

ALASKA LEGISLATURE SPECIAL COMMITTEE / SUBJECT FILE 8672
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**THE TASK FOR STATES IS NOT TO SELECT
THE SINGLE BEST APPROACH. RATHER, THE
FUNDAMENTAL TASK FOR STATES IS TO
SORT OUT WHICH MIX OF CONTROL
STRATEGIES, REWARDS, AND SANCTIONS
WILL CONTRIBUTE MOST EFFECTIVELY TO
[IMPROVEMENTS IN SCHOOL
PERFORMANCE] ACCORDING TO EACH
PARTICULAR STATE'S CIRCUMSTANCES.**

**MICHAEL COHEN
NATIONAL GOVERNORS' ASSOCIATION**

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**IF NEW DIRECTIVES IN SCHOOL
PERFORMANCE ARE TO SUCCEED IN
THE YEARS AHEAD, THE ALASKA
LEGISLATURE, THE OFFICE OF THE
GOVERNOR, AND THE STATE BOARD OF
EDUCATION MUST GUARANTEE THAT
THIS TASK WILL BE ACTED UPON
POSITIVELY AND WITHOUT DELAY.**

**JOINT SENATE-HOUSE COMMITTEE ON
SCHOOL PERFORMANCE
JANUARY, 1991**

CHAPTER TWO

STRUCTURAL CONTROL OF SCHOOLING: ISSUES AND RECOMMENDATIONS

Traditionally policy makers have mandated objectives for public education as a means to effect school reform. Chapter 173 in Alaska statutes, described in Chapter One, is a classic example of this technique. Another method, and in the minds of some a more realistic and tangible one, is to alter the structural form of the education system. This chapter discusses changes to structural form that the Joint Committee believes will improve school performance. These include the following: 1) school governance and finance, 2) professional development through personnel training and certification, 3) program definition and curriculum, and 4) research, evaluation, and dissemination.

SCHOOL GOVERNANCE AND FINANCE

The most fundamental structural elements in Alaska's schools are its systems of governance and finance. Of the two, the manner in which schools are financed is the one most often the subject of public interest and the one most apt to come under the scrutiny of the legislature. Nonetheless, several systems of school governance have been deployed since the beginning of formal American education in Alaska over one hundred years ago. A brief review of the changes that led to the current systems of both governance and finance helps to clarify the issues facing the legislature today.

*School Governance and Finance in Historical
Perspective* 9

The origins of what was to become a dual, territorial (later state)-federal system of education that persisted well into the 1980s derived from settlers who arrived in Alaska during the early years of the 20th century as part of the gold rush and other commercial ventures of that period. By an act of Congress in 1905, municipal governments were authorized to establish schools for the children of settlers; these schools were separate from existing federal schools. Most efforts at formal education, primarily for Native children, had previously been undertaken by missionaries, the U.S. Bureau of Education (Department of Interior), and in a few instances local citizens.

The territorial legislature in 1917 enacted what came to be called the Uniform School Act. It established a territorial department of education and thereby systematized schools for non-natives on a territory-wide basis. Earlier that year the United States Congress empowered the territory to "establish and maintain schools for white children and colored children and children of mixed blood who led civilized lives." The first territorial Commissioner of Education had the job, on the one hand, of developing a system of territorial control over the city schools through processes not unlike most chief state school officers, and on the other of performing all the duties as administrator for the rural system.

Native children were excluded from the authority of the territorial Department of Education since it was generally agreed that the education of Natives was already and should remain the responsibility of the federal government. The attitude of the first territorial Commissioner of Education was consistent with this provision and reflected the law and the separatist attitudes of that

period. The Commissioner declared in the Department's first official report:

There are several objections to the maintenance of a unified system of schools for white and native children, the principle ones being the irregularity of the attendance of the natives and their inability to conform to the standards of the whites in the matter of health and sanitation.... The highest good of both races ... seems to require separate schools for at least a few decades.¹⁰

Thus, it became official policy that the territorial system was to be uniform for "white" children and that federal schools were to be maintained for Native pupils.

Since a policy established during this period favored separate school systems according to race, it is of significance that a unique and unanticipated attendance pattern developed contrary to the intent of this policy. As time went by, increasingly more villages contained either a territorial school or a federal school but not both. The greatest number of exceptions occurred in the incorporated city school districts and rural schools with mixed populations. In these locations segregated federal and territorial schools prevailed. Nevertheless, eventually many Native pupils came to attend territorial/state schools despite the Commissioner's earlier declaration.

Historical accident is sometimes given as one reason this attendance pattern emerged. Villages with schools established early in the American period, especially former mission schools, originated and remained in the federal system. And when new schools in the most remote villages with nearly exclusive Native populations were established, they were usually federal, although here too there were notable exceptions. Generally, however, if new schools were added to the territorial system, they were in villages

along the coast, including the Aleutian Islands, along the railbelt and highway system, and in mining communities.

Another factor that increased the number of Native pupils in territorial schools was a ruling by the territorial attorney general in 1943. Faced with increasing instances of strife in the villages because of attempts to integrate Native and white students on the part of some and resistance to this trend on the part of others, the Territorial Commissioner of Education requested an opinion from the attorney general on the rights of Native children relative to school attendance. The attorney general ruled that Native pupils could not be compelled to attend solely Native schools if a school for other children was provided in the community.¹¹ Compared with attitudes toward race at the time, the opinion was remarkable for its directness. This was also the period when Governor Gruening, the Alaska Native Brotherhood, and others were pressuring for an end to segregation in employment and public facilities and the legislature outlawed discrimination in hotels and restaurants. Alaska appears to have been ten to twenty years ahead of the nation as a whole in matters of civil rights.

As territorial and city schools became more integrated, the original notion that they be maintained exclusively for non-Natives became immaterial, although it was not until 1967 that segregated, dual federal-state schools within the same community disappeared completely. (Northway was the site of the last instance where there were two school units in a single community: one for Natives [BIA] and one for non-Natives [state]). The BIA did not entirely discontinue education services in Alaska until 1985.

Following statehood in 1959, four years elapsed before much attention was given to the structure of the dual system of schools. It was not until 1962 that attention was drawn to the matter. In that year a memorandum of agreement developed between the Bureau

of Indian Affairs and the state calling for a common program of education between the two groups. Subsequently, a U.S. Department of Interior Task Force suggested that a single, distinct administrative structure was essential if schools were to respond effectively to the multicultural composition of the Alaska population. With attention of the Kennedy Committee on Indian Education focused on schooling in Alaska in the mid 1960s and the Great Society programs of President Lyndon Johnson, designed to overcome poverty and assist minorities in their campaign to achieve equal opportunity, the status of education became a major statewide issue, especially among the Native population. Until this time no strong voice from Native consumers of educational services had been heard, and especially not from those in the villages. Emergence of the Native population into the movement for improved schools gave it credibility and momentum.

Recognition of the need for programs of education designed with Native needs in mind gave rise in 1970 to the Alaska State Operated School System (ASOSS). Independent of the state Department of Education, which had been administering the schools outside municipal districts since 1932, and governed by its own board of directors with regional Native representation, ASOSS was given responsibility for all rural schools (other than those in the still active BIA system) in the "unorganized borough." ASOSS, anticipated as a positive move in the direction of Native involvement in education, soon became a clumsily administered bureaucracy accused of insensitivity to the culture of rural people and inadequate to meet their needs. Because of this view ASOSS became the last major centralized governmental unit to govern non-federal village schools.

At the request of the state Department of Education and the legislature, the University of Alaska at Fairbanks undertook a study to identify alternative ways of providing school services for the

unorganized borough. Recommendations derived from the study, in conjunction with the Alaska Federation of Natives, were incorporated in an act of the legislature that created Regional Education Attendance Areas (REAs) as "service districts" in the unorganized borough. They became operational in July, 1976, ending forty-four years of direct territorial/state operation of non-municipal schools.

When REAs were established, the demand for local control was so pronounced that the legislature and state board took extraordinary measures to assure that there would be a minimum of interference from state government in REA school affairs. Recently, however, testimony taken by the Senate Special Committee on Education and by the Joint Committee suggests that the mechanisms created at that time may have worked as much to the detriment of local interests as to their advantage. By definition, REAs are regional units of state government since they have neither constitutional status nor independent taxing and budgetary powers; they are not local units of government as thought by some who administer or govern them. Some REAs are quite large, containing many villages within their boundaries; others are small in size and population. At first, REAs were seen as a transitional measure until rural communities became able to support education services financially and until experience in managing schools had become more widespread. REAs now, however, have become firmly ensconced units of government. Their endurance, seen as detrimental by some and favorable by others, is one reason some of today's issues have arisen.

Operational procedures in borough and city school districts have undergone fewer changes over the years than schools in the rural areas, although the relaxing of Department of Education oversight responsibility has enabled all districts to become more autonomous than ever before. For example, at one time school

district activities were assiduously monitored at the state level, and even annual line item approval of school district budgets by the Commissioner of Education was routine. Now school districts within boroughs and cities are considered to be essential units of local government, and their authority is thought by many to be inalienable. Nonetheless, it is worth noting that it took the legislature in the early 1960s to mandate the creation of most of Alaska's borough school districts.

The history of school finance in Alaska is no less convoluted than governance, and the ways that funds have been raised and distributed over time have undergone several changes. At first, in the latter part of the 19th Century, funds for schools came from the U.S. Department of Interior (Bureau of Education), town governments, churches, business firms, and local citizen contributions. During the first thirty years of the 20th Century, school operations (other than in the federal system) were supported mostly with license monies collected in incorporated communities and with grants or entitlements from the territorial legislature.

As district needs became greater, the territorial legislature, in 1931, began supporting school districts with a guaranteed, fixed amount of foundation money based on size of enrollment. On the assumption that costs were greater on a per pupil basis in the smaller school communities, the smallest districts were allotted 85 % of their prescribed basic need, medium sized districts 80 %, and the largest 75 %. Although the formula was easy to administer, it did not take into account a district's inability to raise money nor extraordinary circumstances that might result in higher operational costs. While the formula did, however, markedly improve the financial security of the city districts it did not provide for equality of opportunity for students nor for equity among district tax payers. Schools outside of cities continued to be funded at 100 % by the territory/state, further impairing Alaska-wide tax equity.

As it became apparent that differences existed among districts concerning their ability to generate tax revenue and maintain schools, the need for a more sophisticated and equitable method of allocating state school funds intensified. To their credit, Alaskans were among the first of several states in the country to recognize the need for equity in inter-district state funding of schools. Commissioned by the State Board of Education, Alaska's first equalization foundation plan, published in 1961 and enacted into law by the legislature in 1962, provided for the equitable distribution of state money to city and borough school districts according to each district's ability to raise local funds. 12

Changing conditions brought modifications to the plan, but in the minds of some they are not sufficient to enable the system to cope with conditions that vary and increased expenses. These are discussed below under the section on issues. But first, to clarify the Joint Committee's recommendations in this area, what follows is a brief consideration of some of the principles and terms embodied in an equitable system of state school support.

Equity Principles and Other Concepts in School Finance

The need for school finance reform across the country became a major national movement in the 1970s. Court decisions that grew out of the movement have since been felt at all levels of school funding everywhere. In the early 1980s the movement leveled off and declined, but it is once again emerging as a contentious topic in several states, especially in light of attention given to current court cases in Texas, New Jersey, and now in Alaska, where equity is at issue in a lawsuit brought against the state by the Mat-Su Borough School District in December, 1990.

The principle of fiscal equity and its close counterpart, student equality of opportunity, have remained the driving force of the movement for better balanced fiscal policy in Alaska, as elsewhere. Moreover, it is important to keep in mind that there are two branches of fiscal equity: the revenue or tax dimension and the distribution or expenditure dimension. Generally, legislatures and the courts have been concerned with both, tax and expenditure equity.

Equity, as used by the Joint Committee, is derived from the doctrine of fairness and impartiality. This doctrine requires that answers to questions about governance and finance be considered in general terms of fairness, especially fairness in levying tax burdens, allocating the wealth of the state as a whole, and sharing decision making mechanisms. Moreover, they also must be answered in terms of equality of opportunity to learn among all the children of the state. It is the measure of *equity* in the system that distinguishes the level of *equality* of educational opportunity accorded by the system.

Until the latter half of the 20th Century, equality of educational opportunity was seldom a concern in the majority of school finance and governance systems. But thirty to forty years ago, equality took on new meaning in school finance reform, especially following *Brown v. Topeka* in 1954. For example, Charles Benson of the University of California, noted scholar in school governance and finance systems, described in 1961 the principle as applied to schooling this way:

The one universally accepted criterion of a public activity is that it affords equal treatment to all. With respect to schooling, this implies that any two children of the same abilities shall receive equivalent forms of assistance in developing those abilities....¹³

How to develop the means and find the resources to guarantee this notion has become an inescapable consideration of those responsible for developing educational policy. Nonetheless, as fundamental and necessary as the principle of equal treatment to all with the same abilities may be, it is not sufficient in a multicultural society such as exists in Alaska. The following discussion describes the reason for this assertion. ¹⁴

Equal educational opportunity can be defined in several ways. In making school finance policy the definition chosen determines to a great extent the type of school finance system that will follow. Listed below are seven concepts of educational equality relating to school finance, first identified and described by Arthur Wise while at the University of Chicago.

1. the foundation system concept
2. the equal-dollars-per pupil concept
3. the competition concept
4. the fiscal neutrality concept
5. the leveling concept
6. the minimum attainment concept
7. the full opportunity concept

In brief, they may be described as follows:

1. The "foundation system concept" requires a satisfactory minimum offering, expressed in money to be spent, which shall be guaranteed to each pupil. This was the concept most relied on in Alaska's territorial system for distributing funds. Many complex formulas have been derived to satisfy the guarantee feature of this system, all based on the fundamental idea that certain minimums are essential for all, regardless of local resources.

