintiffs.

Edgewood is one of 12 independent school districts in metropolitan San Antonio. It does not exist in isolation, but rather in competition with the other 11 school districts. All 12 districts recruit teachers, special service personnel, supervisors, administrators and other staff from a common labor pool. Since Edgewood was the poorest of the 12 school districts, it was limited in the amount of enrichment funds that could be utilized to supplement the state minimum salary.

During my tenure as a teacher and principal in Edgewood, the state minimum salary was the salary schedule used. There was no supplement. As a result, Edgewood and other very low wealth districts became the training ground for school personnel who could then be hired in other parts of the city. If they preformed well, they were motivated to apply for a position in a nearby higher-paying district. Since few of the Edgewood professional personnel came from the district itself, moving to another district meant working closer to home, with a higher salary, better fringe benefits and superior working conditions.

Edgewood was forced to hire emergency non-certified teachers. If they completed their certification requirements, jobs were readily available elsewhere. This led to a trend of a constant outward flow of the best performing personnel.

Although the handicap in recruiting and keeping teachers was the most obvious hardship

Tools for

Fair Funding

In Texas, the public school funding system creates schools where the quality of education that a child receives is based on the wealth of the neighborhood in which he or she happens to live plus some equalization funding from the state. In May 2006, the Texas Legislature passed House Bill 1, which took the funding system back a decade. It is imperative that educators, families and communities are aware of funding inequity and how it affects everyone.

A Snapshot of What IDRA is Doing

Developing leaders – IDRA has worked with several organizations in identifying key reform issues in such areas as school funding equity and funding for dropout prevention, bilingual education, and college access and success. The groups have then been outlining potential collaborative efforts.

Conducting research – IDRA has collected numerous documents that provide different organizations' perspectives on major education issues that may be addressed in the 2007 Texas legislative session. IDRA is developing summary information that will be disseminated to education stakeholders through presentations and web-based delivery strategies.

Informing policy – IDRA has been working with several organizations across the state to lead a briefing for state policymakers on the issues surrounding the high school dropout crisis. The session was presented by: Children at Risk, Rice University – Center for Education, the Center for Public Policy Priorities, the University of Texas –Texas Center for Educational Policy Texas Appleseed and IDRA. The group released a set of nine principles for solutions, "Addressing the Dropout Crisis in Texas: Principles for Action" (<http://www.idra.org/images/stories/PrinciplesForAction.pdf>). You can also see the PowerPoint presentation used in the session covering an overview of the dropout crisis, the magnitude and impact of the problem, and rationale and principles for solutions at: <http://www.idra.org/images/stories/TexasDropoutCrisisPresentation.ppt>.

Engaging communities – The school finance section of the IDRA web site is being updated with new revenue data based on the changes made in HB1. Community members can visit the site to see how the recent policy changes are affecting their districts. You can see this and other policy information on the education policy section of IDRA's web site by going to: http://www.idra.org/Education_Policy.htm/.

Tools for Action continued on next page

Action

What You Can Do

Get informed. The Center for Public Policy Priority's web site has a great deal of information on the happenings around school finance in the capitol. You can read more about school finance and other important education topics at <http://www.cppp.org>.

The IDRA web site has a section under Education Policy where you can find out how funding is broken down by district at: http://www.idra.org/wrapper/Choose_your_District/.

The IDRA web site also has a section to help you learn more about the issue, including: Why Fair Funding (quickly find out where we've been and where we are now); Equity vs. Adequacy (why "adequate" schools set the bar too low); and Quick Background (why fair funding depends on our state, how your schools are funded; how your property taxes are calculated; and how the current system promotes equity). Go to http://www.idra.org/Education_Policy.htm/Fair_Funding_for_the_Common_Good/.

Geocities.com has created a web site that presents an overview of the funding disparities that plague U.S. schools. The site provides a general idea of the scope and nature of the problem, as well as the research that has been done: <http://www.geocities.com/schoolfunding/>.

Get involved. Local education funds are independent, non-profit organizations at the center of reform efforts to improve public education and reconnect people to the institution of public education. The Public Education Network has developed a new handbook with step-by-step information on how to establish and run a local education fund. Go to http://transaction.publiceducation.org/LEF_Handbook/.

