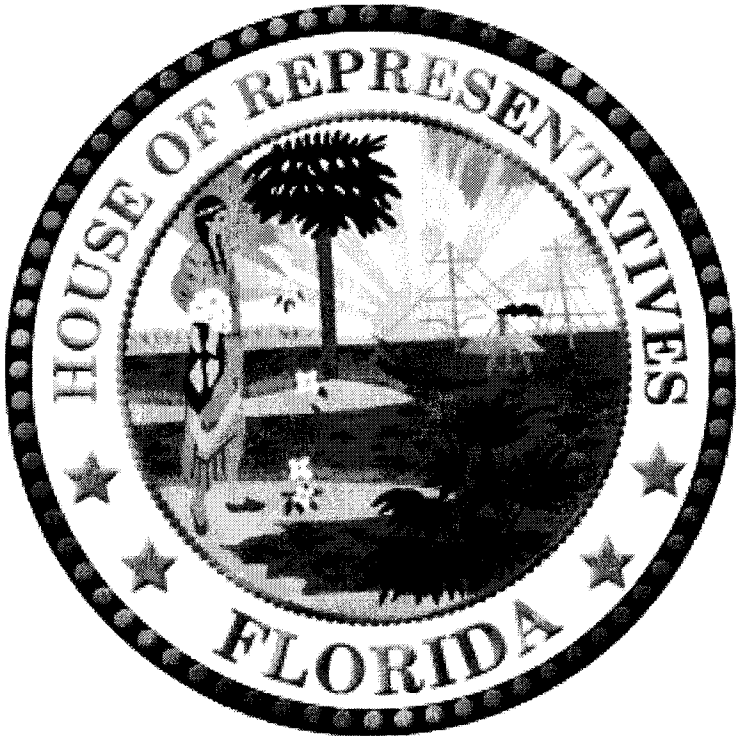


Joint Meeting
Schools & Learning Council
Committee on K-12
Committee on 21st Century Competitiveness
Meeting Packet

November 7, 2007
212 Knott
9:00 am – 12:00 pm

Marco Rubio
Speaker

Joe H. Pickens
Council Chair

Council Meeting Notice

HOUSE OF REPRESENTATIVES

Speaker Marco Rubio

Schools & Learning Council

Start Date and Time:	Wednesday, November 07, 2007 09:00 am
End Date and Time:	Wednesday, November 07, 2007 12:00 pm
Location:	212 Knott Building
Duration:	3.00 hrs

Joint Meeting

The Schools & Learning Council will meet jointly with the Committees on K-12 and 21st Century Competitiveness for the purpose of:

Discussion of issues relating to the Florida Comprehensive Assessment Test (FCAT).

Presentation by Department of Education staff, facilitated by
Jeanine Blomberg, Florida Commissioner of Education.

Presentation by Dr. Thomas H. Fisher of Fisher Education Consulting.

Discussion of issues relating to class size.

NOTICE FINALIZED on 10/30/2007 15:07 by TJG

Committee Meeting Notice

HOUSE OF REPRESENTATIVES

Speaker Marco Rubio

Committee on 21st Century Competitiveness

Start Date and Time:	Wednesday, November 07, 2007 09:00 am
End Date and Time:	Wednesday, November 07, 2007 12:00 pm
Location:	212 Knott Building
Duration:	3.00 hrs

Joint Meeting

The Committee on 21st Century Competitiveness will meet jointly with the Schools & Learning Council and the Committee on K-12 for the purpose of:

Discussion of issues relating to the Florida Comprehensive Assessment Test (FCAT).

Presentation by Department of Education staff, facilitated by
Jeanine Blomberg, Florida Commissioner of Education.

Presentation by Dr. Thomas H. Fisher of Fisher Education Consulting.

Discussion of issues relating to class size.

NOTICE FINALIZED on 10/30/2007 15:09 by TJG

Committee Meeting Notice

HOUSE OF REPRESENTATIVES

Speaker Marco Rubio

Committee on K-12

Start Date and Time:	Wednesday, November 07, 2007 09:00 am
End Date and Time:	Wednesday, November 07, 2007 12:00 pm
Location:	212 Knott Building
Duration:	3.00 hrs

Joint Meeting

The Committee on K-12 will meet jointly with the Schools & Learning Council and the Committee on 21st Century Competitiveness for the purpose of:

Discussion of issues relating to the Florida Comprehensive Assessment Test (FCAT).

Presentation by Department of Education staff, facilitated by Jeanine Blomberg, Florida Commissioner of Education.

Presentation by Dr. Thomas H. Fisher of Fisher Education Consulting.

Discussion of issues relating to class size.

NOTICE FINALIZED on 10/30/2007 15:08 by TJG

Florida Comprehensive Assessment Test (FCAT)

Florida's Assessment and Accountability System

Jeanine Blomberg
Florida Commissioner of Education

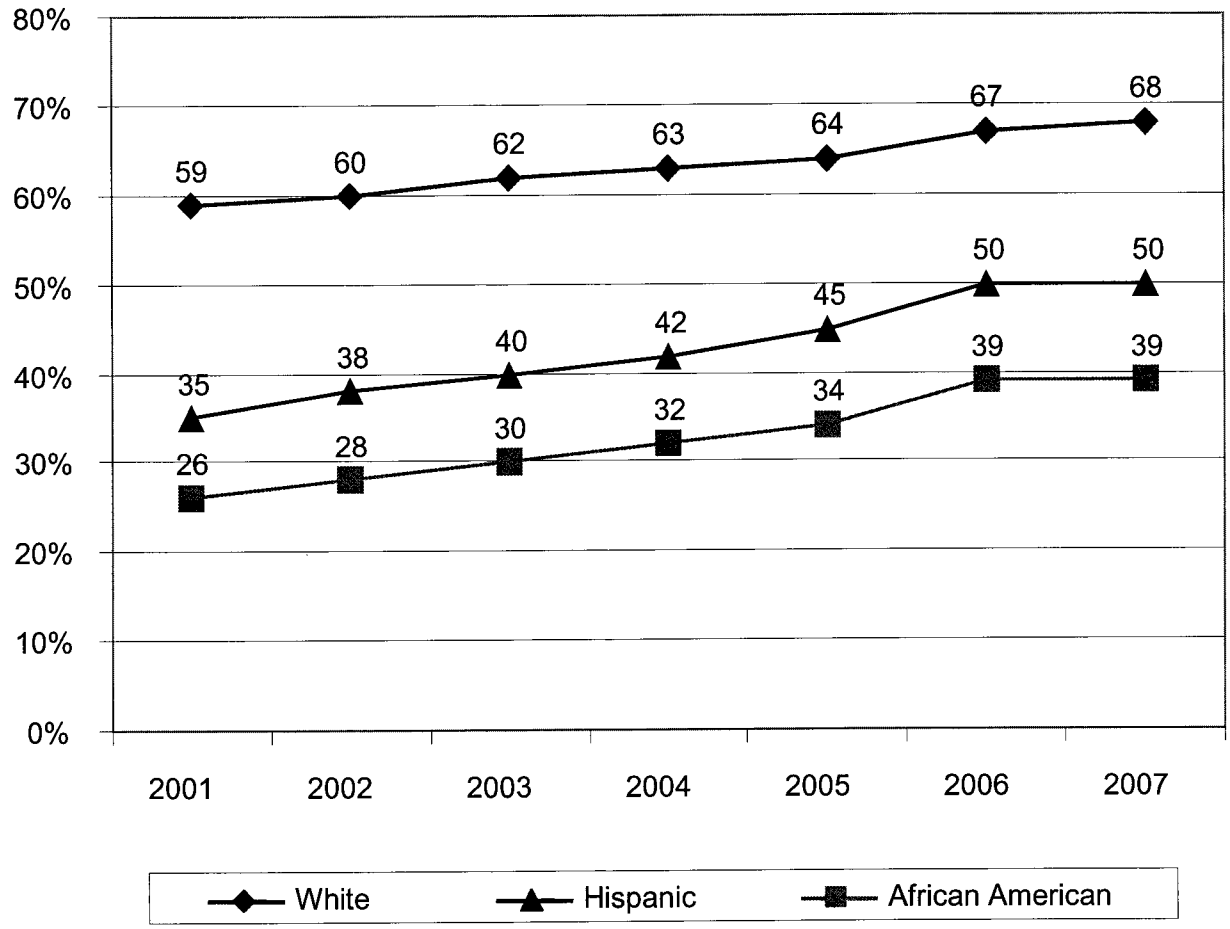
Florida House of Representatives
Schools and Learning Council
Committee on 21st Century Competitiveness
Committee on K12 Education

November 7, 2007

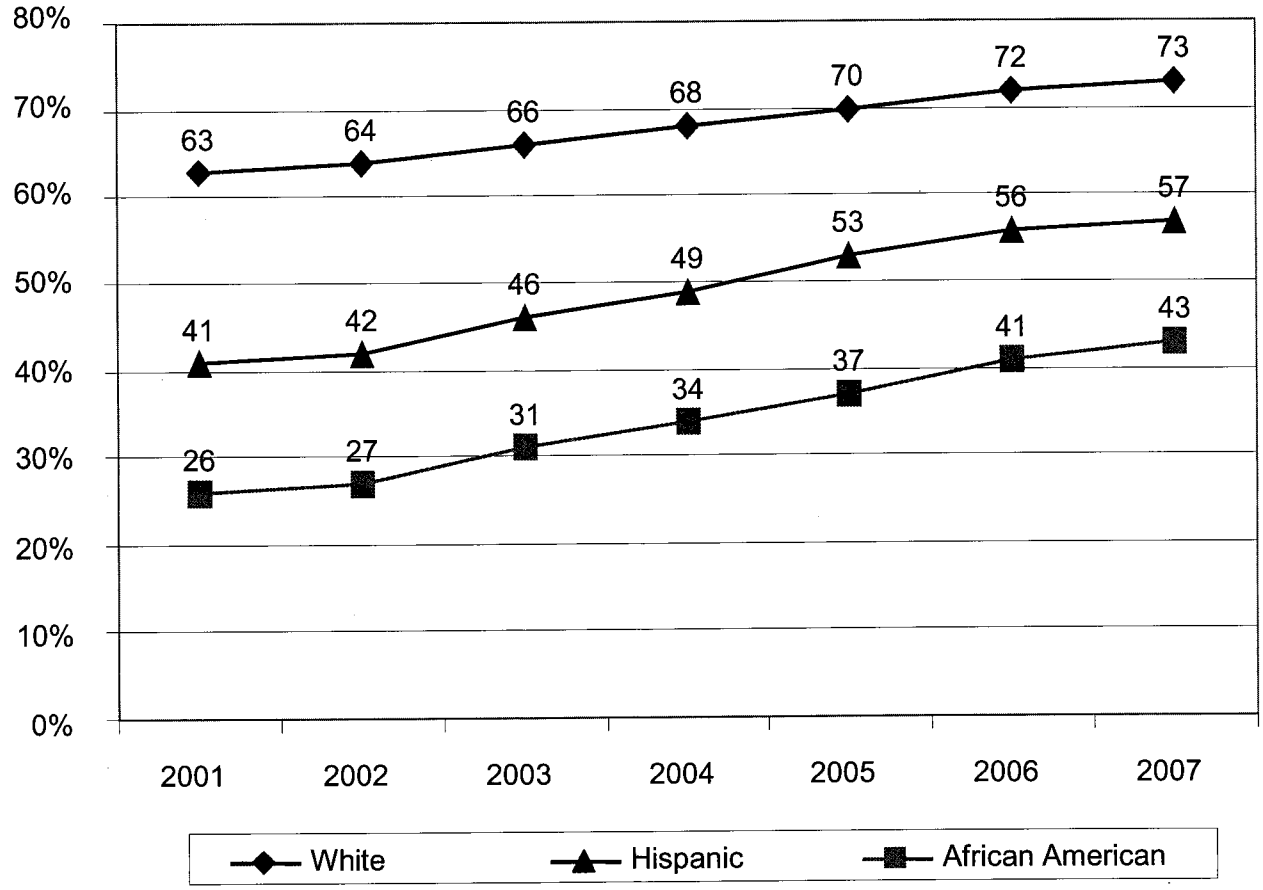
Guiding Principles for Florida's Assessment and Accountability

- Strive for academic excellence and safeguard equity
- Create system-wide accountability that is actionable and will improve learning for all students
- Maximize the involvement of educators and other stakeholder groups in decision making
- Provide transparency of system elements for all Floridians
- Include achievement and progress components across all levels in the system (elementary, middle, and high)
- Provide sufficient lead time for implementing changes to the system
- Maintain a focus on learning goals, rather than on relative achievement

FCAT Reading
Achievement Level 3 and Above
(On Grade Level and Above)
Grades 3-10



FCAT Mathematics
Achievement Level 3 and Above
(On Grade Level and Above)
Grades 3-10



Florida's PK-12 Assessment and Accountability System

Assessment Programs

- **FCAT – Grades 3-11**
  - SSS - Standards Based Tests
    Reading & Mathematics (Grades 3-10); Science (Grades 5, 8, & 11); Writing+ (Grades 4, 8, & 10)
  - NRT – Norm-Referenced Tests
    Reading & Mathematics (Grades 3-10)
- Alternate Assessment for Students with Disabilities
- FLKRS- Kindergarten Readiness Screener
- CELLA –English Language Learners Assessment
- PSAT/PLAN – Grade 10
- NAEP - National Assessment of Educational Progress

Accountability Programs

- **School Grades**
- **AYP** – Adequate Yearly Progress
- Voluntary Pre-Kindergarten (VPK) Readiness Rates
- Accountability for Supplemental Education Services (SES) Providers
- Other Programs Supporting State/Federal PK-12 Accountability

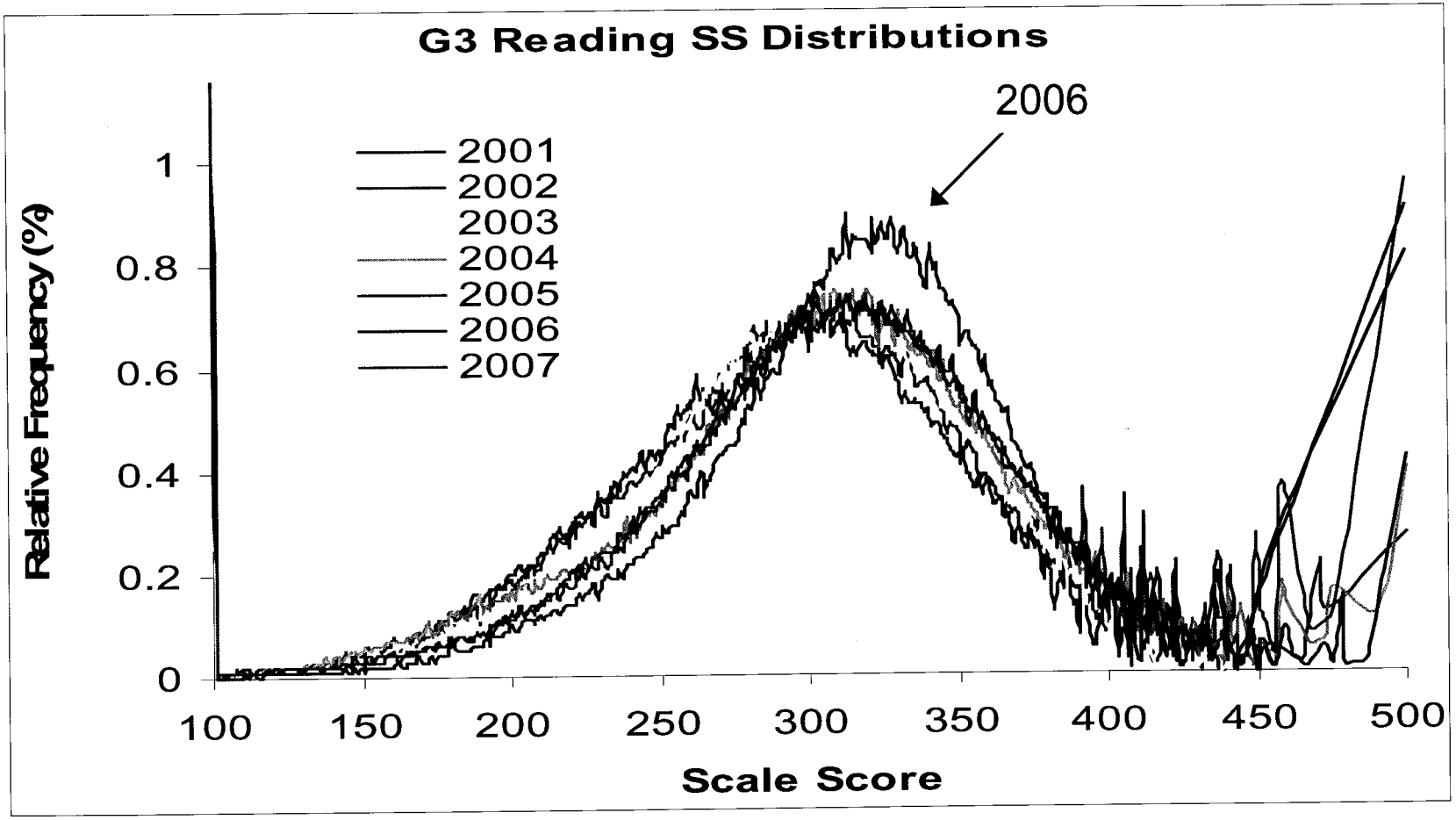
Topics for Discussion

- FCAT Grade 3 Issue
  - Buros Report
- FCAT External Committee
  - Accountability Concerns
- Questions about the FCAT
  - Test purpose, types of questions, schedule, high school standards, end-of-course exams

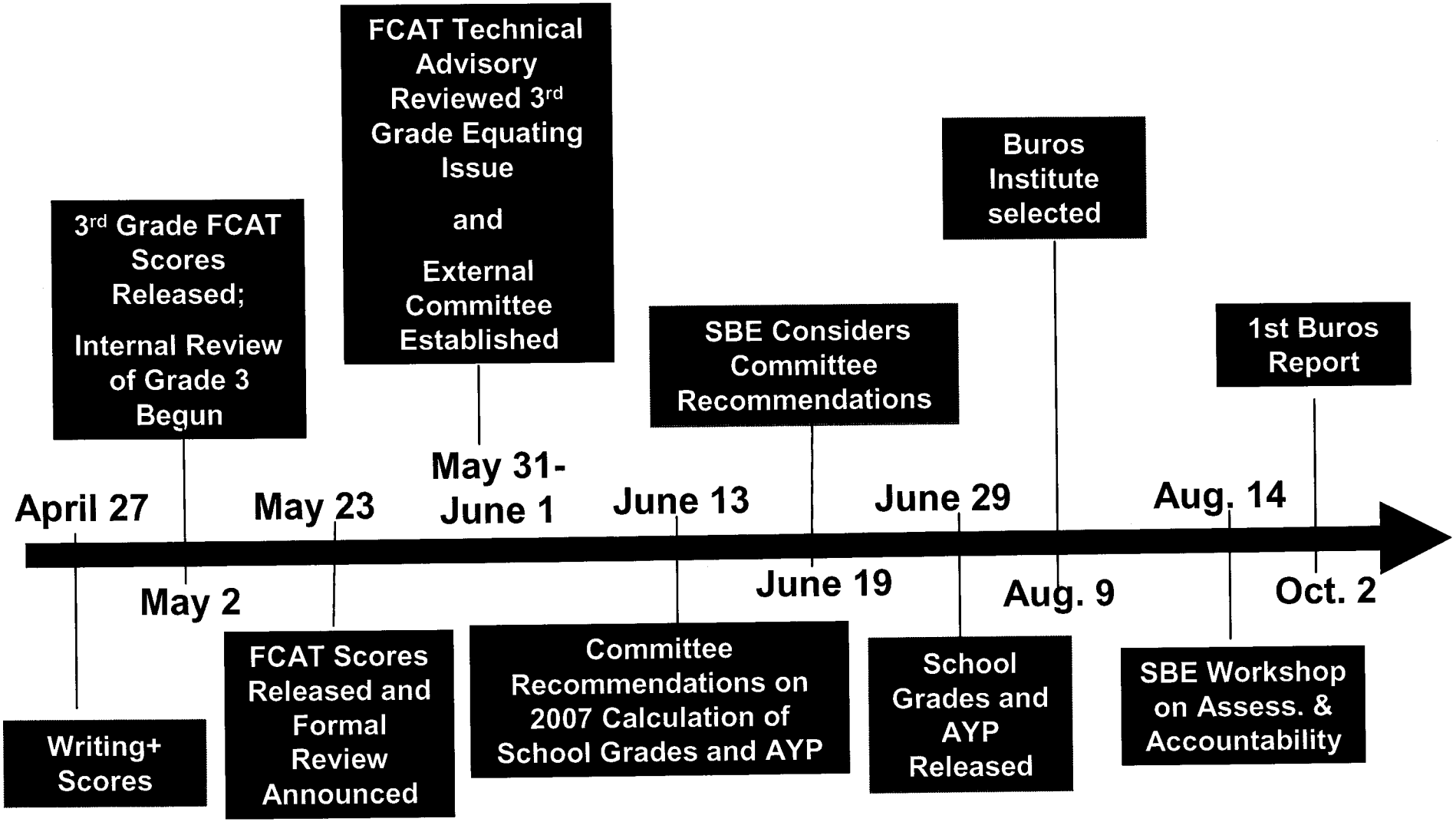
FCAT Grade 3 Issue

- Data Fluctuations
  - In 2006, Grade 3 reading spiked by 8 percentage points up to 75% scoring Level 3 and above.
  - In 2007, Grade 3 reading dropped to 69%, but was still 2 percentage points higher than 2005.
- DOE Conclusions
  - The 2006 third graders scored better on common items than third graders in 2005 and in 2007.
  - The test equating was affected by changes in the location of anchor reading passages and items.
  - Both contributed to the spike in performance.

Grade 3 FCAT-SSS Scores



2007 Key Events – External Review



FCAT External Review Committee

June 13 – Criteria for Expert Review Grant

1. Nationally recognized expertise in test analyses and equating
2. Not a current contractor or affiliated with the Florida DOE, its current contractors, Florida policymakers, special interest groups, or stakeholders
3. Has the capability of performing analyses via independent resources
4. Is available to conduct applicable research in a timely manner
5. Is eligible for a State of Florida grant in that it is a university or non-profit organization

The Initial Buros Report – Oct. 2

Five items raised

1. Increase the size of the calibration sample and in doing so ensure that the sample is not biased by gender (will be implemented for 2008)
2. Assure that anchor items are aligned with actual test items (completed for 2008)
3. Be cautious about high stakes uses of results that address "content clusters" within the Sunshine State Standards
4. Clarify the rolls of organizations involved in the testing program; add an "external auditor"
5. Use the Pearson correlation coefficient to reduce instances of random error (will be implemented in 2008)

FCAT External Review Committee

June 13 – Other Recommendations

- **School Grades**
  - Exclude 2006 3rd Grade Reading scores in the calculation of learning gains; safeguards in place to ensure schools are held harmless (Approved by State Board of Education (SBE) on June 19, 2007).
  - Suspend adequate progress of the lowest 25% of students requirement in 2007 (Rejected by SBE on June 19, 2007).
- **AYP**
  - Exclude 2006 3rd Grade Reading scores in the safe harbor and growth model calculations of Adequate Yearly Progress (Approved by US ED on June 27, 2007).
- **MAP**
  - As technical assistance to districts, the DOE provided NRT-based value tables for determining grade 3 to grade 4 growth

FCAT External Review Committee

Pending Issues

1. Further consideration of changes to the "adequate progress of lower performing students" component of School Grades to recognize improvements
2. Considerations concerning the performance of students on the 8th, 9th, and 10th grade FCAT Reading (lower than students in earlier grades)

School Grades 2007: What is Measured

POINTS COMPONENTS

READING	MATH	WRITING	SCIENCE
Performance	Performance	Performance	Performance (new in 2007)
Learning Gains	Learning Gains	A = ≥525 B = 495 - 524 C = 435 - 494 D = 395 - 434 F = < 395	Points: 400 for Performance 400 for Learning Gains 800 = Possible Points (100 for each of 8 components)
Learning Gains of Lowest 25%	Learning Gains of Lowest 25% (new in 2007)		
Bonus Points for Retakes (11th & 12th grade)		Possible Bonus Pts. = 10	

Additional requirements applied AFTER a school's points are calculated:

- Adequate Progress for Lowest 25%—required to earn grade based on calculated points. If a school does not meet this requirement, the school's grade is lowered one letter grade.
- Participation Requirement (Percent Tested)—required to earn grade based on calculated points. Schools must test at least 95% of their students to earn an "A", at least 90% to earn any other grade.

Pending Issues – School Grades:

Adequate Progress of the Lowest Performing Students

Current Policy

- At least half (50% or more) of the lowest performing students (bottom quartile) must show learning gains in reading and math
- Penalty for Missing Adequate Progress?
  - Drop One Letter Grade

Pending Issues – School Grades:

Adequate Progress of the Lowest Performing Students

Example: Okeechobee High School

- School earned enough points to receive a "C" – did not meet the 50% threshold
- 42% of the bottom quartile made learning gains in 2007, representing **a 16 percentage point increase** from 2006 (26%)
- However, despite the significant increase, the **school grade was lowered from a "C" to a "D"**, since the percentage remained below 50%

Pending Issues – School Grades:
Adequate Progress of the Lowest Performing Students

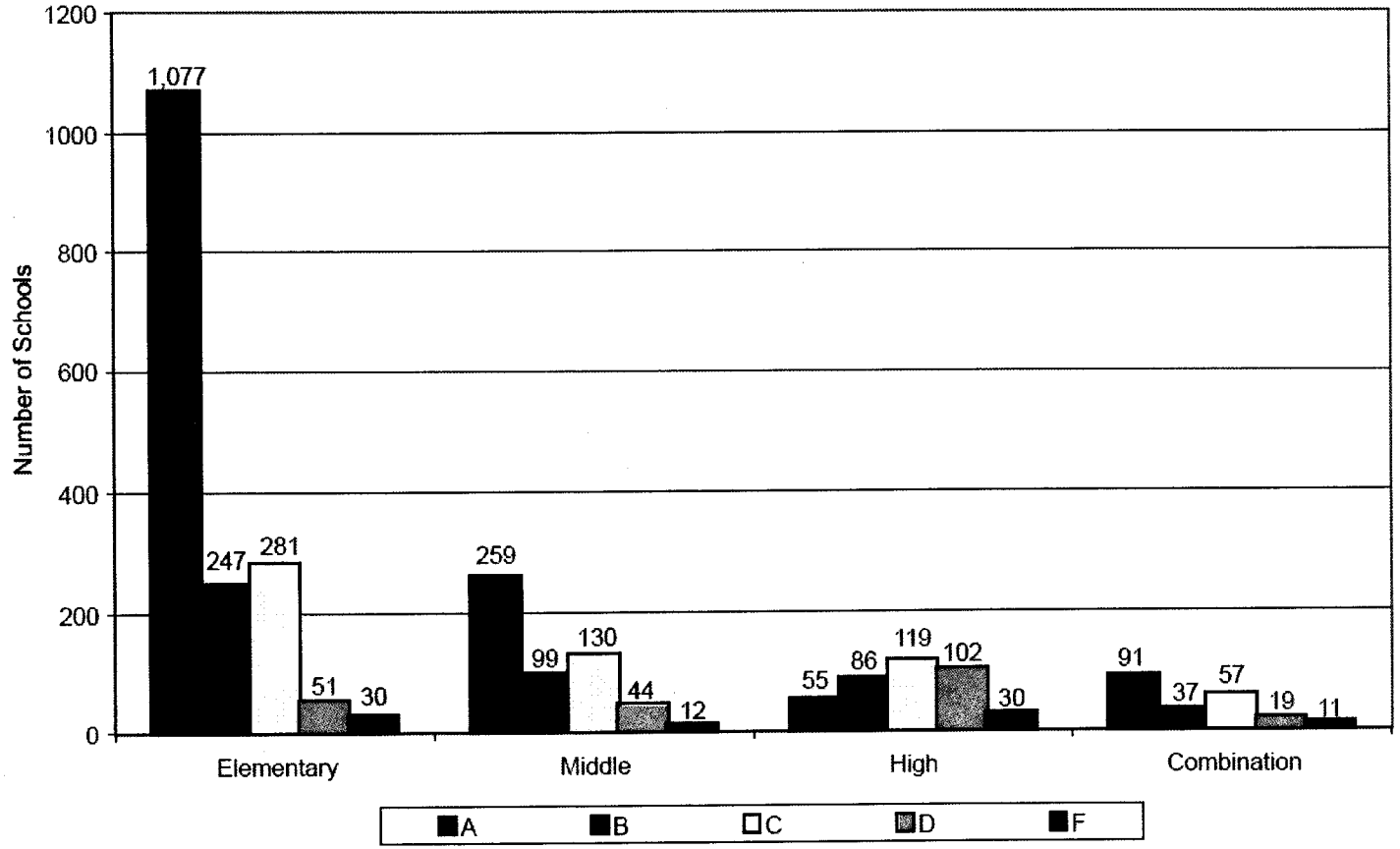
Issues Under Consideration

- Composition of Bottom Quartile
- Keep the focus on learning gains for schools' most struggling students
  - Maintain the target of at least 50% making gains
  - Recognize significant improvements in the learning gains of these students

Pending Issues – School Grades:

High School Performance

- A lower percentage of Florida's high schools earn A's and B's compared to elementary and middle school



NEXT STEPS

- Recommendations of Buros and the External Review Committee presented to the State Board of Education
- Buros reports number 2 and 3 will be completed and published
- Expert reviewers will examine key elements of the entire FCAT program and provide an independent "post hoc" examination of the 2008 test administration
- The 2008 testing cycle will begin with Writing on February 12-15 and Reading, Mathematics, and Science March 11-24

Additional FCAT Questions

- Types of Assessments: What are the several types of assessments administered in Florida? What value does each bring to measuring students' progress?
- FCAT Test Items: Why does the FCAT include different kinds of test items such as constructed-response items and multiple-choice items? What are key differences and what value does each provide? On what tests do both occur?
- FCAT Scheduling: Why is the FCAT scheduled when it is – before the end of the school year? Do the initial Buros recommendations have any impact on test scheduling?

Types of Assessments

Purposes

- Diagnostic
- Achievement
- Certification
- Aptitude
- Attitudinal/Psychological

Interpretations

- Criterion-Referenced
- Norm-Referenced

Period

- Formative
- Summative
- Cumulative/Comprehensive

Methods

- Paper and Pencil
  - Selected-Response (multiple choice, matching)
  - Constructed-Response (essay, short-answer, gridded)
- Computer-Based Tests (most CBTs are just like paper-and-pencil tests rather than computer-adaptive; typically they don't utilize questions specifically designed for computers)
- Performance (speeches, playing musical instruments, figure skating, etc.)

What type of assessment is FCAT?

- **IT IS** – A Summative Achievement Test
  - Measures state content standards
  - Uses annual content sampling
  - Describes strengths and weaknesses in broad areas
- **IT IS** – Used for Student/School Accountability
  - For Students – specific achievement requirements
    - Promotion (except for Grade 3 Reading, determined by school districts' progression plans)
    - High School Graduation
  - For Schools – specific expectations (School Grades & AYP)
- **IT IS NOT** – A Diagnostic Test
  - FCAT does not determine the nature of weaknesses or deficiencies and does not provide a remedy or solution

FCAT Design

- Standards-Based Tests of SSS[1]
  - Reading Comprehension (Grades 3-10)
  - Mathematics in Applied Contexts (Grades 3-10)
  - Science Multi-Disciplinary (Grades 5, 8, & 11)
  - Writing Skills and Processes (Grades 4, 8, & 10)

- Norm-Referenced Tests (SAT10)[2]
  - Reading Comprehension (Grades 3-10)
  - Mathematics Problem Solving (Grades 3-10)

[1]SSS – Florida Sunshine State Standards

[2]SAT10 – Stanford Achievement Test™, 10th Edition has been used since 2005 and the Stanford 9 was used from 2001 through 2004.

How are the tests different?

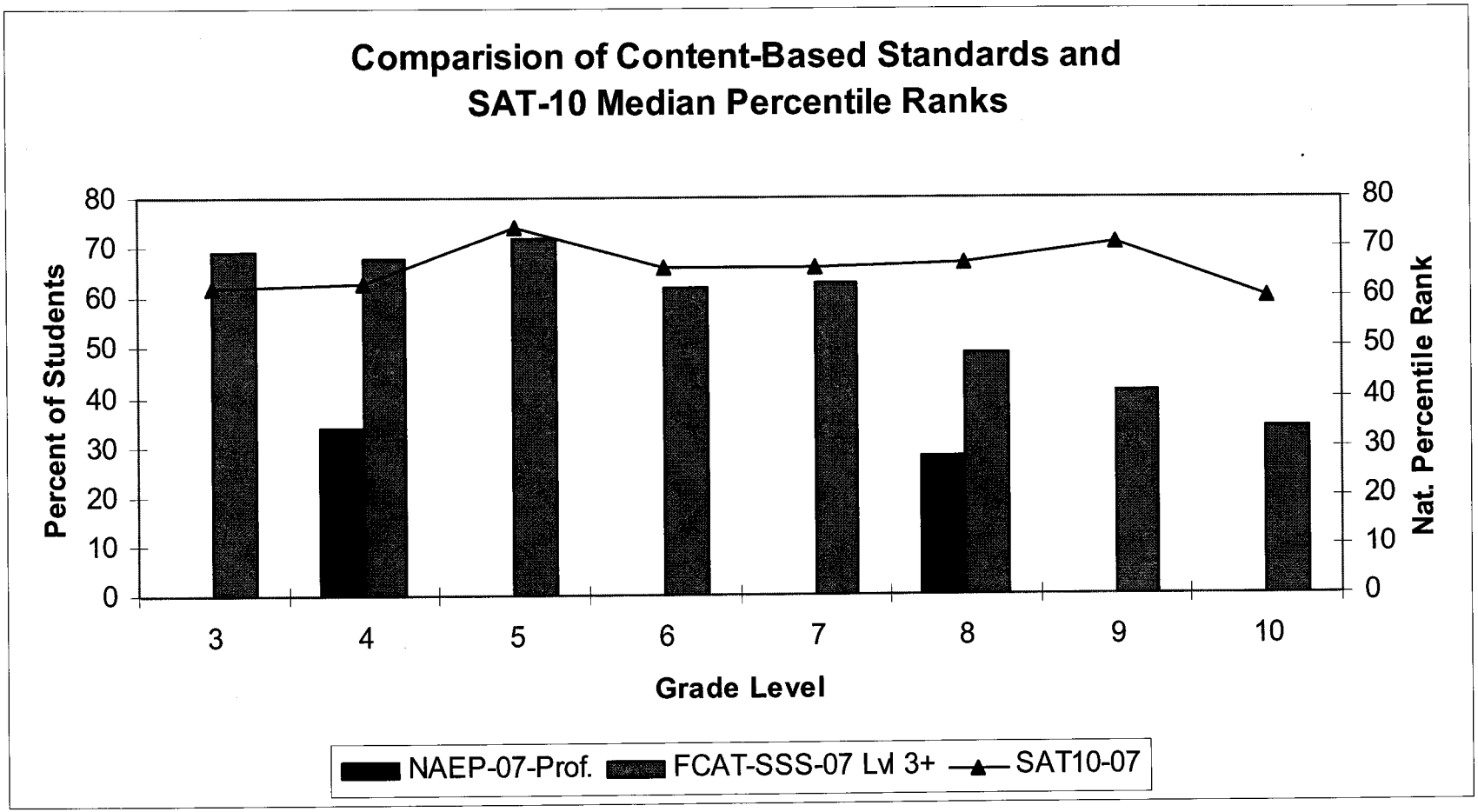
FCAT SSS

- Measures Sunshine State Standards (SSS)
- Purposes:
  - To increase student learning of rigorous standards and accountability
  - To increase school effectiveness and accountability
- Reports scores compared to standards (achievement levels)

FCAT NRT

- Measures generalized curriculum standards
- Purposes:
  - To ensure Florida's expectations are reasonably representative
  - To help parents compare Florida and national achievement
- Reports scores compared to those of a national sample of students (norm group)

Interpreting Different Florida Scores



Percentile ranks should not be used to recommend achievement standards.