2. The "equal-dollars-per pupil" concept assumes there is no reason for one individual, minority or majority, rural or urban, bright or dull, to be granted more resources than another. Ability is not considered a sufficient reason for differential allocation of funds.
3. The "competition concept" provides distribution of resources to students according to their talent. In this definition, equality is an individual rather than a social focus. It simply means that the more able students deserve more education, regardless of the wealth of parents, ethnicity, or location.
4. The "fiscal neutrality concept" stresses that education may not be a function of wealth other than the wealth of the state as a whole. Therefore, school financing systems must make financial resources from taxes equally available for the education of each child, regardless of the district in which he or she lives. This is the principle most often cited as a feature necessary to assure equality of opportunity.
5. The "leveling concept" requires that resources be allocated in inverse proportion to the ability of each student. In effect, this approach compensates for the shortcomings of some pupils and is typically provided in categorical, compensatory programs.
6. The "minimum-attainment concept" of educational equality requires that each student shall receive educational resources until he or she reaches a specified level of achievement, regardless of the time required.
7. The "full opportunity concept" assumes that students may differ in their ability to learn and that each person should be given an

opportunity to develop his or her abilities to the fullest, regardless of the length of time required. ¹⁵

These seven concepts of equality of opportunity can be expressed as two equity principles:

1. The equal treatment of equals, or horizontal equity principle.
2. The unequal treatment of unequals, or vertical equity principle.

Berne and Stiefel have explained the two principles this way:

Horizontal equity is concerned with the equality of revenues for all children.... Children are assumed to be equally deserving, and horizontal equity measures the difference between the actual distribution and a perfectly equal distribution. The smaller the difference from equality, the greater the horizontal equity....

If members of the group are not equal and some are judged to be deserving of more or less of the object of concern, then application of the vertical ... principle may be appropriate.... If learning handicaps are recognized as a characteristic that identifies children who should receive more revenues than children without learning handicaps, then the principle of vertical equity is applicable.... [Thus], vertical equity can be expressed as the unequal treatment of unequals....¹⁶

The current system of distributing financial resources to school districts in Alaska contains features from both the vertical and horizontal principles of equity. Features of the foundation system concept, the fiscal neutrality concept, and the leveling concept can be identified. The current system was adopted during the 1987 legislative session (Chapter 91, SLA 1987). (A brief explanation of Alaska's current system of distributing state school funds appears in "A Review of Alaska's Foundation Funding Program" published by

A REVIEW

THE ALASKA SCHOOL FOUNDATION FUNDING PROGRAM

JANUARY 1989

ALASKA'S PUBLIC SCHOOL FOUNDATION PROGRAM, AS 14.17 enables the state to meet fiscal equalization criteria outlined in the federal PL-874 law, commonly known as the "disparity test." Alaska must meet the guidelines in order to utilize approximately \$70 million in PL-874 funds within the state foundation plan as general revenues.

PL 81-874 DISPARITY TEST - The federal PL-874 disparity test measures the disparity in local school district expenditures. The test takes into consideration designated state and local revenues. Under guidelines of the disparity test, the range of revenues may not vary more than 25 percent between the school district that raises the lowest amount of revenues per instructional unit and the school district that raises the greatest amount. Since federal regulations allow states to eliminate five percent of the

students at the top of the scale and five percent at the bottom, Alaska eliminates both of its oil rich school districts, Valdez and North Slope Borough, which contribute considerably more than 25 percent beyond the lowest amount. Since REAAs are not authorized to raise local taxes, five percent of the students at the bottom of the scale can be from any REAA. The disparity test uses \$60,000 per instructional unit as the base.

THE FOUNDATION PROGRAM is based on the "instructional unit" method of funding.

THE DEFINITIONS printed on page 2, when used with the two mathematical formulas below and the numerical data on page 4, provide for understanding the foundation law.



THE FORMULA USED TO CALCULATE BASIC NEED:

$$\text{BASIC NEED} = (\text{INSTRUCTIONAL UNITS}) \times (\text{AREA COST DIFFERENTIAL}) \times (\$60,000)$$

THE FORMULA USED TO CALCULATE STATE FOUNDATION AID:

$$\text{STATE FOUNDATION AID} = (\text{BASIC NEED}) - (\text{LOCAL EFFORT}) - (90\% \text{ ELIGIBLE PL-874})$$

TERMS AND CONCEPTS:

ADM (AVERAGE DAILY MEMBERSHIP) - The average of the number of students enrolled in a school district or specific school program (vocational education, bilingual education, special education) over a specified fall or spring reported period. The more students a district has in Average Daily Membership, the more funding it receives through the foundation program.

INSTRUCTIONAL UNIT - A number represented by a group of students identified by grade levels and whether the students are enrolled in vocational, special or bilingual education programs.

AREA COST DIFFERENTIAL - A factor multiplied by a school district's instructional units to adjust for costs - primarily personnel costs - in various school districts. Factors vary between 1.0 and 1.46, depending usually on remoteness of the district.

INSTRUCTIONAL UNIT VALUE - The amount under the new foundation formula is \$60,000 per instructional unit. That amount was established by the regulation when the law was passed.

BASIC NEED - An amount of money determined by multiplying the area cost differential by the number of a school district's allowable instructional units times the instructional unit value, set annually by the legislature. The foundation program sets the instructional unit value at \$60,000.

REQUIRED LOCAL EFFORT - Under the law, city and borough school districts are required to contribute the lesser amount of:

- (1) the equivalent of funds generated by a four mill tax levy based on the full and true value of the taxable real and personal property in the school district; or
- (2) 35 percent of a school district's basic need for the preceding school year.

School districts are not allowed to contribute more than the equivalent of 2.0 mills or \$12,600 per adjusted unit in addition to required local effort in order to hold disparities in funding per instructional unit among school districts to no more than 25 percent. The amount of local effort, either in the 4 mill equivalent or 35 percent basic need, is subtracted from a school district's basic need. Since Regional Education Attendance Areas do not have authority to collect taxes, there is no deduction for the local contribution portion of basic need in these districts.

PL-874 - Federal Law PL-874, impact aid to education, provides federal funds to school districts for children of parents living and/or working on federal property as an "in lieu of local tax: revenue. Under the foundation program 90 percent of each school district's eligible PL-874 receipts is subtracted from the district's basic need.

STATE FOUNDATION AID - The amount of state money school districts are entitled to receive under the Public School Foundation Program, after local and federal shares are deducted. (See page 4, column G.)

OTHER ISSUES:

DECLINING ENROLLMENT - The law contains language that protects districts from losing more than 10 percent of the prior year's K-12 instructional units.

CENTRALIZED CORRESPONDENCE STUDY - The law provides a formula for computing funds for the state Centralized Correspondence Study program. Instructional units are computed under the same formula used by elementary schools with more than 200 students and multiplied by 0.65.

GATHERING/ REPORTING STUDENT DATA - The statute requires districts to report to the Department of Education by October 15 of each school Year an estimate of its student population for the next school year. The Department of Education will use the estimates to determine the amount of state foundation aid to seek from the Legislature for the following school year.

FUND BALANCE LIMITATION - The law prohibits districts from accumulating an unreserved fund balance of more than 10 percent of their operating expenditures for the year. The Department of Education must deduct the amount exceeding 10 percent from a school district's succeeding year's foundation entitlement.

FULL AND TRUE VALUE - The Department of Community and Regional Affairs will determine the full value of the taxable real and personal property in each city and borough school district for the purpose of calculating a school district's required local effort.

DISTRIBUTION PROCEDURES - The Department of Education will make payment of foundation aid through monthly payments to school districts. The payments for the first nine months of each fiscal year will be based on actual student counts for the prior school year. Payments for the last three months will be adjusted by actual year student counts. Any overpayments or underpayments made during the first nine months will be adjusted in the final three payments of the fiscal year. The first counting period will be during a 20-day period ending on the fourth Friday in each October. A subsequent reporting period, a 20-day period ending the second Friday of each February, may be used to calculate foundation funding, if the February counting period yields more instructional units.

FACTORS AFFECTING FY 90

PL-874 CHANGES - Federal law now allows local school districts to receive 125% of their normal impact aid money for students who qualify under the Indian and Native impact aid formula. Under this new program, the 25% above the normal 100% share cannot be taken into consideration in state funding formulas. The prohibition was adopted so that the local school districts in equalized states, such as Alaska, would receive the full 25% add-on benefit. In Alaska the new add-on rule results in a loss of funding from the foundation program of \$7,804,925 for FY 90.

REDUCED LOCAL SHARE - A significant reduction of the assessed value of property in most municipal school districts has reduced the value of the required local share of basic need in the FY 90 foundation formula. Under the foundation formula, the state must make up the difference between this reduced local share and basic need. This increases the projected full entitlement cost of the foundation formula by \$20,406,269 for FY 90.

the Department of Education in 1989, and is inserted as Exhibit 1. Detailed provisions of the entire system are delineated in Chapter 17, sections 14.17.010 - 14.17.250 of the compiled Alaska statutes, attached as Appendix D.)

In general, ways to raise money for education, the revenue dimension of school finance, are as various as the ways that can be devised for allocating funds. But compared to many states, the manner by which school funds are raised in Alaska are relatively uncomplicated. Exhibit 1 briefly describes the current system of generating school district funds as well as the means for distributing them. Among the most noticeable features in the revenue dimension is the fact that REAA districts have no local tax liability.

A detailed explanation (prepared by the Department of Community and Regional Affairs) of the means by which local revenues are generated, especially property taxes, appears as Appendix E. As forthright and uncomplicated as the system ostensibly is, equity issues in the revenue dimension are increasingly attracting attention. A detailed description of both the revenue and distribution dimensions of Alaska's system of school finance is provide below in the section dealing with issues in school finance.

Equity Principles and Concepts in School

Governance

To govern customarily implies the authority to make and administer public policy, thereby controlling and regulating the actions of others. Governance as a determinant of school performance ranges from the broadest of policy topics at the state level, such as judicial decisions on constitutional issues, to legislative

matters, such as creating or dissolving school districts and funding the foundation program, to state board activities, such as regulating teacher certification and graduation requirements, to routine responsibilities in local districts, such as the selection of administrators and vendors of school supplies. At a meeting of the Alaska Coalition for Education in October, 1990, 130 subjects were identified as coming under the heading of governance. With so many topics subject to control, the question of which level of authority has the ultimate responsibility to adjudicate an issue often complicates the process, especially since interests in the outcome of each issue may be affected at each level.

In recent years criticism of schooling in general has increased steadily. For example, the "bankruptcy" of the wholly funded Copper Valley REAA by action of its superintendent and board did much to damage the credibility of "local control" in the legislature and with the general public. Public comment regarding school district expenditures for lobbying, litigation, and legal fees not connected with litigation has been negative as well. And as pointed out by Michael Kirst, one of the country's foremost authorities on the organization and control of education, a loss of confidence in local education authorities has weakened the traditional American commitment to local control of education. Furthermore, Kirst asserts that

The urge to reform education results from a loss of confidence in the local capacity to maintain high academic standards. Many superintendents cannot control their agenda or structure the outcomes of decisions as they could in the past. The golden age of the superintendent has passed, with profound consequences for administrative control.... [and] school boards have been subjected to an unprecedented attack during the 1980s. Additionally, local boards continue to grapple with problems in the necessarily grey area between the board's policymaking and the superintendent's administrative responsibilities....¹⁷

There are those who contend that Kirst's observations, drawn from the country as a whole, do not apply to Alaska. Nevertheless, during the life of the Joint Committee, ill-suited systems of school governance have often been cited as the basis for this type of criticism. Whether or not this is an accurate or well-informed perception remains to be definitively confirmed, but declining confidence in local education authorities as a result of inadequate school performance is a stark reality in Alaska today. Many, if not most, observers of and participants in education are quick to acknowledge that much of Kirst's commentary is credible throughout Alaska. For example, the chairperson of the Alaska Coalition on Education's subcommittee on governance observed at a recent statewide meeting (October, 1990) that many school superintendents and school board members are concerned about the declining credibility of Alaska's school districts, that district governance is often seen as inefficient and uncaring, and that change is inevitable. Few participants demurred. A question was then posed by the chair: "Will change be through legislation or innovative ways of the districts on an individual basis?"¹⁸ The answer may depend on whether districts are able to regain the confidence of the public through effective restructured schooling.

Prior to an examination of specific issues in school governance, a brief review of how the system is presently constituted is appropriate. Fifty-four districts comprise the system as a whole: 16 borough school districts, 18 first class city school districts, and 20 REAA school districts in the unorganized borough. They are governed by approximately 330 school board members. These policy makers regulate the activities of 6708 full time equivalent teachers (6586 of whom are in classrooms), 1005 administrators and managers at various levels and hundreds of

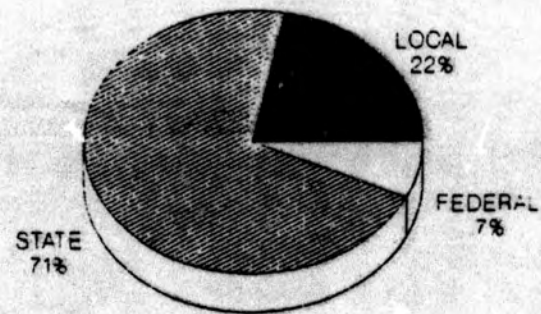
support personnel, all of whom in turn are serving 112,161 students in 1990-91.

There are three types of school districts in Alaska: 1) each first class city in the unorganized borough is a city school district, 2) each organized borough, regardless of class, is a borough school district, and 3) the area outside organized boroughs and outside first class cities (the unorganized borough) is divided into Regional Education Attendance Areas. (The Court has declared it is implied in statute, although not specified, that REAAs are to perform as school districts.) Although each class of school district functions under somewhat different rules, especially in matters of school finance, all schools in the state are generally regarded as the Alaska system of education. That system, however, has anomalous political and geographical boundaries arranged in a way that may be difficult to justify from a number of important standpoints. These include the problems of equitable distribution of decision making authority, of efficiency of daily operation and prudent expenditure of financial resources, and of the capacity to make programmatic changes that might lead to improved school performance.

Examples of organizational arrangements that cause these problems include the following: the Chugach REAA surrounds the city of Cordova and skirts the city of Valdez; the Lower Yukon REAA surrounds the Kashunamuit REAA and the municipality of Saint Marys; the Lower Kuskokwim REAA geographically includes the Yupit REAA; and the Southeast Islands REAA includes the municipalities of Craig, Hydaburg, Kake, Klawaock, Petersburg, and Wrangell. These are just some of the extraordinary organizational arrangements that have evolved over the past fifteen years that affect equity, efficiency, prudence, and judicious change. Organization, however, is only one probable cause of these problems; diversity of situations is another.

