

## District of Columbia Public Education Finance Reform Commission

Tuesday, September 27, 2011 – 4:30 p.m. to 6:30 p.m.  
Martin Luther King Jr. Memorial Library, Room A-10  
901 G Street NW, Washington, DC 20001

### Meeting Goals

- To initiate the work of the Public Education Finance Reform Commission (Commission).
- To highlight key issues and priorities to be addressed in the Commission's study.
- To review and discuss the scope of the analysis that will inform the Commission's report and recommendations.
- To review data needs and availability for assessing the equity/uniformity, adequacy, affordability and transparency of education funding in the District of Columbia.

### Meeting Notes

<b>Introduction, Goals and Process of the Commission</b> <i>Elizabeth Partoyan, Vice President, Collaborative Communications Group</i>	
<i>Partoyan:</i>	<p>Good afternoon. My name is Elizabeth Partoyan, and I am a Vice President with Collaborative Communications Group. I will be facilitating today's meeting, and I want to start by thanking each of you—members of the commission and the community—for being here. As you know, this is the initial meeting of the long-anticipated DC Public Education Finance Reform Commission.</p> <p>The goals for this meeting are at the top of the meeting agenda. <i>[Reviewed goals.]</i></p> <p>The Deputy Mayor for Education, De'Shawn Wright, will be joining us soon. In the meantime, I will take some time to go over some important introductory and background information.</p> <p>Please note that we have a Commissioner joining us by phone: Mary Filardo, Executive Director of the 21<sup>st</sup> Century School Fund. Please also note that some Commissioners will need to leave the meeting before we adjourn. I want to thank them now for their participation in the meeting.</p> <p>Brief biographies for each commissioner are in your meeting materials. At this time, let's have the Commission members around the table introduce themselves. Commissioners, please say your name, title, and organization or agency.</p>
<i>[Role call of Commissioners]</i>	<ul style="list-style-type: none"><li>• Jenn Comey, Research Associate and Deputy Director of NeighborhoodInfoDC, The Urban Institute<sup>1</sup></li><li>• Celine Fejeran, Program Analyst, Office of the Deputy Mayor for Education</li><li>• Allison Kokkoros, Chief Academic Officer, Carlos Rosario International Public Charter School</li><li>• Jeremy Williams, Interim Executive Director, Director of Business Oversight Government, DC Public Charter School Board (PCSB)</li><li>• Lisa Ruda, Chief of Staff, District of Columbia Public Schools (DCPS)</li><li>• Irasema Salcido, Founder and President, Cesar Chavez Public Charter School</li><li>• Hosanna Mahaley, State Superintendent of Education, Office of the State Superintendent of Education (OSSE)</li></ul>

<sup>1</sup> Opinions expressed by Jennifer Comey are hers and should not be attributed to the Urban Institute, its trustees, or its funders.

	<ul style="list-style-type: none"> <li>• Justin Constantino, Budget Counsel, Mayor's Budget Office</li> <li>• Lisa Raymond, Senior Education Advisor, DC City Council Committee of the Whole</li> <li>• Timothea Howard, Director, Community Engagement and Learning, CentroNia</li> <li>• Yesim Yilmaz, Director of Fiscal and Legislative Analysis, Office of the Chief Financial Officer</li>   <li>• Ed Lazere, Executive Director, DC Fiscal Policy Institute</li> <li>• Mary Filardo, Executive Director, 21st Century School Fund <i>[on phone]</i></li> </ul>
<b>Legislative charge</b>	
<i>Partoyan:</i>	<p>Thank you, Commission members.</p> <p>You have in your materials the legislative charge from The Public Education Reform Commission Establishment Act of 2010, codified in DC Official Code §38-2914.</p> <p>As specified in the charge, The goals of the DC Public Education Finance Reform Commission are to:</p> <ul style="list-style-type: none"> <li>○ Study the uniformity of funding between DCPS and public charter schools;</li> <li>○ Study the funding level needed by all public schools to meet the academic standards of the District;</li> <li>○ Study the fiscal ability of DC Government to provide necessary funding levels; and</li> <li>○ Make independent recommendations on revisions to the Uniform Per Student Funding Formula (UPSFF) for consideration in the development of the Fiscal Year 2013 budget.</li> </ul> <p>I want to make an important point— that in fulfilling the legislative charge, the Commission will both seek and honor meaningful engagement by the public and knowledgeable advisors so that its recommendations are of the highest possible caliber, informed by stakeholders throughout the city.</p>
<b>Work plan and timeline</b>	
<i>Partoyan:</i>	<p>Let's spend a minute on the work and timeline of the Commission process.</p> <p>This meeting is the first of four to eight proposed public meetings of the Commission.</p> <p>Collaborative Communications Group and The Finance Project have been contracted for phase one of the work, which goes through this Friday, September 30.</p> <p>Phase two, for which a Request for Quotes has been issued by the DC Office of Contracts and Procurement, will begin October 1.</p> <p>As many of you know, the amended legislation specifies this Commission is to complete its work by November 30, 2011. Because the goal of the Commission is to inform the Fiscal Year 2013 budget, the timeline will be amended if needed in order for the Commission to make the best possible recommendations.</p>
<b>Processes for deliberation and decision making</b>	
<i>Partoyan:</i>	<p>I now want to speak briefly to the process we envision for the work of the Commission and for this meeting.</p> <p>First, this initial meeting is largely informational no action is required by the Commission. Therefore, formal rules of order will not need to be followed. Of course, general rules of conduct are certainly expected and appreciated.</p> <p>Public engagement is vital to this Commission and its work. For the members of the public present today, we are grateful that you are here and we welcome your input into the meeting. So that we have time to accomplish all of the meeting goals, please reserve your comments and inquiries for the</p>