- Standards should be based on content taught and tested
- Standards should be established to challenge the status quo and improve student achievement
- Standards should reflect world class achievement (that is, be guided by national or international standards, e.g., NAEP, TIMSS, PISA.)
- Standards should be set to achieve desired outcomes for graduates

Types of test items on FCAT

Item Format	SUNSHINE STATE STANDARDS				NRT
	Reading	Writing	Math	Science	
Essay		4, 8, 10			
Multiple-Choice	3-10	4, 8, 10	3-10	5, 8, 11	3-10
Gridded-Response			5-10	8, 11	
Short-Response	4, 8, 10		5, 8, 10	5, 8, 11	
Extended-Response	4, 8, 10		5, 8, 10	5, 8, 11	

Challenges of implementing constructed-response test items

- Human scorers must be hired for handscoring.
- Florida scoring standards must be established and maintained.
  - Florida educators must develop scoring criteria for each short- and extended-response test item.
  - Scorers must be trained to implement the Florida criteria.
  - Scorer quality must be monitored for consistency and accuracy via observation and analysis of reports.
- Handscoring is time consuming (each student's responses must be read two or three times)
- Handscoring is expensive

Value of implementing constructed-response test items

- They encourage the teaching and learning of higher-order process and critical thinking skills described in world class standards and 21st century skills
- They measure aspects of the standards that could not otherwise be assessed.

  For example: writing an essay, drawing a graph, explaining a proof, developing hypotheses, describing character development, comparing and contrasting narrative elements, etc.
- They encourage students to move from reciting and identifying information to the point of applying information in a real, meaningful, and lasting way.
- They provide a more accurate measure of achievement of some standards and some groups.
- They discourage the teaching of only "test-wiseness".

FCAT Scheduling History

- 1997-1999: FCAT given in Jan./Feb.
- 2000-2007: FCAT given Feb./March
  - Writing – February
  - Reading/Mathematic/Science/NRT – Late Feb./Early March
- 2008: FCAT Reading/Mathematic/Science/NRT – Mid/Late March
- Rationale: provide scores by the end of the year for student and school accountability
- Other Options: will require additional changes
  - Test in Late May – report in the fall (statistical equivalence of existing items and scales; school choice and NCLB reporting requirements)
  - Test in the fall– report in December (statistical equivalence of existing items and scales; lacks student accountability)
  - Test in Mid-April - eliminate performance tasks and report in June (statistical equivalence of existing items and scales; more drill-type, teaching-to-the-test concerns)

Dr. Thomas Fisher's
VITA & Resumé

VITA

Thomas H. Fisher, Ed. D.

Thomas H. Fisher is a native of Tennessee and earned a BS in Mathematics from Middle Tennessee State University. He holds a M.Ed. in Secondary Administration from the University of Toledo and an Ed.D. in Curriculum Development from Wayne State University in Detroit, Michigan. He also has completed several psychometric and statistics courses as a post-doctorate student at Florida State University. He was a mathematics teacher for eight years, a school district program evaluation specialist for two years, and the Coordinator of Dissemination and Training for the Michigan Educational Assessment Program for four years. While living in Michigan, he taught graduate courses in statistics, research methods, and curriculum for Eastern Michigan University, Michigan State University, and Wayne State University.

Dr. Fisher joined the Florida Department of Education in March 1976 and served 26 years as the Educational Testing and Evaluation Administrator responsible for K-12 student testing programs, college-level testing programs, and professional licensure examination programs until November 2002.

Dr. Fisher has served as an advisor on assessment and accountability issues to the U.S. Department of Education and several state education agencies. He has published over 60 articles in professional journals and made many presentations at national and regional professional meetings. He was appointed by the U.S. Secretary of Education to the National Assessment Governing Board and served for two three-year terms. Dr. Fisher has wide experience as a speaker on large-scale assessment issues and has served as a court witness in several legal cases related to Florida's testing programs, including the Debra P. v. Turlington challenge to the state high school exit examination, and in litigation in the states of Kentucky and California.

Dr. Fisher retired from the Florida Department of Education in November 2002 and formed Fisher Education Consulting, LLC. Consulting services have been provided to customers such as the U.S. Department of Education, CTB/McGraw-Hill, Pearson Education Measurement, Harcourt Educational Measurement, The College Board, Princeton Review, Florida State University, and AccountabilityWorks, Inc. He serves on technical advisory committees for the States of Arkansas, Idaho, Michigan, North Dakota, and Virginia. He is a member of the ETS Research Panel and an advisory board for Pearson Education Measurement. He serves as a peer reviewer and consultant for the U. S. Department of Education with regard to the No Child Left Behind Act of 2001.

Fisher Education Consulting, LLC
555 Hickory Blvd.
McMinnville, TN 37110

Telephone 931.668.0775
FAX 931.668.0460

E-mail: thfisher@blomand.net or thfisher@earthlink.net
Web site: www.fishereducation.com

RESUMÉ

THOMAS H. FISHER

FISHER EDUCATION CONSULTING, LLC

Personal Data

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555 Hickory Blvd.
McMinnville, TN 37110
Telephone 931-668-0775
Fax 931-668-0460
E-mail: thfisher@earthlink.net; thfisher@blomand.net
Web site: www.fishereducation.com

Education

Postdoctoral work in statistics and psychometrics
Florida State University

Ed. D. Degree, 1972
Wayne State University
Detroit, MI
Curriculum Development with emphasis on Educational Research and Evaluation

M. Ed. Degree, 1965
Toledo University
Toledo, OH
Secondary School Administration

B. S. Degree, 1962
Middle Tennessee State University
Murfreesboro, TN
Mathematics major, Science and English minors

Affiliations

National Council on Measurement in Education
American Educational Research Association

Work Experience

Chief Manager
Fisher Education Consulting, LLC
McMinnville, TN

Fisher Education Consulting, LLC, is a small consulting company headquartered in Tennessee. Dr. Fisher provides consulting and data analysis services to various organizations and governmental agencies. Current and previous customers include: the U. S. Department of Education, Harcourt Educational Measurement, The College Board, Florida State University, Accountability Works, and the States of Arkansas, Florida, Idaho, Indiana, Michigan, North Dakota, and Virginia. Dr. Fisher serves on Technical Advisory Committees for five states. Examples of his consulting work include: writing Requests for Proposals, writing background and position papers on assessment and accountability issues, preparing one state's AYP Plan for *No Child Left Behind*, making presentations to a State Board of Education in one state and to a joint House and Senate Education Committee in another state, serving as an expert witness in litigation, and conducting data analyses for a program evaluation.

Vice President and Treasurer
Fisher Education Consulting, Inc.
Tallahassee, FL

Fisher Education Consulting, Inc., was a small corporation headquartered in Florida during 2002-03. It provided services identical to those described above.

Department of Education (Retired November 30, 2002, with 26+ years of service)
State of Florida
Tallahassee, FL

Educational Testing & Evaluation Administrator, Achievement and School Performance Section, responsible for conceptualizing, designing, and implementing Florida's assessment, testing, and evaluation programs. This involves approximately 1.6 million K-12 students, 40,000 college students, and 20,000 educators annually. I supervised about thirty staff members and was responsible for an annual budget of about $57 million. I started in this position March 1, 1976. The specific programs under my direction were:

Florida Writing Assessment Program;
College-Level Academic Skills Testing Program;
Florida Teacher Certification Examination Program;
Florida Educational Leadership Examination Program;
College Entry-Level Placement Testing Program;
College Basic Skills Exit Testing Program;
Florida Comprehensive Assessment Testing Program;
Florida Reading Diagnostic Assessment Program
Florida School Readiness Uniform Screening System
Evaluation programs for designated legislative initiatives.

I was responsible for conceptualizing, designing, implementing, and revising, as necessary, the various programs under my direction. This required me to work with various advisory groups, Department of Education staff, the State Board of Education, staff from postsecondary institutions across Florida, legislative staff and committees, other state departments of education, and the U.S. Department of Education.

Wayne State University
Detroit, MI
Visiting instructor in the College of Education teaching a graduate course in Statistics. Fall term, 1975.

Department of Education
State of Michigan
Lansing, MI

Coordinator of Dissemination and Training for the Michigan Educational Assessment Program having responsibility for the planning, coordination, completion, and evaluation of various dissemination efforts of the program. Assist in the overall management of the program including budgeting and planning. Coordinated special Departmental projects and assisted Department staff on problems related to evaluation, needs assessment activities, and data collection tasks. I supervised two professionals and various secretaries and was in the position from July 13, 1974 to February 28, 1976.

Michigan State University
East Lansing, MI
Visiting instructor in the College of Education teaching a graduate course in Curriculum Planning. Spring term, 1975.

Department of Education
State of Michigan
Lansing, MI

Research Consultant with the Michigan Educational Assessment Program having responsibilities for Program dissemination activities, planning and future development of the Program, analysis and interpretation of data, composition and review of Program materials, ESEA Title III needs assessment activities and on-site project evaluations, and coordination of Michigan's participation in the Cooperative Accountability Project, an interstate project. In the position from February 29, 1972 to July 13, 1974.

Livonia Public Schools
Livonia, MI

Specialist in Research and Program Evaluation with major responsibilities for designing K-12 project evaluation schema, coordinating evaluation projects, analyzing data, computer programming and operation, and dissemination of test and evaluation results to the staff and public. In the position one and one-half years from 1970 to 1972.

Visiting instructor, Eastern Michigan State University, College of Education, teaching research methodology. Three terms from 1970 to 1972.

Office of the Board of Education
Plymouth Community Schools
Plymouth, MI

Part-time assistant to the Business Manager assisting in the development of fiscal reports, school equipment purchase plans, and budgets. In the position over one year, 1966-1967.

Plymouth Senior High School
Plymouth, MI
Mathematics teacher for four years, 1966-1970.

Maumee Senior High School
Maumee, OH
Mathematics teacher for two years, 1964-1966.

Maumee Junior High School
Maumee, OH
Mathematics teacher for two years, 1962-1964.

Accomplishments in Florida

Responsible for supervising the creation of requests for proposals for competitive bids and negotiating contracts with various commercial firms and universities.

Responsible for communicating the design and results of the testing programs to the State Legislature and State Board of Education through personal presentations and written documents.

Responsible for designing and supervising all phases of the Statewide Student Assessment Program.

Responsible for improving and expanding the dissemination, test development, and exceptional student testing dimensions of the statewide assessment program.

Represented the Department before various audiences of professional educators.

Served on various special projects for the Department such as an accountability task force, a committee studying the cost effectiveness of public schools, a committee implementing an innovative early childhood program, and a committee implementing teacher merit pay programs.

Responsible for communicating the purposes, design, and results of the testing programs to citizens through the print, radio, and television news media.

Responsible for successfully defending the student testing program in five separate legal challenges, the most famous of which was the Debra P. v. Turlington case, a landmark case in competency testing.

Have served as a witness (fact and expert) in several legal challenges to the State's testing programs both at the administrative level and in actual court litigation.

Responsible for the development and implementation of the College-Level Academic Skills Examination.

Responsible for the development and implementation of the "indicators of progress" program for the State Board of Education.

Responsible for the development and implementation of the Florida Teacher Certification Examination and the Florida Educational Leadership Examination.

Responsible for the design and development of over fifty subject area specialty examinations used for teacher certification in Florida.

Responsible for the creation of test specifications for student standards of excellence.

Responsible for the development and implementation of a statewide norm-referenced testing program utilizing test items from the National Assessment of Educational Progress.

Responsible for the development and implementation of a high school course examination program.

Responsible for the design and implementation of validity studies for the National Teacher Examination subject area tests.

Served as a lobbyist for the Department of Education on matters related to testing and accountability. Experienced in writing proposed statutes and State Board of Education administrative rules.

Responsible for the implementation of a program to test the subject area expertise of teachers applying for merit pay.

Responsible for the review and approval of school district plans for implementing teacher merit pay programs at the local level.

Responsible for the evaluation of various legislatively mandated programs including RAISE, Reform, PREP, PRIME, and Early Childhood.

Responsible for the development and implementation of Florida's first student writing assessment program.

Responsible for the development and implementation of Florida's single college-entry level placement testing program.

Responsible for the implementation of Florida's School Readiness Uniform Screening System for kindergarten students.

Responsible for preparation of the assessment and accountability portions of Florida's 2001-02 Title I Plan and the Title I part of the 2002-03 *No Child Left Behind* legislation.

Honors and Accomplishments at the Florida Department of Education

Work unit superior achievement award
Individual merit pay award, several times
Individual Sustained Superior Achievement award

Publications

M. Ed. Thesis: "A Seven-State Survey of Fringe Benefits for Teachers."

Ed. D. Dissertation: "A Descriptive Study of the Continuous Progress Curriculum Within the Bloomfield Hills, Michigan, Public Schools."

Fisher, Thomas H. and Roth, Rodney W. "A Descriptive Study of Local Districts' Reaction to the Michigan Educational Assessment Program." The Michigan School Board Journal, 14 (August, 1972), 12-13.

Fisher, Thomas H. "An Evaluation of the Junior High Science Program: Interaction of Man and the Biosphere." School Science and Mathematics Journal, 72 (February, 1973), 106-110.

(Michigan Department of Education). The Equating Report: Year-to-Year Analysis of the Cognitive Tests of the Michigan Educational Assessment Program, 1970-72. Lansing, MI: March, 1973.

Fisher, Thomas H. "The Development of An Attitude Survey for Junior High Science." School Science and Mathematics Journal, 73 (November, 1973), 647-652.

Fisher, Thomas H. "Educational Evaluation in Perspective." The Michigan School Board Journal, 20 (August, 1973), 14-15.

Fisher, Thomas H. "Michigan's New Teacher-Aid." The Michigan School Board Journal, 20 (September, 1973), 26+.

Fisher, Thomas H. "View Into the Department: Michigan Educational Assessment Program." Michigan Association of State and Federal Program Specialists, 5 (September 21, 1973), 3-4.

Fisher, Thomas H. "How SDE's Testing Will Work This Fall." Teacher's Voice, (Michigan Education Association), September 3, 1973, p. 2+.

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Fisher, Thomas H. and Smith, Julia. "Adventures in Implementing a Testing Program" Educational Measurement: Issues and Practice, 10 (Spring, 1991), 24-26.

Fisher, Thomas H. and Roeber, Edward D. "Educational Standard-Setting at the State Level." A position paper prepared for the National Assessment Governing Board, Washington, DC, (April, 1991).

Fisher, Thomas H. "The Ten Most Important Questions to Ask in Covering Testing." A workshop presented to the Education Writers Association, Atlanta, GA, October 1, 1993.

Fisher, Thomas H. "Letters from the Western Frontier." Illinois State Genealogical Society Quarterly, 26 (Spring, 1994), 3 - 11.

Fisher, Thomas H. "Two Amboy Boys Go to War." Illinois State Genealogical Society Quarterly, 28 (Spring, 1996), 3-24.

Fisher, Thomas H. "A Review and Analysis of the Tennessee Value-Added Assessment System." A paper prepared for the State of Tennessee, Office of Educational Accountability, Comptroller of the Treasury, February 14, 1996.

Additionally, while with the Michigan and Florida Departments of Education, I have written or supervised the creation of several filmstrips and videos. Hundreds of reports, manuals, brochures, and special publications have been prepared under my supervision.

Speeches

Speeches have been a major responsibility while working for the Michigan and Florida Departments of Education. Speeches to professional associations, conferences, college classes, local district staff meetings, and groups of citizens are too numerous to be listed individually herein. A selection of the most distinctive presentations are listed below.

Williamsburg, VA
Mid-Atlantic Interstate Project

Midland, MI
Michigan ASCD Conference

Denver, CO and Phoenix, AR
Cooperative Accountability Project

Princeton, NJ
Annual Testing Directors Conference

Miami Beach, FL
Florida Education Association United

New Orleans, LA
Southern Legislative Conference, Council of State Governments

Williamsburg, VA
College of William and Mary

Key Biscayne, FL
Conference of Deputy Chief State School Officers

New Orleans, LA
Southern Assn. of Colleges and Universities

Milwaukee, WI
University of Wisconsin

Hartford, CT
Dept. of Education and Legislative Committee on Education

Charleston, SC
South Carolina ASCD Conference

Madison, WI
Rural/Regional Education Association

Lincoln, NB
Nebraska Unicameral Education Committee

Jacksonville, FL
National Federation of Urban-Suburban School Districts.

Villa Park, IL
DuPage High School District 88, Conference on Competency Education

Little Rock, AR
Arkansas Association of Educational Administrators

Clearwater, FL
Early Childhood and Elementary Education Curriculum Conference

West Palm Beach, FL
Eastern Educational Research Assn.

Hot Springs, AR
Arkansas Department of Education Conference on Assessment

Tuscaloosa, AL
Alabama Department of Education Conference on Competency Testing

Boca Raton, FL and Nashville, TN
Southern Regional Education Board Meeting on Educational Achievement in the South

Nashville, TN
National Conference on Critical Issues in Competency-Based Testing for Vocational-Technical Education

Coral Gables, FL
Southern Regional Education Board Legislative Committee Meeting on Current Testing Issues

Nashville, Tennessee
House and Senate Education Committees. Discussion of Tennessee's value-added student assessment system

Atlanta, Georgia
Southern Education Foundation 15th Annual Continuing Conference, November 19, 1997

Hechinger Institute on Education and the Media at Teachers College, Columbia University, July 18-20, 1997

Little Rock, Arkansas
Joint Meeting of the House and Senate Education Committee, August 12, 2003

Ann Arbor, Michigan
Michigan School Testing Conference, March 5, 2004

Other Miscellaneous Professional Experiences

Chairman of the Salary and Welfare Committee of the Maumee, Ohio, Education Association

Chairman of the Audit Committee of the Maumee, Ohio, Teachers' Federal Credit Union

Chairman of the Principal's Advisory Committee, Plymouth, Michigan, High School

Member of the Superintendent's Advisory Council for the Willow Run Public School District, Ypsilanti, Michigan

Co-Chairman of the BACK the Board Committee, Willow Run Public School District, Ypsilanti, Michigan

Co-Chairman of the 1972 Annual Conference Program Committee for the Michigan Educational Research Council

Member and Technical Advisor of the Citizens' Advisory Committee on Public Opinion Surveys for the East Lansing Public School District

Member of the Technical Advisory Council for the Pennsylvania Quality Educational Assessment

Member of the Advisory Committee on Minimum Competency Testing, National Institute of Education, Washington, DC

Advisor to the Illinois State Board of Education on the topic of minimum competency testing of exceptional education students

Advisor to the Southern Regional Education Board, Atlanta, Georgia, on the implementation of an interstate achievement testing program

Member, Editorial Board, NCME Educational Measurement: Issues and Practices

Advisor to the Council of Chief State School Officers, Washington, D.C. on the design of a state-by-state achievement testing program

Member, Editorial Board, Applied Measurement in Education

Advisor to the U. S. Department of Education on reporting systems for educational accountability programs

Advisor to the Southern Regional Education Board, Atlanta, Georgia, on the evaluation of a special program to improve the education of minorities in three selected colleges

Consultant, Office of Educational Accountability, Comptroller of the Treasury, State of Tennessee, on issues related to the value-added student assessment system.

Member, Steering Committee for State-by-State Achievement Testing, Council of Chief State School Officers

Member, Mathematics Committee for State-by-State Achievement Testing, Council of Chief State School Officers

Member, Technical Advisory Committee for the Texas Academic Skills Project, Texas Education Agency

Member, Assessment Policy Committee Task Force on State Comparisons, National Assessment of Educational Progress

Member, High School Proficiency Examination Technical Advisory Committee, Ohio Department of Education

Member, Technical Advisory Committee for Competency Testing, Michigan Department of Education

Member, Assessment Subcommittee, Educational Information Advisory Committee, Council of Chief State School Officers

Reader/reactor for various project reports and proposals for the U. S. Department of Education.

Report/reactor, U. S. Governmental Accounting Office (GAO), on issues related to the establishment of standards of performance for the National Assessment of Educational Progress.

Member, Advisory Council on Education Statistics, U.S. Department of Education, National Center for Education Statistics.

Member, Committee on the Evaluation of National and State Assessments of Educational Progress, Board on Testing and Assessment, National Research Council.

Member, National Assessment Governing Board. Co-Chairman of the NAGB Committee on Standards, Design, and Methodology.

Consultant, California Department of Education, on implementation of their high school graduation examination.

Consultant on Assessment and Accountability, U. S Department of Education, *No Child Left Behind* Title I Negotiated Rule-Making Committee

Consultant, North Carolina Department of Education, on statewide assessment and accountability matters.

Work completed on behalf of Fisher Education Consulting beginning December, 2002:

Consultant, Florida Department of Education, to develop the state accountability plan for *No Child Left Behind.*

Consultant, Indiana Department of Education, on setting passing scores for a high-stakes student assessment test.

Consultant, U. S. Department of Education, serving as a "peer reviewer" for *No Child Left Behind* plans for several different states.

Consultant, Bradford County, Florida, school board on matters related to test security.

Consultant, Accountability Works, Washington, D.C., advising regarding a request for proposals for implementation of a statewide assessment program.

Consultant, North Dakota Department of Education, writing a Request for Proposals for the statewide assessment program.

Consultant and Member, Michigan Educational Assessment Program, Technical Advisory Committee.

Consultant and Member, North Dakota Educational Assessment Program, Technical Advisory Committee.

Consultant and Member, Virginia Educational Assessment Program, Technical Advisory Committee.

Consultant and Member, Arkansas Educational Accountability Program, Technical Advisory Committee.

Consultant and Chairman, Idaho Statewide Assessment Program, Technical Advisory Committee.

Consultant, *AccountabilityWorks!*, Washington, D.C., serving as Project Director for development of CELLA, an English Language Learner assessment.

Consultant, Harcourt Educational Measurement.

Consultant, Florida State University, College of Communication, analyzing student assessment data for a program evaluation.

Member, Advisory Board for Pearson Education Measurement, Inc.

Consultant, The Princeton Review

Consultant, CTB/McGraw-Hill

Member, Educational Testing Service Research Panel.

Consultant, U. S. Department of Education, serving as a "peer reviewer" for *No Child Left Behind* growth model plans for several different states.

Expert witness, Kentucky school finance case, *Young v. Williams*.

Expert witness, California statewide assessment program litigation, *Coachella Valley v. California*.

Consultant, Florida Department of Education, providing quality control advice concerning the Florida Comprehensive Assessment Test (FCAT).

Statistics, Research, and Measurement Courses Completed

Fundamental Research Skills	Educational Statistics
Fundamentals of Statistics	Multivariate Analysis
Advanced Research & Experimental Design	Variance and Covariance
Advanced Problems in Measurement	General Linear Models
Factor Analysis	Measurement Theory II

Computer Proficiencies. I serve as the webmaster for my church web site. I am proficient with:

Windows XP	WORD	EXCEL
SPSS	ACCESS	Microsoft Publisher
Microsoft PowerPoint		

Statewide Assessment & Accountability: Lessons Learned

Statewide Assessment and Accountability: Lessons Learned

Florida House of Representatives
Schools & Learning Council
November 7, 2007

Fisher Education Consulting, LLC
McMinnville, Tennessee

The big picture issues

- Education is complex and expensive.
- Policy makers want efficiency, yet equality; data and accountability, yet "local control."
- There is no "royal road." It's complicated, especially when there are high stakes for students and schools.

Many experiences since 1976....

- 1976 Educational Accountability
- Functional Literacy; SSAT-I/II
- Debra P. v. Turlington
- FCAT, Writing tests
- Placement tests, CLAST, FTCE, FELE
- RAISE, REFORM, PRIME, PREP
- SCANS, Blueprint 2000
- Influence of NAEP

Lesson 1: High stakes tests create challenges…

- o Curriculum and instructional validity
- o Sufficient lead time to learn
- o Opportunities for retesting
- o Tests must meet APA standards
- o Passing scores must be properly set
- o Prevent test bias; accommodations

Lesson 2: Controversy is normal…

- Generally, the educational community does not like state control, especially testing and accountability.
- Many people think a diploma should be guaranteed based on attendance and credits.
- All course credits are not equal. Grade inflation. Lack of standards.

Lesson 3: Data are useful…

- More informed decisions can be made with data than without.
- Data enables research into questions about funding, articulation, program effectiveness, teacher quality, etc.
- Generally, we spend too much time creating data and not enough time interpreting it.

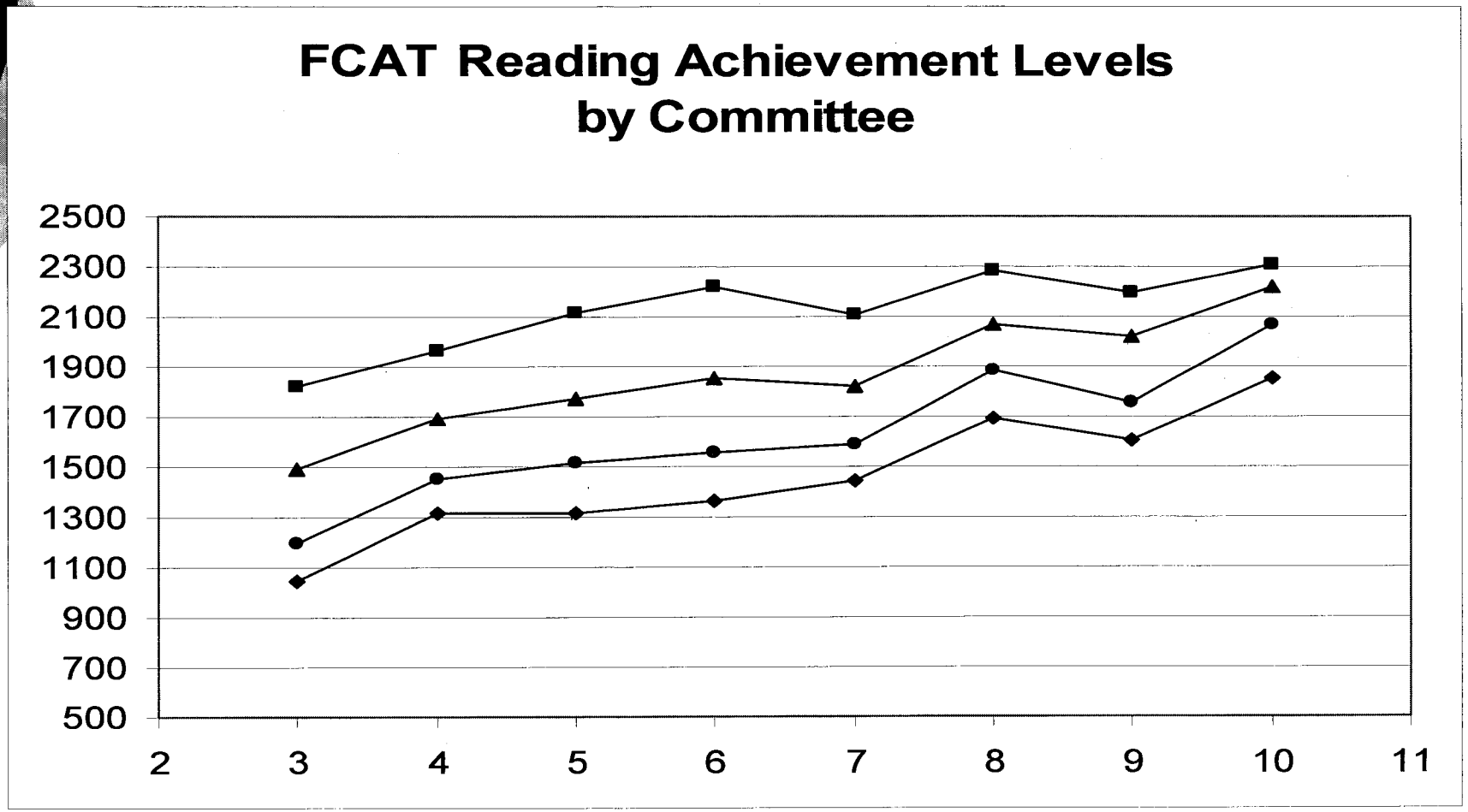
Lesson 4: Testing is complex…

- Operating a testing program requires resources, time, and sufficient budget.
- Every step in a testing program is related to every other step. Planning and coordination needed.
- To change direction is difficult, requiring planning and time.

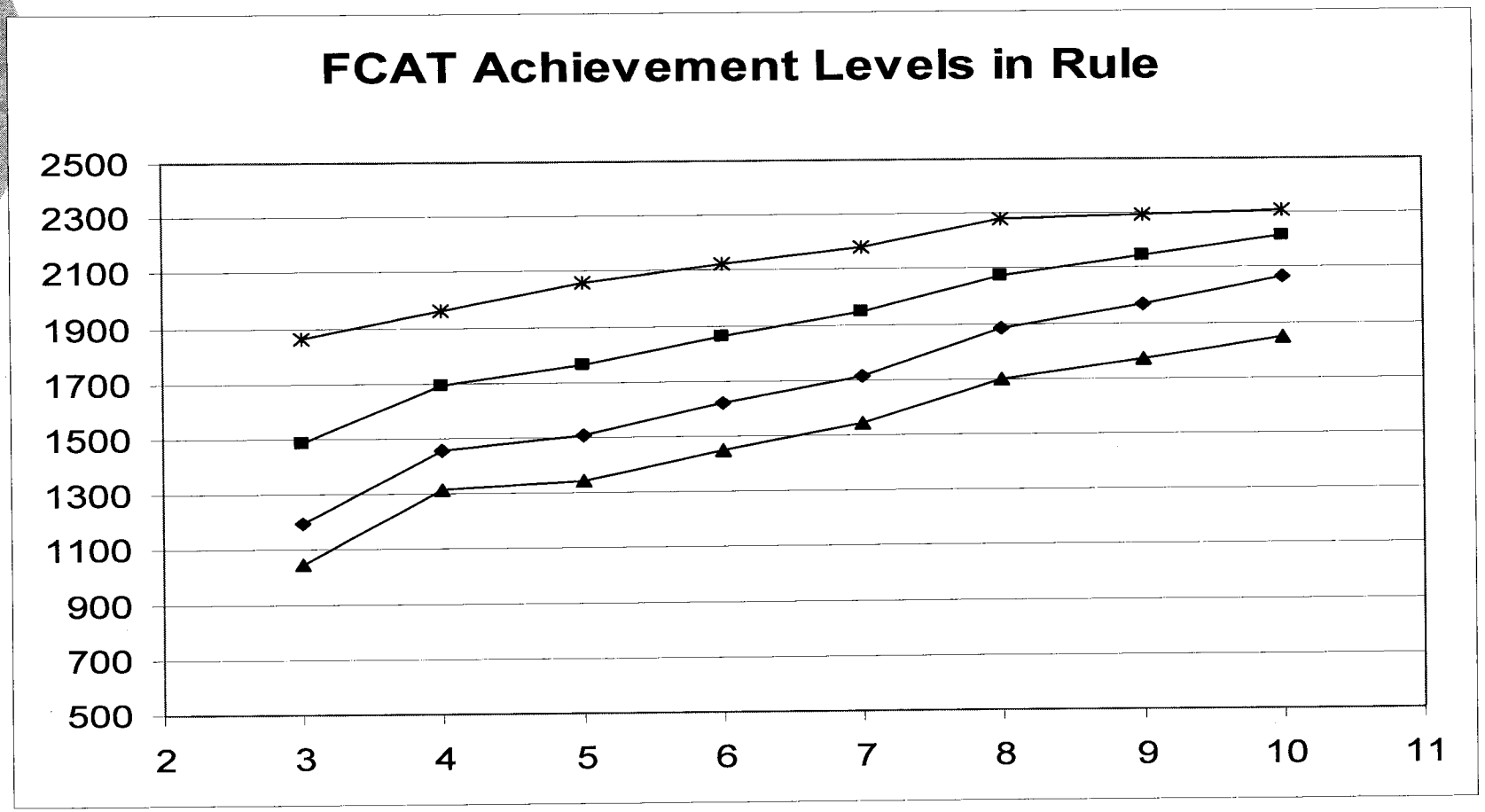
Lesson 5: Room for arguments…

- Time of year to test
- Constructed response items
- Norm-referenced tests
- Narrowing the curriculum
- Using test scores for accountability, growth measurement, prediction, articulation
- Passing scores / achievement levels

Independent Standard Setting Recommendations Are Not Consistently Challenging



Adjustments Make Standards Consistently Challenging



Lesson 6: Influence of the feds…

- Federal money comes with strings
- NCLB requirements for challenging content, testing, accommodations, disclosure of data, AYP, corrective actions at school level, etc.
- NAEP twelfth grade test
- NAEP state comparisons
- Not likely to diminish in future

Lesson 7: Problems can occur…

- Lost answer sheets
- Errors in scoring programs
- Last-minute corrections = problems
- Errors in answer keys
- Cheating by students/educators
- Data trends go up, go down
- Tracking students over time

Conclusions

- Florida has been a leader in testing and accountability.
- The FCAT program is sound and of better quality than most other states.
- Statewide assessment must serve state needs, and these needs sometimes change over time.
- No statewide assessment and accountability program is ever free of controversy.

Dr. Fisher's 1988
Article on Testing

APPLIED MEASUREMENT IN EDUCATION, 1(2), 157-170

Testing the Basic Skills in the High School—What's in the Future?

Thomas H. Fisher
Florida Department of Education

Because citizens continue to demand educational accountability, it is unlikely that basic skills testing in the high schools will dissipate over the next few years. However, changes will be made in testing methodology and content. Educators and citizens will debate whether to raise minimum competency requirements as students' scores increase over time. Tests will be revised to include more than just reading, writing, and arithmetic. Advances will be seen in the collection and transmission of test data through new computer technology. Statewide student data bases will be developed. High-school course testing and state-by-state achievement testing will be introduced. The worth and financial cost of mandated testing programs will continue to be discussed.