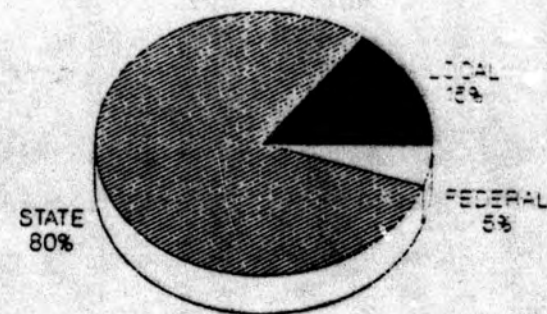
FIGURE 2

FOUNDATION FUNDING BY SOURCE
FISCAL YEAR 1988



BASED ON ACTUAL FUNDING

FOUNDATION FUNDING BY SOURCE
FISCAL YEAR 1991



BASED ON FULL FUNDING

In average daily membership districts range in population from 28 pupils to over 40,000. Some are single site districts; others have many schools in a single municipality or REAA. In physical size districts range from fewer than just a few square miles to others that encompass tens of thousands. The largest, the North Slope Borough, occupies 84,983 square miles (slightly larger than the state of Minnesota.) In fiscal 1991 this assortment of districts is supported with \$511,081,199 from state revenues in operational expenses through the foundation program and over \$230,000,000 from other sources, mostly local property taxes and federal entitlements. Figure No. 2 graphically shows sources of school district revenue in 1988 and 1991. Briefly stated, the enterprise is immense and complex. It is also sometimes described as cost ineffective, cumbersome, and difficult to monitor from the state level where responsibility for its operation ultimately resides. With this general description of Alaska's school system in mind and declining confidence in school district effectiveness a reality, it may be asked, what are the policy issues associated with school finance and governance?

Current Issues in School Finance

Almost every factor in the School Foundation Funding Program is presently being questioned in one way or another by one group or another. Some factors are considered more important than others, and some are more problematic than others. But on average there appears to be more discontent than satisfaction with the system as a whole. The most vexing issues in the system, posed as questions, include:

- 1) Do economy of scale and regional cost differentials account for and thereby justify the wide disparity in expenditure per pupil in average daily membership found throughout the state?
- 2) Should REAAs continue to be exempt from local tax efforts? Are communities in REAAs such as Glennallen, Tok, Delta, Bethel, and McGrath less able or willing to pay local taxes to maintain schools than say, to name only a few, Ninilchik, Nenana, St. Marys, Nome, or Kotzebue where taxes are paid? Several REAAs have the potential for higher assessed valuations than many municipal districts.
- 3) Are the means used to determine local tax mill rate equivalents fair? Are they adequate? Should the optional maximum allowable local contribution differential be reduced? Increased? What effect do optional contributions have on fiscal neutrality?
- 4) Is the schedule for calculating instructional units equitable for all districts? Do they assign the correct number of units to small schools and to special programs?
- 5) Are area cost differential values realistic? Are there better ways to calculate them?
- 6) Are the assessment practices for determining full and true property values adequate? Are they applied uniformly throughout the state? (Although Alaska law requires an equal and uniform system of local taxation and has established standards for appraisal of all property assessed by the state or its political subdivisions, vast differences in property type and location and varied provisions for tax exemptions create the potential for inequities to trickle into the system. The equitable distribution of state aid in the foundation formula is

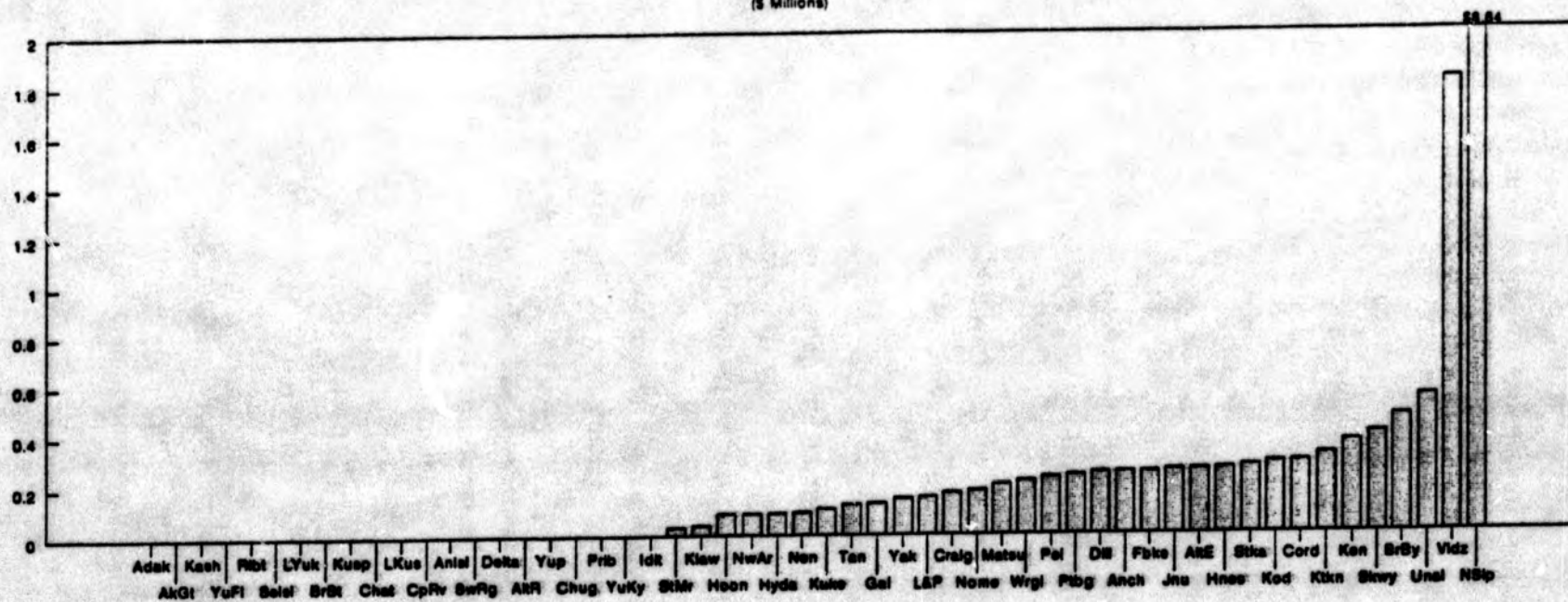
so dependent on accurate and equitable statewide assessment practices that it may be time to determine if the system is working as planned.

- 7) Is the present instructional unit value the right amount required to meet "basic need"? Can basic need be better defined?
- 8) Should districts continue to have the freedom to use funds generated by the foundation program without specification or limitation placed on them by the state?
- 9) Are the "creative financing" practices of some districts in the way they raise local contributions in lieu property tax excessive?
10. How can funds for early childhood and parenting education be made available as an annual entitlement in the foundation program although expenditures in support of these programs are made outside the formal school system?
- 11) Should the Foundation Program be funded in a separate appropriation prior to adoption of the state's annual budget?
- 12) To what extent do qualifying requirements of P.L. 874 (intended to reduce resource inequity among districts) have a reverse effect by producing resource disparity?

The issue that transcends all of those above, and which is the most imperative, asks the question, Does the present system meet the test of fiscal neutrality? That is, is the wealth of the state as a whole made equally available for the education of each child? Related questions ask: Is there equality of resources among property rich and property poor districts after state funds are made available? Is there tax liability equity among municipal school

FIGURE 3

1989 Property Value Per ADM
(\$ Millions)



Prepared by the Legislative Research Agency, December 1990 (91-007)

districts? Is intra district financial equality aggravated by taxpayer inequity between municipal districts where local taxes are paid and REAA districts where there is no local tax liability? The condition of the foundation program, as displayed in the following graphs, suggests that answers to these questions are apt to reveal a badly flawed system in need of recasting.

Figure 3 graphically illustrates the range of property wealth (revenue-generating potential) in dollars per average daily membership (ADM) in each of Alaska's school districts. Values of assessed property range from \$35,464 per child in the poorest property district to \$8,840,927 per child in the wealthiest. There are seven districts where a one mill tax would bring in less the \$100.00 per child in average daily membership (and \$35.00 per ADM in the poorest), and there are seven districts where a one mill tax would bring in more than \$300.00 per ADM (in the richest district, one mill can bring in \$8,800.00 per ADM.) The remaining nineteen city and borough districts fall in the middle range. REAAs are shown on the graph as having no local tax base since they have no taxing authority.

Figures 4 and 5 illustrate AS 14.17.025, that part of the foundation program that specifies the amount that local districts must and what they may not provide to their annual budgets as local contributions. This section requires that local districts (other than REAAs) raise the equivalent of a four mill tax on a full and true value of taxable real and personal property tax or 35% of the district's basic need for the preceding year. The outcomes of this feature of the program are represented in Figure 4. (The North Slope Borough is required to raise less than one mill to meet its local obligations and Valdez only one mill.)

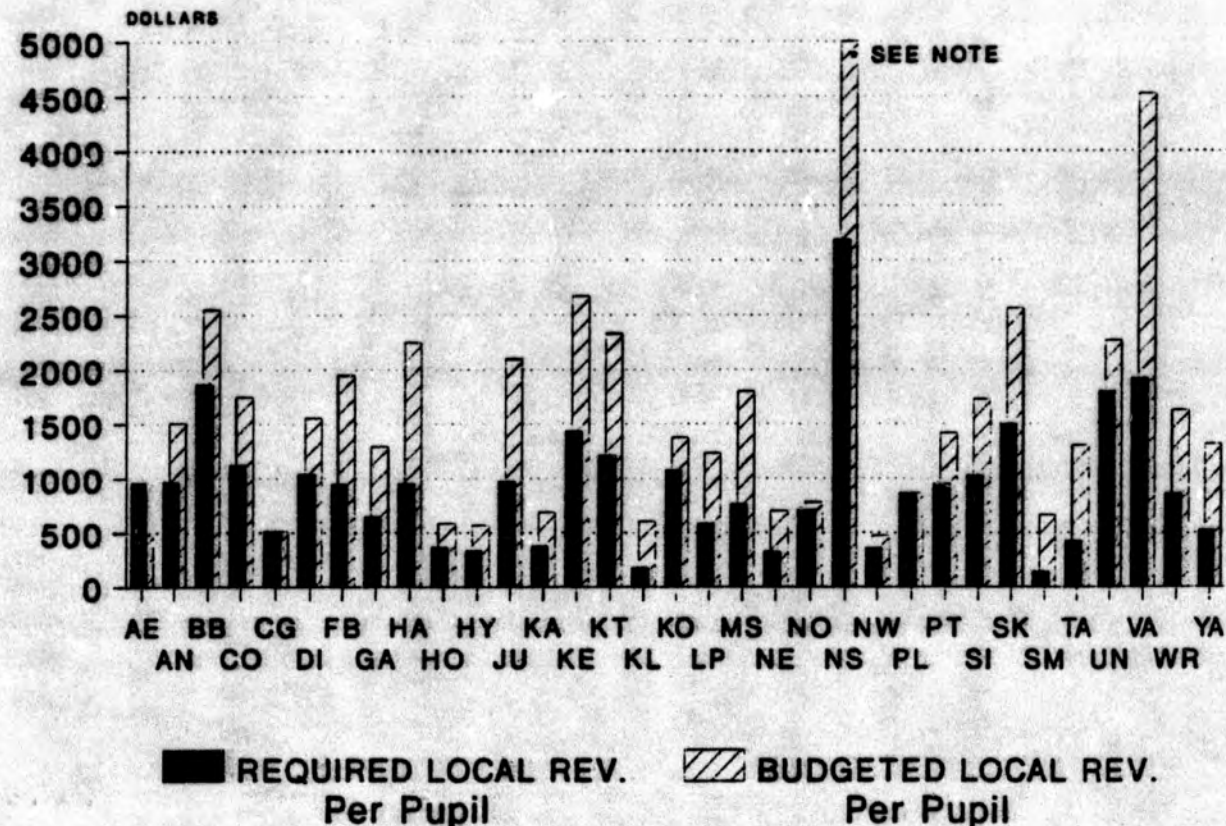
Figure 5 illustrates the effect of the provision of the act that allows city and borough districts to exceed the required level of local

FIGURE 4

City/Borough
abbreviations

Aleutians East • AE
Anchorage • AN
Bristol Bay • BB
Cordova • CO
Craig • CG
Dillingham • DI
Fairbanks • FB
Galena • GA
Haines • HA
Hoonah • HO
Hydaburg • HY
Juneau • JU
Kake • KA
Kenai • KE
Ketchikan • KT
Klawock • KL
Kodiak • KO
Lake & Peninsula • LP
Mat-Su • MS
Nenana • NE
Nome • NO
North Slope • NS
Northwest Arctic • NW
Pelican • PL
Petersburg • PT
Sitka • SI
Skagway • SK
St. Mary's • SM
Tanana • TA
Unalaska • UN
Valdez • VA
Wrangell • WR
Yakutat • YA

LOCAL REVENUE PER PUPIL FY91 REQUIRED & BUDGETED AS 14.17.025



NOTE: North Slope's revenue per pupil is \$15,279.