Get results. Nationwide, people identify education as a top priority and are willing to pay more to support an educational system that reflects greater equity and yields better results. If you agree with these views and believe that all children must have access to an excellent – not minimally adequate – education, voice your concerns and mobilize others to join you. You can also get results by becoming a local resource to your school, board, community group or other parents on how various school finance policies impact children in your community, district and state.

Myths School Finance – continued from Page 6

in the competition among school districts, there were other more subtle competitions, not generally recognized, but psychologically detrimental to the students. For instance, Edgewood participated in the University Interscholastic League activities. In each of the three high schools, the football, basketball and baseball teams were each coached by a single individual. The Edgewood teams competed against teams that had as many as six coaches. It was heartbreaking for me, as well as for the students and coaches, to see the Edgewood teams consistently defeated by other teams with superior coaching, along with superior equipment and practice fields.

Neither educators nor the general public appear to have given extensive thought to the psychological implications of kids being consistent losers, not necessarily because of a lack of talent, but because the system does not provide adequate resources for the development of talent.

Myth #4 Disparities in Spending Should Be Corrected Only by Upward Leveling

The apex of this argument came about when the state courts found the state system of school finance unconstitutional, and it was no longer a question of *whether* the system should be equitable, but rather, *how* the system was to be made equitable.

The argument that equity can best be achieved by leveling upwards sounds reasonable until one considers the resources involved. In the October 1991 issue of the *IDRA Newsletter*, I presented arguments showing that leveling upwards was not a feasible solution:

"High wealth districts concede that the state has limited resources

Myths School Finance – continued on Page 12

Principles for Fair Funding

All children deserve an excellent education, and excellence is impossible without equity. Our children are precious. The future of a child should not depend on that child's heritage, family income or neighborhood. The ongoing battle over school funding is still about a state at a crossroads – one road offering the possibility of excellent and equitable education of all of our state's children, the other focused on providing only minimum quality to meet minimum standards.

The Texas Supreme Court's decision in *West Orange-Cove vs. Neeley* required that the Texas legislature gather for another special session in 2006 dedicated to the reform of the existing school funding plan. Though taxes and who pays them occupied much attention, it was the funding system that the courts targeted for reform. While some

aspects of the current funding plan did need improvement, many Texans were deeply concerned about the oft noted promise to totally dismantle the existing public school funding system and replace it with one that would provide only an "adequate" education for our children, one that would provide minimums for some and quality schools for a few.

In its haste to say it has acted and thereby satisfied the court's mandates, the legislature created a plan that is less fair, less progressive, less equitable, and that supports mediocrity for most and excellence for a few.

To help focus on the reforms that may be included in the current session, IDRA uses a set of principles to help assess any proposed school funding reform plan. We welcome their adoption and dissemination by all who agree that all children are valuable, and none is expendable.

Principle 1: Funding Equity –

Texas must maintain or increase the level of equity found in the existing funding system.

Principle 2: Equal Return for Equal Tax Effort –

Texas must specifically provide for equal return for equal tax rates, for all school districts, at all levels of the state permitted tax effort.

Principle 3: Excellent Education –

Texas must provide equitable access to excellent education (defined as equitable access to high quality curricula, teaching, support services, and facilities) for all students in all school districts, precluding the need for and thereby prohibiting any local un-equalized enrichment.

Principle 4: Access to Equalized Enrichment –

Texas must ensure that, if local supplementation of a state-funded adequate system is allowed, the entire additional local tax effort provides equal yield for equal tax effort, regardless of the local property wealth of individual districts.

Principle 5: Recognizing Special Student Costs –

Texas must equitably provide add-on funding based on actual costs of providing appropriate supplemental services to students identified as limited English proficient, low-income, or requiring special education services.

Principle 6: Access to Equalized Facilities Funding –

Texas must provide equitable access to funding for school facilities so that all districts have equal access to facilities revenue for equal tax effort. Facilities funding should provide support for updating and maintaining existing facilities, as well as funding for new facilities. Special facilities-related needs for fast growth districts should be recognized in any proposed funding formulae.

Principle 7: Maintaining Levels of State Support –

Texas must ensure that the state will fund a minimum of 60 percent of the overall cost of education in the state.