	<p>public comment period later on in the meeting.</p> <p>If you have individual questions or comments that you prefer not to present verbally, or time does not permit everyone who wishes to speak to do so, please use the public comment cards at the entrance to the meeting room. If you do not already have a comment card and want one, please raise your hand and a staff member will bring one to you. Please be sure to give your comment cards to a staff member before you leave so we are sure to have your input.</p> <p>Following the adjournment of the meeting at 6:30 p.m., members of the Commission and representatives from Collaborative Communications Group and The Finance Project will remain for 30 minutes to listen to additional questions and comments.</p> <p>Links to an audio recording and minutes from this meeting will be posted on the website of the Office of the Deputy Mayor for Education by this Friday, September 30.</p> <p>Phase two of this work includes the development of a website for the Commission. Until that is established, a Facebook page for the DC Public Education Finance Reform Commission has been set up for the posting of all materials and for public comment.</p>
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**Commission structure, composition and leadership**

<p><i>Partoyan:</i></p>	<p>Let me speak now about the Commission itself. The 13 members of this Commission represent a cross-section of District offices, local education agencies (including DC Public Schools and public charter schools), local and national school finance experts and community organizations. You were selected to serve on the Commission by Collaborative Communications Group and The Finance Project because of your knowledge and expertise, reputation and the important fact that, together, you reflect the array of needs and interests related to this vital matter for the District: education finance reform.</p> <p>Every Commissioner will be responsible for making a good faith effort to share with the Commission all data, studies and expertise that are relevant to the work of the Commission.</p> <p>As a Commissioner, you represent the Commission as a body, not yourselves as individuals or your institutions. Thank you for assuming that role as you interact with members of the community during your service on the Commission.</p> <p>It is important to note that this is a working Commission, not simply an advisory body. Because the recommendations made will be those of the Commission, full participation in meetings and careful review of materials by all Commissioners is extremely important.</p> <p>Let's turn now to leadership of the Commission. With input from Commissioners and our own expertise, Collaborative and The Finance Project identified key qualifications and characteristics required in a chair for this Commission.</p> <p>Based on our analysis, Ed Lazere, who is the executive director of the DC Fiscal Policy Institute, was asked—and has agreed—to serve as chair. Many of you know Ed. He brings to this role several assets that are key to both his leadership and to the success of the Commission, and are in alignment with the qualification set forth by the other Commissioners:</p> <ul style="list-style-type: none"> <li>○ He has demonstrated the ability to be impartial and objective;</li> <li>○ He is reputable among DC government and community stakeholders;</li> <li>○ He has expertise in financial issues in the district; and</li> <li>○ He has the disposition needed to identify priorities and set direction for the Commission.</li> </ul> <p>As chair, Ed will have several responsibilities, including:</p> <ul style="list-style-type: none"> <li>○ Chairing the Commission meetings and moderating public comment periods;</li> </ul>
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	<ul style="list-style-type: none"> <li>○ Serving as the spokesperson for the Commission to the media and the community;</li> <li>○ Leading by example, speaking and acting as a member of the Commission body rather than as an individual about the work of the Commission;</li> <li>○ Providing input into the development of agendas for Commission meetings and Commission reports; and</li> <li>○ Ensuring questions and concerns of Commission members and the public are directed to and fielded by the organization or organizations contracted to staff the Commission.</li> </ul> <p>Members of the Commission, thank you for sharing your ideas for the chair position and for your support of Ed in this important role.</p>
<i>Lazere:</i>	<p>I am honored to serve on the Commission and serve this important position in the District of Columbia. I know my fellow Commissioners feel the same way. I look forward to working with you. I haven't had a lot of time or notice to prepare opening remarks, which could be a good thing.</p> <p>The issue before us is incredibly important. We have a robust charter school movement and public school reform efforts in the city. I think everyone acknowledges that public education is the dominant issue in the District of Columbia and funding is key to this.</p> <p>How we fund is critical to this effort. The issues before us are: How do we decide? How do we make sure we have adequate levels of funding? How are we transparent? How can we afford it?</p> <p>In some ways, these are concrete and objective. Measuring what we need to run a school. How can we make sure charters are getting the same as public schools? I understand that this can be an impassioned discussion because there's never enough money. I understand that the discussion will come with strong personal views and the members of the Commission and the public will be sharing those views. I am hoping the Commission will gather information, hear about key issues from experts and then have a frank discussion about the four key items we need to resolve as the Commission.</p> <p>I look forward to a really open process with my colleagues. In a few moments, we will have a discussion about the scope of our work.</p>
<i>Partoyan:</i>	<p>Thank you, Ed, for your comments and service. Let's dig in. I am now going to turn to my colleagues from The Finance Project. Biographies for Cheri Hayes, Matthew Joseph and myself are enclosed in your materials. I will not discuss them now; just know you have experienced colleagues in front of you.</p> <p>We will break when the Deputy Mayor for Education, De'Shawn Wright comes in so he can welcome you and make some brief remarks. So with that, I turn it over to Cheri.</p>
<p><b>Defining the Scope &amp; Focus of the Commission's Study of Education Finance in the District of Columbia</b>  <i>Cheryl Hayes, President and CEO, The Finance Project</i>  <i>Matthew Joseph, Program Director, The Finance Project</i></p> <ul style="list-style-type: none"> <li>• <b>Setting the parameters: Identification of key issues and priorities to be addressed by the Commission</b></li> <li>• <b>Scope of analysis: Clarifying the focus and breadth of the study (uniformity/equity, adequacy, affordability and transparency)</b></li> <li>• <b>Data needs and availability</b></li> </ul>	
<i>Hayes:</i>	<p>Thank you so much. It is nice to see all of you. Let me just say how much we are looking forward to working with you in this early phase. We are going to talk about the scope and focus of this study. What are the kinds of information and data that are going to be important and where we are going to get it?</p>