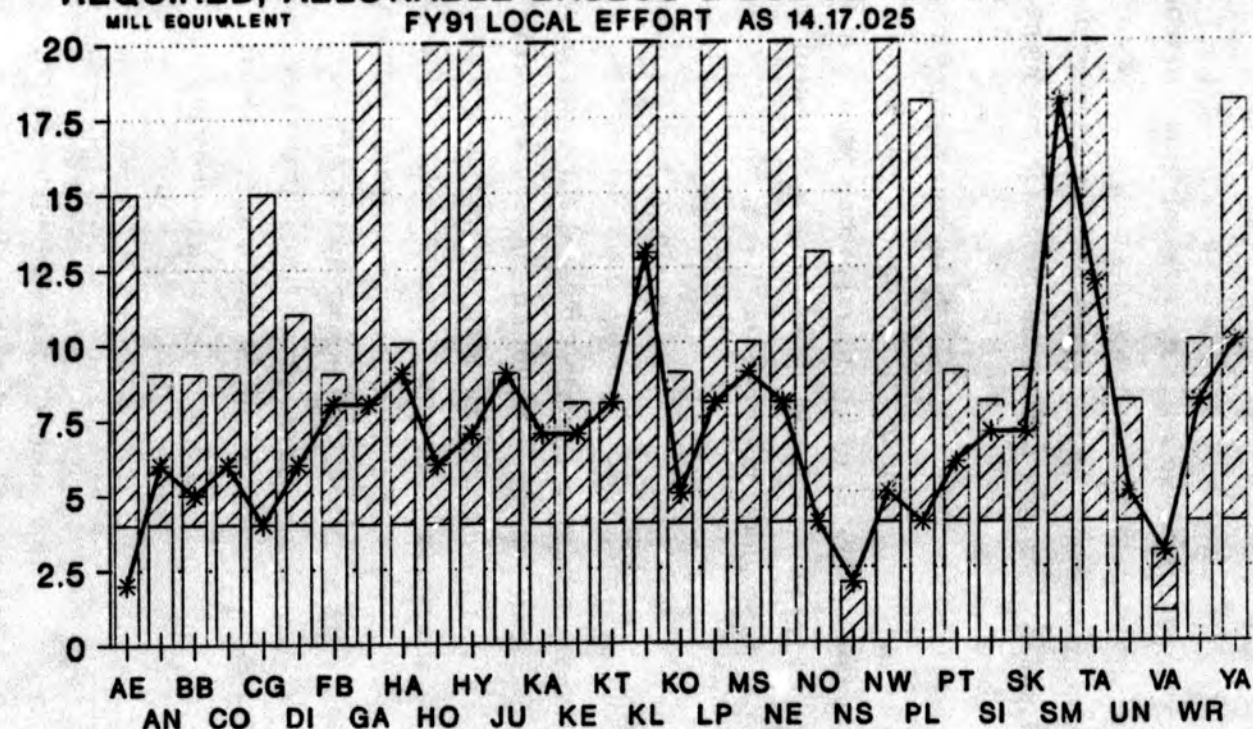
FIGURE 5

City/Borough
abbreviations

Aleutians East • AE
Anchorage • AN
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Craig • CG
Dillingham • DI
Fairbanks • FB
Galena • GA
Haines • HA
Hoonah • HO
Hydaburg • HY
Juneau • JU
Kake • KA
Kenai • KE
Ketchikan • KT
Klawock • KL
Kodiak • KO
Lake & Peninsula • LP
Mat-Su • MS
Nenana • NE
Nome • NO
North Slope • NS
Northwest Arctic • NW
Pelican • PL
Petersburg • PT
Sitka • SI
Skagway • SK
St. Mary's • SM
Tanana • TA
Unalaska • UN
Valdez • VA
Wrangell • WR
Yakutat • YA

MILL EQUIVALENT OF TAX EFFORT

REQUIRED, ALLOWABLE EXCESS & BUDGETED LOCAL EFFORT



This chart has been limited to 20 mills.

MINIMUM
required
local effort

ALLOWABLE
EXCESS
23% of
basic need

LOCAL CONTRIBUTIONS
FY91 BUDGETED
LOCAL REVENUE
AS 14.17.250 (7) "LOCAL CONTRIBUTIONS"

contributions, although with a limit placed on that amount. The so-called "capping effect" of this provision prohibits districts from raising more than the equivalent of an additional two mill levy on district property or 23 % of basic need, whichever is greater. The purpose of this prohibition is to achieve a certain level of equality of resources among districts. This provision notwithstanding, the ten most property poor districts find it necessary to raise funds at the maximum level permitted.

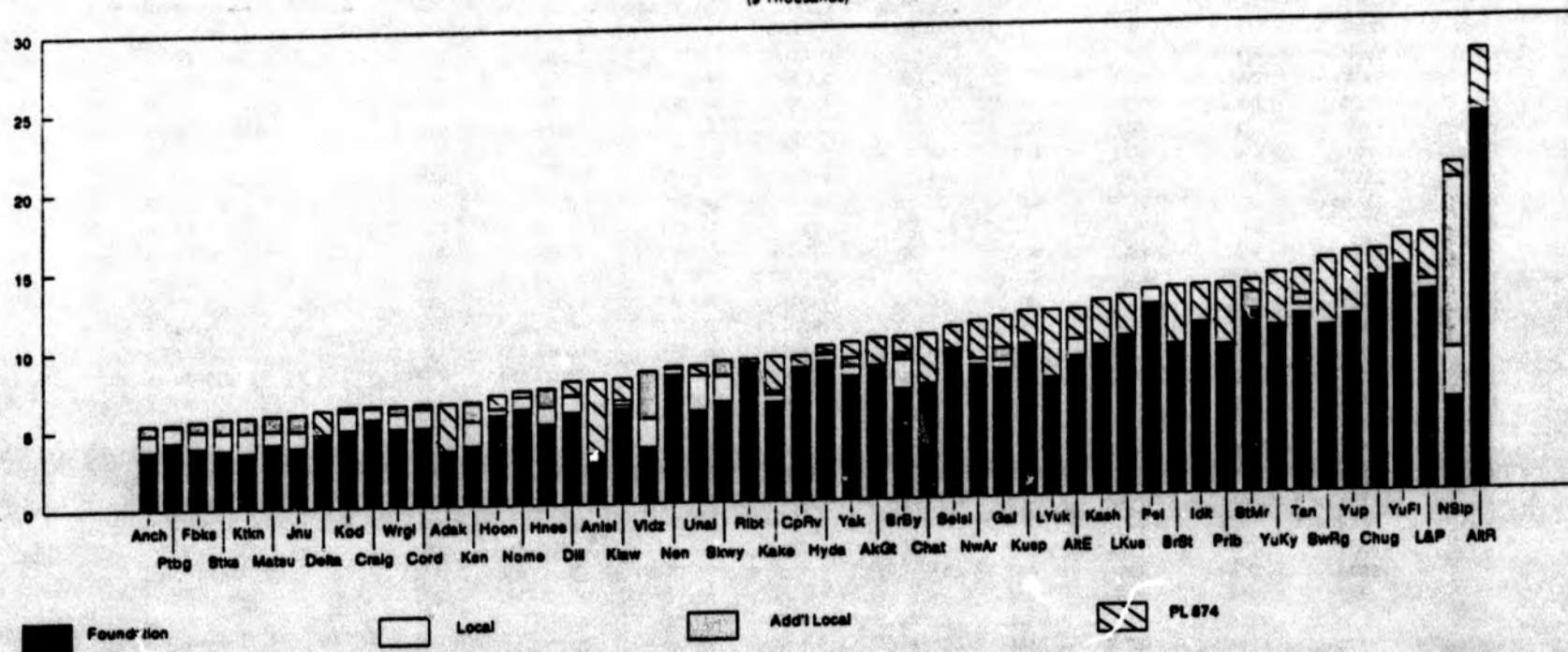
The solid line connecting local contributions in mill equivalents may be the most telling feature in figure 5. It represents the level of support (local effort) levied by each district in 1991. If the current formula effectuated fiscal neutrality the jagged solid line (revealing resource distribution disparity) would be flat. Note that the range of local effort varies from 2 mills and 3 mills in the wealthiest districts to 18 mills in the poorest. The net effect of Chapter 15, as seen in these illustrations, is to require property poor districts to exert substantially greater effort to raise local funds than property rich districts, which are allowed to contribute to their budgets a lower level of effort.

It may be that the fairest, most easily computed, and cost effective way to distribute state wealth so as to achieve fiscal neutrality would be the state to fund 100% of all public education. Such a procedure would, incidentally, leave municipal tax bases free for local needs other than schools.

(As an incidental addendum to figure 5, it should be noted that the Aleutian East Borough school district, because it is in a transitional phase from REAA to Borough, is required to raise only the equivalent of 2 mills during its first year of operation. Its local

FIGURE 6

Estimated Per ADM Revenue from All Sources
(\$ Thousands)



Prepared by the Legislative Research Agency, December 1990 (91-067)

TABLE 2

ALASKA DEPARTMENT OF EDUCATION
 FY91 FOUNDATION PROGRAM AS 14.17.025
 LOCAL REVENUES: REQUIRED, ALLOWABLE EXCESS & BUDGETED
 12/10/90 BEJ

	ACTUAL FY91 ADM	1989 FULL VALUE DETERMINATION	REQUIRED FY91 LOCAL	ALLOWABLE EXCESS	BUDGETED LOCAL	1 MILL PER ADM	REQUIRED PER ADM	BUDGETED PER ADM	ALLOWABLE PER ADM	REQUIRED MILL EQUIV.	ALLOWABLE MILL EQUIV.	BUDGETED MILL EQUIV.
ALEUTIANS EAST	364	\$87,528,600	\$350,114	\$926,808	\$175,057	\$240	\$962	\$481	\$3,507	4	11	2
ANCHORAGE	40,533	9,836,722,410	39,346,890	45,054,240	61,067,977	243	971	1,507	2,082	4	5	6
BRISTOL BAY	253	117,937,900	471,752	540,822	645,559	466	1,865	2,552	4,002	4	5	5
CORDOVA	438	122,992,900	491,972	645,978	764,805	281	1,123	1,747	2,599	4	5	6
CRAIG	311	40,178,500	160,714	431,664	159,228	129	517	512	1,907	4	11	4
DILLINGHAM	457	118,601,000	474,404	842,490	710,000	260	1,038	1,554	2,882	4	7	6
FAIRBANKS	14,246	3,398,331,900	13,593,328	16,267,440	27,751,000	239	954	1,948	2,096	4	5	8
GALENA	120	19,585,100	78,340	314,916	155,152	163	653	1,293	3,277	4	16	8
HAINES	433	103,888,200	415,553	642,390	974,801	240	959	2,250	2,442	4	6	9
HOONAH	234	21,586,000	86,344	376,878	137,341	92	369	587	1,980	4	17	6
HYDABURG	108	9,024,100	36,096	234,186	61,459	83	333	567	2,493	4	26	7
JUNEAU	5,124	1,247,450,700	4,989,803	5,801,244	10,744,000	243	974	2,097	2,106	4	5	9
KAKE	179	16,843,800	67,375	305,118	122,592	94	377	686	2,084	4	18	7
KENAI	9,169	3,285,880,710	13,143,523	11,599,590	24,507,607	358	1,433	2,673	2,699	4	4	7
KETCHIKAN	2,693	819,271,400	3,277,086	3,044,832	6,278,771	304	1,217	2,331	2,347	4	4	8
KLAWOCK	202	9,194,000	36,776	335,478	122,000	46	182	604	1,844	4	36	13
KODIAK	2,404	645,143,800	2,580,575	3,409,290	3,316,000	268	1,074	1,379	2,492	4	5	5
LAKE AND PENINSULA	413	60,371,500	241,486	1,420,986	510,000	146	584	1,234	4,023	4	24	8
MATSU	9,460	1,813,556,490	7,254,226	10,826,514	17,038,193	192	767	1,801	1,911	4	6	9
NENANA	196	16,186,800	64,747	378,258	137,343	83	331	701	2,263	4	23	8
NOME	778	137,990,000	551,960	1,263,804	607,960	177	710	781	2,334	4	9	4
NORTH SLOPE	1,359	11,961,774,300	4,335,240	23,923,549	20,770,000	8,799	3,189	15,279	20,788	0	2	2
NORTHWEST ARCTIC	1,582	142,713,800	570,855	3,791,136	750,008	90	361	474	2,757	4	27	5
PELICAN	48	10,440,800	41,763	143,382	41,763	217	866	866	3,841	4	14	4
PETERSBURG	681	162,441,900	649,768	838,212	962,204	238	954	1,413	2,184	4	5	6
SITKA	1,738	446,849,500	1,787,398	1,921,236	3,008,379	257	1,029	1,731	2,134	4	4	7
SKAGWAY	145	54,411,100	217,644	258,060	371,044	376	1,504	2,563	3,286	4	5	7
ST. MARY'S	116	4,184,700	16,739	315,054	76,739	36	145	664	2,870	4	75	18
TANANA	109	11,511,900	46,048	294,216	142,000	106	422	1,303	3,122	4	26	12
UNALASKA	258	116,125,240	464,501	479,826	585,624	450	1,800	2,269	3,659	4	4	5
VALDEZ	762	1,370,370,900	1,464,960	2,740,742	3,449,218	1,797	1,922	4,524	5,516	1	2	3
WRANGELL	509	110,198,000	440,792	671,784	829,284	217	866	1,630	2,186	4	6	8
YAKUTAT	150	19,792,100	79,168	286,212	197,620	132	528	1,317	2,436	4	14	10

contribution during its first year is not based on property wealth of the district.)

Figure 6 summarizes the financial outcome of all of the features of the foundation program. It illustrates the amount of money available from all major sources for school operations per ADM in 1991. These include required local contributions, optional additional contributions, federal P.L. 874 funds, and state foundation entitlements. The amounts budgeted per ADM range from approximately \$5,500 per ADM to \$28,000 per ADM.

Table two displays those current revenues that are required and those that are optional; also shown are total local funds budgeted for fiscal 1991.

Essentially, the graphs and table illustrate those characteristics of AS 14.17.025 that establish three classes of school districts: municipal districts that must contribute the equivalent of a four mill property tax levy to their annual operational budget; municipal districts that contribute an amount equal to 35 % of basic need for the preceding year to their annual operational budget (placing them at an advantage over other municipal districts); and REAA school districts that make no local contribution to their annual operational budget (giving them an advantage over all municipal districts.) The extreme differentials in expenditure per ADM among districts and the disproportionately high burden of local effort required of property poor districts may partially be explained by economy of size (due to size of enrollment, small districts are not as efficient as large districts and they are unable to spread fixed costs over as many students as large districts) and regional cost differentials; more likely higher costs per ADM in some districts exist because the current formula frustrates the principal of fiscal neutrality. Article I, Sec. 1 of the Alaska Constitution, provides "...that all persons are equal and entitled to equal rights,

opportunities, and protection under the law." Because of inherent inequities in three financial classes of school districts, this provision may be obstructed. Given this likelihood and the issues listed above, there is broad based support for a comprehensive inquiry of the financial foundation program.