Principle 8: Tax Burden –

Texas must base any potential requirement for additional state revenue on adoption of progressive measures of taxation that are based on local school district and/or individuals' ability to pay taxes, and must not result in a shift of tax burdens from high wealth to all other districts or from more affluent to lower income taxpayers.

information, Texas senate leaders called for an interim study of Texas facilities at the end of the 2005 session.

Weak Facilities Detailed

In late 2006, the state released results of the first comprehensive assessment of Texas school facilities compiled in the last decade. Following is a summary of findings from *Current and Future Facilities Needs of Texas Public School Districts* (Texas Comptroller of Public Accounts, 2006).

- Texas schools used a total of 10,557 portable facilities comprising more than 12 million square feet.
- Among 3,500 instructional facilities in the survey, only 62 percent were rated as good or excellent; 25 percent were rated as being in fair condition, and 6 percent (which included 205 instructional facilities) were rated as poor or in need of replacement.
- Of an estimated \$4 billion in facilities needs identified by Texas school districts, only 10 percent was incorporated in fiscal year 2006 budgets; 91 percent of existing maintenance needs were deferred for some future action (most likely due to lack of sufficient funding to address the needs identified).
- The greatest needs for facilities funding were reported in urban and central city districts, though small town and rural communities also reflected significant needs.
- Projected facilities needs were estimated by asking districts to project enrollment growth: 56 districts projected a growth of 25 percent or greater over the next five years; another 111 projected similar growth over the next 10 years; a total of 296 school districts projected growth rates of 25 percent or greater over the next 15 to 20 years.
- The great majority of facilities needing replacement over the next 20 years are elementary school

Did you know?

As a result of legislative actions in 2006 in Texas' school finance system...

- ❖ 4.1 million children are in schools with severely limited resources for qualified teachers, up-to-date curriculum and basic supplies. At the same time, 200,000 children are in well-funded schools receiving an excellent education.
- ❖ The gap in average per pupil expenditures has grown by 30 percent. Texas' top 50 wealthiest schools are 72 percent White. Texas' poorest 50 schools are 94 percent Hispanic.
- ❖ Funding for special student populations remains grossly insufficient. Bilingual education is given a weight of 0.10, when research shows it should have a weight of 0.40. Compensatory education is given a weight of 0.20, when research shows it should have a weight of 0.40. Either local districts and communities must make up the difference or students are left unserved or underserved.

Source: Intercultural Development Research Association

campuses.

- Though the summary focused on instructional facility needs, the study also identified extensive repair and replacement needs in other categories that included space used primarily for administrative, support services, warehouse, extracurricular and residential purposes.
- The survey reported that 659 elementary, 125 intermediate, and 115 high schools had enrollments that exceeded the schools' capacity.

With one-third of Texas' school districts responding to this survey, the results give a good panorama of the facilities needs our schools are facing. For the few who may have continued to question the need for substantial state involvement in helping local school districts, these new data provide a somber insight into the extent of the need. While addressing all the needs that have been identified would no

doubt require the billions of dollars identified in this long-needed study, it is unlikely that the legislature will do more than address a portion of the existing facilities funding needs.



IDRA Recommendations

As state leaders grapple with prioritizing investments in this long-neglected area, IDRA recommends that the following guide those policy deliberations.

- Any funding provided to support facilities construction, maintenance or repair should be incorporated into state equalized funding formulae.
- Priority for funding should begin with addressing instructional facility needs.
- In the likely event of limited state

Equalizing Funding – continued on Page 10

Equalizing Funding – continued from Page 9

funding, factors considered in any prioritization should include district property wealth, age of existing district facilities, safety considerations and district growth over the previous three to five years.

- To help fund state support for local district facilities, to provide greater equity in facilities resources and to contain some state costs, some level of recapture should be instituted for facility-related tax efforts.

Few would question the importance of the quality of the buildings in which education is provided. While the state had made some improvements in providing for equalized funding of daily operations

(weakened by the recent re-introduction of unequalized enrichment), its efforts related to facilities funding fall far short of what is needed.

The new information from the 2006 report on existing school facilities can help inform the legislative process, but by itself it will not create the will needed to fully address this long-neglected need that impacts all school districts, in all portions of the state, with all manner of students.