	<p>Before I get into the issues, I want to say something. One of the things about commissions is that you are brought together as a group a people who have very different perspectives, experiences, bodies of knowledge and yet a common purpose—to ensure the quality and equity of education in the District of Columbia for all children whether they attend public schools or charter schools in the Northeast, Southwest, Southeast or Northwest. And I hope that in our work together we can really roll up our sleeves, think collaboratively and constructively about what we know and what we don't know and what we need to know. And in that process make good decisions. Not perfect decisions, but good decisions that will serve the city well, the city's children well, and represent the good judgment of this group of people.</p> <p>I also want to introduce my colleague, Matthew Joseph. Matthew is a senior staff member at The Finance Project. He has significant experience working on education finance. So he brings a lot of knowledge of the ups and downs of these particular kinds of endeavors. We hope that you look at us as approachable. Ultimately the decisions are yours. Our job is to be the staff. And report the recommendations that ultimately emanate from this group and not represent the views of Collaborative or The Finance Project. We will do our best to serve you, to make sure that we provide good sound information, that we share our judgments about the analysis of data, about the implications of what we are doing. To the extent that we do our jobs well you will know it because you will do your job well.</p> <p><i>[Deputy Mayor Wright arrives.]</i></p>
<p><i>Deputy Mayor:</i></p>	<p>Good afternoon everybody. Excuse my voice is a little bit raspy—I've been before a Council hearing for most of the day. First, I'd like to say thank you to the Commissioners. We have asked you to do very important work and we've made these calls and reached out to you to be partners in this in rather short notice. Each of you were selected to be among our 13 Commissioners because of your expertise and knowledge both in public education but also your knowledge around school financing. And so the work that you're going to be doing over the next week to month is critically important to helping us shape the landscape of public education in the city, so I want to thank you for your service. I also want to thank the people in the back who have joined us. I think that is reflective of the fact that we're talking about very important issues as we go forward. I'm sure that you will hear from this group today about what the charge is to go forward, but for us I want to reiterate that you have the absolute support from the Office of the Deputy Mayor for Education to support you in this work. Whatever it is that we can do to be supportive of you and to make sure that you have all the information going forward that you need to, as you said, make very independent recommendations about how we should move forward. We want to make sure that you have all the intelligence and data that you need and we will make sure that we will facilitate access to our partners all throughout DC government, not just in the education space.</p> <p>Let me say that part of the work of this group is going to be to look at how we fund individual students in schools. And it's challenging work. The issue around equity and transparency is complicated, it's messy, and I'm glad that we've got some brilliant minds that are going to help us figure it out and show us a way forward. At the end of the day you will make recommendations to us on whether or not you think there need to be changes to schools. And we will take that guidance; we will work with our partners on the Council and the community at large to make sure that we are trying to direct ourselves, to make sure that we are investing in our kids' futures regardless of whether they are in the public school space or the public charter space.</p> <p>I do want to recognize our partners in this work that were recently selected. Getting this first meeting kicked off took a lot of work. And Collaborative Communications and The Finance Project did a lot of work to make sure that we got this kicked off in this fiscal year, which explains why we are going to do the work in two different phases. The first phase of the work is going to include inviting the Commissioners, setting up the first set of meetings. This phase of the work is going to</p>

