

DRAFT Report of the Joint Task Force on Basic Education Finance

REVIEW VERSION

This report is currently being reviewed by Task Force members. A final, revised version will be available by the end of the month.

December 15, 2008

Washington State Joint Task Force on Basic Education Finance
<http://www.leg.wa.gov/Joint/Committees/BEF/>

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BACKGROUND

The 2007 Washington State Legislature created the Joint Task Force on Basic Education Finance (Task Force) to review the definition of basic education and develop options for a new funding structure. The Task Force was directed to build on the work of Washington Learns, a 2005-06 Governor-led effort that involved a review of Washington's early learning, K-12, and higher education systems. Exhibit 1 outlines the specific legislative direction provided to the Task Force.

The Task Force is composed of 14 members: five, including the Chair, appointed by the Governor; eight legislators; and the Superintendent of Public Instruction. Exhibit 2 lists Task Force members.

In 2007 and 2008, the Task Force met 17 times for a total of 25 days (see Exhibit 3). Early meetings included staff presentations regarding basic education finance history, current funding formulas, and research evidence; public hearings; presentations from nationally known experts; and initial Task Force discussions. Funding proposals were first presented to Task Force members in June 2008. Formal Task Force proposals for preliminary decision-making were distributed in October and November 2008.

This document summarizes the recommendations of the Task Force following the December 8-9, 2008, meeting. Draft legislative language is appended.

Exhibit 1

SB 5627 Assignments for the Joint Task Force on Basic Education Finance

- ✓ “Review the definition of basic education and all current basic education funding formulas.”
- ✓ “Develop options for a new funding structure and all necessary formulas.”
- ✓ “Propose a new definition of basic education that is realigned with the new expectations of the state's education system.”
- ✓ “[R]eview and build upon the following:
 - reports related to K–12 finance produced at the request of or as a result of the Washington learns study, including reports completed for or by the K–12 advisory committee;
 - high-quality studies that are available; and
 - research and evaluation of the cost-benefits of various K–12 programs and services developed by the institute.”
- ✓ The recommended “funding structure should reflect the most effective instructional strategies and service delivery models and be based on research-proven education programs and activities with demonstrated cost benefits.”
- ✓ Consider the following issues:
 - (a) Professional development for all staff;
 - (b) Whether the compensation system for instructional staff shall include pay for performance, knowledge, and skills elements; regional cost-of-living elements; elements to recognize assignments that are difficult; recognition for the professional teaching level certificate in the salary allocation model; and a plan to implement the pay structure;
 - (c) Voluntary all-day kindergarten;
 - (d) Optimum class size, including different class sizes based on grade level and ways to reduce class size;
 - (e) Focused instructional support for students and schools;
 - (f) Extended school day and school year options;
 - (g) Health and safety requirements; and
 - (h) Staffing ratios and other components needed to support career and technical education programs*
- ✓ “The recommendations should provide maximum transparency of the state's educational funding system in order to better help parents, citizens, and school personnel in Washington understand how their school system is funded” and “be linked to accountability for student outcomes and performance.”
- ✓ “In light of recent court decisions, the task force shall specifically consider issues related to equalizing school employee salary allocations among school districts*”
- ✓ Report to the legislature by December 1, 2008*

**Added in 2008 legislation*

Exhibit 2

Washington State Basic Education Finance Joint Task Force
Dan Grimm, Chair
Representative Glenn Anderson
Terry Bergeson, Superintendent of Public Instruction
Senator Lisa Brown
Cheryl Chow, Board President, Seattle School District
Laurie Dolan, Governor's Office
Senator Mike Hewitt
Senator Janea Holmquist
Representative Ross Hunter
Superintendent Bette Hyde, Bremerton School District
Superintendent Jim Kowalkowski, Davenport School District
Representative Skip Priest
Representative Pat Sullivan
Senator Rodney Tom
<u>Alternates:</u>
Representative Kathy Haigh
Representative Fred Jarrett

Exhibit 3

Washington State Basic Education Finance Joint Task Force Meeting Days
September 10, 2007
October 22, 2007
November 19-20, 2007
December 13, 2007
January 11, 2008
March 24, 2008
April 14, 2008
May 6, 2008
June 9-10, 2008
July 8, 2008
August 6, 2008
September 15-16, 2008
October 20-21, 2008
November 10-11, 2008
November 17-18, 2008
November 24-25, 2008
December 8-9, 2008

KEY DRAFT RECOMMENDATIONS

- ✓ Define basic education as the opportunity for students to meet proposed new high school graduation requirements.
- ✓ Basic education includes supplemental instructional opportunities for disadvantaged students, including at-risk pre-school children.
- ✓ Establish a new state budgeting system with allocations based on class size and instructional hours in model elementary, middle, and high schools, with flexibility for local school district spending.
- ✓ Increase state allocations to school districts based on reduced class size assumptions, especially in grades K through 3, more instructional time, and higher allocations for school employee salaries.
- ✓ Reform the compensation system:
 - Determine salary increases and continuing contracts for teachers based on performance factors (career ladder).
 - Set school employee salary allocations benchmarked by comparable wages in regional non-school employee labor markets.
 - Eliminate state allocations for teacher salary increases based on additional educational credits and degrees.
 - Create a new performance-based teacher certification system supported by increased resources for professional development and mentoring.
- ✓ Implement a common state-funded fiscal accountability and budgeting system for all school districts and enhance the statewide student information system.
- ✓ Implement the State Board of Education's proposed accountability system principles.

1. BASIC EDUCATION DEFINITION

1.A. Task Force Recommendation: Implement the program of basic education instruction and related funding formulas in the proposal from Representatives Ross Hunter, Pat Sullivan, Fred Jarrett, Glenn Anderson, Skip Priest, and Senator Rodney Tom (the “legislators’ proposal”).