The latest Texas Supreme Court ruling noted that there was a lack of evidence of the extent of need for facilities in Texas public schools. This study addresses that concern.

Failure by the current legislature to significantly improve its effort to equalize facilities funding will no

doubt lead to a new legal challenge that focuses primarily on facilities. We can only hope that this legislature, unlike its predecessors, has the resolve and the fortitude to do what is needed and what is right for all Texas students.

Resources

Cárdenas, J.A. *Texas School Finance Reform: An IDRA Perspective* (San Antonio, Texas: Intercultural Development Research Association, 1997).

Texas Comptroller of Public Accounts. *Current and Future Facilities Needs of Texas Public School Districts* (Austin, Texas: Texas Comptroller of Public Accounts, October 2006).

Texas Supreme Court. Ruling in *Edgewood vs. Meno* (January 25, 1995) pg. 49.

Dr. Albert Cortez is director of IDRA Policy. Comments and questions may be directed to him via e-mail at comment@idra.org.

Remembering Anthony



IDRA mourns the loss of Anthony Daniel Mayoral. Anthony was the student president of IDRA's Youth Education Tekies project in San Antonio at the Edgewood Family Network. A high school freshman, he led 12 of his skate boarding buddies and other local high school students in working with their parents and other community members wanting to learn computer skills and how to use technology as a tool for improving their neighborhood schools as well as for personal needs (job applications, college access information, etc.). Anthony was a personable young man who used his bilingual skills to help adults in the technology class. Anthony, his mother, Maria de los Angeles Mayoral, and his grandmother, Maria Guadalupe Mayoral, died in a car accident on December 21, 2006. Anthony was 15 years old.



14th Annual IDRA

La Semana del Niño

Early Childhood Educators Institute™

April 24-26, 2007 • San Antonio, Texas • Airport Hilton

Designed for

- ❖ Early Childhood Educators
- ❖ Administrators
- ❖ Parents
- ❖ Parent Educators and Liaisons

The Annual IDRA *La Semana del Niño* Early Childhood Educators Institute offers a valuable series of information-packed professional development sessions that are customized to value and respond appropriately to the linguistic and cultural assets of a diverse student population.

Keynoter

Dr. Elena Izquierdo, associate professor, University of Texas at El Paso, principal, author, researcher and nationally-recognized consultant. Her research and professional specializations focus on second language acquisition theory and practice; biliteracy development; the education of English language learners; and school reform.

Other Invited Presenters

Distinguished State Legislators
Early Childhood Leaders and Practitioners

Building Quality Early Childhood Education

This three-day institute will focus on pedagogy, curriculum and strategies. Scheduled sessions include building quality early childhood instruction, shared and guided reading, vocabulary development, fluency, comprehension, writing, math and science. Sessions are presented by early childhood educators, consultants and IDRA staff. These sessions will enable you to learn best practices and to receive tools that you can immediately use in your classroom. CPE credit is available. Topics to be addressed include:

- ❖ state requirements and policies
- ❖ practical, quality instruction
- ❖ effective school and home partnerships

Learn to create environments that encourage children to explore, experiment, question, wonder, create and play as they acquire literacy, numeracy and skills for school success. Educators and parents will have opportunity to see features of quality early childhood settings. Valuable tools for setting up centers of learning will be shared.

Participants Will...

- ❖ Examine the importance of early literacy for English language learners.
- ❖ Develop appropriate and culturally-relevant pedagogy.
- ❖ Explore research-based effective practices in early childhood education.

Centers of Learning

- ❖ Visit sites with unique bilingual early childhood programs!
- ❖ Discover how they are sustaining success!
- ❖ Learn about best practices in action!

Video Conference

Wednesday, April 25, 2007

Partners for School Accountability

Colaborando para la Responsabilidad Escolar

This two-hour video conference is for parents and parent educators across the state. Participants will share insights and experiences in this interactive session, conducted in English and Spanish, focusing on accountability under the *No Child Left Behind Act*.

To register your video conference site or to find a participating location near you, contact Lena Guerra at IDRA 210.444.1710.

Parent Leadership Institute

Thursday, April 26, 2007

This interactive, bilingual institute will provide a forum for parents, parent liaisons and educators to discuss the important leadership role for parents in their children's school success. This institute provides wonderful networking opportunities for parents and families.