	<p>wrap up relatively quickly and move because of the way that our calendar works, into phase two. There is already an RFQ out for phase two of this work to keep this work moving forward seamlessly and provide staff support to you all.</p> <p>The main thing around phase two of the work is continuing to convene the Commission, implementing the public engagement strategy, developing a Commission website, providing brief reports, providing an equity report, developing a follow-up report with recommendations and providing a final document with recommendations. Because we are doing this work in two phases, all the work that is done by September 30 will be made public and shared with the community at large, then we will complete part two of the work. We look forward to working with you in the coming days.</p>
<p><i>Hayes:</i></p>	<p>Thank you. It was so nice to have you join us.</p> <p>The first thing that we are going to do this evening is to review the charge of the commission, which is to review equity, adequacy, affordability and transparency. All of those are critical issues when it comes to education funding and financing strategies. One of the things about key concepts is that they are not always consistent with one another. So understanding and thinking carefully about what we mean by equity and uniformity, what we mean by adequacy, affordability and transparency seem to be a critical place to begin our discussions, to think through the considerations around them and to make sure that we have the issues on the table so that the Commission going forward, and the contractor conducting the study will know what data will be required to get at those issues in a wholesome and robust way and what the issues are going to be around the collection and analysis of that data. The discussion tonight is going to be fairly technical. It is going to be fairly nitty gritty, but I want to make sure that we are thinking about what those issues are and that the Commissioners themselves have the opportunity to voice their views on some of these public concerns and that members of the public who have joined us as well.</p> <p>Let's begin about talking about what we mean by equity and uniformity. In the legislation, uniformity between DC public schools and public charter schools is specified. It takes into account that services may be provided by DC government as well as actual dollars, but a provision suggests that DCPS schools and public charter schools should receive equal funding. Under the formula, DC offers equitable payment to DC public schools and to public charter schools that is based on a per pupil funding formula. That's called the Uniform Per Student Funding Formula (UPSFF) and that formula was originally established in 1996 and has been updated periodically in response to new information and new thinking on adequacy and equity as well as changes in the cost of living. Right now the UPSFF is administered in a way that gives schools a certain amount of dollars per student and then adjustments are made for children at different grade levels, for students with disabilities and for students serving a high number of students with special needs or who lack English language skills. Right now there is no provision for students who do not meet or who lack basic literacy skills and need help to meet minimum literacy requirements—so that is an issue we will want to put on the table in terms of how we define equity in the funding formula. The adjustments that the formula makes are based on an assessment of services in terms of adequacy. We'll get to adequacy in a minute. The notion is that beginning in Fiscal Year 2012, services provided by DC government to schools will be provided on an equitable basis to DCPS and charter schools. There are services provided by DC government and agencies to the education system and our schools in DC and we will probably want to take a look on the equity of those decisions and how those decisions are made to allocate resources between DCPS and public charter schools.</p> <p>As we get started, I want to engage the Commissioners on these issues around equity. What are the critical issues that we will need to address with regard to equity in DC concerning students with special needs, from different neighborhoods, with respect to services provided in different schools?</p>

<i>Williams:</i>	My name is Jeremy Williams, Public Charter School Board. I think there are a couple of different issues that you can give some weight to. One that I've been into is the facilities issue. They say that traditional schools get on average \$6,000 of funding and charter schools get about \$2,800. I definitely would like to see us spend a considerable amount of time fleshing that out. Some of the studies performed were done by non-governmental entities. I would definitely like to see governmental entities spend some time here to see if there is any room to close that gap.
<i>Hayes:</i>	As we think about the issues of facilities, there are two aspects to take into account. One is the capital investment in facilities. The other is the operational aspect of maintaining facilities. Both of those are important, but they are funded differently, so we will want to make sure that we are in agreement about what is the domain of our analysis here so that we don't talk in an undifferentiated way about facilities.
<i>Salcido:</i>	My name is Irasema Salcido, Cesar Chavez Public Charter School. Those two areas are huge for us. If we need capital—this is insufficient and it is my understanding that the traditional schools get money from capital investment that charter schools do not receive. That has to come out from us and the maintenance of facilities is a huge expense. In addition to not having the capital improvement money for facilities, it means many of us cannot have the gyms and the things that schools should have. The other is the city services that are public resources that many times are not available for the charter schools—we have to pay for the nurses ourselves. Funding needs to be equitably available to charter schools.
<i>Kokkoros:</i>	My name is Allison Kokkoros, Carlos Rosario Public Charter School. I would just like to second what Jeremy has said. This is an issue that has a huge impact on charter schools and there are multiple aspects to it. I also think an issue that is a priority to address is the different ways that the enrollment reports are handled—so if a charter school does not meet its reporting requirements, it is docked. That system is not in place with public schools. I think that is a clear issue that needs to be addressed.
<i>Fejeran:</i>	My name is Celine Fejeran, Office of the Deputy Mayor for Education. The question I have is clarifying language. In common discussions, we use equity and equal interchangeably. I don't know if the Commissioners want to move forward in using those equally. We might want to make sure that we're operating in the same framework in using those two words.
<i>Hayes:</i>	"Equity" and "uniformity" are often used interchangeably. I'm not sure if that is right or wrong, but I think that the Commission should have a common idea in mind about that. I'd like us to come back to this idea.
<i>Comey:</i>	My name is Jennifer Comey, Urban Institute. The point of equity might have something to do with the neighborhoods. My question is that are we thinking of this as LEAs [ <i>local education agencies</i> ]? Or are we thinking about them as Ward 5 versus Ward 7 schools? I think that is an important issue to address.
<i>Raymond:</i>	My name is Lisa Raymond, DC Council Committee of the Whole. I'd like to go back to Celine's point. We've had a lot of conversations with the Council about whether we should be providing additional funding for students that are struggling, whether it is socioeconomic challenges, whether they require wraparound supports and challenges. Students that are struggling and behind require a lot of intensive support, so I think we should be considering whether these are issues whether these students need additional funding—it's not equal, but it's about equity.
<i>Yilmaz:</i>	My name is Yesim Yilmaz, Office of the Chief Financial Officer. I think one thing that will help clear up my thinking about this issue is, are we talking about functions that are in existing formulas, or other functions that are not included in the formula? Resource officers from MPD [ <i>Metropolitan</i>