Furthermore, another matter that compounds the problem of providing equity in the finance system is reliance on regional cost differentials computed from household cost-of-living data rather than data that may more closely reflect the costs of operating a school district. The current system of determining regional cost differentials is not thought to be an accurate measure of true costs among school districts. A recent study by the McDowell Group, based on costs of maintaining schools instead of households, may provide improved equity in this area. It remains to be applied, if found to be appropriate, to the foundation formula.

Two issues of lesser magnitude that do not concern the state as a whole, but are troublesome to the districts affected nonetheless, revolve around the problems of economy of scale. Because of the small average daily membership (ADM) and geographic isolation of some single and dual site city school districts, extraordinarily high costs present special problems. (Legislation to alleviate some of the problems attributed to small size, passed in the last session, allows for voluntary co-operation among districts through joint service contracts. But this measure may only partially relieve problems associated with being a small and isolated district.)

Furthermore, it is claimed that the schedule in Chapter 15 used to determine the number of instructional units in geographically large borough districts which contain isolated, single school site communities results in inequitable distribution of state money. Both of these issues, however, are minor compared to the other state-

wide inequities explained above. Inadequacies in single and dual site district funding and in small communities in geographically large, rural districts may be resolved by applying suggestions such as those currently offered by the Alaska Association of School Administrators. (As a stop-gap measure, the Joint Committee endorses the association's position.) The Association's position paper on this and other school finance issues is attached as Appendix F.

While the forgoing discussion deals with inequities in funds for school district operations through the foundation program, it should be pointed out that inequities also exist in the distribution of state funds for capital improvements. Municipal school districts are obliged to meet a portion of their capital improvements expenses; REAAs are not, thereby establishing two classes of districts in this regard.

The National Conference of State Legislatures has posed four questions that a state legislature should examine when the need for revision in its school finance structure becomes apparent. They are:

- 1) What fiscal inequities result from the present system?
- 2) What are the causes of such problems?
- 3) What can be done to remedy the inequities?
- 4) What will be the fiscal impact of proposed aid reforms?

To answer all four questions requires assembling data on the present system, analyzing that data, designing new alternatives, and evaluating the effects of those alternatives on the system. ¹⁹The following outline designed by the National Conference of State Legislatures suggests what needs to be done to meet these requirements.

AN OUTLINE FOR THE ANALYSIS OF PRESENT AND PROPOSED FUTURE SCHOOL FINANCE STRUCTURES

- I. Description of the present system**
 - A. Statewide maximum, minimum, average, standard deviation for:**
 - Current expenditure per pupil
 - Equalized property value per pupil
 - Equalized school tax rate
 - State aid per pupil
 - B. Proportion of educational revenues derived from local, state, and federal sources**
 - C. Comparisons with national patterns and other states (Expenditures, incomes, source of revenues, state and local tax payments per capita)**
 - D. Extent of disparities in expenditures, property wealth, school tax rates (Rank orders, bar graphs, comparisons of extreme or groups of districts)**
 - E. Differences in expenditures between 5th and 95th percentile**
 - F. Declining or increasing enrollment (Past trends, future projections for the entire state and for individual districts)**
- II. Analysis of disparities and problems in the current system.**
 - A. Patterns of disparity in school expenditures, school tax rates and property wealth (Region, size, type of community)**
 - B. Sources of expenditure inequities (Expenditures vs. income; expenditures vs.**

property wealth; state aid; federal aid vs. property wealth)

C. Sources of tax inequities (School tax rate expenditures; school tax rate vs. property wealth; school tax payments vs. income)

D. Interrelationships among district characteristics (property wealth, school tax rate, expenditures, income, size, region type of community)

E. Patterns of declining [or increasing] enrollment (Drop [or increase] in enrollment vs. property wealth, income, school tax rate, expenditures, size, type of community, region)

F. Impact of providing other local services, (education expenditures vs. other local expenditures or proportion of local property tax levy devoted to other services; school tax rate vs. proportion of local levy devoted to education; type of community vs. property wealth per capita, school tax rate, total tax rate; proportion of local levy or budget devoted to education)

G. Effects of expenditure disparities (Expenditures vs. school characteristics and educational outcomes)

III. Analysis of impact of alternative new programs

A. Projection for each district:

New expenditure for each district
New school tax rate
New state aid per pupil
Increase [or decrease] in state aid per pupil
Increase [or decrease] in total state aid

Analysis for Entire State:

B. Increase or decrease in cost (Total and by program)

-
- C. New levels of expenditures and tax rates (Maximum, minimum, average, standard deviation)
 - D. New proportion of educational revenues derived from local, state, and federal sources
 - E. Extent of disparity in new expenditures and new school tax rates (See I.D.)
 - F. Sources of variations in expenditures and school tax rates (New expenditures, new school tax rates vs. region, size, type of community, property wealth, income, educational needs, costs)
 - G. Rank ordering of districts on the basis of their gains or loss from new program (By total change in state aid and in school tax rates).²⁰

In the past the legislature has declared it to be its policy to provide an equitable level of educational opportunity through its financial foundation program. The activities (assembling and analyzing data, and designing alternatives and evaluating their effects) called for in this outline will enable the legislature to determine how well it is currently fulfilling that policy.

Current Issues in School Governance

Issues concerning the governance of schools have always been with us, and as processes of education have grown more complex, so too have the issues. Governance, and its related subject, organization, are fairly straightforward terms. Governance

authority and the means (usually money and political influence) to exercise that authority. Organization, the environment of an enterprise, is the setting in which decisions are made, leadership exercised, and routine tasks carried out.

Governance topics are at issue today primarily because of the loss of confidence in the educational establishment as a whole and because of tangled and overlapping school district boundaries among the three classes of districts. Arriving at a satisfactory system of governance is further aggravated because different regions of Alaska with disparate physical, economic, and social characteristics may have unlike needs. School *restructuring*, the current catchall term or cliché frequently used to claim solutions for a host of schooling problems, generally revolves around school governance issues. These are being debated in nearly every state of the country, in some cases with proposals for solutions nothing short of drastic and revolutionary. And although *restructuring* as a term may be used excessively, it is descriptive and has significance. (A review of major education restructuring now currently underway in other states appears in the paper "Education Legislation," attached as Appendix G).

All of the governance issues listed below have been included in this report because they tenaciously persist as unresolved problems. As with issues in school finance, some are broader in scope than others, and some are more contentious than others. But all are sources of tension among the various factions competing for authority to control the process and outcomes of schooling. Posed as questions, the following issues appear to be the most vexing and most in need of immediate attention.

- 1) Is Alaska's policy of delegating decision-making authority to three different organizational systems (city, borough, and REAA school districts), often with overlapping

boundaries, the most practical, efficient, and equitable organizational arrangement available to the legislature? It appears not to be.

- 2) What reasons make it necessary to delegate decision-making authority by creating districts within districts, such as small REAAs within large REAAs or small city districts within REAAs? Do these reasons justify the expense and inefficiency inherent in this arrangement? The general impression is that they do not.
- 3) Should REAAs continue to exist in their present form? As now constituted they are nothing more than service districts in the unorganized borough? When established they were considered to be the product of a temporary, transitional measure awaiting a more authoritative organizational structure. Fifteen years later they are anomalous units of governmental structure, firmly in place.
- 4) Should some districts be merged with others to provide better economy of scale and more efficient distribution of administrative responsibilities?
- 5) If consolidating and merging school districts are solutions to current problems in governance and organization, should these activities be mandated or encouraged (through incentives, perhaps) through voluntary intra-district cooperation?
- 6) Should advisory school boards, especially in small and remote communities, be delegated legal decision-making authority? There has been widespread testimony that they should be.

- 7) Is the decision-making authority of the state board of education and/or the Commissioner of Education and their authority to require school district compliance with regulations sufficient? Does the role of the state board of education need to be strengthened?
- 8) Are current provisions for secondary schooling in rural areas with small enrollments adequate and cost effective; especially are high schools with limited resources sufficient to meet the needs of high school graduates today? Is it necessary to initiate a new generation of regional high schools to expand and improve existing programs? If so, how should they be constituted, where should they be located, and what should be their governance mechanism?
- 9) Should the state system of public education be extended to a "13th year" to provide "developmental education" for students not able to cope with higher education, or because of functional illiteracy are unemployable? If implemented, should this extension be the responsibility of the public school system, the University of Alaska, or a combination of the two? How might existing University of Alaska and school system programs and facilities provide for this group of students (especially those in the rural areas)?
- 10) Should decision-making authority, the locus of control (especially in matters affecting curriculum, internal institutional structure, budgets, staff qualifications and hiring practices, promotions, school calendar, and use of facilities), be shifted (devolved) from central district offices to individual schools? Should principals,

teachers, and residents in their immediate communities be delegated authority in areas now held by local boards and central administrations? In brief, these questions ask, is school-site-based management a viable option in Alaska? Increasingly there is support for decision-making authority to be devolved so that there can be more school-level personnel and parent involvement in schooling processes.

The issue of feasibility and desirability of site-based school management focuses some of the issues raised above. Providing more legal decision-making authority at school sites has the potential to lead to substantial school improvements according to some observers; to others the shift is unworkable. Taken to its limits, site-based management, or "empowered schools" as the concept is sometimes called, requires that decision-making authority for most school policies and practices dealing with instruction and management be devolved to teachers, principals, and local community groups. To do so would change the roles of school district boards and superintendents (where the traditional factory model chain of command from the top down is the general practice) by reducing their authority. Thomas B. Timar of Harvard University and David L. Kirp of the Graduate School of Public Policy at the University of California, Berkeley have described how this shift might be accomplished:

The most important conclusion that we can draw from state reform efforts is that a major shift in policy needs to occur. Policy makers must focus their attention on making schools better places in which to work.... A theory of institutional support must be based on... [the] premise that schools as institutions are the principal targets of reform. Tightening curricular standards and ratcheting up certification requirements, for example, may mean nothing if the schools lack the organizational competence to make use of improved curricula and better-qualified teachers....

Authority and responsibility have to be distributed and differentiated across the entire system of education. The states have the responsibility to establish clear expectations [The Alaska legislature did just that last year.] and a general educational framework.... Authority at the local level needs to be decentralized at the school site. A theory of institutional support is anchored in the conviction that everyone in schools is responsible for planning, for budgeting, and for program evaluation. Budgets are tied to assessment and diagnosis, targeting money where it most needed. Responsibility is not segmented and parceled out among a host of players. For schools to take responsibility for their own efficacy means that schools must behave as purposive organizations rather than as shopping malls--mere conglomerations of marginally related activity centers. 25

Obviously changes to this extent have the potential for strife and tension among the people affected unless adequate planning precedes transfers in levels of authority and unless decision-making authority is unequivocally transferred. To make this change or any others that alter the existing system, the legislature must clarify the policies and the means required to carry them out.

The scope and complexity of school governance and organization give credibility to the conclusion that if anything is to be done in this sphere to improve school performance it cannot be done piecemeal; schools are tangled institutions, governed by many traditional rules and shaped by many factors, not the least of which is political expediency. John E. Chubb of the Brookings Institute has elaborated on this concept this way:

[The] institutional structure and character [of schools] is shaped by their environment--by their relationship with parents, of course, but more pertinently by the way they are controlled, by their connections to administrative and political superiors. Those organizational qualities that we consider to be essential ingredients of an effective school--such things as academically focused objectives, pedagogically strong principals, relatively autonomous teachers, and collegial staff relations--do not flourish

without the willingness of superintendents, school boards, and other outside authorities to delegate meaningful control over school policy, personnel, and practices to the school itself. Efforts to improve the performance of schools without changing the way they are organized or the controls they respond to will therefore probably meet with no more than modest success; they are even more likely to be undone.

This unfortunately poses a dilemma for improving the performance of public schools. Significant gains in student achievement may well require basic changes in the ways schools are governed and organized—in the authority entrusted to them, the objectives imposed upon them and the professional discretion they are granted.²¹

The opportunity given the Joint Committee to examine school performance in Alaska has led to the conclusion that the dilemma posed by Chubb is an Alaskan dilemma, but not one that is insurmountable. As revealed by the nature and number of issues in school governance identified in this report, it can be assumed that the current system of delegating decision-making authority among three types of school districts is far from the equitable or optimal system it should be. And although there is widespread discontent with several aspects of the present system, in part because of what is perceived to be ineffectual and inefficient management and arbitrary and illogical dimensions of some school district boundaries, little attention has been focused on what will be required to still the criticism.

However, a model for institutional support that balances state objectives with local initiatives and takes into account the needs of teachers, administrators, and local school board members in their collective efforts to improve school performance is theoretically attainable. Alaska has the means and the people to bring about the necessary changes. Whether or not it is politically feasible will depend on the extent to which the legislature puts the need for long term and substantive school reform above more limited and immediate interests.

*Recommendations In School Finance and
Governance*

The way decision-making authority is delegated and distributed and the adequacy of financial support provided to schools will be among the most telling outcomes of efforts to improve Alaska schools. Too often school finance and governance issues have been examined independently of each other and at times "fine tuned" in a superficial way. ***School finance and governance simply are not independent variables; when one is altered, the other absolutely will change, whether planned or not.*** And it is clear that fine tuning the system is no longer sufficient, if it ever was.

Thus the ultimate question under the heading of school finance and governance asks: Is the state allocating financial resources and installing local authority over decisions in the most effective and equitable way? Testimony and study leave the impression that it is not. But before this pronouncement can be universally accepted and alternative systems proposed, they must be authenticated; questions posed in this report must be answered definitively. Answers will establish the rationale necessary to design a system of education that is faithful to the principles of equity and equal educational opportunity so necessary to meet the educational needs of all children and youth. The state should then be confident that it has established as close to the ideal organizational arrangement as is possible and that it is allocating the optimal amount of financial resources required for schools to meet the needs of each individual student and the needs of society as a whole.

One of the reasons for including the section on historic perspectives earlier in this chapter is to illustrate that Alaska's systems of school finance and governance are not static; they are the product of evolution, adjusting over time to accommodate changes in societal values and the need for an educated populace to keep pace in a complex, cosmopolitan, and technological world. However, when an education system fails to keep pace with the changing needs of individuals and society, it becomes necessary for the legislature to determine what needs to be changed. *That time is at hand.*

Accordingly, the Joint Committee on School Performance recommends:

that the legislature, in recognition of the urgency of the need for improved school performance, initiate a thorough investigation of the school finance and governance systems of Alaska public education. It is further recommended that this work be conducted as a legislative "in-house study" (utilizing the resources of the Department of Education when required) and that it be carried out under the auspices of a newly created joint committee on school performance (as recommended in Chapter Three). The study shall include answers to the questions posed in this report and propose a system of governance and a financial foundation formula in agreement with the findings. The committee shall report its findings and make its proposals no later than January 1993.