To register for parent leadership institute, contact Lena Guerra at IDRA 210.444.1710.

to eliminate existing disparities, therefore the disparities can be slowly eliminated over a period of time. Leveling up would consist of the allocation of additional state money on the basis of low wealth until all districts are on a par with the wealthiest. Unfortunately, this will never come to be. Not only is the disparity so great that several generations of children would finish school under the present inequitable system prior to parity being achieved, but the failure to provide a practical cap for high wealth districts allows them to continue to increase disparities at the high end of the expenditure range as the state pours money in at the low end.

“In the past 40 years since the implementation of the current system of school finance, each attempt by the legislature to narrow disparities with the infusion of huge sums of money for low wealth districts has resulted in an increase in expenditures by high wealth districts which has actually increased the disparities in wealth.” (Cárdenas, 1991)

Myth #5 Reform Efforts Result in Loss of Funds for Rich Districts

Every time that an attempt was made to reform the system to provide increased equity, the cost effects of the proposed change were estimated by the Texas Education Agency and reported in the public media. Inevitably, the projections in the reported data failed to take into consideration existing inequitable tax rates, and thus high wealth school districts were depicted as losing huge amounts of funds. In each case the amount reported as a loss was contingent upon a continuation of inequitable and low tax rates for the high wealth districts, a condition seldom or never mentioned in the report. This provided a distorted

picture of the effects of the proposed change with extensive concern and sympathy for the children in high wealth districts.

Myth #6 Caps on School Expenditures are Unfair

Since its inception, the Texas system of school finance has always provided limitations on the amount that can be expended for education at both the state and local levels. Throughout its history there has been a limitation on the maximum tax rate that may be enacted to supplement with local enrichment funds the inadequate provisions of the minimum foundation program.

In middle wealth school districts, the cap on the tax rate has served as mild limitation on how much can be expended in support of the educational program. In low wealth districts, the limitation on the permissible tax rate has served as a severe constraint on the quality of education. Even at the highest tax rate permitted by state law, low wealth school districts could not compete for the acquisition of personnel and material resources. As more money was allocated for the low wealth districts, a slight increase in the tax rate in high wealth districts was re-established and, in most cases, exacerbated the disparities.

Since the state revenues available for equalization were finite, it was evident very early in the reform period that low wealth districts would never catch up unless the limitation on the tax rate was extended or replaced with a limitation on revenues. Each time such a recommendation surfaced, there was a loud cry from educators and patrons in high wealth school districts that it was detrimental to place a limit on the quality of education in the state.

It is difficult not to accept this argument, but it was evident that without such a limitation all efforts

for the creation of an equitable system were doomed. As stated previously, it was extremely unfair to place a cap on local enrichment that served as a constraint on only the low wealth districts. A better alternative is to place feasible constraints on all districts and to place no limitation on the amount that the state can expend on education with all school districts receiving equal benefits.

For all practical purposes, limitations on the quality of education have always existed, even in the wealthiest school districts. Regardless of the amount expended for education in high wealth districts, local school campuses within a district have never had the prerogative of outspending other campuses within the district. It is difficult to accept the concept of unlimited disparities in interdistrict expenditures, when districts observe rigid limitations on intradistrict disparities.

Expenditures disparities are caused by unlimited local enrichment which in turn is extremely inequitable because of large disparities in local wealth. Until such time as these local wealth disparities are neutralized, there can never be an equitable system of school finance in the state.

Myth #7 Money Does Not Make a Difference

As the threat of fiscal equalization arose, there was a consistent reaction from high wealth districts asserting that there was no need for an equitable system since “money does not make a difference.”

This argument first surfaced during the *Rodriguez* trial. When the federal court noted a much higher level of expenditures in the high wealth district than in the low wealth district documented in the court case, the immediate response by defendants was that the different levels of

expenditures did not necessarily indicate a better educational program in the high wealth district. At one point, defendants argued that the excess wealth was used for the development of curricular materials that were than made available to low wealth districts, thereby nullifying the advantages of wealth.