	<i>Police Department]</i> is one example. Going back to the idea of equity, are we thinking about traditional functions, or public health and safety funding where the distribution of resources is usually done by need? It would help my thinking if we define these areas.
<i>Hayes:</i>	I think that the issue of uniformity, equity and equality is important. It may be good to have the Commission weigh in on this before moving on. I think Lisa put it very nicely—is equity based on need or the uniform distribution of resources? I think we need to think about that.
<i>Salcido:</i>	It seems like we might have to have more than one definition. You can shoot for equality no matter what. You should receive equal funding for resources in any school. Equity, it seems to me, some kids are three or four years behind, but there has to be some differences. Equality of some resources for some kids, but there are some kids that the school needs to take care of their needs too—that is a dilemma for me.
<i>Hayes:</i>	This is a very complicated issue. It is an issue that different states and localities have dealt with in different ways. In some places, the education funding laws are clear—that some funds are distributed equally on a uniform basis. That is, based on a formula that may take into account special needs, but against these special needs there is this basic weighting. Others take a more judgmental approach where some students start off behind others and they try to figure out what it takes to provide an equitable education. This is a case where I feel we need some agreement on how we are going to look at it. While we can still build into our assessment of the per-student funding formula, the extent to which it meets criteria that we lay out, we have to be clear about the criteria by which we are going to judge it.
<i>Mahaley:</i>	I'm struggling a little with the conversation because it feels largely DCPS versus charter, what is equitable between the two. Whereas, from my perspective, I'm thinking about what's equitable between taxpayers and homeowners. So things that are coming to mind to me are things like, if facilities are made available to charter schools, is it equitable for children from those communities to be enrolled in those schools. Two other things—so special education and transportation and special education tuition for students with the highest performing needs. Is this an equitable use of resources? So I'm just struggling with this conversation that pits our two public sectors against one another.
<i>Howard:</i>	I'm Timothea Howard, CentroNia. I'm not struggling, but I'm brainstorming in my own mind on a couple of points. This is just my view. I'm not buying the struggle between public schools and public charter schools. It seems to me as a teacher and an educator that we have a broad community of learners. Part of what we are charged with is how best to serve all those learners and not to think about them as where they sit during the day, but what are the goals that are being met and that need to be met at the end of the day, and what kind of dollars do we need to address those. In our situation, we have both children from public schools, feeder schools and charter schools. I have to think of all the students that I'm thinking about as a community of learners and how we get the dollars to make this work. How do we make every student an achiever and how do we get the families involved in that process? There are other layers in this process. I think we need to think of another layer as the community of learners that we have. I think that moves the conversation a little bit differently.
<i>Partoyan:</i>	As a facilitator, I want to get equity, transparency, equality and adequacy all in front of us tonight. Let's make sure we give ourselves time to give each of these an initial touch tonight.
<i>Hayes:</i>	I'd just like to reinforce what Timothea said and hope that we think of this not as one set of schools versus another, but as how to meet the needs of different children across all communities in all parts of the city.  The second major concern in education funding is adequacy. Adequacy is a term that we often use to

	<p>define what it takes for children to meet the standards on core outcomes. The District of Columbia has a very clear set of standards now. We are measuring children against those standards on an annual basis. Presumably, our foundation formula is set so that it takes account of adequacy. It has not been analyzed in that way in a long time. I think one of the questions is the extent to which adequacy as well as equity or uniformity is an important consideration for this Commission in the way that we think about the distribution of resources to children across this city. I want to make sure that we are clear on where we stand on that. We need to determine what is required to help students address and meet core standards based on where they start and what they need to get there. As Timothea said quite elegantly, we have a pool of learners that is very diverse in our city, as with most cities. The question that needs to be addressed in terms of adequacy is, Does the current formula take account of adequacy in terms of distribution and to what extent is that an issue that this Commission is going to wrap its arms around?</p>
<i>Partoian:</i>	<p>I had the opportunity to speak to each of the Commissioners before this evening to get a sense of what they could bring to the table. In several of these conversations, on the issue of adequacy, a couple of you raised this issue of what “adequate” is. just want to bring that into the room because it is something the Commission may want to speak to. Given what I’ve said, given what Cheri has said, do you have issues that you would like to raise here tonight?</p>
<i>Raymond:</i>	<p>One issue that has come up a lot with our education partners is, Are we spending enough time in school? Many charter schools dedicate resources to a longer day and school year. It is something DCPS is interested in exploring. It is very expensive. We are talking about additional hours, that’s one cost. But is it enough?</p>
<i>Salcido:</i>	<p>This is a very difficult figure to figure out. You have to think about teacher salaries. What would it take for students to make the high standards? An extended day? Better teachers? How do you come up with what is adequate? There are so many pieces. Do we agree there’s an adequate amount that would allow any school to have adequate funding for the needs of its students? It is a very important topic, but given the task we have, I don’t know how to get what we need to make a recommendation.</p>
<i>Hayes:</i>	<p>I think it is a very big issue. In a number of states over the last years, they have looked at education funding formulas in terms of adequacy, not just in terms of equity and uniformity. One of the reasons is so all children have opportunities to learn. All children have the supports and services to be effective learners. In New Jersey, it became the root of strong investments in early learning and afterschool programs.</p> <p>This Commission can determine what is within the domain. What are you going to look at and how are you going to look at it? If you are going to rule it out, you need to be clear why you are ruling it out. You need to look hard at what adequacy is. What are the components of adequacy as they apply to our children here in DC?</p>
<i>Yilmaz:</i>	<p>I agree with you. How much should we be spending is a difficult question, but to my mind, there’s another side. How much are we are spending? I think we have far more experience with charter schools compared to the last time we worked on this formula. I think one thing we can do that is worthwhile is to see how much we are spending and start from there.</p>
<i>Lazere:</i>	<p>I understand that there is a significant body of literature in other states that we can learn from. We can better understand what the ingredients of an adequate education are. It can be quantified and dollars put behind it. The discussion of adequacy follows our discussion of equity. What it takes to educate a child depends upon his circumstances. A child that is an English language learner or a child with special needs or a child from a poor family can be part of the formula to make sure it’s</p>