During September 1987, two documents came across my desk in the Florida Department of Education. The documents attracted my attention because they seemed to characterize the ongoing debate about the quality of our public schools and the role testing is to play. The first document was a survey conducted by the Florida Organization of Instructional Leaders (FOIL; Nations, 1987). This organization represents most of the assistant superintendents for instruction and is very influential. FOIL conducted this survey of Florida's 67 school districts to determine what achievement tests were being routinely administered and how many hours were being consumed in their administration. From these data, the economic cost of the programs was projected. The study is reminiscent of attempts in the early 1970s to direct attention to the total financial cost of testing (Cooperative Accountability Project, 1974; House, Rivers, & Stufflebeam, 1974).

The survey results claimed that 10,000 hr of student time are spent preparing for the statewide assessment tests. An estimated $634,000 in

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administrator time is spent coordinating these tests, and another $445,000 is spent coordinating district norm-referenced tests. The data for the 11th grade showed that the districts administer from 3 to 12 achievement tests annually.

It is certainly proper for FOIL to question the number and scope of testing programs used in the public schools. Unfortunately, the issues will not be easily resolved, because citizens and legislators evidently believe that tests are necessary to monitor the overall quality of the public school programs.

The second document of interest was the September 21, 1987 issue of *Newsweek*, certainly an influential shaper of public opinion. An article titled "Back to the Basics" described how American industries are creating schools for their workers (Copeland, 1987). The schools are not only teaching technical skills, such as how to operate a lathe, but they are also teaching employees how to read proficiently, how to do simple mathematics calculations, and how to write. The author stated, "At General Motors, new technology has forced retraining every three to five years—and employees without the basic skills quickly fall behind" (p. 55). The article asserted that this problem is the fault of the public schools, which are not providing the quality education needed by today's workers.

The point of this contrast is that many educators are concerned (a) that there is too much testing in the schools and (b) that state-imposed testing is a particular burden. Many citizens, on the other hand, are suspicious of educators' performance, and more testing and accountability is demanded for both students and teachers. Salganik (1985) summarized parents' rationale as follows:

> Test results would tell confused or insecure parents how much their children were learning or how 'good' their children's schools were. These parents would no longer have to rely on educators, whom they had come to distrust, for this information. (p. 609)

In response, legislators enact new laws designed, for example, to increase high-school graduation course requirements or to implement new testing requirements to reveal whether educators are effectively using existing resources.

It seems likely that this situation will not change in the foreseeable future. Indeed, basic skills testing in the high schools is apparently a growing enterprise, not a shrinking one. Changes may occur in form, but not in substance. People have had their appetites whetted for information, and this desire will not lessen in the future. Therefore, it is worthwhile to explore several current trends in high-school testing so the reader may contemplate what is likely to happen over the next decade.

RAISING THE MINIMUMS

In the mid- to late 1970s, many states initiated minimum-competency testing programs. These programs used multiple-choice tests in reading, writing, and mathematics; were administered to all students; and were often tied to promotion or graduation. They were described and debated in numerous journals such as *Phi Delta Kappan* ("Minimum Competency Testing," 1978) and *Educational Leadership* (a section called "Competency Testing" included Newman, 1979; Pipho, 1979; Wise, 1979).

In general, these programs defined a minimal level of performance students were required to attain to make continued progress from grade to grade or to be awarded a standard high-school diploma. The emphasis was not on challenging the brighter students. Indeed, the emphasis was on the opposite end of the spectrum of achievement—to try to guarantee that all students received at least a minimum education in the basic skills.

The programs were controversial for many reasons—for example, perceived state control of education, possible bias against minority students, and increased emphasis on low-level skills. In some places, the debate entered the courts where aggrieved parties tried to force the governing bodies to change or delete the testing programs. The most famous of these trials was the *Debra P. v. Turlington* (1979) case in Florida—which established that the state had the right to impose a testing requirement as long as it was done fairly. Once the *Debra P.* case was settled, other states (e.g., Ohio and New Mexico) moved ahead to initiate testing requirements.

Gains in student achievement have been reported from those states and districts that have implemented required testing programs (Popham, Cruse, Rankin, Sandifer, & Williams, 1985). Student proficiency increased as school personnel made greater efforts to provide instruction directed toward the required content. In Florida, for example, student achievement has steadily increased over the years as measured by equated test means (Beard, 1987). For the October 1986 administration of the Florida State Student Assessment Test, 15 of 18 performance standards were mastered by more than 90% of the students (Florida Department of Education, 1987d).

As performance increases, a dilemma is created that provides another opportunity for debate. In the minds of some, once minimum standards are established, they should not be changed—that is, once a minimum, always a minimum. If one accepts this position, the state and districts could eventually test thousands of students annually, knowing that only a small percentage might be designated as having learning deficiencies needing additional instruction. Alternatively, one can argue that the purpose of these testing programs is to move education forward toward higher standards. This can be done only if the performance expectations are adjusted as soon as students have reached the initial minimums. This

particularly makes sense when one views the low level of challenge provided by minimum competency tests.

In addition to concerns raised about the minimum expectations as student scores increase over time, one must recall that there are a number of critics who were never convinced in the first place that minimum competency tests would help education. For example, Wise (1979) argued that the tests would do nothing for average and above-average students. Wise also believed that minimum competency tests would narrow the curriculum by focusing only on elementary reading, writing, and arithmetic skills (Brandt, 1983). In response to these concerns, educators are being urged to teach and assess higher order skills (Quellmalz, 1985) and the "new basics" of English, mathematics, science, social studies, and computer literacy ("The New Basics," 1983).

Last, there is a new movement toward educational accountability taking place at the postsecondary levels (Southern Regional Education Board, 1987). Legislators are concerned because so much money is being spent for remedial (i.e., college preparatory) instruction at the postsecondary level. Colleges and universities are beginning to discuss what would be appropriate performance expectations for their students and how they might assess the degree to which the standards are being met. Florida already has a competency test for college sophomores, the College-Level Academic Skills Test (CLAST), which must be passed to receive an associate of arts degree or a baccalaureate degree (Florida Department of Education, 1987a). As performance trends are closely inspected for the college and university tests, there may be a tendency to say that students are not coming to college adequately prepared. Postsecondary educators will put pressure on the high schools to expect more, to raise standards, and to document that students are ready for college work. Minimum competency tests will not serve this function. Further, colleges and universities may determine that their placement needs are not being met by the traditional Scholastic Aptitude Test (SAT) and the American College Testing Program (ACT) examination. They may demand that new placement examinations be administered late in the high-school senior year, particularly for the subject areas of English and mathematics.

The future, then, holds the possibility for changes in the current emphasis on minimum competency tests. The minimums will be made more difficult as student performance increases, because citizens will not be satisfied with the very low levels of performance now expected on such tests. Second, there will be movement toward broadening the content of such tests beyond reading, writing, and arithmetic. In Florida this has already happened as the Legislature is now requiring minimum performance standards in science, computer literacy, history, government, geography, and economics (Florida Department of Education, 1987c). Third, there may be compromises by

which some students are exempted from taking the minimum competency tests if certain criteria are met. Presumably, this would provide additional time for these students to take other tests more closely attuned to their higher levels of performance. Fourth, additional testing is likely to occur for college-bound students, and greater curriculum and testing articulation will be seen between the secondary and postsecondary levels.

ADDED DIMENSIONS TO BASIC SKILLS TESTING

As previously stated, appetites have been whetted for information about how students are achieving. Citizens will likely want more information, not less, in the future. For high schools, future changes in the testing programs, representing newer dimensions, refinements to the present efforts, will probably revolve around (a) subject-area testing, (b) national comparison testing, and (c) concerns about test security.

Subject Area Testing

One can readily extend the arguments justifying minimum-competency testing programs in reading, writing, and mathematics to subject-area testing in the high school. That is, if it serves the interest of equity to administer reading competency tests uniformly to every student, to ensure that students are learning basic skills regardless of where they attend school, then likewise it would be equitable to test students in algebra 1, English 2, or world history. Students moving from one city to another, in the same state, also have the right to anticipate that consistent expectations will be placed on them. For the university admissions officer, consistency of expectations from one high school to another would be highly desirable. Thus, a trend is emerging across the nation to create new testing programs for the high schools that will require students to take state-developed course examinations.

Course examinations have been developed and are being routinely administered at this time in North Carolina (Brown, 1987) and in California (D. Carlson, personal communication, September 23, 1987). Examinations are being developed in Florida and are scheduled for administration beginning in the spring of 1989 (Florida Department of Education, 1985). Districts such as Dade County, Florida (R. Turner, personal communication, September 23, 1987) and Albuquerque, New Mexico (C. Robinson, personal communication, September 28, 1987) are already administering subject-area tests before the state-level examinations are ready for use. Although designs differ across these programs, it is clear that the examinations are not measuring only minimum competencies. Instead, they

measure the full extent of the course expectations and, thus, are challenging to all students taking the courses.

The development of high-school course examinations is not as easy as the development of the assessment tests in current use. For one thing, there are hundreds of high-school courses, and it would be very difficult to build tests for each. Second, many courses include student objectives not easily measured with multiple-choice test items. The objectives may require students to provide rather than to select answers or even to perform some task. This requires more testing time than usually available, unless the objectives are sampled in some way. Third, there must be some motivation for students to want to take the examination, especially if it is state-mandated test. One way to motivate students to take a course examination seriously is to require them to pass the test to obtain course credit. This is risky, however, as the student probably could not be given multiple opportunities to take the test, a procedure usually adopted to be fair to students. An alternative is to entice the students to take the test, as in California, by offering some sort of diploma endorsement of competency.

Regardless of how the tests are implemented, once they are in place and the data are collected the door is open for data analyses of a different, more powerful character than has been seen before. Principals, teachers, and district educators, not to mention state officials and citizens, will conceivably have information available about how students perform within a particular course, for a particular teacher, or even a particular class period. Test performance can be compared with teacher-assigned grades. Student performance in a course can be related to other variables of interest, such as the entire range of socioeconomic variables, student background variables, and school resources variables. This type of testing opens the door for better training of teachers in the construction of classroom tests. It will lead to introspection about the use of grading scales and performance standards. It will lead to reviews of school policies and practices when, for instance, two schools have inverse patterns of performance on the externally developed course test and grades issued to students taking the course.

In summary, the implementation of high-school course examinations is going to be quite interesting to observe. They have great potential for bringing about positive improvements in teaching and grading practices as long as educators use the information productively and positively.

National Comparison Testing

Local school districts have administered commercial norm-referenced tests for years. Typically, the tests are administered to all students in selected grades, and the results are used for course placement or counseling and to compare performance of the district against national student norms. In

some situations, the test results have been used as a criterion for grade promotion (Cates & Ash, 1983). Use of these commercial norm-referenced tests has been very routine and unquestioned; however, events now occurring will probably change this.

Two fundamental questions are being asked about current policies and practices in norm-referenced testing. First, there is the issue of whether the tests are as meaningful and useful as educators believed. A norm-referenced test is supposed to generate a national comparison norm for a student, and little is expected beyond that. Publishers have tried to create reporting systems that can generate more detailed information about the students' attainment of specific skills, but these attempts have not been terribly successful. A brief norm-referenced test cannot indicate student mastery of a set of individual performance objectives. Second, when selecting a norm-referenced test, one must be willing to face the fact that the test content may not adequately match the curriculum content. For these reasons, many educators would prefer to cease administering norm-referenced tests and devote students' limited testing time to the measurement of important skills with locally constructed criterion-referenced tests. The primary reasons this is not done more frequently at this time are (a) tradition and (b) the requirements of federal compensatory education programs, which often rely on norm-referenced test data for placement and evaluation. Alternatives to the traditional administration of these tests are discussed later in this article under Impact of Technology.

Second, norm-referenced testing programs are being criticized because of the inadequacy of the national norms and the inconsistency of results across various tests. In Florida, all 67 districts administer some type of nationally normed test, but there is little consistency in test selection (Florida Department of Education, 1986). Test results are not comparable across districts, thus making any meaningful comparisons impossible, a fact that has not escaped the eyes of the legislators. Perhaps more condemning is the recent criticism of commercial norm-referenced tests by the Friends for Education (Cannell, 1987). Cannell argued that state and local educators are deliberately deceiving citizens and parents by selecting norm-referenced achievement tests that will always show that the students are achieving above national norms. He rather convincingly reported information from various states and districts to demonstrate his point. One can argue with the way in which Cannell has considered the statistical explanations for this phenomenon, but he cannot be faulted for realizing that the current use of norm-referenced tests produces results that are neither current nor representative of the nation. He has attracted the attention of at least one major national newspaper, and his arguments may create impetus for more inquiry.

The issue of nonrepresentativeness of national norms can be solved if a

test is constructed to measure some of the more commonly taught student objectives and is then administered to a carefully drawn sample of students. The National Assessment of Educational Progress (NAEP) has done this for a number of years. However, NAEP only gathers information on a sample of students nationwide and does not produce state-by-state comparison data. The latter issue has become important in the last 3 or 4 years due to the production of the "wall chart" of educational data prepared annually by the U.S. Department of Education (U.S. Department of Education, 1985). This chart reports student achievement data through the SAT and the ACT examination. Unfortunately, the data are not comparable across states any more than the dozen or so achievement tests in Florida are comparable across districts. To answer this criticism, the Council of Chief State School Officers recently enacted a resolution calling for the measurement of student achievement across all states using instruments to provide comparable data (see Council of Chief State School Officers, 1984).

The council will attempt to use tests based on NAEP. The rationale for this is that NAEP already represents a type of compromise of content coverage and measurement strategies. If, however, NAEP exercises and procedures are determined to be unacceptable, the council will consider other alternatives. In either event, the implementation of a national comparison testing program will affect the high-school testing programs. First, it can be anticipated that a sample of students in each state will have to participate annually. In some states, the council program may be woven into the state assessment program in such a way that all students in every high school will participate. True nationally comparative data will be available in various subject areas, thus raising the question of whether or not the local district should continue its use of locally selected commercial norm-referenced tests. Second, given that citizens and decision makers are interested in more than reading, writing, and arithmetic, high-school students will begin to take tests in more areas than they presently face. This should serve to increase curriculum improvement efforts in areas outside "the three Rs."

Concerns About Test Security

People do not like to talk about issues of test security. It is distasteful to realize that there are a few students, educators, or citizens who do cheat on tests. However, it is an issue that must be considered. A testing program is often imposed from outside the system, sometimes giving people an excuse to cheat—after all, the test was not desired by the local educators or students. And, if students might be deprived of a diploma for not passing a test, the penalty is severe enough to lead some students to cheat. Teacher merit-pay may depend on the performance of students on achievement

tests, a fact that could lead someone to alter answer sheets or provide answers to students.

When Florida was just beginning its high-school graduation test, a newspaper actually requested permission to print the test in the Sunday edition prior to its administration so citizens could see what it looked like. Others demanded the right to see the test or to keep a copy of the test after it was administered. People not associated with test development committees tried to gain entrance to the committee meetings to see what was on the test. In all cases, permission was refused and access to the test was limited by the state to those who were authorized. This was made possible because the department asked for the legislature's cooperation in passing statutes removing the tests from certain public records laws.

But, as the stakes have increased, so has the need for additional legal restrictions. Following South Carolina's lead, Florida recently enacted a law making it a first-class misdemeanor for anyone to contribute to cheating on the state tests. The punishment could be a fine and incarceration of up to 90 days. In the future, persons handling secure test materials must be even more careful in how they store, inventory, administer, and return the tests.

The implication for high-school teachers, counselors, and administrators is clear. As the measurement stakes are raised, the procedures for administering the tests will become more restrictive. Great care must be taken with the administration of the required tests, and adequate time must be allocated for training the staff to complete the assigned tasks correctly.

IMPACT OF TECHNOLOGY

Computers in the High Schools

There is no question that we are being affected in many ways by the advent of modern electronic technology. This article was written on an electronic word processor that permits the writer to change type fonts, underline, copy paragraphs, move sentences, insert artwork, plot graphs, and create the reference list in a second operational window while the manuscript is being typed. The software checks the spelling of words and prints the final copy on a laser printer in camera-ready condition. The usefulness of such equipment has not escaped the eyes of educators, as can be seen from the many journal articles devoted to using the new electronic technology ("The Computer Age," 1982; "Computers," 1983; "Empowering Students," 1986; "Visions of the Future," 1984). Computers are being used in the classrooms to teach students to write and to learn mathematics. Teachers use the computers to teach programming languages and to keep records of student

performance on classroom tests. Administrators use computers to schedule classes and to maintain budgets.

But there is another revolution in the use of computers destined to affect the high schools and the manner in which students' test records are created and maintained. This is occurring in two ways. First, the creation of the economical microcomputer and desktop scanner has made it possible for every school to have its own test processing center. On some machines, the teacher can insert an optical scan answer sheet and the computer will grade it instantly. The answer sheet is returned with the number (or percentage) correct marked and the items marked right or wrong throughout the test. On the more complex machines, the students' answers can be scored instantly or can be stored on a disk for later processing by software as complex as any mainframe system could be.

More important, through the use of networks and computers linked by telephone, a school district can connect all its schools electronically. District administrators can send messages to each school through electronic mail programs. Classroom teachers can send attendance data directly to the district offices hourly, if necessary. The district and school personnel can query electronic data bases for information to assist in research on a particular topic. And, records for an individual student can be maintained on a district master file and downloaded to an individual school on command. Simple logic would indicate that what a district can do within its own boundaries, a state can do across all districts. Florida has instituted an information system—the Florida Informational Resource Network (FIRN)—to do just that.

FIRN is an electronic network connecting all local school districts, the postsecondary institutions, and the Florida Department of Education (see Florida Department of Education, 1987b). Individual users can also enter the network from home computers by dialing a local access number. FIRN has many uses. For example, it permits districts to access software located at another location for the purpose of building class schedules. Districts can transmit data to the Florida Department of Education instead of sending written records through the mail. And, it enables the state to create an informational data base that will maintain permanent records on each student. These records will constitute an electronic cumulative folder that can be accessed whenever a student moves from one location to another.

If one combines the idea of high-school course examinations with the idea of local district or school scanning capability, it is possible to imagine a system in which the examinations are scored within 24 hr of their administration with the results returned to the school via an electronic transfer of information to an appropriate form in the school's computer printer. The advantages of such a system for keeping track of student progress and for conducting research on educational programs are obvious.

Florida is ahead of the nation in its implementation of the FIRN system, but it seems likely that other states soon will do the same thing. Ours is an informational age, and the computer makes information readily available. It is unlikely that the movement toward such powerful data base systems will waiver.

Different Testing Strategies

The use of microcomputers for the storage and retrieval of test information is not the only way in which high-school basic skills testing programs will change in the future. Two other techniques are appearing on the horizon that will be quite useful to educators and students. The first of these is the creation of "adaptive tests." McBride (1985) stated: "Within fifteen years this form of testing will completely displace paper-and-pencil tests in many programs" (p. 25). Although this may be a bit overstated, there is no doubt that the use of adaptive tests is a promising opportunity.

In essence, adaptive testing is made possible by using modern statistical techniques with the computer serving as a storage device for items. The software selects an item of middle difficulty as a beginning point. Subsequent items are selected based on whether the student answers correctly or incorrectly. By careful selection of the item sequence, the computer is able to identify the student's level of proficiency after leading the student through relatively few questions. The student's knowledge can, therefore, be measured much more quickly. This system has been made available through the College Entrance Examination Board with its Computerized Placement Tests (Educational Testing Service, 1986). It is also apparent that, by using an interactive videodisc, adaptive testing could become even more attractive. The videodisc is able to store thousands of items and to retrieve them instantly, complete with television-quality graphics.

It is doubtful that adaptive testing with computer terminals will be the method of choice for large-scale testing programs. The cost of the equipment and the space for test administration would be quite prohibitive. On the other hand, the use of such equipment for administering tests to students in small numbers would be quite feasible. Such techniques could be used (a) to test students who were absent on the day of the regular test, (b) to administer optional tests to students desiring certain information about their abilities, and (c) to administer specialized placement tests taken by only a few students. The technology is readily available today; it is only a matter of time until the systems are widely implemented.

The second strategy that will likely affect high-school testing is the use of the more sophisticated test analyses techniques that are now being discussed. As has been previously stated, educators are concerned that currently there are too many separate testing programs. Many of these

affect the high schools. There are district norm-referenced and criterion-referenced tests, state proficiency tests, college placement tests, armed forces aptitude tests, new state-by-state comparison tests, the NAEP tests, and, of course, classroom tests. It would be quite helpful if at least a few of these testing sessions could be used for multiple purposes, thus reducing the time devoted to testing. And, in a related matter, it would be helpful if tests designed for local use could generate state data or vice versa.

For tests in which the interest is only in summative scores, one can conceive of testing students on only a sample of items from a total battery of items calibrated on the same scale. This approach was used by the Southern Regional Education Board in its attempt to measure the achievement of students in the southern states (see Southern Regional Education Board, 1986). In this project, a sample of approximately 2,000 students was tested in each of eight participating states. Each student was tested for about 45 min. When the data from all students were combined, the results predicted the state's position on the national scale quite accurately. Conceivably, the same approach could be used by any local district wishing to gather normative information on its schools but not needing extensive individual measures.

Second, through the efforts of Bock and Mislevy (1987), sampling procedures are being developed that depend on the administration of a set of core items in addition to several sets of matrix sampled items. Through sophisticated statistical procedures, it is believed that these methods can be used to generate accurate data at the student level and at all levels up to and including the state level. Again, the emphasis is on generating useful information with a minimal investment of time.

SUMMARY AND CONCLUSIONS

The purpose of this article has been to describe several emerging trends in basic skills testing programs at the high-school level. Several different trends have been discussed, including the future of minimum competency testing, the initiation of course examinations, the advent of state-by-state comparisons, the rising concern about test security, and the pending impact of modern electronic technology. The general thesis of this article is that the future will bring more testing, not less, although there will be significant changes in the way in which the tests are implemented.

Unfortunately, current changes in educational programs and requirements quite often result in confrontation between the professional educator and the parents and citizens. Parents and citizens demand more use of tests, whereas educators all too often resist and delay. Brandt (1985) so accurately commented on the situation: "It is regrettable that a profession should be so

critical of one of the basic tools of its trade" (p. 3). I certainly agree with Brandt on this point, and I hope that future developments will bring about a change in attitude. Tests are not a cure-all for educational problems, but they can be quite helpful when used correctly. Educators have the opportunity to be involved in designing these new testing adventures and they can stress the goal of proper test use. I am optimistic that the goal can be reached.

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Schools & Learning Council

Florida Comprehensive Assessment Test (FCAT)

Fact Sheet

January 2008

1. What is the Florida Comprehensive Assessment Test?	Current law requires the Commissioner of Education to design and implement a statewide program of educational assessment. As part of this program, the commissioner must develop and implement the Florida Comprehensive Assessment Test (FCAT) to measure student achievement in reading, writing, mathematics, and science. The FCAT consists of two types of tests. First, it includes criterion-referenced tests (CRTs) in reading, writing, mathematics, and science, which measure a student's progress toward meeting benchmarks described in the *Sunshine State Standards* **(Refer to Sunshine State Standards Fact Sheet)**. A student's scores on the FCAT are based on the CRT test items. Second, the FCAT includes norm-referenced tests (NRTs) in reading and mathematics, which compare the achievement of Florida students with that of their peers nationwide. The NRT portions of the FCAT are not reported as part of student scores and, thus, are not included in the calculations of school grades.
2. How is the FCAT developed and constructed?	The CRT portions of the FCAT are developed exclusively for use in Florida based specifically on the benchmarks of the *Sunshine State Standards*. The FCAT CRT test items are developed by the Department of Education (DOE), outside contractors, and several hundred Florida educators and citizens. The following process is currently used to develop test items for the CRT portions of the FCAT: • ***Item writing.*** DOE develops and periodically revises test-item specifications that detail the specific *Sunshine State Standards* benchmarks to be assessed. Test writers from an outside contractor draft, review, and edit the test items. • ***Pilot testing.*** The contractor administers newly written (pilot) test items to small groups of students outside Florida. The students are interviewed after testing to identify the challenges they had in understanding the test items. • ***Committee reviews.*** New test items are submitted to

several committees composed of Florida educators and citizens. The committees review test items for various issues, which include the following:

- *Bias.* Whether test items provide an advantage or disadvantage (unrelated to an understanding of the content) to a student with certain personal characteristics, such as gender, race, ethnicity, religion, socioeconomic status, disability, or geographic region.
- *Community sensitivity.* Whether the subject matter of test items will be acceptable to students, their parents, and other members of Florida communities. Examples of sensitive topics may include wildfires, hurricanes, or other topics considered too offensive or sensitive for students or that may distract students. Unlike bias, however, sensitivity issues do not necessarily affect student success on an item, whereas bias may.
- *Content validity.* Whether test items are appropriate for the grade level, accurately measure the benchmarks, evaluate the specified level of cognitive complexity, are clearly worded, and, for multiple-choice items, have only one correct answer.

- ***Field-test items.*** New test items are field tested by all Florida students taking the annual administration of the FCAT. Field-test items are not counted toward a student's score, but are embedded among the operational items that are counted. Field-test items are used to generate statistical data about the performance of students on the items. In addition, student responses to field-test items are further reviewed by committees to reveal any oversights in the design of the test items.
- ***Statistical review.*** DOE performs statistical analyses of student scores on the field-test items. A field-test item must satisfy certain quality criteria for the item to be included on future administrations of the FCAT as an operational (scored) item.
- ***Test construction.*** DOE annually develops test-construction specifications that are used to build a complete test for a single year. Based on the specifications, DOE selects the test items and creates a test form, which includes both the operational items and field-test items **(see Question 3)**. In addition, the test form includes anchor items used to compare test results

	from year to year and linking items used to compare the progression of test results from grade level to grade level. For the NRT portions of the FCAT, DOE selected the *Stanford Achievement Test Series, Tenth Edition* (*Stanford 10* or *SAT10*) developed by Harcourt Assessment.
3. What types of test items are included on the FCAT?	Test forms for the CRT portions of the FCAT include four types of test items: • ***Operational items.*** Test items that have undergone extensive review and field testing and which are counted toward a student's score. • ***Field-test items.*** New test items included in the annual administration of the FCAT, embedded among the operational items, but which are not counted toward a student's score. Field-test items generate statistical data about the performance of students on the items **(see Question 2)**. • ***Anchor items.*** Test items appearing as operational items on the FCAT in prior years which are used to ensure that test scores may be comparable from year-to-year through a statistical analysis known as "equating" **(see Question 6)**. Anchor items are not counted toward a student's score. • ***Linking items.*** Periodically, operational items on one grade level's test are included on tests for one grade level above and one grade level below the operational test for purposes of calculating a developmental scale **(see Question 7)**. A developmental scale shows whether a student's performance improved, declined, or remained consistent from grade to grade. Linking items do not count toward a student's score in the adjacent grade-level tests. FCAT test items appear in various formats. These include: • ***Multiple choice.*** Test items that present students with several options from which to choose. Multiple-choice items are included in testing for each FCAT subject and grade level **(see Question 4)**. • ***Gridded response.*** Test items that require students to solve a problem for which the answer is numerical. Answers must be written and bubbled into a number

grid. Gridded-response items are included in FCAT Mathematics (grades 5-10) and FCAT Science (grades 8 and 11) **(see Question 4)**.

- ***Performance tasks.*** Test items that require students to provide either a short or extended written response. Short-response items may, for example, ask students to describe a character in a story, write a mathematical equation, or explain a scientific concept. Examples of extended-response items include comparing two characters, constructing a graph, or describing the steps in an experiment. Performance tasks are included in FCAT Reading (grades 4, 8, and 10), FCAT Mathematics (grades 5, 8, and 10), and FCAT Science (grades 5, 8, and 11) **(see Question 4)**.

- ***Writing prompt or prompted essay.*** Test items in which the student is given a topic on which to write an essay. Writing-prompt items are included in the essay portion of FCAT Writing+ **(see Question 4)**.

The NRT portions of the FCAT, the *Stanford 10* developed by Harcourt Assessment, include only multiple-choice items.

4. In what grades is the FCAT administered?

Current law requires the FCAT to assess students in reading, writing, mathematics, and science. Students must be assessed annually in grades 3 through 10 in reading and mathematics. Both the CRT and NRT portions of the FCAT satisfy these requirements by assessing students in reading and mathematics in grades 3 through 10.

Current law requires the assessment of students in writing and science at least once at the elementary, middle, and high school levels. DOE consequently determined that the CRT portions of the FCAT assess students in writing in grades 4, 8, and 10 and in science in grades 5, 8, and 11. The NRT portions of FCAT (*i.e., Stanford 10*) do not assess students in writing or science.

The following table shows the grade levels at which each subject test is administered and the types of test items included in each test **(see Question 3)**:

FCAT CRT Items by Subject and Grade Level

Grade	Reading	Writing+	Mathematics	Science
3	MC		MC	
4	MC, SR, ER	WP, MC	MC	
5	MC		MC, GR, SR, ER	MC, SR, ER
6	MC		MC, GR	

7	MC		MC, GR	
8	MC, SR, ER	WP, MC	MC, GR, SR, ER	MC, GR, SR, ER
9	MC		MC, GR	
10	MC, SR, ER	WP, MC	MC, GR, SR, ER	
11				MC, GR, SR, ER
Retake	MC		MC, GR	

KEY:
MC Multiple choice
GR Gridded response
SR Short-response performance task
ER Extended-response performance task
WP Writing prompt or prompted essay

5. When is the FCAT administered?

Current law requires the Commissioner of Education to establish a schedule for administration of the FCAT which provides for the latest possible administration of the test and the earliest possible provision of the results to the school districts, which is feasible within available technology and appropriations. For the 2007-2008 school year, the commissioner has established the following testing schedule:

February 12-15, 2008

FCAT Writing+
(Grades 4, 8, and 10)

March 11-24, 2008

FCAT Reading,
FCAT Mathematics,
and *Stanford 10* (NRT in reading and mathematics)
(Grades 3-10)

FCAT Science
(Grades 5, 8, and 11)

The schedule also includes dates for students to retake FCAT Reading and FCAT Mathematics:

September 24-28, 2007
or October 1-5, 2007
(Grades 11-Adult)

March 11-24, 2008
(Grades 11-Adult)

June 16-20, 2008
or June 23-27, 2008
(Students scheduled to graduate May or June 2009 – Adult)

6. How is the FCAT scored?

Multiple-choice and gridded-response items are "machine scored," that is, scanned and scored using automated systems. Performance tasks (short-response and extended-response items) and prompted essays are handscored by trained evaluators. After student responses on the FCAT are

	machine scored or handscored, DOE performs statistical analyses on the responses, known as "equating," to compare them to responses from testing in prior years. To equate tests from one year to the next, some operational (scored) items from one year are selected to appear identically on the following year's test. Test items repeated the following year are known as "anchor items" and are not counted as part of the student's score. Based on the statistical relationship between student scores on the anchor items and scores on the operational items, the scores on the second year's test are scaled to scores on the first year's test, thereby allowing the scores to be compared. The results of equating are scale scores ranging from 100 to 500. Scale scores are calculated in grades 3 through 10 for FCAT Reading and FCAT Mathematics. Scale scores for FCAT Writing+ (grades 4, 8, and 10) and FCAT Science (grades 5, 8, and 10) are also calculated.
7. How are FCAT scores reported and what do the scores mean?	FCAT scores are generally reported in two ways: by achievement level and by developmental scale score. The State Board of Education has adopted rules establishing five achievement levels for FCAT. Level 5 represents the greatest achievement, while Level 1 signifies the lowest achievement. The rules identify ranges of scale scores, by grade level, for each achievement level. For example, a student scoring in Level 1 on FCAT Reading earned a scale score that falls within a range from 100 to 258, while a student scoring at Level 5 earned a scale score within a range from 394 to 500. The upper and lower scale scores of each achievement-level range are known as "cut-point scores." DOE periodically establishes standards setting committees to recommend cut-point scores for the five achievement levels through a process, known as "bookmarking," for reviewing grade-level expectations for student performance on FCAT test items. Committee members include teachers from the targeted grade levels and subject areas, school and district curriculum specialists, school and district administrators, university faculty from the discipline areas, and business and community leaders. Students who score at Levels 3, 4, or 5 are performing at or above grade-level expectations. Students who score at Level 1 or 2 are performing below expectations and need additional instruction in the content assessed at that grade level. Achievement-level scores (Levels 1-5) are reported for