**PROFESSIONAL DEVELOPMENT OF SCHOOL
PERSONNEL**

No matter how well-thought-out and executed an equitably financed and organizationally well-restructured education system may be, it will fail to result in improved school performance if it lacks teachers who are well-educated, motivated, and respected. Much of the education reform movement during the past decade has been focused on improving the quality of teacher performance through improved professional development. Over 1000 pieces of legislation regarding teachers were enacted during the 1980s. As pointed out by Michael W. Sedlak:

Reformers have attempted to change public education from the top down with mandates to address a particular problem; with rules, procedures, and standards generated to facilitate goal attainment; and with monitoring and evaluation to assess progress. What has been missing has been an appreciation of how such programs would actually affect the daily lives of students and teachers.²²

Edward Meade, who several years ago was the Ford Foundation program officer in charge of the Foundation's school improvement projects, observed that in many programs the Foundation had sponsored, the complexity of improving schools had been underestimated. The Foundation learned, according to Meade, that "the ultimate innovator in schools was the teacher [and] lasting and significant changes would not occur unless teachers were directly and actively involved in the planning and development of the desired changes." ²³

Reinforcing this concept are calls for reform from outside the profession. Owen Butler, former chairman of Procter and Gamble, speaking as chairperson of the national Committee for Economic Development, described the effort for improved school performance from a businessman's point of view:

We are trying to change from a system in which teachers are regarded as almost assembly-line classroom production workers to a system in which teachers are free to innovate and experiment and use creativity to improve teaching. We are trying to deregulate, to move the control of the schools from the top-down to the bottom-up. We are trying to provide better financing and attract better people into the profession. This requires a total change in the "corporate structure."²⁴

Although having started "at the top" in its recommendations for ways to bring about improved school performance, the Joint Committee is aware of the danger of limiting its efforts to that level. The Committee finds general agreement with the positions taken by Sedlak, Meade, and Butler. Issues in this report concerning school district accountability, finance, and governance, for example, should not obscure the actuality that most of what comes to bear on schooling from the top eventually affects the classroom and does so significantly. It is the extent of teacher efficacy, the capacity to produce the desired effects, that will determine the success of the outcomes sought at other levels.

Historically Alaska has been more progressive than many states in the way it has selected teachers, certified them, and, in some instances, trained them. However, and although it is generally recognized that the aggregate of Alaska's current teaching force is among the best trained and competent in the nation, the right to retain its historic claim to excellence has been acutely eroded in recent years. Teacher shortages, primarily in rural schools where there currently is an annual teacher turnover rate of 30%, have made it necessary to recruit teachers who do not have the background to succeed under the demanding conditions found in many Alaska schools. Approximately 900 vacancies had to be filled in Alaska's schools in 1989-1990, but fewer than 20% of those vacancies were filled with graduates of teacher training programs in Alaska.

Furthermore, and more to the issues at hand, demands placed on teachers in general, rural and urban, because of an exploding knowledge base and a decline in the traditional family-oriented society of previous generations, make it necessary to have a body of teachers better educated and trained than ever before. Unique and extraordinary personal traits, knowledge, sensitivity, and ability are essential if teachers are to meet the challenges contemporary Alaska society places on them. The ways these characteristics are defined and the processes by which they may be identified or instilled in those who choose to teach are the focal points around which issues in professional development revolve. Thus, the quality of teacher performance as a result of teacher education and professional training, the provisions for teacher certification, and the teacher tenure laws are the topics most often at issue in the subject of professional development.

Teacher Education and Professional Training

As pointed out by Anne Lewis of the American Association of School Administrators, "Schools cannot be restructured unless training for the profession also undergoes radical changes." 27 During the past decade many reports from some of the most prestigious government and private institutions have called for substantial changes in the way teachers are trained. Among the reports, those that have come from the Holmes Group (an extensive consortium of deans of education from 123 of the country's colleges and universities, including the University of Alaska), the Carnegie Forum on Education and the Economy, and the Education Commission of the States emphatically support the need for reform in teacher education. In the *Journal of Teacher Education* (May-June 1987), Edith Guyton and George Antonelli summarized the recommendations common to these and many other reports issued in the past few years:

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1. Raise standards for admission to teacher education and the teaching profession.
 2. Move professional education of teachers to the post-baccalaureate level.
 3. Revise the teacher education curriculum, particularly to incorporate research findings.
 4. Make efforts to enhance the prestige of and respect for teachers and the teaching profession.
 5. Engage Arts and Sciences faculty in the teacher education program.²⁸

These five recommendations are considered not only to be keys to improved teacher efficacy everywhere but also to be particularly appropriate to professional development in Alaska, especially with regard to moving professional education of teachers to the post-baccalaureate level. Altogether, the effect that is sought is that of a restructured school system that significantly improves education in the classroom. To achieve this objective, teachers who work in those classrooms need to be the best and the brightest available. They will not be if they are not more critically screened at the time they make application to teacher training programs and if they are not more academically challenged during their university experience.

The most recent study of the way teachers are educated, the "Study of the Education of Educators" (one of the most extensive investigations on this subject ever conducted) adds yet another dimension to the debate over what should constitute an adequate education for teachers. Carried out at the University of Washington under the leadership of John I. Goodlad over a five-year period, the investigation was completed in 1990. A fundamental part of the study was this question: "How might schooling and teacher education be productively linked?". Goodlad summarized findings from the study, in response to this question, this way:

In setting out to study the education of educators in a representative sample of colleges and universities, my colleagues and I concluded that teacher education should be geared to reasonable expectations for those who are to be stewards of schooling in a democratic society.

We postulated four broad categories of expectations --the legs of the stool on which teaching as a profession rests. First, teachers must understand that citizenship is the primary political office under a constitutional government, and they must possess a foundation of knowledge about the nation's government and its expectations for citizens. Second, teachers must have the intellectual tools to participate broadly in the human conversation and to introduce young people to it. Third, teachers must possess the pedagogical knowledge and skills necessary to arrange optimal conditions for educating the young. Fourth, teachers must thoroughly understand the common-places of schooling (goals, clients, organization, curriculum, instruction, and evaluation), promising alternatives, the nature of healthy schools, and how to sustain renewal.²⁹

The current debate in teacher education revolves around how such an ideal combination of traits in all teachers can be achieved. Moreover, nearly all of the school improvement reports of the past few years, especially those of the Carnegie Forum, Holmes Group, and Education Commission of the State, have called in unequivocal terms for strengthening liberal arts foundations as a prerequisite for the professional study of teaching. It is reasonable to assume that if teachers are to measure up to the four categories of expectations called for by Goodlad, they must be liberally educated, although not at the expense of training in sound pedagogical knowledge and skills. This call for an education of breadth and depth among educators implies that teacher education programs, regardless of the forms eventually agreed to, will require more effort and time than in years past.

At the turn of 19th century, graduation from eighth grade was all that was require to be hired as a teacher. Later, graduation from high school became the standard to become an elementary teacher, followed a few years afterward by the need to possess a diploma from a two-year "normal school." It was not until after World War II that all states required graduation from a four-year teacher education program to become a certificated teacher. Although many candidates for a teaching credential (especially high school teachers) now complete requirements for a four-year B.A. or B.S. degree before going into teacher education, the norm is a four-year program as a student for a Bachelor of Education degree with an endorsement in elementary or secondary teaching. Now, however, in consideration of the rapid development of a more thoroughly educated and technically specialized society, it is essential that the education of teachers advance no less rapidly.

Despite the consensus that there is an urgent need to upgrade the level of education of future teachers, the components of an ideal teacher education program remain at issue. Most large research-oriented universities favor requiring that prospective teachers first must have a B.A. or B.S. degree in a solid subject matter discipline before starting professional teacher education training. Smaller, possibly less secure, institutions have been reluctant to support the movement at the same level of assertiveness because they do not have the resources to make such a monumental change. In Alaska where this requirement has received considerable study and debate at every campus, the movement has not gone beyond the appraisal stage. (It has been suggested that no Alaska campus has the resources necessary to effect this change or no campus is willing to take the first step toward implementation lest it lose a competitive edge in the recruitment of students who are unwilling, financially unable, or lack

undertake a longer and more academically demanding program.)

Although Alaska schools require teachers to be thoroughly educated along lines proposed in most recent national reports, the need for teachers who have been trained in programs specifically designed for Alaska's distinctive conditions and multicultural population is a separate but equally imperative problem. Unfortunately such programs remain elusive on a sustained, institutionally supported basis. Alaska-specific programs developed in the past have not produced sufficient numbers of appropriately prepared teachers, and they still do not. A shortage of teachers sensitive to the needs of their students and well trained in the theories and techniques required in a multicultural society persists. Earlier programs that were judged to be effective and should by now be routinely available to both pre-service and in-service teachers are no longer available. Recent innovative programs, especially programs intended to improve school performance in rural areas or to increase the number of Alaska Natives in the teaching force, have not attained the momentum, financial means, or credibility necessary to become routinely offered. Although some early programs did not deserve to be continued and some current proposals may lack substance, inadequate funding, university personnel with insufficient backgrounds, or lack of institutional commitment are the more frequent causes for scantness of teacher training programs in Alaska. It has become incumbent on the legislature to provide incentives that will help to overcome these limitations.

Teacher Certification

Teacher certification is as integral to the professional development of teachers as teacher education. Among the many topics in public education now at issue nationally, certification of teachers is one of the most frequently debated. To focus the elements of this debate, The National Center for Education Information published, in 1990, *Alternative Teacher Certification: A State-By-State Analysis*, in which detailed descriptions of alternative teacher certification practices across the country are reported. Table 3, showing the extent of activity among the states regarding alternative routes for certifying teachers, summarizes data from that report. Only three states, Alaska, North Dakota, and Rhode Island, are shown on the table under the heading "not considering" alternative routes.

However, the author of the report points out the difficulty of obtaining the most recent information from the states due to rapidly changing policies across the country. Aince the Alaska legislature last year had under consideration (but failed to pass) CSHB 203, an act relating to requirements for limited teacher certificates Alaska might have more appropriately been shown in the table under the column headed "considering" alternative routes. Regardless of this aspect of the table, it can be said that the Alaska state board of education is not at the forefront of the nationwide movement exploring innovative proposals in teacher certification. This observation is supported by the following excerpts from the National Center for Education Information's report.

Alternative teacher certification is not only a much debated topic but is also the center of much activity in American education....

The National Center for Education Information (NCEI) has been asking the state directors of teacher education

TABLE 3

STATUS OF STATES REGARDING ALTERNATIVE ROUTES FOR CERTIFYING TEACHERS

STATE	Considering	Proposed	Implementing	Not Considering
ALABAMA			X	
ALASKA				X
ARIZONA			X	
ARKANSAS			X	
CALIFORNIA			X	
COLORADO			X	
CONNECTICUT			X	
DELAWARE	X			
D.C.	X			
FLORIDA			X	
GEORGIA			X	
HAWAII			X	
IDAHO			X	
ILLINOIS	X			
INDIANA	X			
IOWA	X			
KANSAS	X			
KENTUCKY			X	
LOUISIANA			X	
MAINE			X	
MARYLAND			X	
MASSACHUSETTS			X	
MICHIGAN	X			
MINNESOTA	X			
MISSISSIPPI			X	
MISSOURI			X	
MONTANA	X			
NEBRASKA			X	
NEVADA		X		
NEW HAMPSHIRE			X	
NEW JERSEY			X	
NEW MEXICO			X	
NEW YORK			X	
NORTH CAROLINA			X	
NORTH DAKOTA				X
OHIO			X	
OKLAHOMA			X	
OREGON			X	
PENNSYLVANIA			X	
RHODE ISLAND				X
SOUTH CAROLINA			X	
SOUTH DAKOTA	X			
TENNESSEE			X	
TEXAS			X	
UTAH		X		
VERMONT			X	
VIRGINIA			X	
WASHINGTON	X			
WEST VIRGINIA			X	
WISCONSIN	X			
WYOMING	X			

and certification about their status regarding alternatives to the traditional college approved teacher education program route to certification since 1983. In that year, eight states said they were "implementing alternatives." When asked the question in 1990, 33 states reported they were implementing alternatives.

About a third of the states that say they are implementing an alternative teacher certification route have tied alternative teacher certification to teacher shortages, that is, the alternative program is available only if a traditionally certified teacher cannot be found....

There is considerable similarity in the "requirements to enter" for alternative route programs and for other programs offered in all the states. Basically, if one has a bachelor's degree, at least a C+ college grade point average, has passed a basic skills test, and often a subject speciality area test, one is eligible in almost every state [but not in Alaska] to enter some type of certification program other than going back to college and completing a traditional approved college teacher preparation program before becoming certified to teach.

The real variations among certification routes show up in what happens from the time one is granted a regular teaching certificate--and the variations are enormous--from granting full certification based on transcript and resume analysis to requiring that a person complete a traditional approved college teacher preparation program over time....

Several states issue the candidate some type of temporary or provisional certificate that allows him or her to get a teaching job, begin teaching right away, as long as he or she enrolls in a college of education that has an approved teacher education program and finishes all the requirements of a regular college approved teacher education program over time. The amount of time states allow a person to finish all such course requirements varies, but most states issue one-year temporary certificates which can be renewed as long as the candidate completes at least six semester hours of professional education courses per year. The total number of semester hours that must be completed in such arrangements also varies. The average is 18 semester hours on a college campus. Often the student teaching requirement is waived in lieu of demonstration of "successful" teaching experience.

Still other states that report they are implementing an alternative teacher certification route and require that a candidate get a teaching job--or at least commitment to be hired--also allow the person to be hired as a full-time teacher but stipulate that they go through a specially designed professional education and training program. Again, there are tremendous variations in these types of programs. In some, the new teachers are assigned mentors; in others, they are not. In some, the formal courses they take are offered by a college of education; in others, by the school district; in still others, by a combination of college, school district and even business. The amount of "coursework" varies and is defined differently in different states.