	uniform between charter schools but also that it's adequate.
<i>Partoyan:</i>	A frame I think is useful for this work is the concept of rather than doing more with less, how we do what's right with what we have? As we think about extended time or using other resources, I think we need to think about this.
<i>Hayes:</i>	<p>Without further comments, we will move on to the discussion of affordability. This is one that everyone understands. It is the ability to pay for what you want to buy. If you have the dollars it is affordable, and if you don't, it's not.</p> <p>Within the DC, affordability is multi-tiered and multi-layered. As Yesim said, it is thinking about what it is we are spending. Who bears the burden of paying? Whether it is the supports and services? There's also the issue of projecting the ability of the District given its budget today to be able to meet the judgments that are made about what we need to pay for and the money we need for schools and charter schools. It's important to think about affordability.</p> <p>Some of you noted that affordability should drive the conversation of equity and adequacy. Others said it should follow. We should look at what is equitable and adequate and then think about what is affordable. I want to put this issue on the table. And it is important for us to understand how the Commission looks at affordability.</p>
<i>Constantino:</i>	My name is Justin Constantino, Mayor's Budget Office. I think it's important that we add into the discussion is that we need a timeline. In DC, we budget very differently than other states. Not only do we budget for the current year, but also for the next four years. There is a phasing for affordability. It's not all or nothing. We have phases we can consider.
<i>Raymond:</i>	I am speaking as an individual. I think we should define the need first. We learned from our investments in early education that sometimes additional funding up front can save us money down the road. I appreciate Justin's comment that we do not need to spend everything all at once. We need to think long term. If we invest in the right things, we will be saving money down the road.
<i>Yilmaz:</i>	I think the revenue outlook is very different than where it was in 2006. Also the demographics are very different. There are more services available at a younger age—that adds to the expense. And we also have a shift in the household structure. We are seeing an increase in the population. These two things need to frame the discussion. Whatever budgetary actions, we need to balance our budget for the four-year period.
<i>Comey:</i>	Since I don't come from a budgeting office, I can be more pie in the sky. I would like to caution the Commission that we want whatever we recommend to stand for a while. These will be different. They may be very different in four or five years, so I don't want to limit our thinking to just what is needed now.
<i>Lazere:</i>	I would remind us all that it's not from this Commission's recommendation to Mayor Gray's lips. The Mayor will have to incorporate our recommendations into the budget in the spring. I would like to hope that we have a sense of what is the right level of funding, and let the Mayor make the decisions and balance with other priorities.
<i>Hayes:</i>	<p>I think this is extremely helpful. What I heard is that we need to think about the issues around equity and adequacy, and then think about what is affordable in terms of what is practical and sensible in the long-term.</p> <p>I want to now turn to the issue of transparency. This is an issue that arises in many jurisdictions. While there is a formula and there are statutes, does everyone understand it? Do they understand it</p>

	correctly? This includes policymakers and people in schools and parents and the public as a whole. How well do you believe the UPSFF is understood in the District? What can we do to make it more accessible and transparent?
<i>Ruda:</i>	Lisa Ruda, DCPS. We want transparency not only in terms the inputs from any LEA, but also on the outputs. The CFO has a difficult task of preparing a budget for 90 plus agencies. It does nothing for a parent of a school who wants to know about the budget for the particular school. Our portion of the budget book does not do it justice. We want people to know what goes in and what comes out and where it is going. This is a priority for the Chancellor and DCPS.
<i>Salcido:</i>	Equally important is timing. When is the information is available? I know that in charter schools, we do our planning way in advance. There needs to be a commitment that once the information from the Mayor's office is determined, it is made available as soon as possible. Otherwise, there is a question of what you can do.
<i>Hayes:</i>	Let me ask the question in a different way. We all value transparency. One of the questions is, What do we really understand to be the issues in transparency? Is it that people don't understand how the budgets get made? The budgets themselves? Input into it? I'm not sure I understand the answer to those issues. If they are all important concerns, then we need to undertake a body of investigations to get at and understand them, to think creatively and thoughtfully about solutions. To the extent that transparency is part of the Commission's mandate, how do we want to get at those questions?
<i>Constantino:</i>	One of the most important things is figuring out a way to let the public know how they can have input. I think a lot of people don't know who they can talk to or reach out to. An example is, the Mayor held 15 town halls last year on his budget and plenty of people didn't know they could have given input. People didn't feel like they had a say. We need to figure out how to let people know that this Commission is here and that it's an opportunity to have your voice heard.
<i>Fejerman:</i>	In addition to whatever venues are available, we want to be mindful of what is the best way for the public to give their feedback. Yes, we have great opportunities, but is it really the most conducive way for the public to give the feedback?
<i>Kokkoros:</i>	Touching on how we effectively get to the residents and get feedback and help them understand when they can offer the feedback, I think we should use schools. They are the heart of the community and an ideal venue for engaging communities about education funding.
<i>Yilmaz:</i>	To me, there are two separate issues. The funding formula determines how much money goes to a school. How that money gets spent is based on the school budgets. When we are talking about transparency, I am thinking in the context of how much money is put to meet the goals. The transparency of school budgets is not a part of this and we should keep the two things separate.  The funding formula does not say how a school should spend the money. Besides special education that was added last year, there is nothing to say how something should or shouldn't be spent. It is not worth thinking about it this way. What should the funding level be? It's an entirely different question.
<i>Raymond:</i>	In a very basic sense, transparency needs to be about how our entire city understands how we fund our schools. And the current law requires equity between public charter schools and public schools. A lot of people don't know that it exists. Whatever we can do to help people understand, we need to do. Even if people don't have children, these are their tax dollars and these are important investments we are making.
<i>Comey:</i>	I find myself thinking about transparency beyond the UPSFF. For me is also about this long list of