	FCAT Reading and FCAT Mathematics (grades 3-10), for FCAT Writing+ (grades 4, 8, and 10), and for FCAT Science (grades 5, 8, and 10). The state board's rules also provide for the reporting of FCAT scores according to a developmental scale, which represents a student's grade-to-grade growth. DOE periodically establishes the developmental scale, which comprises ranges of scores from 0 to 3000, by performing statistical analyses, know as "linking," which are similar to equating. Operational (scored) items included on one grade level's FCAT appear identically as "linking items" on the FCAT tests for one grade level above and one grade level below the operational test. Linking allows DOE to calculate the developmental scale by comparing the statistical relationship between student performance on linking items at one grade level to performance at the adjacent grade levels. An individual student's FCAT scale score **(see Question 6)** ranging from 100 to 500 is converted to a developmental scale score ranging from 0 to 3000, which allows the student's FCAT score to be plotted on the developmental scale. The student's developmental scale score shows whether the student's performance improved, declined, or remained consistent from grade to grade. Developmental scale scores are calculated in grades 3 through 10 for FCAT Reading and FCAT Mathematics. Because linking requires scale scores for adjacent grade-level tests, developmental scale scores cannot be calculated for FCAT Writing+ (grades 4, 8, or 10) or FCAT Science (grades 5, 8, or 11).
8. How are a student's FCAT scores used?	***School grades.*** FCAT scores in reading and mathematics (grades 3-10), science (grades 5, 8, and 11), and the essay portion of FCAT Writing+ (grades 4, 8, and 10) are used to calculate school grades **(Refer to School Grades Fact Sheet)**. ***Graduation requirement.*** To receive a standard high school diploma, students must earn passing scores on the grade 10 FCAT in reading and mathematics or attain concordant scores on standardized tests determined by the Commissioner of Education, currently the SAT or ACT **(Refer to High School Graduation Fact Sheet)**. Beginning with the graduating class of 2010, students must also earn a passing score on FCAT Writing+. The FCAT graduation requirement is waived for purposes of

	a standard high school diploma for a student with a disability, if: • The student's Individualized Education Program (IEP) team determines that the FCAT cannot accurately measure the student's abilities, taking into consideration all allowable accommodations **(Refer to FCAT Accommodations and Alternative Assessment Fact Sheet)**; • The student completes the minimum number of credits and other graduation requirements; and • The student does not pass the grade 10 FCAT after one attempt in grade 10 and one attempt in grade 11. ***Third-grade promotion.*** To be promoted from grade 3 to grade 4, a student must score at Level 2 or higher on grade 3 FCAT Reading. The Legislature has authorized "good cause" exemptions from mandatory retention for the following students: • Limited English proficient (LEP) students with less than 2 years of English for Speakers of Other Languages (ESOL); • Students with disabilities who take an alternative standardized reading assessment; • Students who demonstrate, through a student portfolio, that they are reading at a level equal to at least a Level 2 on FCAT Reading; • Students with disabilities who take the FCAT, but who were previously retained in grades K-3 and who have received intensive remediation in reading for more than 2 years; and • Students who were previously retained in grades K-3 for a total of 2 years and who have received intensive remediation in reading for 2 or more years. School districts must also implement a policy of midyear promotion to grade 4 of a student retained in grade 3, if the student demonstrates based on subsequent assessments, alternative assessments, and portfolio reviews that the student is a successful and independent reader, reading at or above grade level, and ready for grade 4. Students promoted after November 1 must demonstrate proficiency above Level 2 on grade 3 FCAT Reading. ***Intensive remediation.*** A student in middle school (grades 6-8), or a high school student (grades 9-11), must complete an intensive reading course, if the student scores at Level 1 on FCAT Reading in the prior year. If the student

	scores at Level 2, the student must be placed in either an intensive reading course or a content-area course in which reading strategies are determined by diagnosis of reading needs. ***Progress monitoring.*** A student in grades 3-10 who scores below Level 3 on FCAT Reading or FCAT Mathematics must be administered additional diagnostic assessments to determine the nature of the student's difficulty, the areas of academic need, and strategies for appropriate intervention and instruction. The student's school, in consultation with the student's parents, must implement one of the following progress monitoring plans: • A federally required student plan, such as an Individualized Education Program (IEP); • A schoolwide system of progress monitoring for all students; or • An individualized progress monitoring plan. ***Merit-based pay supplements.*** Performance-based pay supplements under the Merit Award Program must be based on employee evaluations. At least 60 percent of an employee's overall evaluation must be based on student academic proficiency or learning gains measured by statewide standardized tests (*i.e.,* FCAT). For subjects not measured by the statewide assessment program, a school district may base the employee's evaluation on student performance on national, state, or district-determined tests for the content area and grade level (*e.g.,* end-of-course examinations). ***Adequate yearly progress.*** The FCAT Reading and FCAT Mathematics assessments in grades 3-10, and the essay portion of FCAT Writing+ in grades 4, 8, and 10, are used to determine a school's adequate yearly progress (AYP) in accordance with the federal No Child Left Behind Act **(Refer to No Child Left Behind (NCLB) Act Fact Sheet)**.
9. What options are available for students who do not pass the grade 10 FCAT?	If a student does not pass the grade 10 FCAT, he or she may retake the test as many times as the student wishes until passing. Based on the testing schedule **(see Question 5),** a student generally has six opportunities to pass the grade 10 FCAT before graduation. Students who meet all requirements for a standard high school diploma except passage of the grade 10 FCAT or concordant scores on standardized tests determined by the Commissioner of Education, currently the SAT or ACT tests,

	by the end of grade 12 must be provided the following learning opportunities: • Participation in an accelerated high school equivalency (GED) diploma preparation program during the summer; • Allowance to take the College Placement Test and be admitted to remedial or credit courses at a community college, upon receipt of a certificate of completion; and • Participation in an adult general education program for the period that the student requires to master English, reading, mathematics, or any other subject required for high school graduation. A student attending an adult general education program has the opportunity to take the grade 10 FCAT an unlimited number of times in order to receive a standard high school diploma. In addition, limited English proficient (LEP) students enrolled in an English for Speakers of Other Languages (ESOL) program for less than 2 years, who meet all requirements for a standard high school diploma except passage of the grade 10 FCAT or concordant scores on the SAT or ACT tests, may receive immersion English language instruction the summer after the end of grade 12. The students receiving immersion instruction may take the grade 10 FCAT, SAT, or ACT and may receive a standard high school diploma upon passage of the grade 10 FCAT or concordant scores on the SAT or ACT.
10. What are the applicable statutes and rules?	Section 1001.02, F.S. – General Powers of the State Board of Education. Section 1003.4156, F.S. – General Requirements for Middle Grades Promotion. Section 1003.428, F.S. – General Requirements for High School Graduation; Revised. Section 1003.429, F.S. – Accelerated High School Graduation Options. Section 1003.42, F.S. – General Requirements for High School Graduation. Section 1003.433(2) and (3), F.S. – Learning Opportunities for Out-of-State and Out-of-Country Transfer Students and Students Needing Additional Instruction to Meet High School Graduation Requirements. Section 1008.22, F.S. – Student Assessment Program for Public Schools. Section 1008.25, F.S. – Public School Student Progression; Remedial Instruction; Reporting Requirements. Section 1008.33, F.S. – Authority to Enforce Public School Improvement. Section 1008.345, F.S. – Implementation of State System of

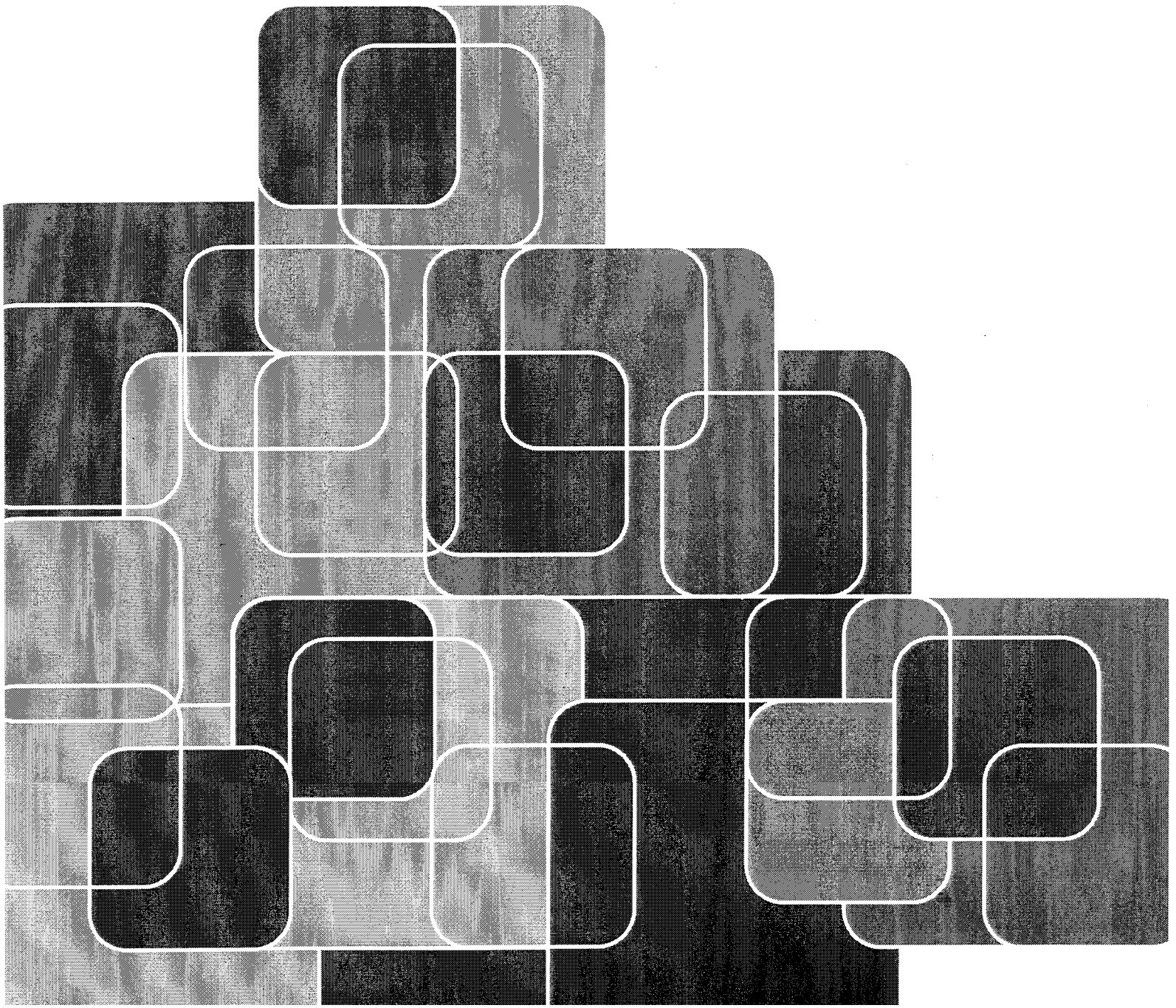
	School Improvement and Education Accountability. Section 1012.225, F.S. – Merit Award Program for Instructional Personnel and School-Based Administrators. Section 1012.2251, F.S. – End-of-Course Examinations for Merit Award Program. Rule 6A-1.09422, F.A.C. – Florida Comprehensive Assessment Test Requirements. Rule 6A-1.09432, F.A.C. – Assessment of Limited English Proficient Students. Rule 6A-1.0943, F.A.C. – Statewide Assessment for Students with Disabilities. Rule 6A-1.09981, F.A.C. – Implementation of Florida's System of School Improvement and Accountability.
11. Where can I get additional information?	Department of Education Office of Assessment and School Performance (850) 245-0513 www.fldoe.org/asp/ Florida House of Representatives Schools & Learning Council (850) 488-7451

State High School Exit Exams: FL Profile/CEP

CENTER ON EDUCATION POLICY CEP

State High School Exit Exams:
Working to Raise Test Scores

September 2007



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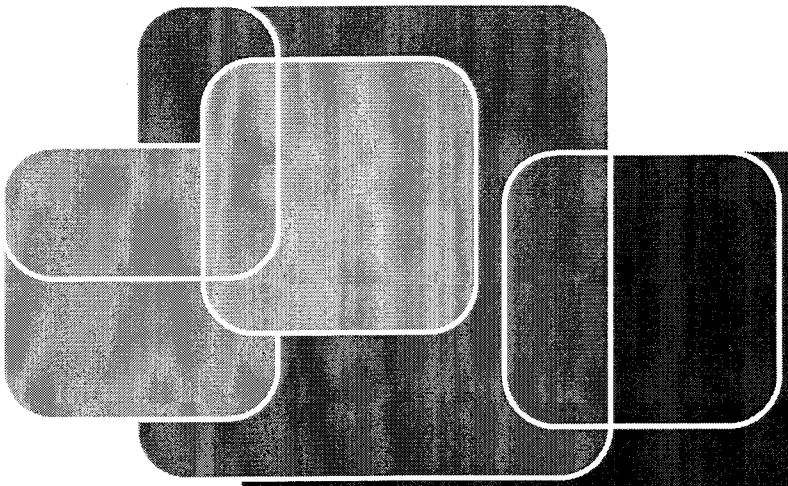

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Based in Washington, D.C., and founded in January 1995 by Jack Jennings, the Center on Education Policy is a national independent advocate for public education and for more effective public schools. The Center works to help Americans better understand the role of public education in a democracy and the need to improve the academic quality of public schools. We do not represent any special interests. Instead, we help citizens make sense of the conflicting opinions and perceptions about public education and create conditions that will lead to better public schools.

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Florida

Florida Comprehensive Assessment Test (FCAT)

Type of test	Standards-based
Purpose	The purpose of the exam is to: • Provide schools with student academic diagnostic information • Determine prospective high school graduates' mastery of the state curriculum • Encourage districts and schools to identify and serve students at risk of academic failure • Provide data to state policymakers on student attainment of state education goals to inform educational policy decisions • Increase alignment of local curriculum and programs of instruction with state education standards • Promote equity of opportunity across all student groups • Meet a state mandate
Major changes/pending changes in exit exam policy	No
Year first administered	1998
Year diplomas first withheld	2003
Subjects tested	Reading, mathematics, and writing. At this time, only math and reading results are used to determine whether students graduate with a standard diploma. Students enrolled in 9th grade for the first time in 2006-07 will need to achieve passing scores on the Grade 10 FCAT Writing+. The writing section will become a graduation requirement for the class of 2010.
Grade first administered	10th
Grade(s) exam aligned to	10th
Number of retakes allowed before end of grade 12	Five retakes are allowed before the end of grade 12, with the first retake opportunity in October of 11th grade.
Retakes after grade 12	Students who have not passed the FCAT but have met other graduation requirements may retake the exam after 12th grade and still receive a regular diploma. There are no limits on the number of retakes or the age for retaking the exam.

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Alternate paths to graduation for general education students	Yes. Students scheduled to graduate are provided an opportunity to meet the testing requirement for high school graduation by using concordant scores on an alternate assessment (SAT/ACT). To use this equivalent score option, students must have taken the FCAT three times without earning a passing score. Also, students who do not meet the exit exam requirement may be awarded a certificate of completion instead of a diploma.
Alternate paths to graduation specifically for students with disabilities	Yes. The FCAT requirement may be waived for students with disabilities who have not achieved a passing score on the exam and have met all other requirements to graduate with a standard diploma.
Alternate paths to graduation specifically for English language learners	No
Exit exam used for No Child Left Behind (NCLB)?	Yes. Results from the first test administration in 10th grade are used to meet NCLB requirements.
Same cut score for graduation and NCLB?	No. The FCAT reading and mathematics passing scores for graduation are lower (in the mid-range of the level 2 or "basic" score) than those used for NCLB purposes (level 3).
Types of assistance provided by the state to all districts to raise *initial* pass rates for all students on the high school exit exam	The state offers technical assistance to help: • Teachers administer the exam, which includes online assistance, specialist(s) in the state education agency, and train-the-trainer workshops; • All teachers prepare students for the exam, which includes online assistance, specialist(s) in the state education agency, and train-the-trainer workshops; • Teachers become more proficient in their content area, which includes online assistance, specialist(s) in the state education agency, field-based specialists, train-the-trainer workshops, grants to districts, and fiscal resources to fund local personnel to provide assistance; • Schools identify and target students for assistance, which includes online assistance, specialist(s) in the state education agency, field-based specialists, train-the-trainer workshops, grants to districts, and fiscal resources to fund local personnel to provide assistance; • Schools implement comprehensive school reform, which includes online assistance, specialist(s) in the state education agency, field-based specialists, train-the-trainer workshops, grants to districts, and fiscal resources to fund local personnel to provide assistance; • Districts improve formative uses of assessment, which includes online assistance, field-based specialists, train-the-trainer workshops, grants to districts, and fiscal resources to fund local personnel to provide assistance; • Districts improve professional development for teachers, which includes online assistance, specialist(s) in the state education agency, field-based specialists, train-the-trainer workshops, grants to districts, fiscal resources to fund local personnel to provide assistance; and • Districts improve the instructional leadership provided by administrators, which includes online assistance, specialist(s) in the state education agency, field-based specialists, train-the-trainer workshops, grants to districts, and fiscal resources to fund local personnel to provide assistance. The state also provides test items from prior years and exam preparation materials for teachers and students.

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Types of assistance or remediation provided by the state to all districts to help students who have failed their *initial* attempt to pass the exit exam

The state provides:

- Targeted remediation programs for students
- Additional professional development for teachers in their content area
- Additional professional development for teachers in meeting the specific needs of students at risk of academic failure
- Additional professional development for teachers in the formative uses of assessment
- Additional professional development for administrators

Types of support provided by school districts to help raise pass rates on the exit exam assessments

School districts in the state are required by law to provide or make:

- District-designed benchmark/formative assessments
- Professional development in the formative use of benchmark
- Professional development in helping teachers become more proficient in their content areas
- Professional development in helping teachers meet specific instructional needs of students at risk of academic failure
- Professional development for administrators
- District-designed curriculum materials*
- Changes in instructional leadership and supports for teachers
- Modified curriculum in regular classes
- Changes in class schedules and offerings
- Remediation offered during the regular school day
- Remediation offered outside the regular school day
- Individualized academic plans for students
- Extended class day

*The noted legal requirement is not applicable to district-designed curriculum materials.

Initial pass rates, 2006

Percentage of Students Passing on the First Try, 2006		
Student Group	**Reading**	**Math**
All students	52%	77%
White	65%	87%
African American	30%	60%
Latino	44%	72%
Asian	65%	91%
Native American	55%	79%
Multiracial	60%	82%
English language learners	11%	46%
Migrant	22%	57%
Students with disabilities	17%	38%
Free or reduced-price lunch eligible	36%	66%
Passing score (scale of 100-500)	300	300

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Cumulative pass rates, 2006	Cumulative pass rates are not available at this time.
Achievement gaps in reading/language arts (based on exit exam administered in 2005-06)	There is a gap in student performance in reading/language arts between: • White students and African American students • White students and Latino students • White students and Native American students • English language learners and non-ELLs • Students with disabilities and students without disabilities • Low-income students and students who are not low-income The state chose not to answer which gap will be the most challenging to close.
Targeted funding or technical assistance to school districts that have the above identified achievement gaps	Yes. Title I grant; Title I Part A; Title V state set-aside; Title V Part 3 VPSC, reading coaches through K-12 reading plan; math coaches; math and science partnership grants; Schoolwide Assistance Teams; Florida State University policy center; state line item appropriations; Supplemental Academic Instruction; state categoricals. The target for funding and technical assistance is to close all achievement gaps in all subgroups using data analysis to focus lessons on mastery of standards.
Achievement gaps in mathematics (based on exit exam administered in 2005-06)	There is a gap in student performance in mathematics between: • White students and African American students • White students and Latino students • White students and Native American students • English language learners and non-ELLs • Students with disabilities and students without disabilities • Low-income students and students who are not low-income The state chose not to answer which gap will be the most challenging to close.
Targeted funding or technical assistance to school districts that have the above identified achievement gaps	For students with disabilities, the state DOE Bureau of Exceptional Education and Student Services (BEESS) funds Project Central at University of Central Florida, which coordinates existing networks to reach all learners. During 2005-06, Algebraic Thinking-Algebra Success Keys (ASK) was a major initiative designed to meet the needs of students with disabilities in mathematics. The project provided professional development related to the following products developed by the state DOE: • Manuals, including *Cool Tools in Algebra: Classroom Informal Assessments for Teachers, and Mentoring Highly qualified ASK Professional Developers* • Lessons plans, including *Using the CRA Process in Algebra* • Video entitled *Video Success for All Students in Math* • Directory of master professional developers in ASK • Brochure entitled *Meeting Instructional Needs in Math* Another project funded by BEESS is the Curriculum Improvement Project. Over the years, this project has developed an array of Parallel Alternative Strategies for Students with Disabilities (PASS) materials. These supplemental textbooks, written to assist students with various learning needs achieve success in the classroom, are presented in an easy to understand format for students seeking a standard diploma. The PASS materials provide resources for teaching courses without changing essential content. The teacher guides give suggestions to stimulate student interest with thought-provoking activities. These inexpensive,

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	ready-to-use resources may be reproduced or used as a textbook or a workbook. A list of PASS materials can be found at www.firn.edu/doe/commhome/pdf/pricepub.pdf. There are three secondary PASS products related to math. State funding is provided to all school districts as a weighted cost factor for provision of instructional services to English Language Learners. School districts are required to provide instruction to ELLs that is equal in amount, sequence, scope, and quality as that provided to non-ELLs. All instruction is aligned to the state's academic standards.
Evaluations of the state exit exam	Florida was included in the Achieve Inc. study, *Do Graduation Tests Measure Up? A Closer Look at State High School Exit Exams* (June 2004).
State test contractor	Harcourt (test development and norm-referenced tests); CTB (test administration, scoring, and reporting)

Class Size

Class Size Requirements;
Funding & Compliance

CLASS SIZE REQUIREMENTS; FUNDING & COMPLIANCE

Class size requirements: In 2002, voters approved the constitutional Class Size Reduction Amendment.[1] The amendment requires the Legislature to fund: (1) a sufficient number of classrooms by the 2010 school year so that no more than a specified maximum number of students will be assigned to each teacher; and (2) the reduction of the average number of students in each classroom by at least two until the maximum number of students is achieved. The maximum number of students specified in the amendment is: (a) 18 students in grades PK-3; (b) 22 students in grades 4-8; and (c) 25 students in grades 9-12.

Section 1003.03(2), F.S., sets forth an implementation schedule for the amendment, which provides that class size, for purposes of determining district compliance with the reduction goals, shall be measured at the:

- District level for each of the three grade groupings during Fiscal Years (FYs) 2003-2006.
- School level for each of the three grade groupings in FYs 2006-2008.
- Individual classroom level for each of the three grade groupings in FY 2008-2009 and thereafter.

Statutory consequences for a district's failure to comply with class size reduction goals are:

- Beginning in FY 2003-2004, the Department of Education (DOE) is required to transfer a district's class size reduction operating funds to class size reduction fixed capital outlay (FCO) in an amount proportionate to the amount of class size reduction not accomplished.[2]
- Beginning in FY 2005-2006, districts are required to implement one of the following policies in the following school year: (a) year-round schools; (b) double sessions; (c) rezoning; or (d) changing instructional staff loads and scheduling, deploying certified district employees to classrooms, or operating beyond normal school days and hours.[3]
- Beginning in FY 2006-2007, the DOE must develop a constitutional compliance plan for the district that includes, but is not limited to, the redrawing of school

[1] Section 1, Article IX of the Florida Constitution.
[2] Section 1003.03(4)(a), F.S.
[3] Section 1003.03(4)(b), F.S.

attendance zones to maximize use of facilities while minimizing additional use of transportation.[4]

Funding: Section 1011.685, F.S., creates an operating categorical fund for class size reduction. Districts are authorized to use such funding for: (a) reduction of class size in any lawful manner if the district has not met reduction goals; or (b) any lawful expenditure if reduction goals have been met with priority to be given to increasing teacher salaries and implementing differentiated-pay provisions. For FYs 2003-2008, the Legislature appropriated a total of $7.75 billion in class size reduction operating funds with $2.7 billion of that amount most recently appropriated for FY 2007-2008. Please see Excel Attachment entitled, "Class Size Reduction Funding History" for additional appropriation history.

Section 1013.735, F.S., creates the Classrooms for Kids Program, which authorizes FCO dollars appropriated to the program to be distributed to districts based on a specified formula. Districts may spend these funds on the construction, renovation, or repair of educational facilities, or the purchase of relocatables, which are in excess of projects or relocatables identified in the district's five-year work program adopted before March 15, 2003. For FYs 2003-2008, the Legislature appropriated a total of $2.5 billion in class size reduction FCO funds with $650 million of that amount most recently appropriated for FY 2007-2008. Please see Excel Attachment entitled, "Class Size Reduction Funding History" for additional appropriation history.

District compliance: For the 2006-2007 school year:

- School-wide class size averages were not in compliance with current statutory requirements to reduce average class size by two students from the 2005-2006 school year:
  - In 111 traditional schools in 32 counties for grades PK-3; 54 traditional schools in 19 counties for grades 4-8; and 23 traditional schools in 15 counties for grades 9-12. Please see PDF Attachment entitled, "Number of Traditional Schools Not in Compliance."
  - In 53 charter schools in 19 counties for grades PK-3; 53 charter schools in 15 counties for grades 4-8; and 6 charter schools in four counties for grades 9-12. Please see PDF Attachment entitled, "Number of Charter Schools Not in Compliance."
- Individual class-based measurements were not yet in compliance with the constitutional maximums set for the 2010-2011 school year:
  - In 284 traditional schools in 34 counties for grades PK-3; 151 traditional schools in 20 counties for grades 4-8; and 32 traditional schools in 16 counties

[4] Section 1003.03(4)(c), F.S.

for grades 9-12. Please see PDF Attachment entitled, "Number of Traditional Schools Not in Compliance."

- In 81 charter schools in 22 counties for grades PK-3; 62 charter schools in 17 counties for grades 4-8; and 7 charter schools in five counties for grades 9-12. Please see PDF Attachment entitled, "Number of Charter Schools Not in Compliance."

Transfers from operating to FCO: During the four FYs between 2003 and 2007, the DOE, as required by statute, has transferred almost $8.4 million in district class size reduction operating funds to district class size reduction FCO. The bulk of this transfer, $5,318,921, occurred in FY 2006-2007. During this FY, the operating funds of 27 counties were transferred to FCO with the smallest transfer being $722 for Seminole County and the largest being $1,766,907 for Orange County. Please see Excel Attachment entitled, "History of Transfers from Operating to Fixed Capital Outlay Due to Non-Compliance."

Class Size Reduction Funding History
Operating and Fixed Capital Outlay

	District	Operating Allocation						Fixed Capital Outlay Allocation						Operating and Capital Outlay Funds
		2003-04	2004-05	2005-06	2006-07	2007-08	To Date	2003-04	2004-05	2005-06	2006-07	2007-08	To Date	
1	Alachua	4,875,025	10,029,471	15,409,039	21,830,628	27,851,083	79,995,246	3,715,656	797,070	505,616	8,836,659	5,727,637	19,582,638	99,577,884
2	Baker	741,965	1,568,526	2,501,160	3,644,177	4,779,159	13,234,987	644,730	96,096	189,982	3,133,531	1,105,938	5,170,277	18,405,264
3	Bay	4,536,490	9,438,579	14,825,686	20,247,071	25,322,172	74,369,998	4,420,678	681,773	619,616	10,115,070	3,380,434	19,217,571	93,587,569
4	Bradford	630,838	1,256,887	1,913,570	2,678,713	3,406,538	9,886,546	1,096,794	68,432	55,589	733,455	524,422	2,478,692	12,365,238
5	Brevard	12,846,988	26,778,989	41,507,774	58,112,052	73,880,971	213,126,774	12,813,233	2,230,022	1,689,350	11,314,373	7,059,949	35,106,927	248,233,701
6	Broward	51,904,582	104,961,423	158,385,201	215,440,195	269,147,792	799,839,193	44,018,517	7,895,720	4,386,251	40,451,273	22,505,759	119,257,520	919,096,713
7	Calhoun	364,654	789,383	1,204,924	1,670,947	2,109,782	6,139,690	354,532	43,180	122,601	423,190	245,901	1,189,404	7,329,094
8	Charlotte	3,067,540	6,016,382	9,328,418	13,370,849	17,215,806	48,998,995	4,034,782	851,686	199,264	2,567,027	2,910,824	10,563,583	59,562,578
9	Citrus	2,572,699	5,358,369	8,280,742	11,848,851	15,298,807	43,359,468	2,447,354	368,158	263,334	7,254,059	7,455,967	17,788,872	61,148,340
10	Clay	5,289,697	11,415,160	18,809,413	27,992,126	37,183,005	100,689,401	8,387,460	2,352,146	1,792,727	38,315,599	31,556,356	82,404,288	183,093,689
11	Collier	7,583,232	16,239,366	25,823,741	36,008,438	46,450,342	132,105,119	17,156,690	2,928,197	2,218,934	39,045,979	7,854,863	69,204,663	201,309,782
12	Columbia	1,619,152	3,351,642	5,279,909	7,516,188	9,777,813	27,544,704	1,616,162	311,032	247,969	5,096,546	1,158,000	8,429,709	35,974,413
13	Dade	71,392,622	141,683,655	210,082,494	280,456,093	350,227,783	1,053,842,647	50,324,970	4,984,664	4,116,344	53,499,162	30,616,996	143,542,136	1,197,384,783
14	De Soto	877,931	1,784,673	2,736,866	3,865,326	4,643,421	13,908,217	600,718	166,626	124,997	833,595	858,431	2,584,367	16,492,584
15	Dixie	366,022	721,663	1,119,632	1,588,382	2,055,909	5,851,608	215,221	36,358	29,745	612,914	488,345	1,382,583	7,234,191
16	Duval	22,353,752	46,450,254	71,726,201	101,594,613	128,717,366	370,842,186	18,296,340	3,032,647	2,067,449	23,018,689	12,265,719	58,680,844	429,523,030
17	Escambia	7,368,614	15,149,140	23,122,491	31,574,723	39,489,032	116,704,000	4,385,854	969,616	660,491	6,995,090	4,061,135	17,072,186	133,776,186
18	Flagler	1,452,129	3,360,818	5,830,674	9,135,214	12,471,176	32,250,011	5,190,149	1,195,911	1,008,442	26,950,650	23,858,139	58,203,291	90,453,302
19	Franklin	229,637	466,654	700,288	918,348	1,141,645	3,456,572	160,380	26,982	20,637	272,187	146,700	626,886	4,083,458
20	Gadsden	1,099,670	2,222,189	3,391,869	4,779,321	5,956,378	17,449,427	670,697	112,833	92,245	1,169,490	2,694,027	4,739,292	22,188,719
21	Gilchrist	465,728	971,107	1,514,704	2,155,703	2,826,786	7,934,028	540,214	128,572	77,865	1,060,009	434,718	2,241,378	10,175,406
22	Glades	178,123	439,417	699,588	868,403	1,323,046	3,508,577	114,343	33,012	214,321	787,400	121,011	1,270,087	4,778,664
23	Gulf	355,996	737,584	1,124,233	1,609,808	2,014,106	5,841,727	445,558	41,560	60,596	447,674	1,170,198	2,165,586	8,007,313
24	Hamilton	334,265	670,962	1,008,495	1,448,357	1,819,774	5,281,853	207,274	85,049	29,095	389,854	576,688	1,287,960	6,569,813
25	Hardee	863,994	1,780,946	2,687,711	3,855,838	4,877,710	14,066,199	1,567,550	135,145	102,756	1,506,255	1,884,896	5,196,602	19,262,801
26	Hendry	1,334,662	2,715,898	4,143,557	5,753,890	7,434,847	21,382,854	1,620,360	223,346	163,352	1,223,870	742,656	3,973,584	25,356,438
27	Hernando	3,245,075	7,032,664	11,525,626	17,019,169	22,836,522	61,659,056	6,391,717	1,687,538	1,373,016	23,227,656	16,756,747	49,436,674	111,095,730
28	Highlands	2,016,873	4,230,556	6,547,968	9,472,460	12,383,373	34,651,230	2,027,286	392,888	567,207	3,847,994	5,674,283	12,509,658	47,160,888
29	Hillsborough	32,621,501	69,344,376	109,290,152	154,292,054	197,122,453	562,670,536	73,698,163	10,417,704	8,520,056	139,682,849	32,337,930	264,656,702	827,327,238
30	Holmes	548,104	1,097,283	1,686,016	2,320,193	2,918,752	8,570,348	309,574	52,777	54,443	1,165,564	321,091	1,903,449	10,473,797
31	Indian River	2,865,379	6,006,432	9,320,486	13,549,600	17,499,550	49,241,447	4,476,084	929,938	604,513	8,183,025	5,174,852	19,368,412	68,609,859
32	Jackson	1,190,395	2,512,086	3,891,310	5,428,637	6,841,060	19,863,488	1,252,414	157,533	141,173	3,026,444	2,404,806	6,982,370	26,845,858
33	Jefferson	238,284	461,246	641,653	908,940	1,062,626	3,312,749	253,792	33,668	26,075	322,669	180,564	816,768	4,129,517
34	Lafayette	169,436	354,018	539,495	762,179	977,291	2,802,419	125,217	21,585	19,831	470,338	617,911	1,254,882	4,057,301
35	Lake	5,809,358	12,678,150	20,694,616	30,152,751	40,821,415	110,156,290	16,514,165	3,343,135	2,190,827	26,675,596	31,512,781	80,236,504	190,392,794
36	Lee	11,946,415	26,031,817	42,762,884	63,247,748	85,015,076	229,003,940	20,557,312	3,876,785	3,885,454	73,681,172	37,272,835	139,273,558	368,277,498
37	Leon	5,602,822	11,650,349	18,008,417	25,630,900	32,334,564	93,227,052	5,436,589	714,545	413,649	12,869,789	7,885,038	27,319,610	120,546,662
38	Levy	1,017,882	2,095,175	3,271,171	4,570,260	5,847,080	16,801,568	758,001	106,486	197,275	1,036,289	2,009,988	4,108,039	20,909,607
39	Liberty	251,694	515,324	791,522	1,178,561	1,371,224	4,108,325	244,519	20,163	49,898	1,536,137	550,114	2,400,831	6,509,156
40	Madison	533,781	1,071,976	1,590,457	2,137,752	2,391,726	7,725,692	262,775	45,497	36,687	462,827	253,926	1,061,712	8,787,404
41	Manatee	7,172,658	14,980,865	23,539,945	32,820,727	42,322,758	120,836,953	11,434,242	1,591,968	1,665,444	33,188,137	3,886,852	51,766,643	172,603,596
42	Marion	6,885,739	14,311,751	22,297,017	31,841,850	41,076,006	116,412,363	9,246,449	1,008,955	1,570,622	23,745,806	15,850,264	51,422,096	167,834,459
43	Martin	3,163,733	6,553,939	10,169,466	14,371,235	18,445,587	52,703,960	7,314,379	736,872	347,236	7,007,005	5,956,614	21,362,106	74,066,066
44	Monroe	1,760,023	3,355,818	4,959,549	6,483,127	8,069,043	24,627,560	1,119,516	197,071	128,004	1,688,742	890,164	4,023,497	28,651,057
45	Nassau	1,761,716	3,699,325	5,843,449	8,487,314	11,031,003	30,822,807	1,840,495	242,361	337,004	6,469,684	5,225,718	14,115,262	44,938,069
46	Okaloosa	5,282,615	10,876,021	16,762,853	22,928,010	28,712,032	84,561,531	2,762,334	450,045	400,238	6,431,609	2,769,177	12,813,403	97,374,934
47	Okeechobee	1,248,071	2,614,544	3,977,964	5,563,563	6,713,595	20,117,737	916,731	442,990	171,018	2,229,468	2,019,818	5,780,025	25,897,762
48	Orange	30,251,601	65,130,075	102,244,041	144,361,879	183,593,247	525,580,843	42,847,383	9,591,731	8,997,612	66,120,159	15,834,213	143,391,098	668,971,941
49	Osceola	7,862,146	17,433,453	28,486,528	41,729,849	55,249,454	150,761,430	24,773,601	4,733,874	2,856,195	37,130,685	35,256,838	104,751,193	255,512,623
50	Palm Beach	32,791,434	67,962,364	103,666,981	140,477,070	175,775,057	520,672,906	43,673,471	7,029,986	5,542,778	30,172,225	13,599,649	100,018,109	620,691,015
51	Pasco	9,978,491	21,589,678	34,617,736	50,225,650	65,530,770	181,942,325	20,250,139	3,790,253	3,967,867	50,018,343	37,066,223	115,092,825	297,035,150
52	Pinellas	20,864,777	42,393,678	64,082,203	88,029,861	110,148,373	325,518,892	17,897,434	2,888,233	1,889,207	25,278,213	10,615,544	58,568,631	384,087,523
53	Polk	14,343,218	29,455,008	49,166,392	72,066,489	94,607,382	259,638,489	24,469,514	2,315,541	3,539,589	81,681,825	62,051,089	174,057,558	433,696,047
54	Putnam	2,047,932	4,172,006	6,448,571	9,012,119	11,471,230	33,151,858	1,470,414	217,183	240,215	2,214,959	1,276,612	5,419,383	38,571,241
55	St. Johns	4,033,920	8,533,415	14,201,993	20,993,265	27,748,334	75,510,927	12,712,811	1,872,542	1,503,125	31,918,185	26,594,997	74,601,660	150,112,587
56	St. Lucie	5,683,398	12,378,846	19,792,052	29,938,986	40,177,456	107,970,738	10,537,201	2,133,287	2,506,377	34,395,504	54,352,358	103,924,727	211,895,465
57	Santa Rosa	3,996,376	8,448,168	13,124,582	18,498,058	23,637,036	67,704,220	5,741,229	1,336,274	909,309	7,058,432	7,387,260	22,432,504	90,136,724
58	Sarasota	7,239,190	15,402,268	23,828,029	33,687,369	43,811,742	123,968,598	9,688,339	2,228,336	2,205,312	16,007,780	9,754,856	39,884,623	163,853,221
59	Seminole	11,264,269	23,800,098	37,457,865	52,046,781	66,334,467	190,903,480	14,122,771	2,419,825	2,449,585	21,076,049	5,409,345	45,477,575	236,381,055
60	Sumter	1,124,357	2,415,048	3,856,576	5,446,636	7,263,783	20,106,400	878,121	106,057	111,348	1,147,414	537,893	2,780,833	22,887,233
61	Suwannee	931,000	1,901,513	3,006,433	4,223,279	5,283,076	15,345,301	610,400	119,584	71,671	2,719,924	2,076,238	5,597,817	20,943,118
62	Taylor	546,428	1,099,249	1,609,872	2,300,218	2,825,861	8,381,628	385,052	59,320	46,412	587,562	322,980	1,401,326	9,782,954
63	Union	354,885	747,728	1,191,416	1,686,519	2,112,569	6,093,117	215,498	36,508	41,865	1,508,846	647,206	2,449,923	8,543,040
64	Volusia	11,248,714	23,442,518	36,104,609	50,430,049	64,155,611	185,381,501	13,670,960	2,241,124	1,867,621	17,488,878	10,079,213	45,347,796	230,729,297
65	Wakulla	801,728	1,701,054	2,644,676	3,851,482	4,863,743	13,862,683	611,602	157,718	358,576	2,503,929	3,583,126	7,214,951	21,077,634
66	Walton	1,046,684	2,142,921	3,466,690	4,785,446	6,099,093	17,540,834	2,216,111	294,834	222,836	4,974,533	954,324	8,662,638	26,203,472
67	Washington	565,598	1,177,715	1,842,099	2,576,688	3,287,710	9,449,810	859,402	124,355	102,867	2,038,696	1,422,802	4,548,122	13,997,932
68	Washington Special	95,331	193,292	283,959	361,432	0	934,014						0	934,014
69	FAMU Lab School	78,292	180,551	250,436	320,354	444,126	1,273,759	62,208	10,251	37,143	148,395	49,938	307,935	1,581,694
70	FAU Lab School	87,718	230,494	366,170	522,843	690,331	1,897,556	197,152	7,494	158,653	616,812	109,055	1,089,166	2,986,722
71	FSU Broward	0	263,800	346,268	482,773	630,598	1,723,439						0	1,723,439
72	FSU Leon	379,279	565,699	869,115	1,218,280	1,535,271	4,567,644						0	4,567,644
73	UF Lab School	191,553	393,363	614,490	860,243	1,106,383	3,166,032	121,217	19,353	14,599	190,252	61,059	406,480	3,572,512
74	Fla Virtual School	352,754	1,204,362	2,359,518	5,264,442	8,270,280	17,451,356						0	17,451,356
	Total	468,198,634	972,191,216	1,507,199,696	2,108,529,344	2,689,867,968	7,745,986,858	600,000,000	100,000,000	83,400,000	1,100,000,000	650,000,000	2,533,400,000	10,279,386,858