This argument would have been difficult to accept even if it were true. Curriculum developed for affluent students in high wealth districts is usually not appropriate for use in low wealth districts with high concentrations of economically disadvantaged, minority, migrant, immigrant and limited-English-proficient students. Actually, many of the educational problems of such students can be attributed to the failure of the elitist U.S. educational system to develop and implement materials and methodologies compatible with the characteristics and needs of atypical school populations.

The additional funds available to high wealth school districts were not allocated to curriculum development, shared or unshared. The bulk of the additional funds were used in augmenting personnel salaries and fringe benefits to attract and retain the best trained, experienced and most successful school personnel. The next highest priority for enrichment funds was the purchase of instructional materials, equipment and facilities to augment the meager supply provided or completely absent in the foundation program.

My fundamental question during the school finance effort was, “If money does not make a difference, why are the rich districts fighting so hard to retain it?”

Myth #8 Recapture is Evil

Under strong pressure from the state courts, the legislature enacted a new school finance system in 1991

Texas School Finance Reform: An IDRA Perspective by José A. Cárdenas, Ed.D.

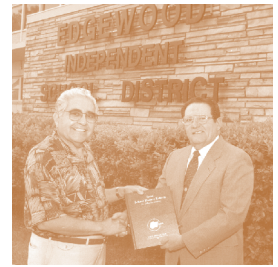
A master story-teller, Dr. José A. Cárdenas offers an insider’s view of the 32-year history of school finance in Texas. Dr. Cárdenas is the founder and director emeritus of IDRA and is the only person who has been actively involved in the entire school finance reform effort since the early days of the *Rodríguez vs. San Antonio ISD* litigation when he was superintendent of the Edgewood Independent School District.

More than a history, this book provides a blueprint for persons interested in bringing about future reform in schools and other social institutions. Beginning with a description of the Texas system in 1950, the account covers court cases, legislation, and advocacy efforts and concludes with the status and future of school finance reform. Personal vignettes sprinkled throughout offer glimpses of those special untold moments that impacted history. Much of this volume – including the myths of school finance and lessons learned – relate to reform efforts in other states as well.

Dr. James A. Kelly, president of the National Board of Professional Teaching Standards, provides a foreword, “Fighting the Good Fight,” describing Dr. Cárdenas as a trailblazer and pioneer. As a former program officer for the Ford Foundation, Dr. Kelly coordinated support for school finance reform efforts around the country.

(ISBN 1-878550-63-2; 1997; 387 pages; hardback; \$30)

*Distributed exclusively by the Intercultural Development Research Association:
5835 Callaghan Road, Suite 350, San Antonio, Texas 78228; Phone 210/444-1710;
Fax 210/444-1714; e-mail: contact@idra.org. It is IDRA policy that all orders totalling
less than \$30 be pre-paid.*



Dr. José A. Cárdenas (right) presents a copy of his book to Demetrio Rodríguez (left), lead litigant in the Rodríguez vs. San Antonio ISD case. Photo credit: Randall Reines Photography, San Antonio, 1997.

based on the creation of County Education Districts that provided an equalization within 188 county and multiple-county taxing entities that eliminated most of the expenditure disparities at a very low cost to the state. Both in efficiency and in cost to the state, this plan, enacted as Senate Bill 351, was the best response to state inequities in school finance developed during the entire reform period, even vastly superior to the current law.

Once the courts had established that the old system of school finance was unconstitutional, the goal of the reformers was to conceptualize a new system that would provide total equity and be affordable. One of the salient problems of the old system was there

were many very high wealth districts with extremely low tax rates. In some, the tax rates were so low that they were commonly referred to as “tax haven” school districts.

Senate Bill 351 would use counties as the base unit for the assessment, collection and distribution of local enrichment funds.

The concept of various districts with varying wealth sharing tax bases was immediately labelled and addressed by the media as the “Robin Hood” plan. All of a sudden, Robin Hood changed from a boyhood hero into a Texas villain. In response to the negative publicity being given Senate Bill 351 by high wealth districts and

Myths School Finance – continued on Page 14

the public media, my article appeared in the September 1991 issue of the *IDRA Newsletter*:

“During the formulation of the new law, Senate Bill 351, and subsequent to its passage, this piece of legislation has been identified in the local, state and national media as the “Robin Hood” plan for school finance equity. This sobriquet is invariably accompanied with the explanation that the new system of school finance takes money from rich school districts and gives it to the poor.