	in-kind services. There's more than just uniform funding. It will be interesting to see it play out.
<i>Partoyan:</i>	This gets to scope of what the Commission takes within its charge. There may be things that need to be dealt with, but that aren't within the scope of this Commission.
<i>Lazere:</i>	I think that while transparency of the formula is important, it's not important to most people. It needs to be clear for those who are digging in. We need to make sure a parent can understand how their school gets funded. And for a parent to understand why one school is getting one level of funding as opposed to another. The ultimate responsibility falls on each school and charter school to explain how the money is being spent.
<i>Hayes:</i>	I want to turn this over to Matthew Joseph now. He has begun to look at the kinds of the data we need to address these issues and how easy it will be to get this data. I think it would be useful for him to share this information so we can all be on the same page.
<i>Joseph:</i>	Thank you. You have a document in your packet, I welcome any feedback you may have in terms of what may be missing.  We were charged with two tasks: 1. To identify any major data needs. 2. To do a preliminary analysis of how hard the data would be to get in form that the Commission could use.  What you see broken out in the four categories is the initial list of the major data elements. In the far right column is assessment based on conversations with the relevant agencies of how hard it will be to get the relevant information, how much time will it take for you to get what you need. What I did was make a determination, based on the conversations I had with different agencies and other source, about whether it is going to be easy or difficult to get the data.  Let's start with equity. Are there major issues we are missing?
<i>Yilmaz:</i>	This is very well prepared, but what would be helpful is what is currently in the funding formula and what is coming in from a different way. That information would be very helpful to me.
<i>Kokkoros:</i>	We need to be defining equity more broadly, not just in terms of funding. I am thinking about equity in terms of process. I am thinking about the disbursements of federal entitlements in charter schools and the delay in being reimbursed. This is more of a process equity piece.
<i>Yilmaz:</i>	On process equity, it would be important to understand the difference between charters and DCPS. What are the charges charters do not have to abide with and what are the charges DCPS does not have to abide with? I think this would be very helpful.
<i>Partoyan:</i>	Comments from the public can be sent to Matthew directly.
<i>Joseph:</i>	Please send any comments by Thursday. If comments come in later, someone else will be able to handle it.  I would like to shift to accessibility and usability. If there are studies and data we can analyze, that will be very helpful. There's so much to look at in such little time. If someone on the Commission has expertise, this is where you can share it with us. You can see that there are some areas where we feel like it is a moderately easy process. There are a few areas where the analysis will be quite complicated.
<i>Partoyan:</i>	It is your responsibility as Commissioners to bring forward any research or knowledge you have to

	this team. Now I will let Yesim share some information with us.
<i>Yilmaz:</i>	A lot of data has to do with the budgets and when the legislation passed. After this meeting, I am happy to share data. It doesn't speak to all the pieces, but it will help.
<i>Partoyan:</i>	We are fortunate to have Yesim from the CFO's office, who brings in the intelligence of the work done by herself and Mary Levy.
<i>Member of the public:</i>	Will that be on the website?
<i>Partoyan:</i>	The Commission will need to determine that. It is still in draft form.
<i>Member of the public:</i>	When will we have time for public comment? A lot of what is being said here isn't true.
<i>Partoyan:</i>	Public comments will be in five minutes, so if you aren't signed up to comment please do so.
<i>Mahaley:</i>	We need to make a revision on the document for item 19: We need to add the Office of the State Superintendent. A lot of what we do is distribute federal funding.
<i>Joseph:</i>	<p>Please turn over to the back part for the other three issues. They aren't broken out quite as much. Do you see enough information under adequacy, for example?</p> <p>The process of determining the staffing levels and then calculating it would be quite complicated. Similarly, capital costs. Those are both in the difficult category. Under affordability, the issues are very complex, but the CFO could run a lot of the analyses, so it would not be quite as difficult. Under transparency, you see it would be under the difficult category. What is it that taxpayers and policymakers would want to have? The notion is that some kind of qualitative piece. This isn't something an agency could hand to us. The Commission would need investigation.</p>
<i>Comey:</i>	Under transparency, I am not suggesting it would be easy, but instead of focus groups could we have a place for public comment and see if that would get you good data?
<i>Mahaley:</i>	I have a comment related to B1 under Adequacy. I hope that in terms of meeting DC standards, we look at schools that are successfully meeting the standards to determine the cost. And look at the resources outside of the per pupil funding and if we can monetize the value of their additional support. This would give us a better idea of what it takes to meet students' needs.
<i>Yilmaz:</i>	Not just in the sense that we do for annual budgeting purposes, but for long-term projections. Some demographic data for would be helpful for equity and affordability.
<i>Joseph:</i>	Thank you very much and thank you for providing feedback.
<p><b>Opportunity for Public Comments</b>  <i>Elizabeth Partoyan, Vice President, Collaborative Communications Group</i></p>	
<i>Partoyan:</i>	<p>Commissioners, if you have follow up thoughts, please send those to Matthew. If you have additional needs, please send them to Matthew by 12:00 noon on Thursday.</p> <p>I want to take this time to transition to the public comment portion of the meeting. I hope you have found the discussion informative and look forward to your responses. Given the time we have, each person who speaks will have three minutes. Brooke Barrett from the Collaborative Communications</p>