2006-07 District-Wide Class Size Average

	District	PK-3	4-8	9-12	Over Constitutional Average 18.00 PK-3	22.00 4-8	25.00 9-12
1	Alachua	17.01	18.24	21.54			
2	Baker	16.09	20.25	19.22			
3	Bay	16.33	18.35	20.77			
4	Bradford	16.18	18.21	20.09			
5	Brevard	16.89	19.83	22.46			
6	Broward	17.06	20.47	24.21			
7	Calhoun	14.36	15.57	14.78			
8	Charlotte	16.14	19.19	22.24			
9	Citrus	13.22	17.94	21.37			
10	Clay	15.90	18.03	19.89			
11	Collier	17.00	18.88	22.61			
12	Columbia	16.11	17.93	20.84			
13	Miami-Dade	18.52	20.52	23.23	0.52		
14	DeSoto	17.33	20.22	22.73			
15	Dixie	16.02	17.08	19.04			
16	Duval	16.53	18.34	21.69			
17	Escambia	16.12	18.95	21.41			
18	Flagler	16.27	19.14	21.11			
19	Franklin	16.21	21.22	17.05			
20	Gadsden	18.79	18.95	20.52	0.79		
21	Gilchrist	15.05	18.19	18.85			
22	Glades	15.22	18.30	17.13			
23	Gulf	16.21	18.53	18.05			
24	Hamilton	15.69	17.69	20.23			
25	Hardee	16.41	17.88	21.23			
26	Hendry	16.60	20.09	20.59			
27	Hernando	16.28	18.94	21.53			
28	Highlands	16.45	18.08	19.56			
29	Hillsborough	14.97	18.59	23.03			
30	Holmes	16.41	17.83	18.47			
31	Indian River	16.82	20.18	22.20			
32	Jackson	16.05	18.31	18.88			
33	Jefferson	15.61	20.78	16.10			
34	Lafayette	16.77	20.28	20.83			
35	Lake	17.03	19.53	22.50			
36	Lee	17.10	19.94	22.66			
37	Leon	17.04	19.37	21.51			
38	Levy	16.90	17.92	19.90			
39	Liberty	16.97	18.97	25.94			0.94
40	Madison	16.22	18.09	17.61			
41	Manatee	18.02	19.40	21.19	0.02		
42	Marion	15.29	17.52	18.16			
43	Martin	16.69	18.50	22.98			
44	Monroe	17.04	18.27	20.89			
45	Nassau	16.56	20.65	20.79			
46	Okaloosa	16.88	18.60	22.08			
47	Okeechobee	16.91	20.08	19.97			
48	Orange	17.18	19.06	22.44			
49	Osceola	17.15	19.81	22.68			
50	Palm Beach	16.83	19.73	22.81			
51	Pasco	12.44	18.24	21.11			
52	Pinellas	16.08	19.69	21.20			
53	Polk	16.71	18.87	22.14			
54	Putnam	17.14	18.34	21.49			
55	St. Johns	17.28	19.38	22.35			
56	St. Lucie	18.45	20.84	20.68	0.45		
57	Santa Rosa	16.81	19.67	22.93			
58	Sarasota	16.80	19.55	21.69			
59	Seminole	16.62	19.30	22.20			
60	Sumter	16.38	18.24	18.61			
61	Suwannee	15.84	20.64	23.46			
62	Taylor	16.95	19.28	18.49			
63	Union	16.88	19.64	15.27			
64	Volusia	16.41	18.77	20.60			
65	Wakulla	17.91	18.67	19.96			
66	Walton	16.69	18.97	19.09			
67	Washington	17.72	21.47	21.47			

State	16.95	19.41	22.19

FLORIDA DEPARTMENT OF EDUCATION

NUMBER OF TRADITIONAL SCHOOLS NOT IN COMPLIANCE WITH CLASS SIZE REQUIREMENTS IN 2006-07

	Grades PK-3		Grades 4-8		Grades 9-12		All Grades - Unduplicated Schools		Total Schools in District
	Not in Compliance with Current Statutes[1]	Not in Compliance with Constitutional Cap of 18	Not in Compliance with Current Statutes[1]	Not in Compliance with Constitutional Cap of 22	Not in Compliance with Current Statutes[1]	Not in Compliance with Constitutional Cap of 25	Not in Compliance with Current Statutes[1]	Not in Compliance with Constitutional Caps	
	-1-								
1 Alachua	5	5	0	0	0	0	5	5	44
2 Baker	0	0	0	0	0	0	0	0	6
3 Bay	2	2	1	1	1	1	4	4	36
4 Bradford	0	0	0	0	0	0	0	0	10
5 Brevard	0	0	0	0	0	0	0	0	92
6 Broward	9	13	6	6	3	3	17	21	234
7 Calhoun	0	0	0	0	0	0	0	0	5
8 Charlotte	0	0	0	0	0	0	0	0	20
9 Citrus	0	0	0	0	1	1	1	1	21
10 Clay	3	3	0	0	1	1	4	4	37
11 Collier	1	1	0	0	0	0	1	1	51
12 Columbia	1	1	0	0	0	0	1	1	14
13 Miami-Dade	1	128	1	76	4	9	6	155	326
14 DeSoto	0	0	0	0	0	0	0	0	7
15 Dixie	0	0	0	0	0	0	0	0	4
16 Duval	13	13	0	0	1	1	14	14	163
17 Escambia	0	0	0	0	0	0	0	0	65
18 Flagler	0	0	0	0	0	0	0	0	11
19 Franklin	1	1	1	1	1	1	2	2	5
20 Gadsden	5	5	2	2	0	0	6	6	18
21 Gilchrist	0	0	0	0	0	0	0	0	4
22 Glades	0	0	1	1	0	0	1	1	3
23 Gulf	0	0	0	0	0	0	0	0	7
24 Hamilton	1	1	0	0	0	0	1	1	5
25 Hardee	0	0	0	0	0	0	0	0	8
26 Hendry	2	2	0	0	0	0	2	2	12
27 Hernando	0	0	0	0	0	0	0	0	20
28 Highlands	0	0	0	0	0	0	0	0	16
29 Hillsborough	1	1	1	1	1	1	3	3	217
30 Holmes	0	0	0	0	0	0	0	0	8
31 Indian River	0	0	0	0	0	0	0	0	22
32 Jackson	0	0	0	0	0	0	0	0	15
33 Jefferson	0	0	0	0	0	0	0	0	5
34 Lafayette	0	0	0	0	0	0	0	0	2
35 Lake	1	1	0	0	0	0	1	1	39
36 Lee	1	1	0	0	0	0	1	1	80
37 Leon	1	1	0	0	1	1	2	2	46
38 Levy	1	1	0	0	0	0	1	1	13
39 Liberty	0	0	0	0	1	1	1	1	6
40 Madison	0	0	0	0	0	0	0	0	7
41 Manatee	13	21	4	5	0	0	16	23	58
42 Marion	1	2	2	2	0	0	3	4	50
43 Martin	1	1	1	1	0	0	2	2	27
44 Monroe	0	0	0	0	0	0	0	0	12
45 Nassau	0	0	0	0	0	0	0	0	17
46 Okaloosa	1	1	0	0	0	0	1	1	41
47 Okeechobee	0	0	0	0	0	0	0	0	11
48 Orange	22	27	10	12	3	6	31	39	190
49 Osceola	4	4	2	2	2	2	7	7	44
50 Palm Beach	0	14	3	7	1	1	4	21	182
51 Pasco	0	0	0	0	0	0	0	0	67
52 Pinellas	7	7	12	20	0	0	18	24	142
53 Polk	3	4	1	1	0	1	4	6	113
54 Putnam	1	2	1	1	0	0	1	2	19
55 St. Johns	2	2	0	0	0	0	2	2	31
56 St. Lucie	0	11	0	7	0	0	0	13	42
57 Santa Rosa	0	0	0	0	0	0	0	0	34
58 Sarasota	1	1	1	1	0	0	2	2	46
59 Seminole	2	3	3	3	1	1	6	7	65
60 Sumter	0	0	0	0	0	0	0	0	12
61 Suwannee	0	0	0	0	0	0	0	0	9
62 Taylor	1	1	0	0	1	1	2	2	9
63 Union	0	0	0	0	0	0	0	0	4
64 Volusia	0	0	0	0	0	0	0	0	80
65 Wakulla	2	2	0	0	0	0	2	2	9
66 Walton	0	0	0	0	0	0	0	0	13
67 Washington	1	1	1	1	0	0	2	2	7
State	111	284	54	151	23	32	177	386	3,038

1. Assumes a requirement to reduce class size by 2 from 2005-06

11/16/2006
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FLORIDA DEPARTMENT OF EDUCATION

NUMBER OF CHARTER SCHOOLS NOT IN COMPLIANCE WITH CLASS SIZE REQUIREMENTS IN 2006-07

	Grades PK-3		Grades 4-8		Grades 9-12		All Grades - Unduplicated Schools		Total Schools in District
	Not in Compliance with Current Statutes[1]	Not in Compliance with Constitutional Cap of 18	Not in Compliance with Current Statutes[1]	Not in Compliance with Constitutional Cap of 22	Not in Compliance with Current Statutes[1]	Not in Compliance with Constitutional Cap of 25	Not in Compliance with Current Statutes[1]	Not in Compliance with Constitutional Caps	
	-1-								
1 Alachua	1	2	1	1	0	0	2	2	14
2 Baker	0	0	0	0	0	0	0	0	0
3 Bay	0	1	0	1	0	0	0	1	3
4 Bradford	0	0	0	0	0	0	0	0	1
5 Brevard	1	2	0	1	0	0	1	2	13
6 Broward	17	21	14	18	1	1	26	30	45
7 Calhoun	0	0	0	0	0	0	0	0	0
8 Charlotte	0	0	0	0	0	0	0	0	0
9 Citrus	0	0	0	0	0	0	0	0	0
10 Clay	0	0	0	0	0	0	0	0	0
11 Collier	0	0	0	0	0	0	0	0	2
12 Columbia	0	0	0	0	0	0	0	0	0
13 Miami-Dade	11	17	17	20	3	3	23	29	57
14 DeSoto	0	0	0	0	0	0	0	0	0
15 Dixie	0	0	0	0	0	0	0	0	0
16 Duval	1	1	1	1	1	1	2	2	4
17 Escambia	1	1	0	0	0	0	1	1	8
18 Flagler	0	0	0	0	0	0	0	0	3
19 Franklin	1	1	0	0	0	0	1	1	1
20 Gadsden	0	0	0	0	0	0	0	0	1
21 Gilchrist	0	0	0	0	0	0	0	0	0
22 Glades	0	0	0	0	0	0	0	0	0
23 Gulf	0	0	0	0	0	0	0	0	0
24 Hamilton	0	0	0	0	0	0	0	0	0
25 Hardee	0	0	0	0	0	0	0	0	0
26 Hendry	0	0	0	0	0	0	0	0	0
27 Hernando	0	0	0	0	0	0	0	0	1
28 Highlands	0	0	0	0	0	0	0	0	1
29 Hillsborough	0	0	0	0	0	0	0	0	24
30 Holmes	0	0	0	0	0	0	0	0	0
31 Indian River	0	0	0	0	0	0	0	0	4
32 Jackson	0	0	0	0	0	0	0	0	0
33 Jefferson	0	0	0	0	0	0	0	0	0
34 Lafayette	0	0	0	0	0	0	0	0	0
35 Lake	2	2	0	0	0	0	2	2	11
36 Lee	4	6	3	3	0	0	5	7	13
37 Leon	0	1	0	0	0	0	0	1	2
38 Levy	1	1	0	0	0	0	1	1	2
39 Liberty	0	0	0	0	0	0	0	0	0
40 Madison	0	0	0	0	0	0	0	0	0
41 Manatee	1	2	2	2	0	1	3	4	8
42 Marion	0	0	0	0	0	0	0	0	2
43 Martin	0	0	0	0	0	0	0	0	2
44 Monroe	1	1	1	1	0	0	1	1	3
45 Nassau	0	0	0	0	0	0	0	0	0
46 Okaloosa	0	0	1	1	1	1	2	2	3
47 Okeechobee	0	0	0	0	0	0	0	0	0
48 Orange	1	2	2	2	0	0	2	3	18
49 Osceola	4	4	3	3	0	0	4	4	9
50 Palm Beach	0	4	1	1	0	0	1	4	42
51 Pasco	1	2	0	0	0	0	1	2	6
52 Pinellas	1	1	0	0	0	0	1	1	6
53 Polk	2	5	2	2	0	0	3	5	23
54 Putnam	0	0	0	0	0	0	0	0	1
55 St. Johns	0	0	0	0	0	0	0	0	2
56 St. Lucie	0	0	0	0	0	0	0	0	0
57 Santa Rosa	0	0	0	0	0	0	0	0	1
58 Sarasota	1	3	2	2	0	0	3	4	9
59 Seminole	0	0	0	0	0	0	0	0	3
60 Sumter	1	1	2	2	0	0	2	2	3
61 Suwannee	0	0	0	0	0	0	0	0	0
62 Taylor	0	0	0	0	0	0	0	0	0
63 Union	0	0	0	0	0	0	0	0	0
64 Volusia	0	0	0	0	0	0	0	0	4
65 Wakulla	0	0	0	0	0	0	0	0	1
66 Walton	0	0	1	1	0	0	1	1	2
67 Washington	0	0	0	0	0	0	0	0	0
State	53	81	53	62	6	7	88	112	358

1. Assumes a requirement to reduce class size by 2 from 2005-06

11/16/2006
12:29 PM

Class Size Reduction
History of Transfers from Operating to Fixed Capital Outlay
Due to Noncompliance

	District	2003-04	2004-05	2005-06	2006-07	To Date
1	Alachua	0	0	0	0	0
2	Baker	0	0	0	0	0
3	Bay	0	0	0	(68,834)	(68,834)
4	Bradford	0	0	0	0	0
5	Brevard	0	0	0	(2,474)	(2,474)
6	Broward	0	0	0	(954,157)	(954,157)
7	Calhoun	0	0	0	0	0
8	Charlotte	0	0	0	0	0
9	Citrus	0	0	0	0	0
10	Clay	0	0	0	(37,392)	(37,392)
11	Collier	0	0	0	(2,573)	(2,573)
12	Columbia	0	0	0	0	0
13	Dade	(323,778)	0	0	(518,149)	(841,927)
14	De Soto	0	0	0	0	0
15	Dixie	0	0	0	0	0
16	Duval	0	0	0	(34,210)	(34,210)
17	Escambia	0	0	0	0	0
18	Flagler	(91,000)	(170,958)	0	0	(261,958)
19	Franklin	0	0	0	0	0
20	Gadsden	(21,452)	(239,147)	0	(4,294)	(264,893)
21	Gilchrist	0	0	0	0	0
22	Glades	0	0	0	0	0
23	Gulf	0	0	0	0	0
24	Hamilton	0	0	0	0	0
25	Hardee	(90,845)	0	0	0	(90,845)
26	Hendry	0	0	0	(35,956)	(35,956)
27	Hernando	0	(268,930)	0	0	(268,930)
28	Highlands	0	0	0	0	0
29	Hillsborough	0	0	0	0	0
30	Holmes	0	0	0	0	0
31	Indian River	0	0	0	0	0
32	Jackson	0	0	0	0	0
33	Jefferson	0	0	0	0	0
34	Lafayette	0	0	0	0	0
35	Lake	0	0	0	0	0
36	Lee	0	0	0	(37,685)	(37,685)
37	Leon	0	0	0	0	0
38	Levy	0	0	0	(7,392)	(7,392)
39	Liberty	0	0	0	0	0
40	Madison	0	0	0	0	0
41	Manatee	(67,858)	0	0	(596,123)	(663,981)
42	Marion	0	0	0	0	0
43	Martin	0	0	0	0	0
44	Monroe	0	0	0	(13,041)	(13,041)
45	Nassau	0	0	0	0	0
46	Okaloosa	(173,204)	0	0	0	(173,204)
47	Okeechobee	0	0	0	0	0
48	Orange	0	0	0	(1,766,907)	(1,766,907)
49	Osceola	0	0	0	(444,463)	(444,463)
50	Palm Beach	(636,324)	0	0	(59,831)	(696,155)
51	Pasco	0	0	0	(7,226)	(7,226)
52	Pinellas	0	0	0	(153,569)	(153,569)
53	Polk	0	0	0	(120,551)	(120,551)
54	Putnam	(75,487)	(164,128)	0	(7,151)	(246,766)
55	St. Johns	0	0	0	0	0
56	St. Lucie	0	0	(496,059)	0	(496,059)
57	Santa Rosa	0	(93,202)	0	0	(93,202)
58	Sarasota	0	0	0	(20,623)	(20,623)
59	Seminole	0	0	0	(722)	(722)
60	Sumter	0	0	0	(193,466)	(193,466)
61	Suwannee	0	(21,100)	0	0	(21,100)
62	Taylor	0	0	0	0	0
63	Union	0	(1,203)	0	0	(1,203)
64	Volusia	0	0	0	0	0
65	Wakulla	0	0	0	0	0
66	Walton	0	(103,934)	0	0	(103,934)
67	Washington	0	(14,117)	0	(19,220)	(33,337)
68	Washington Special	0	0	0	0	0
69	FAMU Lab School	0	0	0	0	0
70	FAU Lab School	0	0	0	(139,269)	(139,269)
71	FSU Broward	0	0	0	(18,983)	(18,983)
72	FSU Leon	0	0	0	0	0
73	UF Lab School	0	0	0	(54,660)	(54,660)
74	Fla Virtual School	0	0	0	0	0
	Total	(1,479,948)	(1,076,719)	(496,059)	(5,318,921)	(8,371,647)

Class Size Case Law

CLASS SIZE CASE LAW

Only one case, *Advisory Opinion to the Attorney General re Florida's Amendment to Reduce Class Size,*[1] has addressed the class size requirements of Art. IX, s. 1 of the Florida Constitution in any substantively meaningful manner. In this case, the Florida Supreme Court held that the provision did not violate Florida's constitutional single subject requirements. In reaching this conclusion, the Court found that the ballot initiative:

- Dealt with a single subject, i.e., the reduction of class size. The fact that it required the Legislature to fund the reduction did not constitute logrolling, but rather permissibly provided the details of how the initiative is to be implemented.[2]

- Did not substantially alter or perform multiple functions of state government because it did not specify a certain percentage of the budget or a specific amount to be spent on reducing class size.[3]

- Did not substantially alter the functions of local school boards. According to the Court:

> Although, as a result of the amendment, the Legislature may choose to fund the building of new schools to achieve the maximum classroom size set as a goal of the proposed amendment, this is not the only method of ensuring that the number of students meets the numbers set forth in the amendment. Rather than restricting the Legislature, the proposed amendment gives the Legislature latitude in designing ways to reach the class size goal articulated in the ballot initiative, and places the obligation to ensure compliance on the Legislature, not the local school boards.[4]

Additionally, the Court held that the ballot title and summary clearly stated the initiative's purpose and was sufficiently accurate and informative.[5]

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[1] *Advisory Opinion to the Attorney General re Florida's Amendment to Reduce Class Size*, 816 So.2d 580 (2002).
[2] *Id.* at 583.
[3] *Id.* at 584.
[4] *Id.* at 584-585.
[5] *Id.* at 585.

816 So.2d 580, 27 Fla. L. Weekly S367

Briefs and Other Related Documents

Supreme Court of Florida.
ADVISORY OPINION TO THE ATTORNEY GENERAL re Florida's Amendment to Reduce Class Size.
No. SC01-2421.
April 25, 2002.

Original Proceeding-Advisory Opinion to the Attorney General.
Robert A. Butterworth, Attorney General, and Louis F. Hubener, III, Assistant ***581** Attorney General, Tallahassee, FL, Presentor.

Mark Herron, Tallahassee, Florida, Counsel for Coalition to Reduce Class Size; and Pamela L. Cooper, Tallahassee, FL, Counsel for Florida Education Association, Proponents.

Steven J. Uhlfelder, Susan L. Kelsey, and Jennifer Parker La Via of Holland & Knight LLP, Tallahassee, FL, Counsel for Citizens for Budget Fairness, Opponents.

PER CURIAM.
The Attorney General has petitioned this Court for an advisory opinion as to the validity of a proposed citizen initiative amendment to the Florida Constitution, submitted by an organization called the Coalition to Reduce Class Size. We have jurisdiction. *See* art. IV, § 10; art V, § 3(b)(10), Fla. Const.

The proposed initiative petition amends article IX, section 1 of the Florida Constitution, which relates to public education. The ballot title of the proposed amendment is: "Florida's Amendment to Reduce Class Size." The summary for the proposed amendment provides:

Proposes an amendment to the State Constitution to require that the Legislature provide funding for sufficient classrooms so that there be a maximum number of students in public school classrooms for various grade levels; requires compliance by the beginning of 2010 school year; requires the Legislature, and not local school districts, to pay for the costs associated with reduced class size; prescribes a schedule for phased-in funding to achieve the required maximum class size.

The full text of the proposed amendment, as indicated in underlining, provides:

Article IX, Section 1, Florida Constitution, is amended to read:

Section 1. Public Education.-

The education of children is a fundamental value of the people of the State of Florida. It is, therefore, a paramount duty of the state to make adequate provision for the education of all children residing in its borders. Adequate provision shall be made by law for a uniform, efficient, safe, secure, and high quality education and for the establishment, maintenance, and operation of institutions of higher learning and other education programs that the needs of the people may require. *To assure that children attending public schools obtain a high quality education, the legislature shall make adequate provision to ensure that, by the beginning of the 2010 school year, there are sufficient number of classrooms so that:*

1. The maximum number of students who are assigned to each teacher who is teaching in public school classrooms for pre-kindergarten through grade 3 does not exceed 18 students;

2. The maximum number of students who are assigned to each teacher who is teaching in public school classrooms for grades 4 through 8 does not exceed 22 students;

3. The maximum number of students who are assigned to each teacher who is teaching in public school classrooms for grades 9 through 12 does not exceed 25 students.

The class size requirements of this subsection do not apply to extracurricular classes. Payment of the costs associated reducing class size to meet these requirements is the responsibility of the state and not of local school districts. Beginning with the 2003-2004 fiscal year, the legislature shall provide sufficient funds to reduce the average number of students in each classroom by at least two students per year until the ****582*** *maximum number of students per classroom does not exceed the requirements of this subsection.*

In determining the validity of initiative petitions, this Court is limited to a review of the following two legal issues: (1) whether the petition satisfies the single-subject requirement of article XI, section 3, of the Florida Constitution; and (2) whether the ballot title and summary are printed in clear and unambiguous language pursuant to section 101.161, Florida Statutes (2001). *See Advisory Opinion to the Attorney Gen. re Fla. Transp. Initiative for Statewide High Speed Monorail, Fixed Guideway or Magnetic Levitation Sys.*, 769 So.2d 367, 368 (Fla.2000). As we have previously stated, our "duty is to uphold the proposal unless it can be shown to be 'clearly and conclusively defective.' " *Advisory Opinion to the Attorney Gen. re Tax Limitation*, 673 So.2d 864, 867 (Fla.1996) (quoting *Floridians Against Casino Takeover v. Let's Help Florida*, 363 So.2d 337, 339 (Fla.1978)). In evaluating the propriety of the initiative petition, the Court does not review the merits of the proposed constitutional amendment, and does not decide whether the Legislature should more appropriately address the subject matter of the proposed amendment. *See High Speed Monorail*, 769 So.2d at 369. Moreover, other constitutional challenges are not justiciable in this type of proceeding. *See Advisory Opinion to the Attorney Gen.-Limited Political Terms in Certain Elective Offices*, 592 So.2d 225, 227 (Fla.1991).

Single Subject Requirement

Article XI, section 3 of the Florida Constitution provides in pertinent part that proposed amendments based on citizen initiative petitions "shall embrace but one subject and matter directly connected therewith." Two reasons exist for the single-subject requirement. The primary reason for the single-subject requirement is to prevent what is known as "logrolling," which is "a practice whereby an amendment is proposed which contains unrelated provisions, some of which electors might wish to support, in order to get an otherwise disfavored provision passed." *High Speed Monorail*, 769 So.2d at 369 (quoting *Advisory Opinion to the Attorney General re Limited Casinos*, 644 So.2d 71, 73 (Fla.1994)). To comply with this single-subject requirement, a proposed amendment must manifest a "logical and natural oneness of purpose." *See Fine v. Firestone*, 448 So.2d 984, 990 (Fla.1984).

The Citizens for Budget Fairness, a group who opposes this ballot initiative, contends that the amendment engages in blatant logrolling because it requires voters who may favor a reduction in class size in Florida to also vote for whatever unspecified and unlimited

expenditure of State funds may be necessary to construct or purchase additional classrooms for public schools. We disagree.

In *Advisory Opinion to the Attorney General-Save Our Everglades,* 636 So.2d 1336, 1340 (Fla.1994), this Court struck down a ballot initiative seeking to "restore the Everglades" by compelling the sugar industry to fund the restoration. The Court explained that the initiative "embodies precisely the sort of logrolling that the single-subject rule was designed to foreclose," because although a majority of voters may consider cleaning up the Everglades to be a laudatory goal, many may disagree with having the sugar industry fund such a cleanup. *Id.* at 1341. Therefore, because the ballot initiative would force voters to choose all or nothing, the Court held that the amendment violated the single-subject rule. *See id.; see also Advisory Opinion to the Attorney Gen. re Right of Citizens to Choose Health Care Providers,* 705 So.2d 563, 565 (Fla.1998) ***583** (holding that health care ballot amendment impermissibly combined two distinct subjects by banning limitations on health care provider choices imposed by law and by prohibiting private parties from entering into contracts that would limit health care provider choice, thereby providing voters with an "all or nothing" choice).

In contrast to *Save Our Everglades* and *Health Care Providers,* in *Limited Casinos,* 644 So.2d at 73, this Court rejected the argument that a ballot initiative that would amend the State constitution to authorize gambling casinos constituted impermissible logrolling. The Court held that the proposal did not combine subjects in such a manner as to force voters to accept one proposition they might not support in order to vote for one they favor. *See id.* We explained that "[a]lthough the petition contains details pertaining to the number, size, location, and type of facilities, we find that such details only serve to provide the scope and implementation of the initiative petitions." *Id.; see also Advisory Opinion to the Attorney General re Stop Early Release of Prisoners,* 661 So.2d 1204, 1206 (Fla.1995) (holding that ballot initiative concerning the early release of prisoners that contained a provision pertaining to life sentences did not constitute logrolling, but merely provided "detail as to how the proposed amendment will be implemented in cases where life sentences are imposed").

In this case, the ballot initiative deals with a single subject-the reduction of class size. The fact that the ballot initiative requires the Legislature to fund this reduction does not constitute the impermissible logrolling engaged in by the ballot initiatives in *Save Our Everglades* and *Health Care Providers,* but rather provides the details of how the ballot initiative will be implemented, as in *Limited Casinos* and *Stop Early Release of Prisoners.* Therefore, we conclude that the ballot initiative does not engage in logrolling.

A second reason for the single-subject requirement is to prevent a single constitutional amendment from substantially altering or performing the functions of multiple aspects of government. *See High Speed Monorail,* 769 So.2d at 369. As we explained in *High Speed Monorail:*

Article XI, section 3 "protects against multiple 'precipitous' and 'cataclysmic' changes in the constitution by limiting to a single subject what may be included in one amendment proposal." The single-subject requirement is a "rule of restraint" that was "placed in the constitution by the people to allow the citizens, by initiative petition, to propose and vote on singular changes in the functions of our governmental structure."

Id. (citation omitted). However, this Court also has observed that it is "difficult to conceive of a constitutional amendment that would not affect other aspects of the government to some extent." *Id.* (quoting *Limited Casinos,* 644 So.2d at 74).

We conclude that the proposed citizens' initiative does not create such "precipitous" or "cataclysmic" changes in the functions of multiple branches of government as to render the initiative clearly and conclusively defective. In *High Speed Monorail,* 769 So.2d at 370, we rejected a single-subject challenge to a statewide high-speed monorail system, explaining that the amendment "may have broad ramifications for this State, but it only deals with one subject and it does not substantially alter or perform multiple functions of government." In that case, we distinguished *Advisory Opinion to the Attorney General re Requirement for Adequate Public Education Funding,* 703 So.2d 446, 450 (Fla.1997), in which the Court struck down a proposed constitutional amendment requiring that forty percent of state appropriations,***584** not including lottery proceeds or federal funds, be allocated to education. *See High Speed Monorail,* 769 So.2d at 370. The Court in *High Speed Monorail* explained:

Although the proposed amendment does not point to a specific tax or fee from which the revenues for the project would come, it also does not require the Legislature to spend a specific percentage of the budget or even a specific amount on the development of this system. Additionally, assuming the amendment would place some restrictions or limits on the veto power regarding the budget for money to build the high speed ground rail system, we do not find this to be the type of "precipitous" or "cataclysmic" change prohibited by the single subject restriction. Such a restriction, unlike the adequate public funding amendment, would not in any event " *substantially* alter" the Governor's powers or "perform multiple functions of government." Indeed, it appears that the branches of government are left with wide discretion in determining the details of the project.

Id. at 370-71.

As in *High Speed Monorail,* the proposed amendment in this case does not specify a certain percentage of the budget or a specific amount to be spent on reducing class size. Therefore, we conclude that the proposed amendment does not substantially alter or perform multiple functions of State government.

Regarding the opponent's argument that the proposed ballot initiative substantially alters the functions of the local school boards, article IX, section 4(b), of the Florida Constitution currently delineates the constitutional duties of school boards as follows:

The school board shall operate, control and supervise all free public schools within the school district and determine the rate of school district taxes within the limits prescribed herein.

The proponent of the ballot initiative contends that the initiative will not substantially alter or perform the functions of the school board to "operate, control or supervise all free public schools within the school district." The proponent maintains that the ballot initiative will not force the district school boards to construct new classrooms or schools in accordance with any particular model or educational theory. Rather, the proponent claims, the proposed ballot initiative simply furthers the already established legislative goal contained in section 236.687, Florida Statutes (2001), which provides:

It shall be the goal of the Legislature ... that each elementary school in the school district beginning with kindergarten through grade three class sizes not exceed 20 students, with a ratio of one full-time equivalent teacher per 20 students; except that only in the case of critically low-performing schools as identified by the Commissioner of Education, the goal in kindergarten through grade three shall be a ratio of one full-time equivalent teacher per 15 students.

Therefore, the proponent argues that only the Legislature, in the manner in which it provides funding for school classrooms, will be required to act as a result of this amendment.

We agree that the proposed amendment does not substantially alter or perform the functions of the local school board. Although, as a result of the amendment, the Legislature may choose to fund the building of new schools to achieve the maximum classroom size set as a goal of the proposed amendment, this is not the only method of ensuring that the number of students meets the numbers set forth in the amendment. Rather than restricting the Legislature, the proposed amendment ***585** gives the Legislature latitude in designing ways to reach the class size goal articulated in the ballot initiative, and places the obligation to ensure compliance on the Legislature, not the local school boards. Accordingly, for all these reasons we conclude that this proposed initiative does not violate the single subject limitation.

Section 101.161

We also conclude that the language of the title and ballot summary of the proposed constitutional amendment comports with section 101.161(1), Florida Statutes (2001). Section 101.161(1) provides, in pertinent part:

Whenever a constitutional amendment or other public measure is submitted to the vote of the people, the substance of such amendment ... shall be printed in clear and unambiguous language on the ballot

.... [T]he substance of the amendment ... shall be an explanatory statement, not exceeding 75 words in length, of the chief purpose of the measure. The ballot title shall consist of a caption, not exceeding 15 words in length, by which the measure is commonly referred to or spoken of.