Some states that report they are implementing alternative teacher certification routes have, in fact, allowed the institutions of higher education in their state to design alternative programs within the university. Others have given the universities very specific guidelines to use in the development of such alternative programs; others have allowed their institutions of higher education considerable leeway in the design of alternatives to their traditional teacher education programs.

A few states use what they call "transcript analysis" as an alternative route, that is, they analyze an applicant's transcript and, in some cases, resume, and decide whether or not the person is qualified to become certified to teach or what specifically one needs to do in order to become fully certified.²⁶

As the Center's report attests, exceptionality has become a legitimate consideration when teacher certification qualifications are legislated. And Alaska, as much as any state, needs teachers with extraordinary skills (alternatives to traditional teacher skills) and experiential backgrounds. Being in need of teachers who have these qualifications will require certification policies that take them into account. Provisions for alternative certification, it is argued, increase the pool of prospective teachers with expertise out of the ordinary, keeping in mind that Alaska is now only training approximately 20% of the new teachers hired each year. Such provisions, however, should be looked upon as the means to augment the teaching force, not supplant it; the need for traditionally

well-educated and trained teachers remains high. The challenge in Alaska will be to develop policies that accommodate both traditional and alternative routes to certification without jeopardizing the integrity of either.

Teacher Tenure

There is a dearth of literature on the subject of tenure in the current school reform movement. Nevertheless, the subject repeatedly comes up in a few circles in Alaska, notably among members of teacher, school administrator and school board associations. While not considered a subject that bears on the quality of school performance as much as those discussed elsewhere in this report, provisions for tenure are a perennial problem among both critics and advocates of the present system. Although the Committee heard little testimony on the subject, pro or con, it is a matter that should be addressed in this report, if only briefly, to put it at rest for a time.

Kirp and Yudof in *Educational Policy and the Law* succinctly describe the essentials of tenure.

Tenure laws and regulations seek to make faculty members secure in their positions by severely limiting the circumstances in which they can be discharged. Generally, they provide for a specified probationary period, usually from three to seven years, after which the teacher is evaluated and either given or denied tenure status. In institutions of higher education, the faculty tends to be deeply involved in this evaluation. In elementary and secondary schools, administrators and school board members make decisions without faculty participation. In theory, at least, tenure is not a form of absolute job security; a tenured teacher may be dismissed before retirement for a variety of reasons: adequate cause, gross misconduct, neglect of duty, mental or physical incapacity, moral turpitude or

financial emergency. The teacher expects, however, to serve until retirement, barring extraordinary circumstances.³⁰

Although not necessarily considered crucial issues in the professional development of teachers, tenure issues are found in the following questions: What is the relevance of tenure in public schools in light of other job protection laws? Should tenure, once granted, apply building wide, district wide, or statewide? What are the merits of and problems associated with the two-year probationary period, as now provided in Alaska law, before tenure is earned? Should it be longer? What would be the consequences of extending the probationary period for teachers on teacher performance?

Although all of these questions deserve informed debate, because there was infrequent reference to tenure as an issue during the life of the Joint Committee comment on the above issues is reserved for another day. There is, however, one exception. It involves the length of the probationary period required before tenure is granted. This subject has been raised often enough among teacher organizations and school boards to require comment by the Committee.

Extending the probationary period would be in line with longer periods of time required in other states and in all probability be fairer to teachers and school boards alike. If qualifying for tenure involves professional development, teachers deserve an opportunity to prove their worth over a period longer than two years, and administrators deserve a longer time to assist in the development of promising but late-blooming teachers.

Peripheral but appropriate to the subject of tenure is the topic of teacher competency testing. Much emphasis throughout the country is being placed on testing teachers to determine their fitness

to teach, especially as measured by mandatory teacher competency tests. All but six states, Alaska being among these, have one form or another of competency testing for teachers. (As recently as 1980 only ten states required testing of elementary and secondary teachers.) Experience with the tests has been mixed. Generally, teachers have had little trouble passing them, but in some states the practice has caused a rift between boards and teachers, especially where the reliability of the tests has been questioned. The subject is infrequently discussed in Alaska, but interest is increasing as the topic becomes better known.

At present a policy of sound in-service training and professional support for beginning teachers over a period of time greater than two years is preferable to the uncertainties of mandatory teacher testing as a screening device for potentially inadequate teachers. Likewise, such a policy would enable administrators to have the opportunity to assist new teachers to adjust to their responsibilities over a longer period. The result would probably reduce the criticism administrators are now subject to regarding claims over arbitrarily dismissing marginal teachers after inadequate teacher evaluations during the probationary period before tenure is granted.

*Recommendations in Professional Development of
School Personnel*

Improved school performance is obviously dependent on well-qualified personnel. To be well qualified, teachers depend on high quality education and teacher training programs in institutions of higher education. The public depends on fair certification laws to assure that teachers are well qualified. It is also important, however, that well qualified candidates to be teachers are not denied access

to the profession because of narrowly constructed regulations. Teachers depend on fair tenure laws to be secure in their positions. As it becomes more critical that issues in these topics be resolved, seven recommendations under the heading of professional development of school personnel are set forth below.

In the matter of teacher education and training it is recommended:

1. that a BA or BS degree in a subject matter discipline be a prerequisite for admission to a professional teacher education program at all campuses of the University of Alaska.

2. that teacher training programs that prepare new teachers and upgrade in-service teachers for assignment in village schools be standard offerings of the University of Alaska system and routinely available as a means to qualify candidates for teacher certificate endorsements appropriate to recommendation number 6 below. (pertaining to village teaching).

3. that the University of Alaska prepare detailed estimates of the funding that will be required to carry out the prior two recommendations, to be made available to the legislature no later than January 15, 1992.

In the matter of teacher certification, it is recommended:

4. that legislation be enacted relating to requirements for limited teacher certificates for the purpose of providing teachers in certain limited fields where baccalaureate degree training is not sufficiently available, so long as the person demonstrates both subject matter expertise and teaching competency.

5. *that the legislature, by resolution, instruct the state board of education to investigate the feasibility and desirability of setting into place alternative certification routes for candidates entering teaching from other fields not covered in recommendation number 1 under this heading.*

6. *that the legislature, by resolution, urge the state board of education to adopt a tiered system of certification that distinguishes between competencies necessary to teach in rural, multicultural communities (Alaska villages) and traditional, urban teaching assignments.*

In the matter of tenure, it is recommended:

7. *that the existing tenure law be changed. Sec. 14.20.150 (2) presently requires teachers to be "employed as a teacher in the same district continuously for two full school years and is reemployed for the school year immediately following the two full years." The Committee proposes the following alteration: "employed as a teacher in the same district continuously for five full school years and is reemployed for the school year immediately following the five full years."*

PROGRAM DEFINITION AND CURRICULA

Strengthened curricula and innovative programs of instruction can be among the most promising components of the school improvement movement. Accordingly, who decides what is to be taught and the content of what students are to be taught have become the focus of reform in many states. Notable in this movement have been efforts to concentrate responsibility for curriculum design at the state level, require more rigorous content of

subject matter, put greater emphasis on thinking skills, and integrate an otherwise compartmentalized curriculum.

Although determining the scope and content of the schools' curricula and developing its instructional programs are among the most important activities of any school system, the question of what schools must teach is not an immediate concern of the Joint Committee on School Performance, except for one topic discussed below. Experience from other states has shown that legislatively mandated curricula and instructional programs have seldom resulted in improved school performance. More often than not this practice has obstructed development of needed innovative programs by limiting options and hampering creative teachers by taking up limited time and resources.

With few exceptions, historically it has been the practice of the Alaska legislature to defer decisions affecting curricula and programs of instruction in the public schools to others. By declaring state purposes of education, as was done by the legislature in HB469, and by prescribing outcomes of education necessary for Alaska students to succeed in adult life, as was done by the state board of education last year, the state has introduced policies that express what it is that schools are expected to achieve. These policies have set the tone for school performance; they do not prescribe how they are to be carried out.

Alaska studies in grades K-12 need to be a notable exception to the legislature's practice to forgo enactment of statutes that prescribe curricula and school programs. Legislation that would underscore the importance of all citizens being well informed in the history of Alaska, its economic development, its political systems, its geography and resources, and the cultural heritage of its various ethnic groups is in order. The state board of education has considered the issue of Alaska studies for many years, but out of

deference to local school boards, holds the position that the state should do no more than produce a model curriculum rather than mandate one. A review of this subject, prepared by the state Department of Education in October, 1990, recounts recent historical actions in this debate:

In 1988 the legislature passed a resolution requesting that the State Board of Education adopt regulations requiring at least one unit of credit in the study of Alaska history and government for graduation. This legislative action was based on the belief that knowledge of one's own state, history and government is fundamental to informed and effective participation in state and local affairs.

In October 1988 the state board directed the Department to work with the Alaska Council for the Social Studies on how to implement this resolution. This group developed a recommendation which was translated into regulatory language.

During the Spring of 1990, proposed amendments to 4 AAC 05.080 (d) were circulated for public review. These amendments would have required that districts develop and implement a K-12 Alaska Studies scope and sequence which contained at least the learning objectives included in the Department's Alaska Studies Scope and Sequence.

Comments were received from nine school districts and persons representing three groups. The majority of the respondents objected to the mandate of specific course content. They viewed this requirement as a violation of local control and local appropriateness and measurability of some of the objectives contained in the proposed Department's scope and sequence.

After reviewing and considering public comment on the subject, the Department recommended that the Board reword the proposed amendment to regulation 4 AAC 05.080 (d)(3) to require that district elementary and secondary curriculum contain, at minimum, the learning objectives in the Department of Education Alaska Studies Learning Objectives.

The Board chose not to take action on the proposed regulation. The Board directed Department staff to reword an Outcome which would address Alaska Studies, within the context of the Outcome language.^{3a}

In November, 1990, the state board considered several alternatives to the problem and agreed to the following notion for inclusion in board regulations:

Require that each district develop performance indicators in Alaska Studies which identify what all students should achieve. This would require districts to identify the information they want students to know about Alaska at both elementary and secondary levels. Documentation of the performance of students would be required of the school district.

During the time these developments were taking place at the board level, the Department's Office of Basic Education and Instructional Improvement in the Division of Education Program Support prepared a highly commendable Alaska studies program for all grades. Although the Committee believes this program should be a required feature of all Alaska schools, its use remains an option at the local level.

Even though the Committee endorses the principle of delegating matters of curriculum to the state board and local districts in general, the study of Alaska is an exception. As the population of Alaska grows and issues concerned with development and utilization of resources become more polarized, the need for all Alaskans to be well informed about Alaska's history, systems of government, geography and natural resources, and rich multiculturally diverse population becomes more critical. Therefore, it is recommended:

that the legislature, by statute, require that the scope and sequence schedule developed by the state Department of Education in its Alaska studies program be incorporated into the curriculum of each school district of the state.

RESEARCH, EVALUATION, AND DISSEMINATION

It is generally agreed that the ultimate reason for educational research is to foster improved school performance. As envisioned by Willis D. Hawley of Peabody College, Vanderbilt University,

The process of improvement starts with the identification of possible alternatives for improving education-related policies and practices and careful research to discover the relative effectiveness and efficiency of these alternatives.

Research should lead to the specification of models ... that can be implemented in a range of settings and the testing of the effectiveness and costs of the new models. This step is essential because virtually all educational strategies are importantly influenced by conditions that often have considerable variation. Understanding how these differences affect the efficacy of the strategy and building such understanding into models for improvement is essential in order to achieve effective changes in management procedures, teaching, curriculum, and other factors that influence student learning.

Once effective practices and policies are identified, and the conditions that influence their relative effectiveness in different settings are specified, this information needs to be disseminated in a variety of forms and formats.³¹

As the Committee collected background material for this report, the need to better understand processes of schooling in Alaska became clear. For instance, why do some pupils succeed

where others do not, why do some programs of instruction work well but others do not, and how can information about successful programs be disseminated more effectively? The approach to a sound research program has been suggested by Hawley fits the need to answer these and similar questions. However, although each branch of the University of Alaska and Alaska Pacific University have declared purposes of furthering knowledge through organized research in education, it cannot be said that their current capabilities are sufficient to achieve this purpose. What little research that is done is initiated only by inspired individual investigators. The issue is not whether there is a need for educational research; the issue is whether or not there is the capability and commitment at Alaska's research institutions to carry it out.

Pointing out that the adequacy of educational research capability in Alaska is at issue is not meant to imply that this shortcoming is being ignored. Efforts to develop a coordinated, sustained institutional educational research presence at the University of Alaska Fairbanks have been underway for some time. As long ago as 1981 a group of University faculty members at Fairbanks approached the legislature to establish an "Alaska Educational Research Foundation" as an independent, quasi-public agency designed to receive, administer, and dispense funds for the purpose of stimulating and supporting research and evaluation activities that address issues of educational significance in the state. And as recently as 1988, a position paper proposing a similar plan was put forth during hearings held by the Senate's Special Committee on School Performance. While the legislature did not take direct action along these lines, the University did by including funds for the effort in its Fairbanks campus budget. Established in the office of the Chancellor of the University of Alaska Fairbanks, an educational research "agency" is now being activated.

The University's new initiative (for sustained educational research) appears promising; there is a need for long-range, ongoing studies that will provide the state with background materials and knowledge of options that are necessary to meet goals of education. Policymakers in state agencies and school districts will continue to require information that will better enable them to relate current efforts at school improvement to principles of equity and to enable them to judge better the validity of the requirements and claims of those who are attempting to reform public education. Although the legislature cannot mandate or guarantee useful educational research, it can endorse promising research initiatives and provide the financial means required for them to succeed--once the University demonstrates its commitment and ability to carry them out. *Therefore* the Joint Committee recommends:

that the legislature support the University's "Alaska School Research Fund" as it has the potential to enable Alaska's research capability to become sufficient to meet the state's educational research needs. Furthermore, it recommends pursuing research on subjects suggested in this report and others that may be suggested, especially those that seek the means to ameliorate causes of inadequate school performance.

The findings and recommendations contained in this report conclude the Committee's work as specified in its enabling legislation. In the following chapter the Committee's conclusions are summarized and its recommendations reviewed.