“This stigmatization of the new system of school finance is unfortunate, since it is erroneous. Senate Bill 351 does not take money from rich school districts and give it to poor school districts. Senate Bill 351 does create a new taxing unit in which taxes collected are used for the population of the unit. But, this is no different from city, county, state or national taxes in which the proceeds are expended according to perceived needs in the taxing entity.

“Under the new system the previously untaxed wealth is now being tapped so that all taxpayers share more equally in supporting area schools.” (Cárdenas, 1991)

Myth #9 Consolidation is the Solution

Prior to the enactment of the Gilmer-Aiken legislation in 1949, there were about 6,000 school districts in Texas. Many of these districts were “dormant” districts, districts that had no students but continued as political entities without a need for taxation since no schools were operational. Gilmer-Aiken eliminated all dormant districts and provided for the elimination of districts that lost their enrollments. Since no minimum number of students was stipulated in the legislation, as long as a district had at least one student it remained

functional.

On the other hand, consolidation has never been perceived by IDRA as a panacea for solving the school inequity problem in Texas. Research in school administration has shown that there is an optimum size for school districts, with a tendency for districts with a smaller number of students to be inefficient and ineffective. There is also evidence that there is an optimum size on the large end of the scale, with districts with excessive number of students tending to be bureaucratic, unresponsive, inefficient and ineffective.

Segments of the school finance reform movement in Texas focused early and exclusively on consolidation as a solution to existing inequities. I believe that the concept of huge tax savings by extensive consolidation is a myth. Wealth is distributed very unevenly throughout the state. In many communities, the consolidation of adjoining school districts would produce one large property-poor school district with a low tax base, a high tax rate and a low tax yield, the very characteristics that both the *Rodríguez* and *Edgewood* court cases attempted to eliminate.

As pointed out in a February 1988 *IDRA Newsletter* article on consolidation:

“Research in school finance indicates that the creation of a large school district does not result in significant savings in administrative costs. The need for a large bureaucratic administrative structure to operate the large district results in increased costs rather than savings. The elimination of a dozen school district superintendents would demand the creation of a dozen new positions in the new system at a similar cost.

“Past administrative assumptions that bigger is better have not proved true in contemporary research. Effective schools research has shown that very large schools are

detrimental to students’ adjustment and performance.” (Cárdenas, 1988)

The nine myths described above did not appear in any special order or sequence but appeared continuously in public opinion, legislation and litigation. Some of them were the result of public ignorance about the system of school finance and mistaken notions about the reasons for the existing inequities. In retrospect, it appears that no sooner had a specific myth been addressed and refuted by advocates of school finance reform before another myth surfaced or resurfaced in opposition to reform.

The myths were widely disseminated by educators in high wealth districts as well as the defendant state agencies in Texas. This was surprising because educators and agency personnel knew better. Professionalism was quickly and easily compromised on behalf of the preservation of the elitist system of education in Texas.

Resources

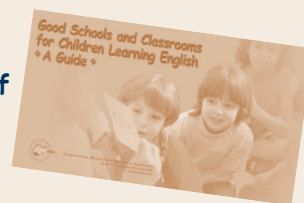
- Cárdenas, J.A. “Is School Consolidation the Solution to Achieving School Finance Equity,” *IDRA Newsletter* (San Antonio, Texas: Intercultural Development Research Association, February 1988).
- Cárdenas, J.A. “Myths and Issues in School Finance: Parts I and II,” *IDRA Newsletter* (San Antonio, Texas: Intercultural Development Research Association, September 1991).
- Cárdenas, J.A. “Myths and Issues in School Finance: Parts III and IV,” *IDRA Newsletter* (San Antonio, Texas: Intercultural Development Research Association, October 1991).
- Cárdenas, J.A. *Texas School Finance Reform: An IDRA Perspective* (San Antonio, Texas: Intercultural Development Research Association, 1997).

José A. Cárdenas, Ed.D., is the IDRA founder and director emeritus. Comments and questions may be directed to him via e-mail at comment@idra.org.