Section 101.161(1) requires that the ballot title and summary "state in clear and unambiguous language the initiative's primary purpose." *Advisory Opinion to the Attorney Gen. re People's Property Rights Amendments Providing Compensation for Restricting Real Property Use May Cover Multiple Subjects,* 699 So.2d 1304, 1307 (Fla.1997). Furthermore, the ballot title and summary must be accurate and informative. *See Advisory Opinion to the Attorney Gen. re Term Limits Pledge,* 718 So.2d 798, 803 (Fla.1998). The purpose of section 101.161 is "to provide fair notice of the content of the proposed amendment so that the voter will not be misled as to its purpose, and can cast an intelligent and informed ballot." *Id.* Finally, the ballot title and summary may not be read in isolation, but must be read together in determining whether the ballot information properly informs the voters. *See Tax Limitation,* 673 So.2d at 868.

The title of this initiative is "Florida's Amendment to Reduce Class Size." The ballot summary makes clear that the Legislature is responsible for providing funding to reduce the number of students in public school classrooms in various grade levels. Thus, when read together, the ballot title and summary clearly inform voters of the amendment's chief purpose, and provide an accurate description of the amendment. Moreover, the summary does not omit any material information and is not misleading.

Both the Attorney General and the Citizens for Budget Fairness contend that the ballot title and summary are defective because they fail to inform voters that an exception to

the Legislature's mandate to fund smaller classroom sizes exists for "extracurricular classes." However, this Court has explained that "the title and summary need not explain every detail or ramification of the proposed amendment." *Advisory Opinion to the Attorney Gen. re Prohibiting Public Funding of Political Candidates' Campaigns,* 693 So.2d 972, 975 (Fla.1997). In other words, "the ballot summary is not required to include all possible effects ... nor 'to explain in detail what the proponents hope to accomplish.' " *Tax Limitation,* 673 So.2d at 868. We conclude that the ballot title and summary are not defective despite the fact that the ballot summary does not inform voters of the exception for "extracurricular classes," because the primary purpose of the amendment-the legislative funding of reduced classroom size-is adequately disclosed in the ballot title and summary. ***586** Therefore, we conclude that the ballot initiative complies with section 101.161(1).

Accordingly, there is no bar to placing the proposed amendment on the ballot.

It is so ordered.

WELLS, C.J., and SHAW, ANSTEAD, PARIENTE, LEWIS, and QUINCE, JJ., concur.

HARDING, J., concurs with an opinion.

HARDING, J., concurring.

I dissented from the majority's opinion in *Advisory Opinion to the Attorney General re Florida Transportation Initiative for Statewide High Speed Monorail, Fixed Guideway or Magnetic Levitation System,* 769 So.2d 367 (Fla.2000), because I believed that citizens' initiative amendment violated the single subject requirement of article XI, section 3 of the Florida Constitution based upon its effect upon multiple branches of state government. *See id.* at 371-72 (Harding, J., dissenting). This Court had previously ruled that a citizens' initiative amendment aimed at public education funding violated the single subject requirement because it affected both the Legislature's appropriation function and the Governor's veto power. *See Advisory Opinion to the Attorney Gen. re Requirement for Adequate Public Educ. Funding,* 703 So.2d 446 (Fla.1997). In *High Speed Monorail,* I found the precedent of *Public Education Funding* to be controlling and required a finding that the high-speed transportation amendment also violated the single subject requirement. *See High Speed Monorail,* 769 So.2d at 372 (Harding, J., dissenting). However, I was alone in my opposition to the high-speed transportation system amendment on that basis. The majority of the Court found the high-speed transportation amendment to be distinguishable because "the branches of government are left with wide discretion in determining the details and funding of the project." *Id.* at 371. Based upon the majority's decision in *High Speed Monorail,* I can find no basis to say that the proposed amendment at issue in this case is defective based upon a single subject violation.

While the instant proposed amendment may not be the model of clarity, I agree with the majority that the term "extracurricular classes" does not render the ballot title and summary defective. *See* majority op. at 585. Opponents of this amendment argue that it is misleading because the summary does not mention an exception to the class size restrictions for "extracurricular classes" and does not define that term in the text of the amendment. However, as the majority notes, the title and summary need not explain

every detail or ramification of a proposed amendment. *See id.* Further, although the term is not defined in the amendment itself, most individuals have a common understanding of the activities or classes that would be considered "extracurricular." Such organized student activities as athletics, band, and student government are connected with school, yet are "not part of the required curriculum" or fall outside the scope of the regular curriculum. *Webster's New World Dictionary* 218 (2d ed.1983). These "extracurricular classes" would be exempt from the class size requirements. Any failure to define this exception with more specificity does not render the proposed amendment "clearly and conclusively defective." *Advisory Opinion to Attorney Gen. re Tax Limitation,* 673 So.2d 864, 867 (Fla.1996).

Fla.,2002.

Class Size Constitutional & Statutory Provisions

Article IX. Education
Section 1. Public Education

(Underlining indicates text relevant to class size requirements.)

(a) The education of children is a fundamental value of the people of the State of Florida. It is, therefore, a paramount duty of the state to make adequate provision for the education of all children residing within its borders. Adequate provision shall be made by law for a uniform, efficient, safe, secure, and high quality system of free public schools that allows students to obtain a high quality education and for the establishment, maintenance, and operation of institutions of higher learning and other public education programs that the needs of the people may require. To assure that children attending public schools obtain a high quality education, the legislature shall make adequate provision to ensure that, by the beginning of the 2010 school year, there are a sufficient number of classrooms so that:

(1) The maximum number of students who are assigned to each teacher who is teaching in public school classrooms for prekindergarten through grade 3 does not exceed 18 students;

(2) The maximum number of students who are assigned to each teacher who is teaching in public school classrooms for grades 4 through 8 does not exceed 22 students; and

(3) The maximum number of students who are assigned to each teacher who is teaching in public school classrooms for grades 9 through 12 does not exceed 25 students.

The class size requirements of this subsection do not apply to extracurricular classes. Payment of the costs associated with reducing class size to meet these requirements is the responsibility of the state and not of local school districts. Beginning with the 2003-2004 fiscal year, the legislature shall provide sufficient funds to reduce the average number of students in each classroom by at least two students per year until the maximum number of students per classroom does not exceed the requirements of this subsection.

(b) Every four-year old child in Florida shall be provided by the State a high quality pre-kindergarten learning opportunity in the form of an early childhood development and education program which shall be voluntary, high quality, free, and delivered according to professionally accepted standards. An early childhood development and education program means an organized program designed to address and enhance each child's ability to make age appropriate progress in an appropriate range of settings in the development of language and cognitive capabilities and emotional, social, regulatory and moral capacities through education in basic skills and such other skills as the

Legislature may determine to be appropriate.

(c) The early childhood education and development programs provided by reason of subparagraph (b) shall be implemented no later than the beginning of the 2005 school year through funds generated in addition to those used for existing education, health, and development programs. Existing education, health, and development programs are those funded by the State as of January 1, 2002 that provided for child or adult education, health care, or development.

1003.03. Maximum class size

(1) Constitutional class size maximums.--Pursuant to s. 1, Art. IX of the State Constitution, beginning in the 2010-2011 school year:

(a) The maximum number of students assigned to each teacher who is teaching core-curricula courses in public school classrooms for prekindergarten through grade 3 may not exceed 18 students.

(b) The maximum number of students assigned to each teacher who is teaching core-curricula courses in public school classrooms for grades 4 through 8 may not exceed 22 students.

(c) The maximum number of students assigned to each teacher who is teaching core-curricula courses in public school classrooms for grades 9 through 12 may not exceed 25 students.

(2) Implementation.--

(a) Beginning with the 2003-2004 fiscal year, each school district that is not in compliance with the maximums in subsection (1) shall reduce the average number of students per classroom in each of the following grade groupings: prekindergarten through grade 3, grade 4 through grade 8, and grade 9 through grade 12, by at least two students each year.

(b) Determination of the number of students per classroom in paragraph (a) shall be calculated as follows:

1. For fiscal years 2003-2004 through 2005-2006, the calculation for compliance for each of the 3 grade groupings shall be the average at the district level.

2. For fiscal years 2006-2007 through 2007-2008, the calculation for compliance for each of the 3 grade groupings shall be the average at the school level.

3. For fiscal years 2008-2009, 2009-2010, and thereafter, the calculation for compliance shall be at the individual classroom level.

4. For fiscal years 2006-2007 through 2009-2010 and thereafter, each teacher assigned to any classroom shall be included in the calculation for compliance.

(c) The Department of Education shall annually calculate each of the three average class size measures defined in paragraphs (a) and (b) based upon the October student membership survey. For purposes of determining the baseline from which each district's average class size

must be reduced for the 2003-2004 school year, the department shall use data from the February 2003 student membership survey updated to include classroom identification numbers as required by the department.

(d) Prior to the adoption of the district school budget for 2004-2005, each district school board shall hold public hearings to review school attendance zones in order to ensure maximum use of facilities while minimizing the additional use of transportation in order to comply with the two-student-per-year reduction required in paragraph (a). School districts that meet the constitutional class size maximums described in subsection (1) are exempt from this requirement.

(3) Implementation options.--District school boards must consider, but are not limited to, implementing the following items in order to meet the constitutional class size maximums described in subsection (1) and the two-student-per-year reduction required in subsection (2):

(a) Adopt policies to encourage qualified students to take dual enrollment courses.

(b) Adopt policies to encourage students to take courses from the Florida Virtual School.

(c) 1. Repeal district school board policies that require students to have more than 24 credits to graduate from high school.

2. Adopt policies to allow students to graduate from high school as soon as they pass the grade 10 FCAT and complete the courses required for high school graduation.

(d) Use methods to maximize use of instructional staff, such as changing required teaching loads and scheduling of planning periods, deploying district employees that have professional certification to the classroom, using adjunct educators, or any other method not prohibited by law.

(e) Use innovative methods to reduce the cost of school construction by using prototype school designs, using SMART Schools designs, participating in the School Infrastructure Thrift Program, or any other method not prohibited by law.

(f) Use joint-use facilities through partnerships with community colleges, state universities, and private colleges and universities. Joint-use facilities available for use as K-12 classrooms that do not meet the K-12 State Regulations for Educational Facilities in the Florida Building Code may be used at the discretion of the district school board provided that such facilities meet all other health, life, safety, and fire codes.

(g) Adopt alternative methods of class scheduling, such as block scheduling.

(h) Redraw school attendance zones to maximize use of facilities while minimizing the additional use of transportation.

(i) Operate schools beyond the normal operating hours to provide classes in the evening or operate more than one session of school during the day.

(j) Use year-round schools and other nontraditional calendars that do not adversely impact annual assessment of student achievement.

(k) Review and consider amending any collective bargaining contracts that hinder the implementation of class size reduction.

(l) Use any other approach not prohibited by law.

(4) Accountability.--

(a) 1. Beginning in the 2003-2004 fiscal year, if the department determines for any year that a school district has not reduced average class size as required in subsection (2) at the time of the third FEFP calculation, the department shall calculate an amount from the class size reduction operating categorical which is proportionate to the amount of class size reduction not accomplished. Upon verification of the department's calculation by the Florida Education Finance Program Appropriation Allocation Conference and not later than March 1 of each year, the Executive Office of the Governor shall transfer undistributed funds equivalent to the calculated amount from the district's class size reduction operating categorical to an approved fixed capital outlay appropriation for class size reduction in the affected district pursuant to s. 216.292(2)(d). The amount of funds transferred shall be the lesser of the amount verified by the Florida Education Finance Program Appropriation Allocation Conference or the undistributed balance of the district's class size reduction operating categorical.

2. In lieu of the transfer required by subparagraph 1., the Commissioner of Education may recommend a budget amendment, subject to approval by the Legislative Budget Commission, to transfer an alternative amount of funds from the district's class size reduction operating categorical to its approved fixed capital outlay account for class size reduction if the commissioner finds that the State Board of Education has reviewed evidence indicating that a district has been unable to meet class size reduction requirements despite appropriate effort to do so. The commissioner's budget amendment must be submitted to the Legislative Budget Commission by February 15 of each year.

(b) Beginning in the 2005-2006 school year, the department shall determine by January 15 of each year which districts have not met the two-student-per-year reduction required in subsection (2) based upon a comparison of the district's October student membership survey for the current school year and the February 2003 baseline student membership survey. The department shall report such districts to the Legislature. Each district that has not met the two-student-per-year reduction shall be required to implement one of the following policies in the subsequent school year unless the department finds that the district comes into compliance based upon the February student membership survey:

1. Year-round schools;

2. Double sessions;

3. Rezoning; or

4. Maximizing use of instructional staff by changing required teacher loads and scheduling of planning periods, deploying school district employees who have professional certification to the classroom, using adjunct educators, operating schools beyond the normal operating hours to provide classes in the evening, or operating more than one session during the day.

A school district that is required to implement one of the policies outlined in subparagraphs 1.-4. shall correct in the year of implementation any past deficiencies and bring the district into compliance with the two-student-per-year reduction goals established for the district by the department pursuant to subsection (2). A school district may choose to implement more than one of these policies. The district school superintendent shall report to the Commissioner of Education the extent to which the district implemented any of the policies outlined in subparagraphs 1.-4. in a format to be specified by the Commissioner of Education. The Department of Education shall use the enforcement authority provided in s. 1008.32 to ensure that districts comply with the provisions of this paragraph.

(c) Beginning in the 2006-2007 school year, the department shall annually determine which districts do not meet the requirements described in subsection (2). In addition to enforcement authority provided in s. 1008.32, the Department of Education shall develop a constitutional compliance plan for each such district which includes, but is not limited to, redrawing school attendance zones to maximize use of facilities while minimizing the additional use of transportation unless the department finds that the district comes into compliance based upon the February student membership survey and the other accountability policies listed in paragraph (b). Each district school board shall

implement the constitutional compliance plan developed by the state board until the district complies with the constitutional class size maximums.

(5) Team-teaching strategies.--

(a) School districts may use teaching strategies that include the assignment of more than one teacher to a classroom of students and that were implemented before July 1, 2005. Effective July 1, 2005, school districts may implement additional teaching strategies that include the assignment of more than one teacher to a classroom of students for the following purposes only:

1. Pairing teachers for the purpose of staff development.

2. Pairing new teachers with veteran teachers.

3. Reducing turnover among new teachers.

4. Pairing teachers who are teaching out-of-field with teachers who are in-field.

5. Providing for more flexibility and innovation in the classroom.

6. Improving learning opportunities for students, including students who have disabilities.

(b) Teaching strategies, including team teaching, co-teaching, or inclusion teaching, implemented on or after July 1, 2005, pursuant to paragraph (a) may be implemented subject to the following restrictions:

1. Reasonable limits shall be placed on the number of students in a classroom so that classrooms are not overcrowded. Teacher-to-student ratios within a curriculum area or grade level must not exceed constitutional limits.

2. At least one member of the team must have at least 3 years of teaching experience.

3. At least one member of the team must be teaching in-field.

4. The teachers must be trained in team-teaching methods within 1 year after assignment.

(c) As used in this subsection, the term:

1. "Team teaching" or "co-teaching" means two or more teachers are assigned to a group of students and each teacher is responsible for all of the students during the entire class period. In order to be considered team teaching or co-teaching, each teacher is responsible for planning, delivering, and evaluating instruction for all students in the class or subject for the entire class period.

2. "Inclusion teaching" means two or more teachers are assigned to a group of students, but one of the teachers is responsible for only one student or a small group of students in the classroom.

The use of strategies implemented as outlined in this subsection meets the letter and intent of the Florida Constitution and the Florida Statutes which relate to implementing class size reduction, and this subsection applies retroactively. A school district may not be penalized financially or otherwise as a result of the use of any legal strategy, including, but not limited to, those set forth in subsection (3) and this subsection.

1011.685. Class size reduction; operating categorical fund

(1) There is created an operating categorical fund for implementing the class size reduction provisions of s. 1, Art. IX of the State Constitution. These funds shall be allocated to each school district in the amount prescribed by the Legislature in the General Appropriations Act.

(2) Class size reduction operating categorical funds shall be used by school districts for the following:

(a) To reduce class size in any lawful manner, if the district has not met the constitutional maximums identified in s. 1003.03(1) or the reduction of two students per year required by s. 1003.03(2).

(b) For any lawful operating expenditure, if the district has met the constitutional maximums identified in s. 1003.03(1) or the reduction of two students per year required by s. 1003.03(2); however, priority shall be given to increase salaries of classroom teachers as defined in s. 1012.01(2)(a) and to implement the differentiated-pay provisions detailed in s. 1012.22.

1013.735. Classrooms for Kids Program

(1) Allocation.--The department shall allocate funds appropriated for the Classrooms for Kids Program. It is the intent of the Legislature that this program be administered as nearly as practicable in the same manner as the capital outlay program authorized under s. 9(a), Art. XII of the State Constitution. Each district school board's share of the annual appropriation for the Classrooms for Kids Program must be calculated according to the following formula:

(a) Twenty-five percent of the appropriation shall be prorated to the districts based on each district's percentage of K-12 base capital outlay full-time equivalent membership, and 65 percent shall be based on each district's percentage of K-12 growth capital outlay full-time equivalent membership as specified for the allocation of funds from the Public Education Capital Outlay and Debt Service Trust Fund by s. 1013.64(3).

(b) Ten percent of the appropriation must be allocated among district school boards according to the allocation formula in s. 1013.64(1)(a), excluding adult vocational technical facilities.

(2) District participation.--In order to participate in the Classrooms for Kids Program, a district school board shall:

(a) Enter into an interlocal agreement pursuant to s. 1013.33.

(b) Certify that the district's inventory of facilities listed in the Florida Inventory of School Houses is accurate and up-to-date pursuant to s. 1013.31.

(3) Use of funds.--In order to increase capacity to reduce class size, a district school board shall expend the funds received pursuant to this section only to:

(a) Construct, renovate, remodel, or repair educational facilities that are in excess of projects identified in the district's 5-year work program adopted prior to March 15, 2003; or

(b) Purchase or lease-purchase relocatable facilities that are in excess of relocatables identified in the district's 5-year work program adopted prior to March 15, 2003.

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Class Size Reduction Strategies

Jane Fletcher
Staff Director

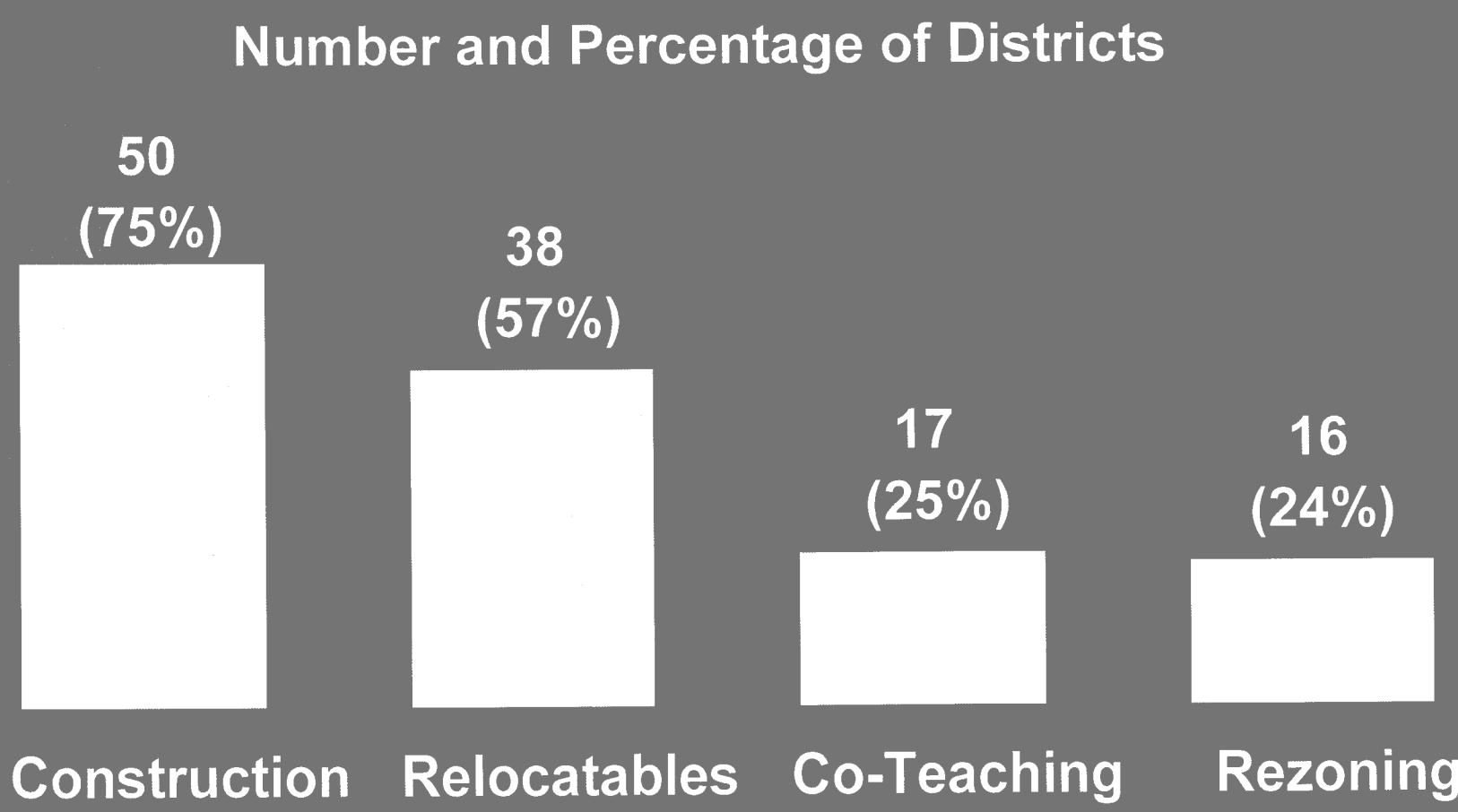
OPPAGA Report # 07-29

Florida Legislature Office of Program Policy Analysis & Government Accountability

Overview

- School districts have relied more heavily on construction than less costly options to meet CSR goals
- Increasing construction costs have made it difficult for districts to construct the classrooms needed for CSR
- School districts can reduce costs in several ways

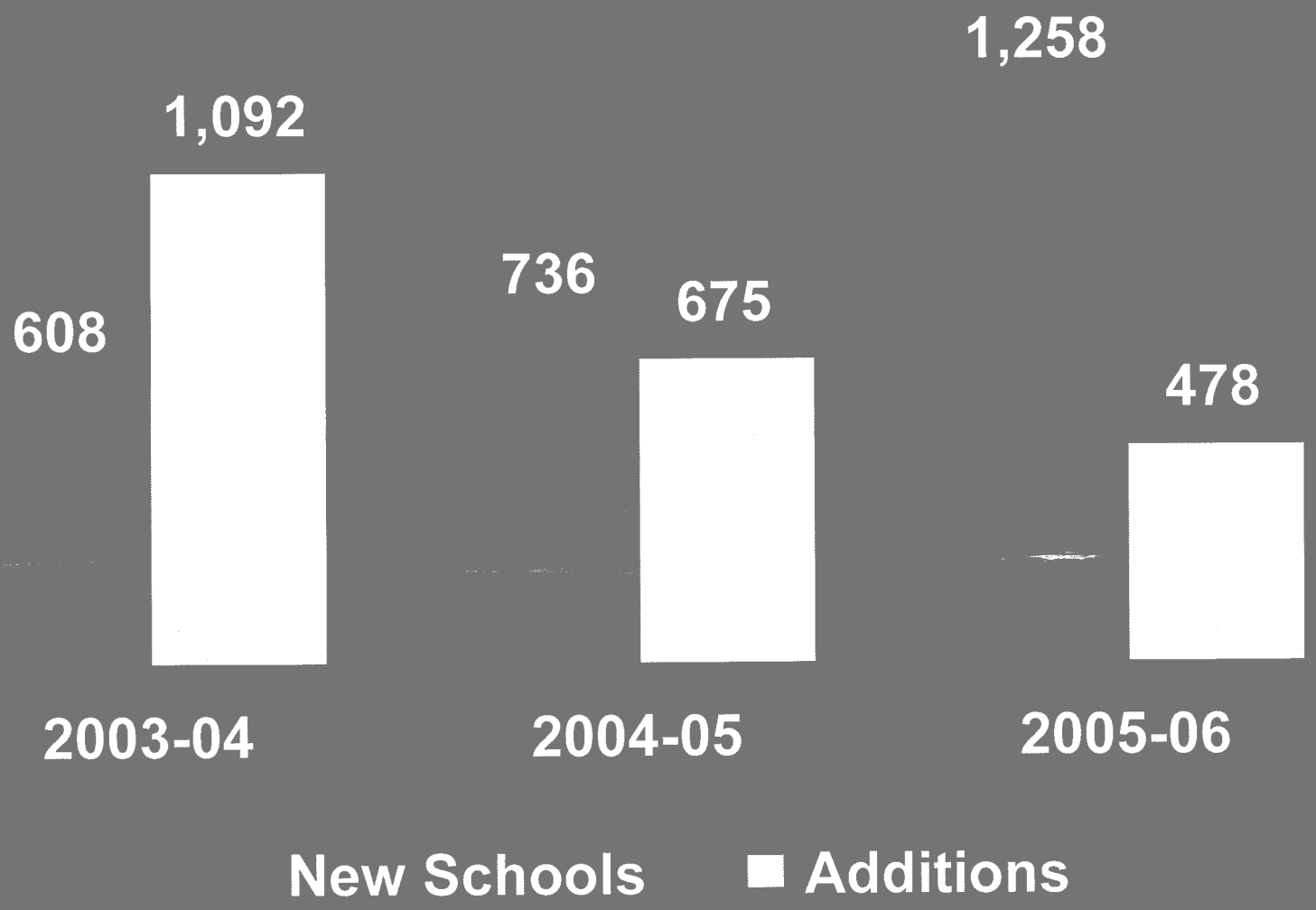
Most School Districts Are Using Construction to Meet Class Size Reduction Requirements



New Schools - Most of the Classrooms Funded by Class Size Reduction

Type of Construction	Number/(Percentage) of Classrooms	
New Schools	2,602	(47%)
Additions	2,245	(41%)
Relocatables	591	(11%)
Other	33	(1%)
Total	**5,471**	**(100%)**

School Districts' Construction Strategies Have Changed Over Time



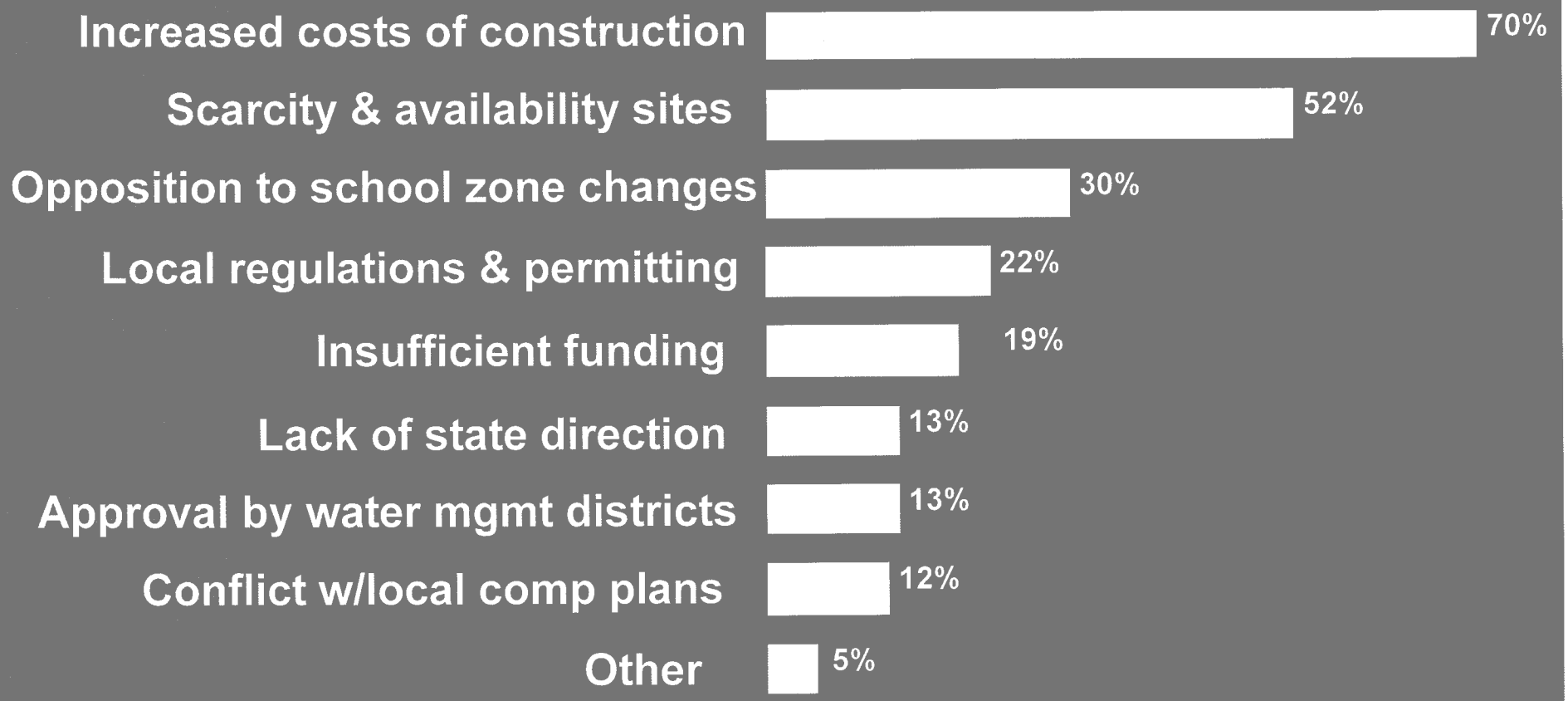
School Districts Frequently Used Relocatables and Modular Construction

- Between 2003-04 and 2005-06 districts added 7,495 relocatables (591 from Classrooms for Kids)
- Relocatables provide flexibility to adapt to demographic shifts
- Districts anticipate reducing the use of relocatables over time
- Some districts also used modular construction to add permanent classrooms in addition to traditional "stick-built" construction
  - Broward added 38 classrooms and Miami-Dade added 15,000 student stations using modular construction

School Districts Are Not Using Strategies To Reduce Construction

- **Few school districts have rezoned to better use underutilized schools**
  - 14 of the 50 districts with underutilized schools have used rezoning
- **Most school districts are not using co-teaching to reduce class sizes**
  - 17 districts using co-teaching to meet class size reduction
  - 3 districts using co-teaching extensively

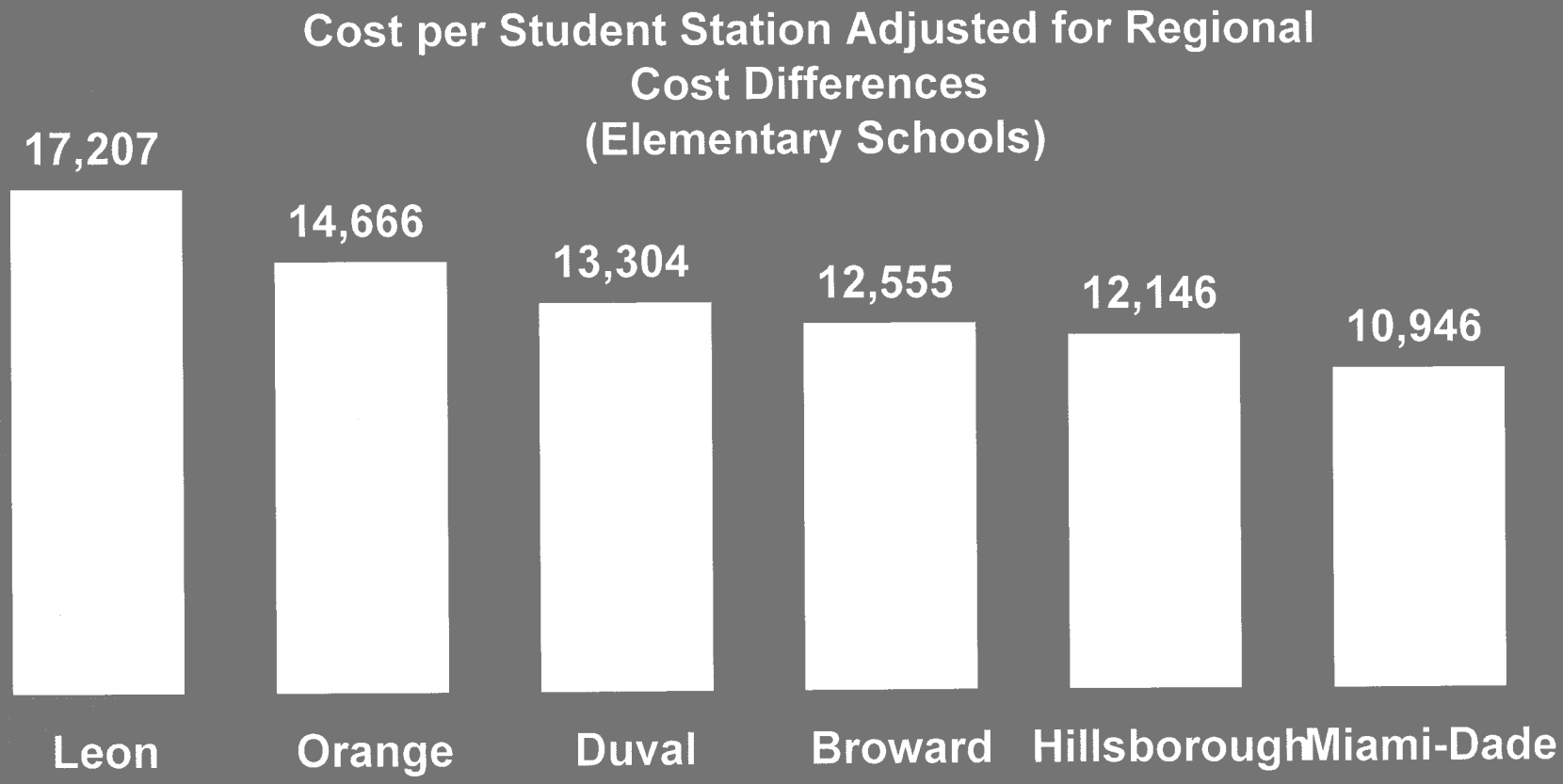
Challenges In Meeting Class Size Reduction Requirements



Challenges In Meeting Class Size Reduction Requirements

- **Increased cost of construction**
  - Higher costs of fuel and materials, rising costs associated with hurricanes
- **Affordable appropriate sites**
  - Increasing property values resulted in selecting less desirable sites with environmental issues and infrastructure constraints
- **Some progress with rezoning**
  - Hillsborough, Palm Beach, Manatee
- **Conflicts with over zoning and permitting**
  - Lack of appropriately zoned sites, lengthy review and permitting processes, conflicting land use regulations among governmental entities

Construction Costs Varied Widely Among Six School Districts

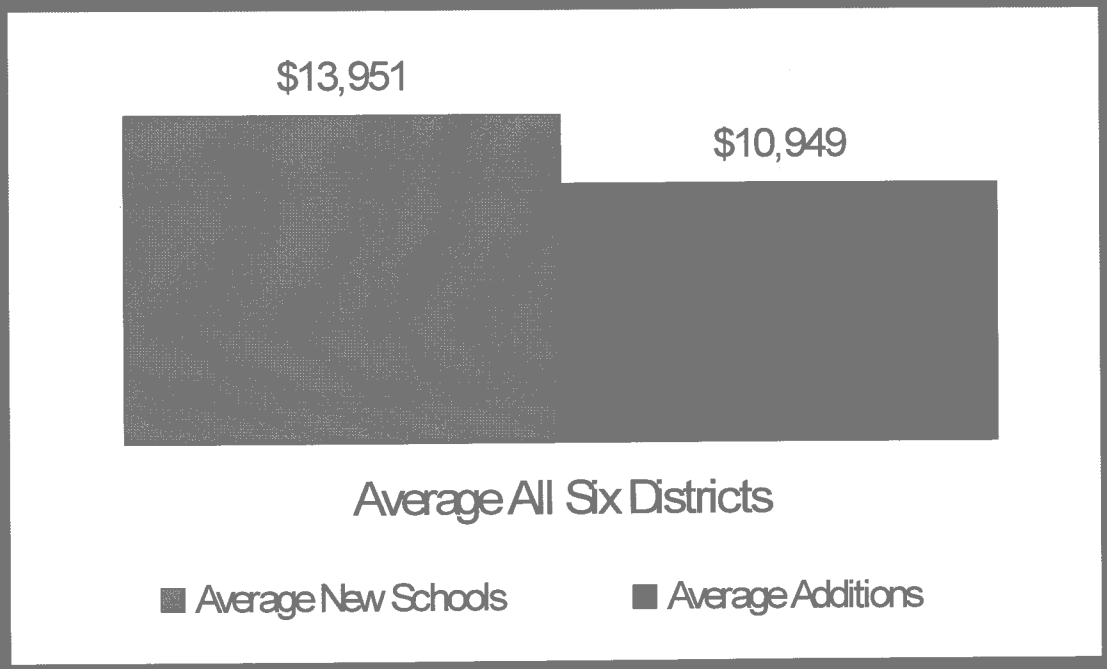


Strategies To Reduce Construction Costs

- **Frugal construction practices and prototypical design can help reduce construction costs**
  - Standard designs enable districts to cut architectural fees, build schools faster, and enable contractors to gain experience with the standard designs.