CHAPTER THREE

SUMMARY AND CONCLUSIONS

When established by the Sixteenth Legislature, the Joint Committee on School Performance was charged with identifying causes of inadequate school performance and recommending ways to overcome them. It has not been the purpose of the Committee to seek an indictment of school personnel or schools in general; in some locations exceptionally effective school programs and teachers are to be found. It is undeniable, however, that in many instances school performance is far from what it eventually must be. Whether due to problems in society as a whole or with Alaska's system of public education, there are conspicuous and critical failings in elementary and secondary education in Alaska. Although the legislature has wisely delegated much of its policy-making authority to school districts, the legislature remains ultimately responsible for failings in the system because of its constitutional mandate to maintain public schools in Alaska. In this role the legislature must seek to alleviate widespread shortcomings.

NEEDS IDENTIFIED

Drawing on material in this and the Committee's first report, the Committee has concluded that shortcomings in school performance may be attributed to the following deficiencies, all of which require immediate attention:

1. The need for stricter school district accountability through more closely monitored school operations by the legislature.

2. The need to encourage greater local participation in school affairs at the community or building level.
3. The need to insist on better coordinated health, social service, and educational agencies as a means to remove barriers to learning among disadvantaged youth.
4. The need to strengthen readiness to learn among pre-school children.
5. The need to raise and distribute funds for school districts more equitably among all regions and political subdivisions of the state.
6. The need to achieve balanced equality of opportunity among all students.
7. The need to redraw some school district boundaries in a way that will make districts more operationally efficient, more cost effective, and more receptive to constituent needs.
8. The need to strengthen professional development in the teaching profession.
9. The need for all students to be better informed about the political and natural history of Alaska, the cultural heritage of all its people, and its economic potential.
10. The need to better understand processes of schooling in Alaska, such as why some pupils succeed where others do not, why some programs of instruction work well while others do not, and how information about successful programs can be disseminated more effectively.

It is not just coincidental that some of the observations made by the Joint Committee in arriving at these needs correspond to those of similarly constituted groups in other states. Many states, either through their legislatures or governors' offices, have undertaken school performance improvement or school system restructuring programs in recent years. The movement for improved school performance is national in scope; many problems relating to school performance identified elsewhere are present in Alaska. Others, some of the most severe, are uniquely Alaskan and are in part the causes of the incongruous gap in performance between poorly performing students, many of whom are in isolated rural villages, and adequately performing students.

RECOMMENDATIONS REVIEWED

In response to the Joint Committee's findings and as the means that will enable the legislature to eliminate or reduce some of the deficiencies the Committee has identified, several recommendations in this and the Committee's first report have been made. To deal with other needs, the Committee has raised several questions about the condition of Alaska's system of public schools that first must be answered before additional recommendations can be made. In either case, the legislature needs to advocate and guarantee changes that will lead to new directives in school performance. The Joint Committee has recommended changes that it believes are preconditions to most improvements in school performance

School District: Accountability [Pages 8 - 12]

The need for stricter school district accountability was well established by the Alaska Senate through the work of its Special Committee on School Performance in 1988 and the Joint Committee

on School Performance in 1989 and 1990. Acting on a recommendation of the Joint Committee, the legislature passed HB 469 in 1990 (now codified as Chapter 173) establishing the purposes, expected outcomes, and goals of schooling. Furthermore, Chapter 173 requires school districts to be held accountable for the authority delegated to them by requiring an annual "report card" on school performance to the public and the legislature. The state Department of Education is currently developing procedures, in cooperation with school districts, the public, and the education profession in general, that will enable the process to be carried out promptly and uniformly. (As a means to underscore the significance of this legislation, Bob Arnold former staff director of the Senate's Special Committee on School Performance, has summarized in essay form his reflections on the legislature's declared purposes of schooling since enactment of Chapter 173. His essay is attached as Appendix H.)

Incentive Grants and Local Participation

[Pages 13 - 16]

The need to encourage greater local participation in school improvement was addressed in HB 469 with passage of a clause in the bill that established the Fund for the Improvement of School Performance, but failed to appropriate funds to activate the program. The governing body of a school district, district advisory board or nonprofit community organization, or a teacher or principal employed by a school in the state, may apply for a grant to improve school performance by submitting an application to the commissioner of education. Without an appropriation creation of the fund serves no purpose. Therefore, the Committee recommends

that no less than \$3,000,000 be appropriated annually to the Fund for the Improvement of School Performance over the next five years.

Health and Family Services Programs

[Pages 16-17]

The Committee recognized that not all causes of inadequate school performance can be attributed to problems in the school system. Thus, the Committee has identified the need for better coordinated health and family-related service programs, for the complexity of the need for change involves social, health, and poverty-related problems. To address these in a coordinated way, the legislature enacted HCR 46 in response to a recommendation in the Committee's first report. That resolution called on the executive branch of government to create a committee of cognizant department heads to develop a plan that will enable their departments to better serve the needs of disadvantaged and "at risk" students through coordinated deployment of resources. The governor is presently examining ways this resolution can be implemented.

To underscore the sense of importance the Committee gives to this subject, it recommends:

that a resolution calling for better coordinated services among the departments of health and social services, labor, community and regional affairs, and education, similar to the resolution calling for this effort passed by the 16th Legislature, be enacted by the 17th Legislature.

*Early Childhood and Parenting Education**[Pages 17-21]*

The need for enhanced early childhood education is consistent with testimony from every corner of the state, urban and rural. Among fundamental causes that deny children the means or motivation necessary to succeed at schooling are inadequate or insufficient early childhood and parenting education. In recognition of this reality the legislature has increased appropriations for early childhood education as has the federal government. There remain, however, many unanswered questions on the nature of early childhood education and how programs should be delivered, answers to which will determine the eventual make-up of Alaska's early childhood programs.

Therefore, as was stated in its first report the Committee recommends:

that the legislature, by resolution, establish a Committee to address the issues and questions on early childhood education that pertain to the education of Alaska's young children, with particular attention given to those children with environmental handicaps. Included among the Committee's responsibility shall be the development of a plan for a statewide program of early childhood education and preparation of a report on its findings with recommendations to the legislature no later than May, 1992.

School Finance and Governance [Pages 29-84]

Of all the needs identified by the Joint Committee, the need for a redesigned system of school governance and finance is the most complex. Because this subject addresses so many important

problem areas (the need for tax liability equity among districts, equitable distribution of state funds for school purposes, and equitable decision making authority among all Alaska communities). meeting it may hold the greatest promise of all the Committee's recommendations. The Committee recommends:

that the legislature, in recognition of the urgency of the need for improved school performance, initiate a thorough investigation of the school finance and governance systems of Alaska public education. It is further recommended that this work be conducted as a legislative "in-house study" (utilizing the resources of the Department of Education when required) and that it be carried out under the auspices of a newly created joint committee on school performance (as recommended in Chapter Three). The study shall include answers to the questions posed in the body of this report (pages 46-47 and 61-64) and propose a system of governance and a financial foundation formula in agreement with the findings. The committee shall report its findings and make its proposals no later than January 1993.

Professional Development of School Personnel

[Pages 84 - 104]

Much of the education reform movement during the past decade has focused on improving the quality of teacher performance through improved professional development. Although it is recognized that the aggregate of Alaska's current teaching force is among the best trained and competent in the nation, this position is at risk. Teacher shortages, primarily in rural schools where recently there has been an annual teacher turnover rate of 30%, have made it necessary to recruit teachers who do not have the background necessary to succeed under the demanding

conditions found in many Alaska schools. The means to develop, recruit, and retain an adequate teacher force, both in numbers and ability, need to be expanded and enhanced. Therefore, in the matter of teacher education and training, it is recommended:

1. that a BA or BS degree in a subject matter discipline be a prerequisite for admission to a professional teacher education program at all campuses of the University of Alaska.

2. that teacher training programs that prepare new teachers and upgrade in-service teachers for assignment in village schools be standard offerings of the University of Alaska system and routinely available as a means to qualify candidates for teacher certificate endorsements appropriate to recommendation number 3 under certification below (pertaining to village teaching).

3. that the University of Alaska prepare detailed estimates of the funding that will be required to carry out the prior two recommendations, to be made available to the legislature no later than January 15, 1992.

In the matter of teacher certification, it is recommended:

1. that legislation be enacted relating to requirements for limited teacher certificates for the purpose of providing teachers in certain limited fields where baccalaureate degree training is not sufficiently available, so long as the person demonstrates both subject matter expertise and teaching competency.

2. that the legislature, by resolution, instruct the state board of education to investigate the feasibility and desirability of setting into place alternative certification routes for candidates entering teaching from other fields not covered in recommendation number 1 under this heading.

3. that the legislature, by resolution, urge the state board of education to adopt a tiered system of certification that distinguishes between competencies necessary to teach in rural, multicultural communities (Alaska villages) and traditional, urban teaching assignments.

In the matter of tenure, it is recommended:

that the existing tenure law be changed. Sec. 14.20.150 (2) presently requires teachers to be "employed as a teacher in the same district continuously for two full school years and is reemployed for the school year immediately following the two full years." The Committee proposes the following alteration: "employed as a teacher in the same district continuously for five full school years and is reemployed for the school year immediately following the five full years."

Program Definition and Curricula

[Pages 104 - 108]

Strengthened curricula and innovative programs of instruction can be among the most promising components of the school improvement movement. Historically it has been the practice of the Alaska legislature to defer decisions affecting curricula and programs of instruction to others. Nevertheless, and although the

Committee subscribes to the principle of delegating matters of curriculum to the state board and local districts, because a critical need is not being met. Alaska studies is an exception to this doctrine. There is a critical need for all Alaskans to be well informed about Alaska's history, system of government, geography and natural resources, and the richness of its multiculturally diverse population.

Therefore, it is recommended:

that the legislature, by statute, require that the scope and sequence schedule developed by the state Department of Education in its Alaska studies program be incorporated into the curriculum of each school district of the state.

Research, Evaluation, and Dissemination

[Pages 109 - 112]

As the Committee collected background material for this report, the need to better understand processes of schooling in Alaska became clear. There is a need for long-range, ongoing studies that will provide the state with background materials and knowledge of options that are necessary to meet goals of education. What little research is carried out by Alaska institutions is usually initiated only by inspired individual investigators. Current capabilities of Alaska institutions of higher education and the Department of Education to fulfill Alaska's educational research needs are being questioned. The issue is not whether there is a need for educational research; the issue is whether there is the capability and commitment at Alaska's research institutions to carry it out.

Efforts at the University of Alaska to develop a coordinated, sustained, institutional educational research presence with its recently established Alaska Schools Research Fund have created the potential to meet most research needs

that this report speaks to as well as many others.

Therefore, the Committee recommends:

that the legislature support the University's "Alaska School Research Fund" as it has the potential to enable Alaska's research capability to become sufficient to meet the state's educational research needs.

Furthermore, it recommends pursuing research on subjects suggested in this report and others that may be suggested, especially those that seek the means to ameliorate causes of inadequate school performance.

This summary leads to the Joint Committee's final recommendation. There is need for the legislature to continue to give extraordinary attention to school performance. Arguments advanced in favor of creating the Joint Committee two years ago remain valid. Some of the Committee's recommendations already acted upon require continuing legislative oversight. And as measures to meet needs identified in this report are developed, they should be monitored by the legislature to guarantee that they are carried out correctly and promptly. In particular, the study of the state's school finance and governance system recommended by the Committee in Chapter Two should be accomplished under the auspices of the legislature. Therefore the Committee recommends:

that the 17th Alaska Legislature establish a House-Senate Joint Committee on School Improvement. The Committee shall continue the work of the Joint Committee on School Performance, make additional recommendations as conditions warrant, and oversee all of the legislature's initiatives in school improvement.

CONCLUSION

Although there have been efforts at school reform over the past several years that failed because they were ill founded or inadequately carried out, it would be a mistake to dismiss current arguments for reform as lacking in substance or to doubt that there is genuine need. Two compelling reasons support this statement and the presumption that there is need to act on the Committee's recommendations definitively and promptly. First, the number of students who drop out of school or finish school unable to fill out a job application form let alone qualify for any kind of employment grows increasingly higher each year. As many as one out of every three students presently enrolled is experiencing social, economic, or academic distress. Complicating these conditions is the reality that these students are not uniformly distributed among the state's fifty-four school districts. There are concentrations of students (often in small, remote villages) where 60% to 70% of the school-age population benefits little from Alaska's education system. These children do not progress toward but rather retreat from requirements of contemporary society. Because they are scattered over such a large geographic area, the critical nature of their deficiencies is not apparent. Consequently, they attract far less public awareness and concern than is usually necessary to activate calls for remedial measures. Nevertheless, these children are there, their need is great, and their numbers are growing.

Second, the level of education necessary to succeed in Alaska's (and the nation's) increasingly technological and educationally demanding society is much higher than ever before. There are more youth falling out of the system who are unable to cope academically or socially at any level than ever before, while at the same time the need to complete a solid basic education as a precondition merely to survive economically steadily increases. In the first report of the Joint Committee, quoting Lisbeth Shore from her book, *Within Our Reach: Breaking the Cycle of Disadvantage*, the point was made that "In today's world, a youngster who leaves school unable to read, write, and do simple arithmetic faces a bleak future. When a substantial proportion of boys and girls leave school uneducated, the rest of us face a bleak future."

Guided by the assumption that all children and youth are able to learn and that the state as well as individual students will profit from their learning, the Committee is convinced that Alaska need not face a bleak future -- *if education is given the priority it requires*. It follows, therefore, that the financial and intellectual resources of the state must be made equally available to all children. The real proof of the legislature's success in advocating and guaranteeing improved school performance will be seen when all students achieve levels of performance commensurate with their abilities regardless of their ethnicity, their gender, their economic circumstance, or their place of residence.

*I HAVE LIVED IN THIS VILLAGE ALL MY
LIFE AND NEVER WENT TO SCHOOL. I
SPEAK ONLY MY NATIVE LANGUAGE.
WHY IS IT THAT THE KIDS WHO
GRADUATE FROM HIGH SCHOOL DO
NOT KNOW ANY MORE THAN I DO?*

**TUNUNUK VILLAGE ELDER
SEPTEMBER, 1989**

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