Good Schools and Classrooms for Children Learning English

Thirty years of research have proven that, when implemented well, bilingual education is the best way to learn English. New research by IDRA has identified the 25 common characteristics of successful schools that contribute to high academic performance of students learning English. This guide is a rubric, designed for people in schools and communities to evaluate five dimensions that are necessary for success:

- ❖ school indicators
- ❖ student outcomes
- ❖ leadership
- ❖ support
- ❖ programmatic and instructional practices



(ISBN 1-878550-69-1; 2002; 64 pages; paperback; \$15)

Developed and distributed by the Intercultural Development Research Association

Contact IDRA to place an order. All orders of \$30 or less must be prepaid.

5835 Callaghan Road, Suite 350 San Antonio, Texas 78228; Phone 210-444-1710; Fax 210-444-1714; e-mail: contact@idra.org.

Highlights of Recent IDRA Activities

In November and December, IDRA worked with **6,074** teachers, administrators, parents, and higher education personnel through **66** training and technical assistance activities and **131** program sites in **11** states plus Brazil. Topics included:

- ◆ SIOP lesson demonstrations for ESL and social studies classes
- ◆ African American and Latino Collaboration for Excellent Schools
- ◆ Achieving the Grade: Reading Proficiency for All

Participating agencies and school districts included:

- ❖ NAME conference, Arizona
- ❖ National Parent Center, California
- ❖ Robstown Independent School District, Texas
- ❖ U.S. Department of Education, Washington, D.C.

Activity Snapshot

The IDRA Texas Parent Information and Resource Center (PIRC) is a comprehensive, multicultural and multilingual parent leadership support program for strengthening partnerships between parents and schools for student success. The project targets critical areas of need in parent involvement throughout the state of Texas. Families with children in schools designated as low-performing and Title I are supported through the activities of this project. The IDRA model of valuing parents as leaders supports an emerging cadre of parents committed to strengthening the educational pipeline from pre-kindergarten through higher education.

Regularly, IDRA staff provides services to:

- ◆ public school teachers
- ◆ parents
- ◆ administrators
- ◆ other decision makers in public education

Services include:

- ❖ training and technical assistance
- ❖ evaluation
- ❖ serving as expert witnesses in policy settings and court cases
- ❖ publishing research and professional papers, books, videos and curricula

For information on IDRA services for your school district or other group, contact IDRA at 210-444-1710.

New!



IDRA

Classnotes Podcast

Free!

IDRA has launched a new podcast series designed to be a tool for public school teachers and administrators as well as to provide insights into key issues in education in the United States.

Online Now



Episode 6: “The Need for Cross-Race, Cross-Sector Dialogues” – Dr. Rosana Rodríguez and Frances Guzmán join Dr. Bradley Scott, director of the IDRA South Central Collaborative for Equity, to discuss

how this cross-sector and multiracial dialogue approach is creating lasting partnerships between African American and Latino communities, using education as common ground for collaboration.



Episode 4: “A Model for Successful Reading Instruction” – Dr. Juanita García, an IDRA education associate, and Hector Bojorquez, IDRA’s web specialist, discuss the

FLAIR model and the impact they have witnessed at one sample school site.



Episode 3: “The Power of IDRA’s Parent Leadership Model” – Aurelio Montemayor, M.Ed., director of the IDRA Texas Parent Information and Resource Center, describes the four dimensions of

the IDRA’s model for parent engagement and how it can unleash powerful transformations for school success.



Episode 5: “School Holding Power for Every Child” – Dr. María “Cuca” Robledo Montecel, IDRA’s executive director, discusses the essence of the problem of weak school holding power and what can

be done to guarantee graduation for every student.

www.idra.org/podcasts

A podcast is an audio file that can be downloaded to your computer for listening immediately or at a later time. Podcasts may be listened to directly from your computer by downloading them onto a Mp3 player (like an iPod) for listening at a later date. The IDRA Classnotes podcasts are available at no charge through the IDRA web site and through the Apple iTunes Music Store. You can also subscribe to Classnotes through iTunes or other podcast directories to automatically receive each new podcast in the series when it is released. Classnotes is free of charge.



5835 Callaghan Road, Suite 350
San Antonio, TX 78228-1190

Non-Profit Organization

U.S. POSTAGE PAID

Permit No. 3192
San Antonio, TX 78228



*Creating schools that work for all children,
through research • materials development • training • technical assistance • evaluation • information dissemination*