Strategies To Reduce Construction Costs

- Adding classrooms to existing schools is less expensive than constructing new schools



Some Districts Use Modular Construction & Relocatable Classrooms

- **Modular classrooms are built largely off-site while site preparation is underway, these units can shorten the construction schedule and reduce costs**
- **Several school districts reported that they have used relocatable classrooms as an economical and flexible class size solution**
  - Relocatables can be a cost-effective way to meet the class size requirement for districts that are expecting lower future student populations, such as Broward and Orange

Questions?

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OPPAGA supports the Florida Legislature by providing evaluative research and objective analyses to promote government accountability and the efficient and effective use of public resources.

OPPAGA Class Size Reduction Report 2007

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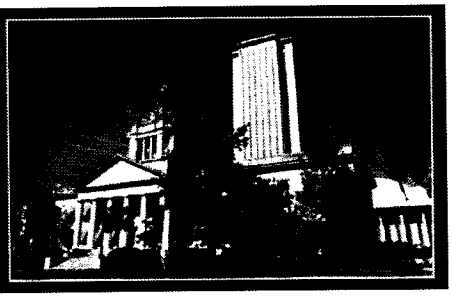


May 2007 Report No. 07-29

School Districts Are Reducing Class Size in Several Ways; May Be Able to Reduce Costs

at a glance

During the 2002 general election voters amended the Florida Constitution to reduce class sizes so that by the 2010-11 school year the maximum number of students in core courses does not exceed specified limits.

Since the passage of the amendment, school districts have relied heavily on construction options such as building of new schools and additions to existing schools and to a lesser extent on relocatables and non-construction options such as rezoning and co-teaching as primary strategies to reduce class sizes. However, districts predict that they will rely more heavily on new school construction in the future to reduce class sizes as options for expansions on existing sites are exhausted.

School districts indicate that increasing construction costs have made it difficult for them to construct the number of classrooms needed to lower class sizes to required levels. However, districts vary widely in their average student station construction costs even after taking into consideration regional cost differences.

School districts can reduce construction costs by adding classroom capacity through additions to existing schools rather than building entirely new schools, by using frugal construction practices and prototypical designs, and by using modular construction and relocatables whenever possible.

Scope

This report provides information to the Legislature on how school districts are using fixed capital outlay (facilities) funds to meet the requirements specified in the Class Size Reduction Amendment to the Florida Constitution, which voters approved in 2002.[1] Specifically, this report addresses the four questions below.[2]

- Are school districts meeting the constitutional requirement to reduce class sizes?
- What strategies are school districts implementing to reduce class sizes?
- What challenges do school districts have in meeting class size reduction goals?
- Are there strategies that school districts can implement to decrease the costs associated with reducing class sizes?

Background

During the 2002 general election voters approved Amendment 9, referred to as the Class Size Reduction Amendment, to the Florida Constitution.[3] The amendment requires school districts to reduce the number of students in each classroom by at least two students per year until the maximum class sizes specified in the amendment are achieved. By the 2010-11 school year, the maximum number of students in core courses may not

[1] Fixed Capital Outlay assets include fixed assets or real property, land, new buildings, and remodeling of real property that materially extends its useful life or materially improves or changes its functional use.

[2] This report does not specifically address how class size reduction requirements apply to charter schools.

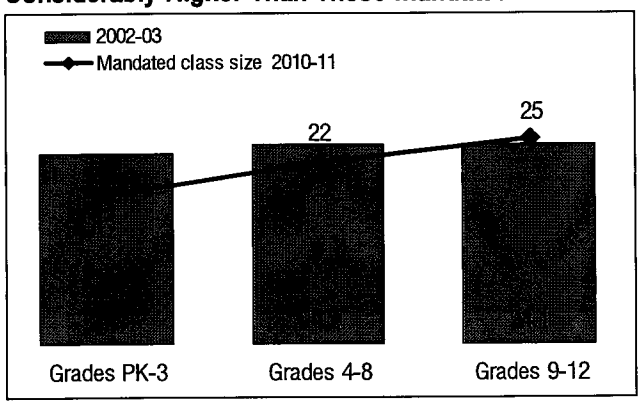
[3] Section 1, Article IX of the Florida Constitution relating to public education

exceed 18 students in grades K-3, 22 students in grades 4-8, and 25 students in grades 9-12. [4] The average number of students at each grade grouping is calculated according to the following schedule:

- at the district level for the 2003-04 through the 2005-06 school years;
- at the school level for the 2006-07 and 2007-08 school years; and
- at the classroom level for the 2008-09 school year and thereafter.

Exhibit 1 shows that in 2002-03 statewide class size averages for elementary and middle grade levels were higher than those mandated in the amendment. [5]

Exhibit 1
In 2002-03, Average Class Sizes for PK-8 Were Considerably Higher Than Those Mandated



Source: Florida Department of Education.

Florida law has several provisions to ensure school districts meet class size reduction goals. Florida law assigns several responsibilities to the Florida Department of Education (DOE) to ensure the state meets class size reduction goals. DOE must develop an annual K-12 fixed capital outlay budget request for meeting statewide facility needs and is responsible for holding school districts accountable for meeting class size reduction goals. DOE must measure each district's annual yearly progress toward meeting the two students per year reduction goals based upon the October student membership survey each year, and must report school districts' progress to the districts, Governor and Legislature.

Florida law provides consequences for districts that do not reduce average class sizes as required. Beginning in the 2006-07 school year, the department is to develop a constitutional compliance plan for districts that are not in compliance with the constitutional requirement. These plans must include, but are not limited to, redrawing school attendance zones to maximize use of facilities while minimizing the additional use of transportation. [6]

The Legislature has provided funds specifically to address class size reduction goals. Early estimates on the cost of meeting the class size reduction requirements varied widely. For instance, estimates for construction and land purchases ranged from $4.4 billion to $9.4 billion. Reasons for this variation included differences in assumptions about what strategies districts would use to add classroom capacity. A major problem in developing precise cost estimates was the unavailability of state-level accurate and reliable data on the number of suitable classrooms at each grade level by school district.

Since 2003-04, in addition to the $1.5 billion in general fixed capital outlay funding, the Legislature has appropriated $1.9 billion in fixed capital outlay funding through the Classrooms for Kids program to be used specifically to meet class size reduction goals. School districts must use Classrooms for Kids funds only to construct, renovate, remodel, or repair educational facilities to increase capacity that are in excess of projects (including the purchase or lease-purchase of relocatable facilities) identified in their five-year work plans adopted prior to March 15, 2003. [7, 8]

[4] The Florida Department of Education defines core courses for class size reduction as reading/language arts, mathematics, science and social studies, foreign language, English for Speakers of Other Languages, Exceptional Student Education, and courses taught in traditional self-contained school classrooms.

[5] These averages were derived by taking the total number students at each level in every term/classroom/period combination in a core course and dividing that number by the total term/classroom period core combination reported. These are statewide averages and do not reflect the number of schools or individual classrooms that exceeded the mandates established in the amendment.

[6] Section 1003.03(4)(b), *F.S.*

[7] *Relocatables* are also referred to as *portables.*

[8] Section 1013.735(3), *F.S.*

Exhibit 2 shows state fixed capital outlay funding for K-12 education by fiscal year. Florida law also authorizes school districts to use funds generated from a levy on local property (ad valorem taxes) to finance school construction projects associated with enrollment growth and ongoing facility needs. [9] State and local fixed capital outlay funds to school districts totaled approximately $12.7 billion from 2003-04 to 2006-07. [10] (Appendices A and B contain a more detailed description on school capital outlay funding and allocations to school districts.)

DOE requested $2.9 billion in its 2007-08 legislative budget request to fund 41 school districts' and four university lab schools' classroom needs to meet class size reduction goals by 2010-11. [11, 12]

[9] Section 1011.71(2), *F.S.*, authorizes districts to levy up to 2 mills without an election. Section 1011.73, *F.S.*, refers to procedures for a voted millage election.

[10] The revenue figures do not include local bond referendums, 1/2-cent sales surtax, impact fees, and certificates of participation or other local sources of funds.

[11] The State Board of Education approved 2007-08 legislative budget request of $2.9 billion was revised downward to $2.1 billion due to smaller than expected enrollment projections by the December 15, 2006 Education Estimating Conference.

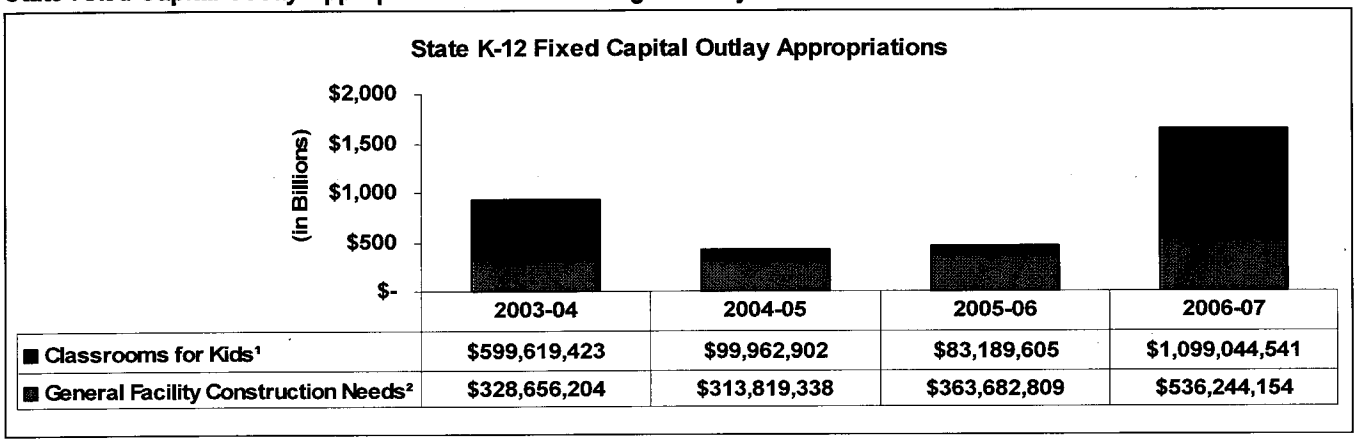
[12] FAMU, FAU, UF, and FSU.

Methods

Florida law provides school districts with considerable flexibility in determining the details of how they will meet the class size requirements. [13] School districts are not required to report their strategies for implementing class size reduction to any state level agency and the Department of Education does not survey school districts to obtain this information. To identify district strategies and assess how they are using fixed capital outlay funds to meet class size reduction goals, we surveyed the state's 67 school districts. We also analyzed classroom inventory, student, and funding data maintained by the Department of Education.

[13] Section 1003.03(3), *F.S.*

Exhibit 2
State Fixed Capital Outlay Appropriations Increased Significantly in 2006-07



	2003-04	2004-05	2005-06	2006-07
Classrooms for Kids[1]	$599,619,423	$99,962,902	$83,189,605	$1,099,044,541
General Facility Construction Needs[2]	$328,656,204	$313,819,338	$363,682,809	$536,244,154

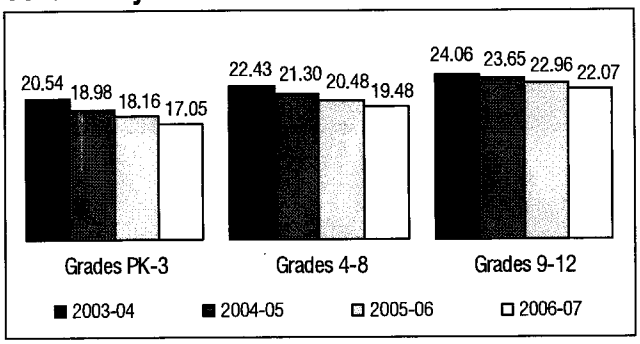
[1] Includes $30 million Lottery District Equity Recognition Allocation for 2003-2004.
[2] These funds are used for general facility construction needs as established in s. 1013.64, *Florida Statutes*. They may also be used for class size reduction projects. The primary source of funds is the Public Education Capital Outlay (PECO) funds derived from the gross receipt tax on utilities services (2.5%) and communications services (2.37%).
Source: Florida Department of Education, Office of Educational Facilities.

Questions

Are school districts meeting the constitutional requirement to reduce class sizes?

Since 2003, school districts have made consistent progress toward meeting class size reduction goals. Exhibit 3 shows on average class sizes have decreased each year since 2003-04. While most school districts (61 of 67) met 2005-06 class size targets, which were at the district level, six did not—Charlotte, Franklin, Gulf, Manatee, Marion and St. Lucie. [14] School districts that do not meet the required two-student-per-year reduction are subject to transfer of a percentage of their class size reduction operating budgets to class size reduction fixed capital outlay budgets which fund school construction. [15]

Exhibit 3
Since 2003-04, Average Class Sizes Have Consistently Decreased for All Grade Levels



Source: Florida Department of Education.

Based on the most recent Department of Education data, school districts may have difficulty meeting the more stringent 2006-07 class size targets, which are set at the school level. DOE data, based on the November 2006 student census, shows that 177 traditional schools (5.8% of the 3,038 traditional schools statewide) and 88 charter schools (25% of the state's 358 charter schools) were not in compliance with the school-level class size requirements. Overall, 42 of 67 school districts had at least one school that did not meet the 2006-07 school-level class size averages at that time. [16] After the appeals process and adjustments, 86 traditional schools and 49 charter schools remained out of compliance resulting in 24 school districts transfering a total of $5.1 million in operating funds to their fixed capital outlay budgets. [17]

What strategies are school districts implementing to reduce class sizes?

Florida law provides several methods that districts can use to reach class size goals. In addition to building new classrooms, districts can encourage students to take dual enrollment classes, maximize the use of teaching staff, redraw attendance zones, and make use of joint use facilities with community colleges and public and private universities. [18] In their responses to our survey, school districts indicated that over the past three years they have relied heavily on new construction and to a lesser extent on adding relocatables to increase available classrooms (see Exhibit 4). Districts predict that they will rely more heavily on new school construction in the future to reduce class sizes as options for classroom expansions at existing sites are exhausted. [19] Few districts have used non-construction options such as rezoning and co-teaching as primary strategies to reduce class sizes.

[14] Eight districts did not meet class size targets in the 2005-06 school years prior to the DOE unexpected student growth adjustment. However, after these adjustments DOE classified Suwannee and Walton county school districts to be in compliance with the targets.

[15] Districts may appeal the transfer to the State Board of Education based on impediments such as unexpected student growth, new teacher hires since the October student count and insufficient space. Based on a review of the appeals, the Commissioner of Education may recommend alternative amounts be transferred.

[16] The number of schools not in compliance with the class size requirement ranged from district to district with 11 districts having one school out of compliance to Orange County with the largest number of schools (31) out of compliance.

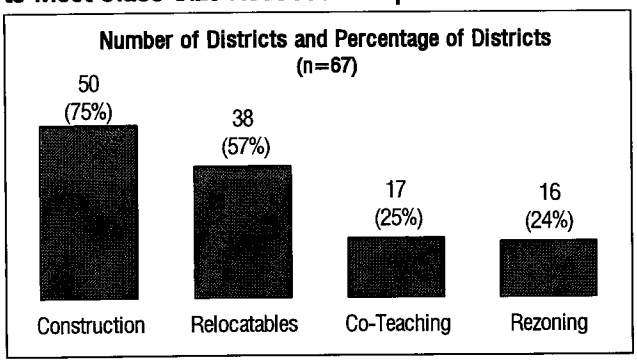
[17] This figure does not include the university lab schools located at FAU, FSU-Broward, and UF.

[18] Section 1003.03, *F.S.*

[19] The new classroom standards adopted by DOE on August 22, 2005, to reduce class sizes to the level required in the amendment caused some school districts to add classroom additions or otherwise expand existing schools even though they were experiencing no growth in student population.

Most school districts relied on construction to meet class size reduction requirements. Between 2003-04 and 2005-06, more school districts relied on construction options than other strategies to meet class size reduction requirements. For instance, as shown in Exhibit 4, 50 of 67 districts (75%) indicated that they were building additional classrooms as a primary way of reducing class sizes. During this three-year period, districts reported building a total of 19,795 additional classrooms, about a quarter of which (5,471 or 28%) were financed all or in part with Classrooms for Kids funds.

Exhibit 4
Most School Districts Are Using Construction Options to Meet Class Size Reduction Requirements



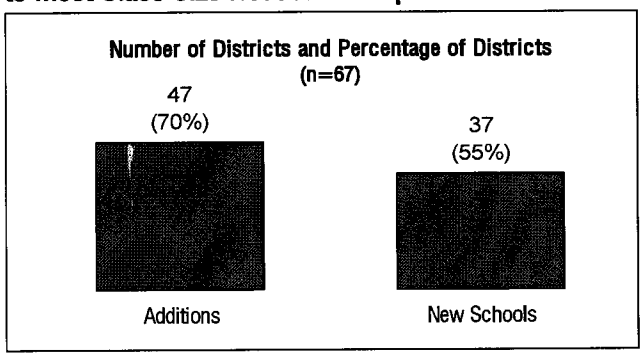
Note: The percentages of strategies used by school districts exceeds 100% because school districts reported using multiple strategies to achieve class size reduction goals.

Source: OPPAGA survey of school districts.

New school construction edged out additions to existing schools to create the largest number of new classrooms added with Classrooms for Kids funds. Between 2003-04 and 2005-06, school districts relied on both classroom additions to existing schools and new school construction to increase the number of classrooms. Because building additions to existing schools is significantly less expensive than building new schools, districts' choices in construction strategies can have a large effect on the state's cost.

As shown in Exhibit 5, most school districts (70%, or 47 of 67) identified classroom additions as a construction strategy used to meet class size reduction requirements. A smaller proportion of school districts, 57% (38) indicated that building new schools was a class size reduction strategy they used. [20]

Exhibit 5
More Districts Relied on the Construction of Additions to Meet Class Size Reduction Requirements



Note: The percentages for construction strategies used by school districts exceeds 100% because school districts reported using both strategies to meet class size reduction goals.

Source: OPPAGA analysis of school districts' survey responses.

Although more districts indicated that they relied on additions to existing schools as their primary strategy to add new classrooms, new school construction resulted in the most classrooms added between 2003-04 and 2005-06 (see Exhibit 6.) This occurred because while more districts relied on additions to existing schools to meet class size reduction goals, those school districts that added the most classrooms generally did so through new school construction.

Exhibit 6
New Schools Provided Most of the Classrooms Funded Wholly and in Part by Classrooms for Kids Funds

Type of Construction	Number/(Percentage) of Classrooms		Number/(Percentage) of Student Stations	
New Schools	2,602	(47%)	56,032	(52%)
Additions	2,245	(41%)	43,206	(40%)
Relocatables	591	(11%)	7,834	(7%)
Other [1]	33	(1%)	498	(<1%)
Total	**5,471**	**(100%)**	**107,570**	**(100%)**

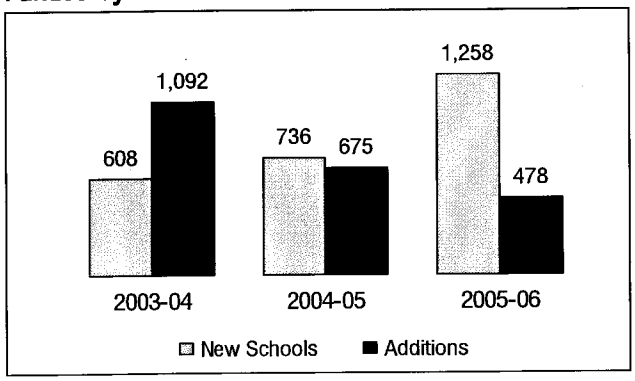
[1] Districts that had met their class size reduction needs reported using Classrooms for Kids funding on other construction projects such as a food service renovation, technical center, or food storage building.
Source: OPPAGA survey of school districts.

[20] The percentage of school districts constructing additions and new schools exceeds 100% because many districts reported using both strategies.

Districts reported that new school construction accounted for 2,602 of the 5,471 (47%) classrooms built using Classrooms for Kids funds. Additions to existing schools followed closely behind new school construction, and produced 2,245 (41%) of the class size reduction-funded classrooms.

School districts' construction strategies have changed over time. While additions to existing schools yielded the most new classrooms constructed using Classrooms for Kids funds in 2003-04, the number of classrooms produced through classroom additions rather than new school construction has steadily decreased over the past three years. As shown in Exhibit 7, districts reported using Classrooms for Kids funds to partially or entirely finance the cost to construct 1,092 classroom additions at existing schools in 2003-04, which exceeded the 608 classrooms added through new school construction. However, by 2005-06, the reverse was true with new school construction accounting for 1,258 (72%) of the 1,736 classrooms constructed using Classrooms for Kids funds. Districts expect this trend to continue until the constitutional mandate takes effect in 2010-11.

Exhibit 7
New School Construction Has Replaced School Additions as the Source of New Classrooms Funded by State Class Size Reduction Allocations



Source: OPPAGA analysis of school districts' survey responses.

School districts indicated that a main reason for this shift in construction strategies is that they have added as many classrooms to existing schools as space and infrastructure permit. As a result, districts will need to build new schools in new locations both to meet the class size requirement and to accommodate growth areas where there are not enough schools to serve the student population.

School districts have frequently used relocatable classrooms and modular construction to add classroom space. Districts reported using relocatable (portable) classrooms as the second most frequently cited class size reduction strategy, with over half (57%) of districts indicating that they added relocatable classrooms as a means to meet class size reduction requirements. Between fiscal years 2003-04 and 2005-06, school districts reported that they added 7,495 relocatable classrooms of which 591 (8%) were financed all or in part with Classrooms for Kids funds. During the three-year period, the costs associated with the lease or purchase of relocatable classrooms accounted for 3% ($21,144,901) of the Classrooms for Kids funds the districts reported ($620,227,685).

Districts gave several different reasons for using relocatable classrooms. Fast-growing districts like Lake and Osceola stated that relocatables allowed them to quickly or temporarily relieve overcrowding where adequate space and infrastructure were available, while other districts reported that relocatable classrooms offered them the flexibility to adapt to demographic shifts within the county. Eighteen districts indicated that they plan to continue to use relocatables as a temporary measure while permanent classrooms are constructed or longer if funds for permanent facilities are not available. However, districts anticipate reducing the use of relocatables over time, especially those that they lease rather than own, as they are replaced by permanent classrooms.

Some districts (Broward, Miami, and Palm Beach) indicated they were also using modular construction to add permanent classrooms in addition to traditional "stick-built" construction. For example, Broward reported that it added 38 classrooms through modular construction, while Miami-Dade indicated that it added 15,000 student stations using modular units. [21]

[21] Prefabricated classroom building of which up to 95% is built off- site.

School districts are generally not using strategies that would reduce the need to construct additional classrooms. School districts generally are not relying on rezoning and co-teaching to meet the class size requirements, although these strategies maximize the use of existing classroom space and therefore reduce the number of new classrooms needed. Only a quarter of the districts indicated that rezoning (16) or co-teaching (17) were among their strategies to reduce class sizes. [22] Districts reported several reasons for not pursuing these options, including the lack of parental support for rezoning and confusion over whether co-teaching was an acceptable method for reducing class sizes.

Few school districts have rezoned to better use underutilized schools. [23] Most districts (50, or 79% of 63 districts reporting) have at least some underutilized schools. However, only 14 of the 50 districts (28%) have rezoned or plan to change school boundaries to maximize the use of classroom space at existing schools. Instead, most districts generally plan to build new classrooms and schools to reduce class sizes.

Districts often cited parental resistance as a primary reason for not pursuing school rezoning as a means to better use existing facilities. Districts also cited increased transportation costs that would be incurred to bus students to underutilized schools and the long bus rides rezoning would require for some students. For example, Brevard County School District reported that it has chosen not to rezone because of doing so would require busing students 75 miles from overcrowded schools in the southern part of the county to underutilized schools in the north. Monroe County School District cited a similar situation in which students would need to be transported 104 miles from Key Largo to its underutilized elementary schools in Key West. Okaloosa similarly noted that Eglin Air Force Base, in the center of the district, serves as a geographical barrier to busing elementary students to underutilized coastal schools. Rezoning also would not help school districts that have experienced rapid growth in areas where no schools currently exist, such as in parts of St. Lucie, Lake, and Osceola counties

Most school districts are not using co-teaching to reduce class sizes. Seventeen school districts (25%) reported that they were using or planned to use co-teaching, in which two or more teachers in a classroom share responsibility for student instruction, to meet class size reduction requirements. Three districts Duval (97%), Lake (60%), and Seminole (40%) reported using co-teaching most extensively, with Duval stating that it will be able to meet the class size reduction requirements almost entirely (96%) through co-teaching. While Department of Education data shows an approximate five-fold increase in the number of class periods taught through co-teaching between 2002-03 and 2006-07, co-teaching still represented only approximately 4% of all class periods taught in 2006-07.

Use of co-teaching may have been limited due to changing state direction on use of this technique. In June 2005, the Florida Board of Education adopted a policy that excluded co-teaching from the calculation of class size compliance for the 2006-07 school year. However, the 2006 Legislature passed a bill to approve the use of co-teaching as an acceptable strategy to meet the class size reduction requirements. Most districts, did report that they are considering co-teaching as a transitional strategy until enough new classrooms can be built or acquired.

What challenges do school districts have in meeting class size reduction goals?

School districts identified several challenges in meeting class size reduction requirements. These include construction cost increases, competition for scarce land suitable for school sites, parental resistance to rezoning, and local permitting processes.

[22] Some districts also reported using innovative strategies such as adding a seventh period to the day (Bradford); converting district-owned non-classroom space to classrooms (Brevard and Santa Rosa); converting abandoned commercial space, such as a K-Mart store, to classrooms and other education uses (Osceola); and redeploying staff to maximize the use of existing facilities (Santa Rosa).

[23] School district classroom facilities are considered underutilized if classroom use is less than 90%.

Districts identified the increased cost of construction as their major challenge to achieving class size reduction goals. Exhibit 8 shows that 70% of school districts report considerable difficulty meeting class size reduction deadlines and staying within budget due to rapid increases in construction costs. This percentage jumps to 94% for the 30 districts with a need for class size reduction funding as identified in the DOE funding formula. For example, the Lake County School District noted that its construction costs have increased substantially due to higher costs for fuel, materials and the effects of hurricanes. Rising costs associated with repairing hurricane damage was also listed as a major challenge by Escambia and Charlotte county school districts. Thirteen districts reported that due to rising construction costs they need more funds to meet class size reduction requirements. [24]

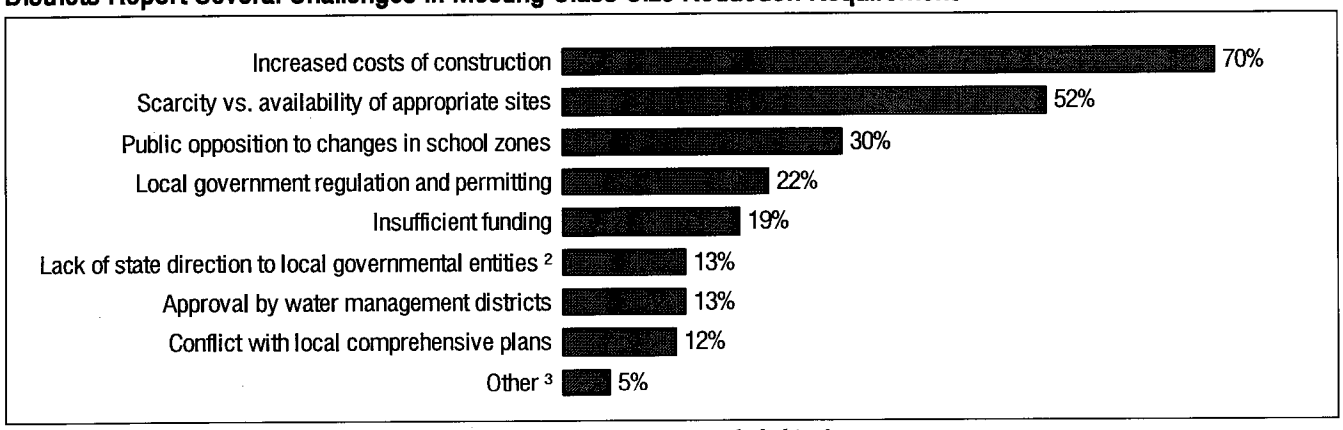
The increase in construction costs affects some districts more than others, depending on the number of additional student stations they need and the strategies they adopt to address the class size reduction requirements. The impact may also be mitigated by the predicted slowing growth in student populations in South Florida, which may relieve the immediate need for new classrooms to meet class size reduction requirements.

[24] These districts are Miami-Dade, Palm Beach, Collier, Osceola, Pinellas, Polk, Sarasota, Baker, Wakulla, Lafayette, Manatee, St. Lucie, and Santa Rosa.

Difficulty finding affordable, appropriate sites was a problem for about half of the school districts. Half (35) of the districts reported difficulties in obtaining property to build new schools. For instance, fast growing districts including Lake, Lee, Osceola, and St. Lucie reported difficulty in finding affordable school sites due to rapidly increasing property values, resulting in selecting less desirable sites that can have environmental issues and infrastructure constraints such as a lack of water, sewers, and roads. Districts reported that these factors have increased the time and costs of finding appropriate school sites.

Some districts are making progress with rezoning schools despite challenges. While districts may face parental resistance to rezoning to help meet class size requirements, several reported that they have successfully taken this step. To help gain public support for changing school boundaries, the Hillsborough County School District created a School Capacity Advisory Council consisting of 35 members to provide recommendations on making the best use of existing facilities. The committee recommended many future school boundary changes which the district plans to implement. The Palm Beach County School District reported that it has reconfigured attendance zones for 50 of its schools, and Manatee County School District reported it plans ongoing boundary changes as the district grows.

Exhibit 8
Districts Report Several Challenges in Meeting Class Size Reduction Requirement [1]



[1] The four university laboratory schools (FSU, FAU, UF, and FAMU) were not included in the survey.

[2] Other than school districts.

[3] Other: relocation problems, enrollment estimation, rezoning, and inadequacies of State Requirements for Educational Facilities to meet program needs.

Source: OPPAGA analysis of districts' survey data.

Districts can face conflicts with governmental entities over zoning issues, approval by water management districts, and permitting delays. Districts report that when constructing new schools or adding classrooms they often contend with a lack of appropriately zoned sites, lengthy review and permitting processes, and conflicting land use regulations among governmental entities within counties. For example, one district reported acquiring a school site only to determine that it could not build on the site due to subsequent changes in the land development regulations adopted by the local government. The Palm Beach County School District similarly reported that some cities have not allowed schools to be built in some residential land use categories, making it difficult to expand campuses and to find new school sites.

Several districts recommended that the Department of Community Affairs provide additional direction to local governments to address this problem. While the department approves local comprehensive plans, it does not review local land development regulations unless they are in conflict with the comprehensive plan. A department official noted that while there are competing legitimate concerns among school districts and local governments, districts deal with a patchwork of regulations that are not well coordinated, and suggested that local governments designate areas where building schools is permissible.

Several districts stated that although they are required to meet class size reduction deadlines by 2010-11, they do not receive priority from local governments in the permit review processes. For instance, the Brevard, Lee, and Pasco county school districts reported lengthy reviews and delays in obtaining development permits, which make it difficult to construct classrooms quickly.

Are there strategies that school districts can implement to decrease the costs associated with reducing class sizes?

The passage of the Class Size Amendment followed the decentralization and transfer of responsibility for public school construction programs from Department of Education to the school districts beginning in 1995. Florida law grants school districts flexibility in their use of state appropriated class size reduction funds to meet class size reduction goals. The strategies that school districts adopt to reduce class sizes can have a significant effect on the overall cost of meeting the constitutional requirement. For instance, districts that seek to meet class size reduction requirements by adding classrooms to existing schools versus building new schools can have significantly lower construction costs. In addition, school districts that use frugal construction practices, prototypical school designs, modular construction, and relocatable classrooms can substantially reduce their costs.

Districts' overall costs of adding classroom capacity vary considerably. School construction costs per student station for elementary classrooms varies substantially throughout the state. We analyzed the construction costs for six districts over the 2000 through 2005 period and found that, after adjusting for regional cost differences, these costs range from a high of $17,207 in Leon County School District to a low of $10,946 in Miami/Dade School District (see Exhibit 9).[25, 26] Given that districts are relying most heavily on building classrooms to reduce class sizes, these construction cost differences may affect the state's cost to meet constitutional requirements.