	<p>Group staff will keep your time.</p> <p>The Commission will be listening to your comments and questions. This is not time for them to have a dialogue. They are just kicking off their work.</p> <p>To the extent possible, we will make sure the answers to the question are posted on the website and the Facebook page. We will also be sure the minutes are posted moving forward.</p>
<i>Ramona Edelin:</i>	<p>Thank you for opening the meetings. It's very important. I am the executive director of the DC Association of Chartered Public Schools. Some of you haven't been a part of the process for the past four or five years. This Commission may not be a direct result, but it certainly is strongly related to the time when charter leaders were coming together in response to the major changes to the facilities funding for public schools.</p> <p>We have a unanimity statement that was strongly condemning the actions that were occurring with the facilities funding and demanding that there be a closer look at education in DCPS and charter funding. There is an explicit desire to see the comparison made, not only within the formula, but all the things outside the formula. We know that this isn't the whole universe. But it is the context and it is an explicit need and a moral obligation. Many of us come from a long history of separate and unequal. We do not intend for our city to continue this.</p>
<i>Robert Cane:</i>	<p>I am the executive director of FOCUS, Friends of Choice in Urban Schools. It's been around for 15 years. I have been trying to get the government to play fair with charter school funding for 13 years. We are experts on the disparities in funding, many of them illegal, and we are glad you are taking a look.</p> <p>We have a great deal of data. I will be sending a legal analysis of the operating funding, as well as graphs of inequities in funding. I wanted to thank all of the non-governmental members for being on this independent Commission. There are so many government members on this Commission, and you will have to be vigilant.</p> <p>I wanted to talk about Yesim's report. The CFO has not been willing to release it. I think this Commission should require that the CFO release not just the data from this report, but also the report's conclusion. If the CFO is going to be on the Commission, the CFO should be transparent. Whatever is released should be on the website.</p> <p>I know I sound a bit aggressive, but we need to make sure that the facts out. I want to point out that when it comes to operating funding, there is a law and it requires all operating funding goes through the UPSFF. There are questions of equity and it is the law and DCPS has been evading the law.</p>
<i>Alicia Rucker:</i>	<p>I am a professional parent of 6 children from ages 7 to 28. My oldest graduated from H.D. Woodson and went to Georgetown University. I don't understand this budget stuff. What I want to see is us as adults figure out how to level the playing field. Why is that when the enrollment comes around, and children are sent back to their neighborhood schools, why doesn't the money follow? How can some publicly funded charter schools have two adults in the classroom and yet DCPS struggles with one? I really want us to model the best model for our students. When will we have a talented and gifted program? Why do we settle for adequate? When will we duplicate the schools that excel? I wanted my child elevated to Phelps. The Chancellor needed approval from someone below her in the chain of command. I am not feeling that. I don't understand why our children are not challenged enough. Why are we labeling students as disruptive, when in fact, they are really bored?</p>

<b>Summary and Next Steps</b>	
<i>Partoyan:</i>	<p>Thank you very much for your input. As we have said, the work of the Commission must be informed by members of the public and respected advisors, as well as the knowledge and expertise of the Commission itself. The public engagement plan is being drafted with the following themes in mind: transparency, outreach, knowledge sharing and connecting—between the Commission and the community.</p> <p>If you did not have the opportunity to sign up for public comment, please use the comment cards to pose your questions or share input. Collaborative will also be sending out a post-meeting survey to all who provided their email addresses on the sign-in sheet. The goal of the survey is to seek feedback on the process and content of this evening’s meeting.</p> <p>As I said earlier, this meeting marks the beginning of the work of the DC Public Education Finance Reform Commission. Over the next few months, the Commission will convene at least monthly in open public meetings. The public will be notified as soon as the meeting dates and locations are set.</p>
<b>6:30 p.m.</b>	<p><b>Adjourn</b>  <i>Elizabeth Partoyan, Vice President, Collaborative Communications Group</i></p>
<i>Partoyan:</i>	<p>Members of the DC Public Education Finance Reform Commission, thank you for your thoughtful contributions to this important work. Members of the community, your presence here is greatly appreciated. Thank you for coming this evening.</p> <p>As I said at the beginning of the meeting and as is noted on the agenda, Commissioners and staff from Collaborative Communications Group and The Finance Project will remain until 7:00 p.m. to listen to further comments or questions from the public.</p> <p>We are now adjourned.</p>