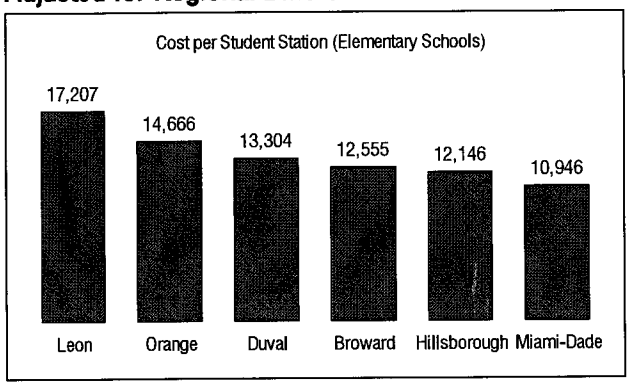
We identified several ways that school districts can reduce construction costs. These include implementing frugal construction practices and prototypical designs, constructing student stations

[25] To compare project costs from different years and locations, OPPAGA analyzed the cost of construction using the Department of Education Cost of Construction reports for fixed capital outlay projects reported annually by school districts for six districts that have their major city included in the RS Means Historical Cost Indexes. These districts and cities were Broward (Fort Lauderdale), Duval (Jacksonville), Dade (Miami), Orange (Orlando), Leon (Tallahassee), and Hillsborough (Tampa). This enabled us to adjust for regional cost differences and annual inflation in our analysis. Since elementary schools comprise the majority of the unmet need identified by DOE, we limited the majority of our analysis to elementary schools in order to control the possible effects of school type on costs. This allowed the comparison of 83 elementary classroom addition projects from four districts and 47 elementary school construction projects from five districts on a cost equalized basis.

[26] The RS Means indexes are used by contractors to prepare bids on construction projects by pricing labor and materials, escalating costs over time and comparing and equalizing cost among different cities. *RS Means Square Foot Costs 27th Annual Edition 2006,* pp. 459 and 461.

through classroom additions to existing schools rather than by building new schools, and adding student stations with modular construction and relocatable classrooms.

Exhibit 9
Construction Costs Per Student Station Varied Significantly Among Six School Districts When Adjusted for Regional Differences



Source: OPPAGA analysis of district cost data from 2000-2005 reported to DOE.

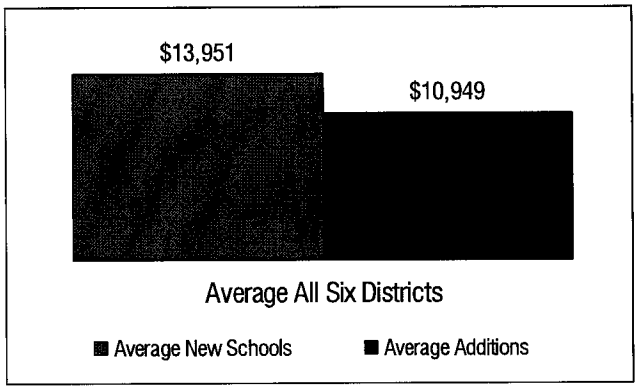
Frugal construction practices and prototypical design can help reduce construction costs. Several districts reported adopting frugal construction practices and prototypical school design to reduce construction costs. For example, the Hillsborough County School District, which had relatively low adjusted construction costs, involved stakeholders in a 1998 study of its facility needs and subsequently adopted space-efficient prototypical school designs to meet those needs. [27] These designs include steps such as building to the minimum state square footage standards, using a standard space-efficient design for each type of building, and combining spaces for multipurpose uses when possible. Using standard designs for elementary, middle, and high schools enables the district to cut architectural fees, build schools faster, and enables contractors to gain experience with the standard designs. As shown in Exhibit 9, these practices enabled the district to have lower construction costs than many other districts.

[27] Frugal construction practices rely on use of readily available materials and standardized mechanical, electrical and telecommunications systems to lower construction costs.

Adding classrooms to existing schools is less expensive than constructing new schools. It is substantially less expensive to build classrooms at existing school sites than to build new schools. As shown in Exhibit 10, the six school districts we examined spent on average $10,949 to add a student station at existing schools, $3,002 less than the average $13,951 cost to add student stations at new schools. A primary reason for this difference is that new schools include not only the classroom space but also relatively expensive support spaces such as administration offices, media centers, and cafeterias.

These cost differences can have a significant impact on the cost of meeting class size reduction requirements. However, as mentioned earlier in this report, many districts indicated that they have reached a point where they have added as many additional classrooms to existing schools as space would permit and that classroom additions increasingly are no longer feasible. Thus, the cost of adding additional student stations in the future is likely to increase as school districts rely more heavily on more costly new school construction.

Exhibit 10
The Cost to Add Student Stations Is Lower for Additions to Existing Schools Than New School Construction



Source: OPPAGA analysis of the 2000-2005 cost of construction data reported by school districts to DOE.

Some districts use modular construction and relocatable classrooms. To help manage construction costs, several school districts (Broward, Dade, and Palm Beach) have used modular construction to lower costs and to speed up occupancy. Because modular classrooms are built largely off-site while site preparation is underway, these units can shorten the construction schedule and reduce costs. For instance, Broward County School District indicated that adding student stations using modular additions enabled it to substantially decrease its average construction costs. Districts that use modular additions view them as permanent solutions to their space problems, and Broward officials reported that these units have received high marks from teachers.

In addition, several school districts reported that they have used relocatable classrooms as an economical and flexible class size solution. These districts included Okaloosa, Orange, and Polk. At an average cost of $75,000 per unit or $3,000 per student station, relocatable classrooms are well below the cost of both modular and traditionally built additions. [28] Relocatable classrooms can be readily moved between schools to meet demographic changes in student populations. Due to their lower cost, these temporary classrooms can be a cost-effective way to meet the class size requirement for districts that are expecting lower future student populations. For example, the revised student enrollment forecasts to 2010-11 projected that the Broward and Orange county school districts will experience declines in student population of 25% and 17%, respectively. [29] These districts may find it more cost effective to use temporary classrooms rather than constructing permanent facilities that may not be needed. (See Appendix C for more information on projected student population declines.)

[28] Costs are based on DOE's average cost of $75,000 for a relocatable divided by 25 student stations.

[29] CO-FTE forecast based on the Office of Demographic and Economic Research December 15, 2006, projections to 2010-11.

Agency Response

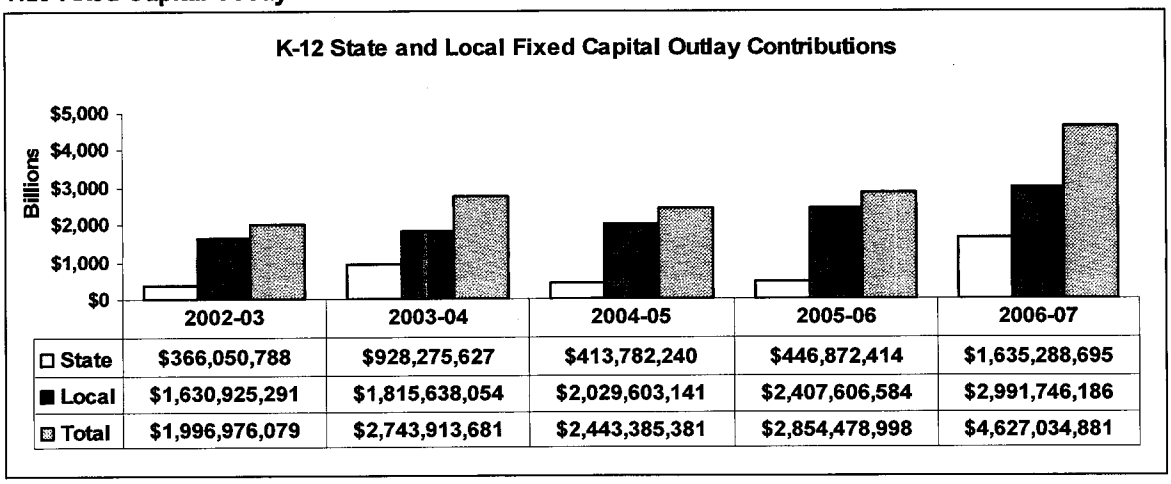
In accordance with the provisions of s. 11.51(5), *Florida Statutes,* a draft of our report was submitted to the Commissioner of Education to review and respond. The Commissioner's written response is reprinted herein in Appendix D.

Appendix A

School Districts Have Financed School Construction from a Combination of Ad Valorem Property Taxes and State Appropriations

School districts have used discretionary (not requiring voter approval) 2-mill revenue as the primary source of fixed capital outlay funding. Table A-1 shows that non-voted 2-mill capital improvements revenue derived from ad valorem (property) taxes authorized in Florida Statutes has been the primary source of funding for public school construction projects. It also shows that fixed capital outlay funding from both state and local sources has more than doubled since the passage of the Class Size Reduction Amendment in 2002-03. The increase in 2-mill revenue has helped offset higher construction costs and can be largely attributed to the dramatic rise in property values during the last three years. [30]

Table A-1
Title Fixed Capital Outlay Contributions to School Districts Have More Than Doubled Since 2002-03



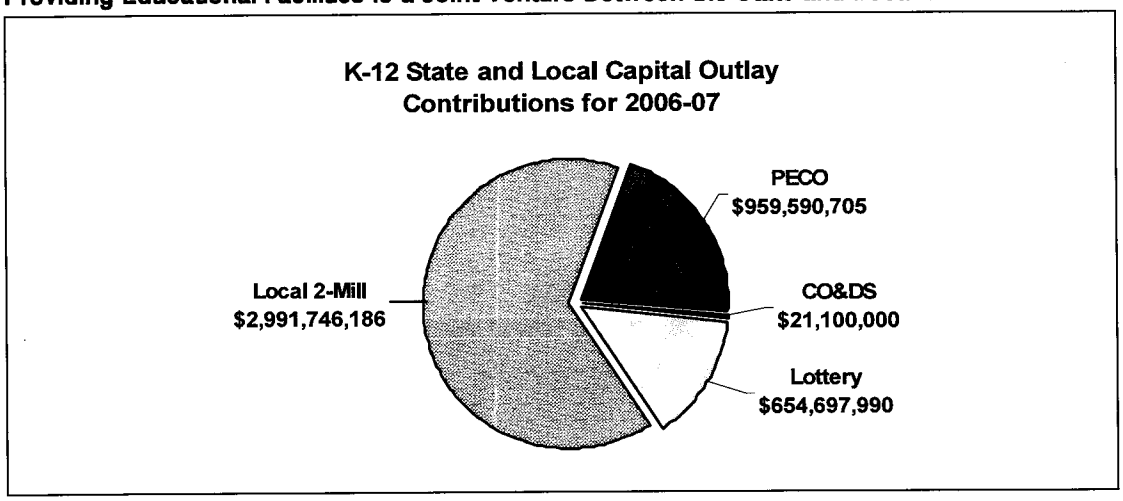
	2002-03	2003-04	2004-05	2005-06	2006-07
State	$366,050,788	$928,275,627	$413,782,240	$446,872,414	$1,635,288,695
Local	$1,630,925,291	$1,815,638,054	$2,029,603,141	$2,407,606,584	$2,991,746,186
Total	$1,996,976,079	$2,743,913,681	$2,443,385,381	$2,854,478,998	$4,627,034,881

Source: DOE, Office of Educational Facilities.

[30] The 2-mill revenue figures do not include local bond referendums, 1/2-cent sales surtax, impact fees, and certificates of participation or other local sources of funds. According to DOE, the sales surtax imposed by 24 districts has added an additional $1.8 billion in funding over the last three years while impact fees imposed by 25 districts over the same time period have added $864.9 million in additional revenues.

Table A-2 shows that for 2006-2007, local property tax revenue accounts for 65% or approximately $3 billion of the total $4.6 billion in school construction funding. The state contribution is 35% or $1.6 billion dollars. [31] The state appropriation includes estimated Capital Outlay and Debt Service (CO&DS) revenue for 2006-07, Lottery revenue and Public Education Capital Outlay (PECO) funding for new construction. [32] The PECO ($445,302,010) portion and Lottery-funded portion ($654,697,990) add up to $1.1 billion in Classrooms for Kids funding to finance new classrooms for class size reduction. The proportion of local and state funding has fluctuated over the years. During the five year period 2002-03 through 2006-07, the state share has ranged from 16% to 35% of the total fixed capital outlay funding for district educational facilities in a given year.

Table A-2
Providing Educational Facilities Is a Joint Venture Between the State and Local School Districts



Note: CO & DS (Capital Outlay and Debt Service) funds are derived from motor vehicle license tag fees and PECO (Public Education Capital Outlay) funds are derived from a gross receipt tax on utilities and communication services.

Source: DOE, Office of Educational Facilities.

[31] The $21.1 million from the Capital Outlay and Debt Service (CO & DS) Trust Fund derived from motor vehicle license tags is estimated.

[32] The PECO Trust Fund, derived from a 2.5% gross receipt tax on utilities and a 2.37% tax on communication services, serves as the primary state capital outlay funding for public schools.

Appendix B

Class Size Reduction Allocations

Table B-1 provides the Classroom for Kids allocation history for school districts for Fiscal Years 2003-04 through 2006-07. The Legislature appropriated approximately $1.9 billion to the Classroom for Kids Program since the passage of the Class Size Amendment on November 5, 2002. Section 1013.735, *Florida Statutes,* describes how each school district's share of the annual appropriation for the program is calculated. This calculation is based on the school district's capital outlay full-time student membership (25%) and the percentage of K-12 capital outlay full-time equivalent growth (65%). The remaining 10% of the appropriation must be allocated according to the allocation formula in s. 1013.64(1)(a),*Florida Statutes,* relating to the square footage and age of existing facilities.

Table B-1 also includes revenue sources for the Classroom for Kids Program. Over the four-year period, these sources included Lottery proceeds, general revenue, Public Education Capital Outlay (PECO) funds. [33] In addition, in 2003-04, school districts received Lottery District Equity Recognition funds if they met the annual two-per-year reduction in class size requirements and participated in any of the following: a half-cent school capital outlay sales surtax, the levy of the local government infrastructure sales surtax, or levied voted millage for capital outlay purposes. [34]

Table B-1
Classrooms for Kids Appropriation History (Passed During the 2003 Regular Session)

School District	Lottery Proceeds Actual 2003-04	General Revenue Actual 2004-05	PECO Actual 2005-06	PECO and Lottery Actual 2006-07	Four-Year Total Classrooms for Kids
Alachua	$3,715,656	$ 797,070	$505,616	$ 8,836,659	$ 13,855,001
Baker	644,730	96,096	189,982	3,133,531	4,064,339
Bay	4,420,678	681,773	619,616	10,115,070	15,837,137
Bradford	1,096,794	68,432	55,589	733,455	1,954,270
Brevard	12,813,233	2,230,022	1,689,350	11,314,373	28,046,978
Broward	44,018,517	7,895,720	4,386,251	40,451,273	96,751,761
Calhoun	354,532	43,180	122,601	423,190	943,503
Charlotte	4,034,782	851,686	199,264	2,567,027	7,652,759
Citrus	2,447,354	368,158	263,334	7,254,059	10,332,905
Clay	8,387,460	2,352,146	1,792,727	38,315,599	50,847,932
Collier	17,156,690	2,928,197	2,218,934	39,045,979	61,349,800
Columbia	1,616,162	311,032	247,969	5,096,546	7,271,709
Dade	50,324,970	4,984,664	4,116,344	53,499,162	112,925,140
DeSoto	600,718	166,626	124,997	833,595	1,725,936
Dixie	215,221	36,358	29,745	612,914	894,238
Duval	18,296,340	3,032,647	2,067,449	23,018,689	46,415,125
Escambia	4,385,854	969,616	660,491	6,995,090	13,011,051
Flagler	5,190,149	1,195,911	1,008,442	26,950,650	34,345,152
Franklin	160,380	26,982	20,637	272,187	480,186
Gadsden	670,697	112,833	92,245	1,169,490	2,045,265

[33] PECO funds, derived from a gross receipt tax (2.5%) on utilities, have historically been the primary state source of fixed capital outlay revenue for school construction projects.

[34] As provided by s. 1013.736, *F.S.*, and line item 14F of the 2003-04 General Appropriations Act.

School District	Lottery Proceeds Actual 2003-04	General Revenue Actual 2004-05	PECO Actual 2005-06	PECO and Lottery Actual 2006-07	Four-Year Total Classrooms for Kids
Gilchrist	540,214	128,572	77,865	1,060,009	1,806,660
Glades	114,343	33,012	214,321	787,400	1,149,076
Gulf	445,558	41,560	60,596	447,674	995,388
Hamilton	207,274	85,049	29,095	389,854	711,272
Hardee	1,567,550	135,145	102,756	1,506,255	3,311,706
Hendry	1,620,360	223,346	163,352	1,223,870	3,230,928
Hernando	6,391,717	1,687,538	1,373,016	23,227,656	32,679,927
Highlands	2,027,286	392,888	567,207	3,847,994	6,835,375
Hillsborough	73,698,163	10,417,704	8,520,056	139,682,849	232,318,772
Holmes	309,574	52,777	54,443	1,165,564	1,582,358
Indian River	4,476,084	929,938	604,513	8,183,025	14,193,560
Jackson	1,252,414	157,533	141,173	3,026,444	4,577,564
Jefferson	253,792	33,668	26,075	322,669	636,204
Lafayette	125,217	21,585	19,831	470,338	636,971
Lake	16,514,165	3,343,135	2,190,827	26,675,596	48,723,723
Lee	20,557,312	3,876,785	3,885,454	73,681,172	102,000,723
Leon	5,436,589	714,545	413,649	12,869,789	19,434,572
Levy	758,001	106,486	197,275	1,036,289	2,098,051
Liberty	244,519	20,163	49,898	1,536,137	1,850,717
Madison	262,775	45,497	36,687	462,827	807,786
Manatee	11,434,242	1,591,968	1,665,444	33,188,137	47,879,791
Marion	9,246,449	1,008,955	1,570,622	23,745,806	35,571,832
Martin	7,314,379	736,872	347,236	7,007,005	15,405,492
Monroe	1,119,516	197,071	128,004	1,688,742	3,133,333
Nassau	1,840,495	242,361	337,004	6,469,684	8,889,544
Okaloosa	2,762,334	450,045	400,238	6,431,609	10,044,226
Okeechobee	916,731	442,990	171,018	2,229,468	3,760,207
Orange	42,847,383	9,591,731	8,997,612	66,120,159	127,556,885
Osceola	24,773,601	4,733,874	2,856,195	37,130,685	69,494,355
Palm Beach	43,673,471	7,029,986	5,542,778	30,172,225	86,418,460
Pasco	20,250,139	3,790,253	3,967,867	50,018,343	78,026,602
Pinellas	17,897,434	2,888,233	1,889,207	25,278,213	47,953,087
Polk	24,469,514	2,315,541	3,539,589	81,681,825	112,006,469
Putnam	1,470,414	217,183	240,215	2,214,959	4,142,771
St. Johns	12,712,811	1,872,542	1,503,125	31,918,185	48,006,663
St. Lucie	10,537,201	2,133,287	2,506,377	34,395,504	49,572,369
Santa Rosa	5,741,229	1,336,274	909,309	7,058,432	15,045,244
Sarasota	9,688,339	2,228,336	2,205,312	16,007,780	30,129,767
Seminole	14,122,771	2,419,825	2,449,585	21,076,049	40,068,230
Sumter	878,121	106,057	111,348	1,147,414	2,242,940
Suwannee	610,400	119,584	71,671	2,719,924	3,521,579
Taylor	385,052	59,320	46,412	587,562	1,078,346
Union	215,498	36,508	41,865	1,508,846	1,802,717
Volusia	13,670,960	2,241,124	1,867,621	17,488,878	35,268,583
Wakulla	611,602	157,718	358,576	2,503,929	3,631,825
Walton	2,216,111	294,834	222,836	4,974,533	7,708,314
Washington	859,402	124,355	102,867	2,038,696	3,125,320
Total	**$599,619,423**	**$99,962,902**	**$83,189,605**	**$1,099,044,541**	**$1,881,816,471**

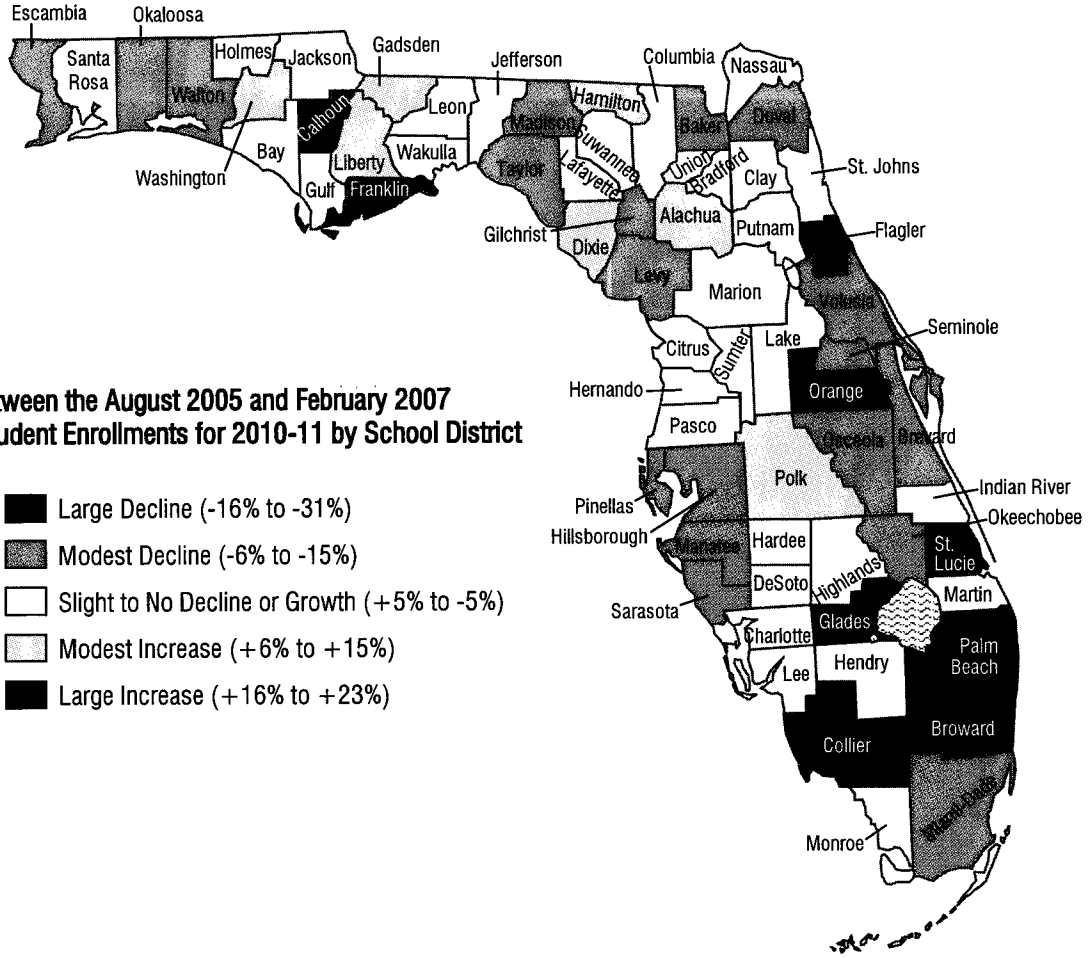
Source: Department of Education.

Appendix C

Changes in Student Population Forecast

This map below portrays the differences between the total 2010-11 capital outlay full time equivalent enrollment projection incorporated in the 2006-07 DOE legislative budget request (based on August 2005 projections) and the projection by the February 2007 enrollment conference.[35, 36] Overall the state experienced a little over a 9% shift in projected enrollment. (See Table C-1.) However, impact on the need for resources is more dramatic than the overall enrollment shift because facilities are fixed resources that need significant lead time for construction. Facilities constructed in one school district cannot easily be used in another school district as populations shift.

Another way of assessing the impact of this shift is that applying the 2006 enrollment projections for 2010-11 that were in the 2006-07 LBR to the 2007-08 LBR formula would double the cost of meeting 2010-11 constitutional class size requirements even though the later overall enrollment projection was only about 9% lower.



[35] The portion of enrollment that requires facilities constructed by the school district.

[36] Based on the data from the Office of Economic and Demographic Research Education Estimating Conference, Public Schools K-12, December 15, 2006.

Table C-1
August 2005 and February 2007 Projected Student Enrollments for 2010-11 by School District

District	Projection August 2005 [1]	Projection February 2007 [2]	Difference	Percentage
Alachua	25,056	26,748	1,692	6.75%
Baker	5,384	5,036	(348)	-6.46%
Bay	24,578	24,576	(2)	-0.01%
Bradford	3,288	3,238	(50)	-1.52%
Brevard	72,396	62,574	(9,822)	-13.57%
Broward	280,957	212,052	(68,905)	-24.53%
Calhoun	2,552	2,066	(486)	-19.04%
Charlotte	18,334	17,460	(874)	-4.77%
Citrus	16,531	16,350	(181)	-1.09%
Clay	40,465	41,243	778	1.92%
Collier	53,872	44,486	(9,386)	-17.42%
Columbia	10,507	10,151	(356)	-3.39%
Dade	337,308	287,418	(49,890)	-14.79%
DeSoto	4,647	4,721	74	1.59%
Dixie	1,970	2,149	179	9.09%
Duval	125,740	118,188	(7,552)	-6.01%
Escambia	41,361	37,580	(3,781)	-9.14%
Flagler	15,312	18,828	3,516	22.96%
Franklin	1,010	823	(187)	-18.51%
Gadsden	5,392	5,691	299	5.55%
Gilchrist	3,095	2,910	(185)	-5.98%
Glades	1,341	922	(419)	-31.25%
Gulf	2,078	1,979	(99)	-4.76%
Hamilton	1,747	1,884	137	7.84%
Hardee	5,205	5,081	(124)	-2.38%
Hendry	7,137	7,242	105	1.47%
Hernando	26,503	26,309	(194)	-0.73%
Highlands	13,241	13,183	(58)	-0.44%
Hillsborough	207,798	192,429	(15,369)	-7.40%
Holmes	3,265	3,192	(73)	-2.24%
Indian River	18,336	17,603	(733)	-4.00%
Jackson	7,176	6,976	(200)	-2.79%
Jefferson	1,114	1,136	22	1.97%
Lafayette	1,115	1,096	(19)	-1.70%
Lake	42,966	44,122	1,156	2.69%
Lee	79,653	80,728	1,075	1.35%
Leon	31,789	31,109	(680)	-2.14%
Levy	6,119	5,703	(416)	-6.80%
Liberty	1,316	1,437	121	9.19%
Madison	2,713	2,365	(348)	-12.83%
Manatee	43,828	41,079	(2,749)	-6.27%
Marion	43,954	44,294	340	0.77%
Martin	18,309	17,631	(678)	-3.70%
Monroe	6,878	6,560	(318)	-4.62%
Nassau	10,805	11,216	411	3.80%
Okaloosa	28,773	26,855	(1,918)	-6.67%
Okeechobee	7,450	6,855	(595)	-7.99%
Orange	204,436	172,621	(31,815)	-15.56%
Osceola	61,173	53,679	(7,494)	-12.25%
Palm Beach	185,720	154,081	(31,639)	-17.04%
Pasco	74,046	70,399	(3,647)	-4.93%
Pinellas	104,449	96,535	(7,914)	-7.58%
Polk	90,093	99,218	9,125	10.13%
Putnam	11,732	11,174	(558)	-4.76%
St. Johns	30,935	31,749	814	2.63%
St. Lucie	41,269	47,969	6,700	16.23%
Santa Rosa	26,538	25,257	(1,281)	-4.83%
Sarasota	45,262	40,151	(5,111)	-11.29%
Seminole	72,278	63,201	(9,077)	-12.56%
Sumter	5,625	5,489	(136)	-2.42%
Suwannee	5,820	5,709	(111)	-1.91%
Taylor	3,060	2,838	(222)	-7.25%
Union	2,150	2,208	58	2.70%
Volusia	69,575	65,611	(3,964)	-5.70%
Wakulla	5,077	5,201	124	2.44%
Walton	6,986	6,255	(731)	-10.46%
Washington	3,302	3,756	454	13.75%
State	**2,764,501**	**2,510,267**	**(254,234)**	**-9.20%**

[1] Department of Education student enrollment projections for 2010-11 used to develop the 2006-07 legislative budget request.

[2] Education Estimating Conference February 12, 2007.

Source: Compiled by OPPAGA.

Appendix D

FLORIDA DEPARTMENT OF EDUCATION

April 27, 2007

Dr. Gary VanLandingham, Director
Florida Office of Program Policy Analysis
and Government Accountability
The Florida Legislature
111 West Madison, Room 312
Tallahassee, Florida 32399-1475

Dear Dr. VanLandingham:

I wish to acknowledge receipt of the Office of Program Policy Analysis and Government Accountability (OPPAGA) report entitled "School Districts Are Reducing Class Size in Several Ways; May Be Able to Reduce Costs," and recognize the effort that went into the production of the report.

The results of your study support the contention of the Department and the State Board of Education that the school districts are, in fact, making every effort to achieve the constitutional requirements which the voters approved in 2002 and are addressing the implementation requirements as specified in Section 1003.03, F.S.

For the first three years of class size requirements, compliance was determined from the district average. However, beginning in 2006-07, compliance with the class size constitutional amendment was measured at the school level. This has provided additional challenges for both traditional public and charter schools. Beginning in the 2008-09 school year, compliance with the statutory and constitutional obligations will be measured at the individual classroom level. As districts plan for this transition, the Department of Education is committed to providing support and technical assistance to ensure compliance for all traditional public and charter schools by 2010.

Sincerely,

Jeanine Blomberg

JB:lcj

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The Florida Legislature

Office of Program Policy Analysis and Government Accountability

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FSBA/FADSS
Class Size Reduction
Presentation

AMENDMENT TO ARTICLE IX, SECTION 1 OF THE FLORIDA CONSTITUTION

ARTICLE IX
EDUCATION

Section 1. Public education.–

(a) The education of children is a fundamental value of the people of the State of Florida. It is, therefore, a paramount duty of the state to make adequate provision for the education of all children residing within its borders. Adequate provision shall be made by law for a uniform, efficient, safe, secure, and high quality system of free public schools that allows students to obtain a high quality education and for the establishment, maintenance, and operation of institutions of higher learning and other public education programs that the needs of the people may require.

(b) To assure that children attending public schools obtain a high quality education, the legislature shall make adequate provision to ensure that, by the beginning of the 2010 school year and for each school year thereafter, there are a sufficient number of classrooms so that:

(1) The school average ~~maximum~~ number of students who are assigned to each teacher who is teaching in public school classrooms for prekindergarten through grade 3 does not exceed 18 students and the number of students who are assigned to one teacher in an individual class does not exceed 23 students;

(2) The school average ~~maximum~~ number of students who are assigned to each teacher who is teaching in public school classrooms for grades 4 through 8 does not exceed 22 students and the number of students who are assigned to one teacher in an individual class does not exceed 27 students; and

(3) The school average ~~maximum~~ number of students who are assigned to each teacher who is teaching in public school classrooms for grades 9 through 12 does not exceed 25 students and the number of students who are assigned to one teacher in an individual class does not exceed 30 students.

The class size requirements of this subsection do not apply to extracurricular or virtual classes. Payment of the costs associated with reducing class size to meet these requirements is the responsibility of the state and not of local school ~~schools~~ districts. Beginning with the 2003-2004 fiscal year, the legislature shall provide sufficient funds to reduce the average number of students in each classroom by at least two students per year until the school average class size for each of the grade groupings ~~maximum number of students per classroom~~ does not exceed the requirements of this subsection.

In exceptional circumstances a school district may request from the governor a temporary waiver of the class size requirements of this subsection which the governor may grant, partially grant, or deny.

Class Size Reduction

K-12 Budget Appropriations

Year	Operating	Capital Outlay	Debt Service
2003-2004	468,198,634	600,000,000	56,000,000
2004-2005	978,825,375	100,000,000	43,902,077
2005-2006	1,528,398,093	0	43,902,077
2006-2007	2,151,230,571	1,100,000,000	100,310,506
2007-2008 *(reflects 2007C budget reductions)*	2,689,867,968	650,000,000	119,710,506
TOTAL	**$7,816,520,641**	**$2,450,000,000**	**$363,825,166**

GRAND TOTAL **$10,630,345,807**
(Operating, Capital Outlay, and Debt Service)

STUDENT ENROLLMENT HISTORY

YEAR	ENROLLMENT (FINAL FEFP)	OVER (UNDER) PRIOR YEAR
2007 - 2008*	2,642,321	4,771
2006 - 2007	2,637,550	(4,571)
2005 - 2006	2,641,121	31,527
2004 - 2005	2,609,594	52,156
2003 - 2004	2,557,438	59,469
2002 - 2003	2,497,969	44,419
2001 - 2002	2,453,550	64,794
2000 - 2001	2,388,756	59,905
1999 - 2000	2,328,851	(10,507)
1998 - 1999	2,339,358	45,460
1997 - 1998	2,293,898	57,860
1996 - 1997	2,236,038	

* Figures for 2007 - 2008 are projections

Average Annual Growth Over 10 years (1996-97 through 2006-07) = 40,052

Average Annual Growth Over 5 years (2002-03 through 2006-07) = 36,620

County by County Vote Results
2002 Class Size Reduction Amendment

COUNTY	YES	NO
Alachua	YES	
Baker		NO
Bay		NO
Bradford		NO
Brevard		NO
Broward	YES	
Calhoun	YES	
Charlotte		NO
Citrus		NO
Clay		NO
Collier		NO
Columbia		NO
Desoto		NO
Dixie	YES	
Duval		NO
Escambia		NO
Flagler		NO
Franklin	YES	
Gadsden	YES	
Gilchrist		NO
Glades	YES	
Gulf	YES	
Hamilton	YES	
Hardee		NO
Hendry	YES	
Hernando	YES	
Highlands		NO
Hillsborough		NO
Holmes	YES	
Indian River		NO
Jackson	YES	
Jefferson	YES	
Lafayette		NO

COUNTY	YES	NO
Lake		NO
Lee		NO
Leon	YES	
Levy	YES	
Liberty	YES	
Madison	YES	
Manatee		NO
Marion		NO
Martin		NO
Miami-Dade	YES	
Monroe	YES	
Nassau		NO
Okaloosa		NO
Okeechobee		YES
Orange	YES	
Osceola	YES	
Palm Beach	YES	
Pasco		NO
Pinellas		NO
Polk		NO
Putnam		NO
St. Johns		NO
St. Lucie		NO
Santa Rosa	YES	
Sarasota		NO
Seminole	YES	
Sumter		NO
Suwannee		NO
Taylor	YES	
Union		NO
Volusia		NO
Wakulla	YES	
Walton		NO
Washington	YES	

TOTAL: YES = 29 NO = 38