Separately, the Task Force decided to add early learning for at-risk children in the definition of basic education.

Key Details: A basic education is an evolving program of instruction that must provide students with the opportunity to become responsible and respectful global citizens, to contribute to their economic well-being and that of their families and communities, to explore and understand different perspectives, and to enjoy productive and satisfying lives. Students must have the opportunity to learn the skills to:

- (i) Read with comprehensive, write effectively, and communicate successfully in a variety of ways and settings and with a variety of audiences;
- (ii) Know and apply the core concepts and principles of mathematics; social, physical, and life sciences; civics and history, including different cultures and participation in representative government; geography; arts; and health and fitness;
- (iii) Think analytically, logically, and creatively, and to integrate different experiences and knowledge to form reasoned judgments and solve problems; and
- (iv) Understand the importance of work and finance and how performance, effort, and decisions directly affect future career and educational opportunities.

In order to have the opportunity to learn the basic education skills and knowledge, students must have the opportunity to complete graduation requirements of 24 credits, with course distribution requirements adopted by the State Board of Education that are intended to prepare students for postsecondary education, gainful employment, lifelong learning, and citizenship. Any change to graduation requirements proposed by the State Board that would have a fiscal impact must be approved by the Legislature before taking effect.

In order to provide this opportunity to students, the state must make available resources to the various school districts to enable them to provide the following program of education. Districts may find it appropriate to modify the model program to fit the unique circumstances of their population.

Instruction must be of sufficient quality to provide the students with the opportunity to learn the basic education skills and knowledge in the amount of instructional time provided by the model program.

In addition to the resources necessary to fund the model program, the state must provide resources that enable districts to provide supplemental instruction to underachieving students, transitional

bilingual instruction for English Language Learners, and special education services for students with disabilities so as to provide the students with a reasonable opportunity to meet the graduation requirements.

In order to take advantage of the program of basic education, some at-risk students will need early learning instructional programs.

2. INSTRUCTIONAL PROGRAM OF BASIC EDUCATION

2.A. Task Force Recommendation: Adopt the legislators' proposal as amended by the Task Force.

Key Details: The instructional program of basic education should provide students with opportunity to take classes that meet the proposed Core 24 graduation requirements. These requirements assume that high school students take at least 24 classes in four years, which requires at least six periods per day. The program also includes adequate time for remediation should a student need additional help to meet graduation requirements. State funding allocations for students who need supplemental instruction are primarily based on measures of poverty (eligibility for free and reduced priced meals). Basic education also includes supplemental instruction for students who do not speak English as their primary language, special education, and early learning instruction for at-risk children. Draft legislation for this section is on page A-2.

Summary of proposed allocations:

- Instructional program is based on the Core 24 graduation requirements proposed by the State Board of Education (SBE).
- Minimum instructional time (see next page for number of instructional days):
 - Middle school (grades 7-8) and high school (grades 9-12): 1,080 hours/year (six 60-minute periods a day of instruction).
 - Elementary school (grades 1-6): 1,000 hours/year.
 - Kindergarten: 1,000 hours/year (for voluntary full-day kindergarten) or 450 hours/year (for half-day kindergarten).
 - Institutions and residential programs: 1,320 hours/year.
 - 1 hour for teacher planning/professional development.
 - Hours/year apply to each grade level (not averaged across grade levels).
 - In recognition of the additional annual hours of instructional time, allocations to school districts for teacher full-time equivalent units shall be adjusted to maintain established staff workloads.
 - Model schools are designed for allocation purposes with elementary schools as grades K-6 and middle school as grades 7-8. Districts can design their schools' grade configurations per local preference. The allocation model shall be adjusted to accommodate either 1,000 or 1,080 instructional hours per year to sixth grade students, depending on their grade configurations in middle school. OSPI shall implement rules to allocate the appropriate resources to each school district.
- Supplemental instruction for underachieving students.
- Supplemental instruction to learn in English for English language learners (ELL students).
- Special education for students with disabilities.
- Instruction for students in institutions and residential programs.
- Early learning instructional programs for at-risk children.

- 180 days. Unless the district receives a waiver approved by the State Board of Education as provided below, each school district's basic education instructional program shall consist of a minimum of 180 instructional school days per school year in all grades offered by the district, and a minimum of 180 half-days or equivalent in kindergarten, to be increased to a minimum of 180 instructional school days according to the phase-in schedule.
The State Board of Education may authorize waivers from the minimum 180-day instructional school year as provided in this section:
 - (a) A school district may apply for a waiver of the minimum instructional school year if necessary to provide a very specialized instructional program. The district's application must describe the educational advantages of offering the program for fewer than 180 days and demonstrate how the minimum annual instructional hour requirement for students will be maintained;
 - (b) The total number of 180-day waivers authorized statewide may not impact more than two percent of the overall student population; and
 - (c) 180-day waivers shall not be granted for purposes of professional development or teacher/parent-guardian conferences.

3. CORE ALLOCATIONS FOR THE BASIC EDUCATION INSTRUCTIONAL PROGRAM

Staffing Levels for the Core Instructional Program

3.A. Task Force Recommendation: Adopt the legislators' proposal as amended by the Task Force.

Key Details: The proposed finance model builds a program of Basic Education from the school level starting with four model schools: primary (grades K-3), elementary (grades 4-6), middle (grades 7-8), and high (grades 9-12). Class size and other staffing recommendations for allocations are as follows. Draft legislation for this section begins on page A-2.

The distribution formula is viewed as an optimal, long-term goal. The technicalities of implementing the degree of change required by this new formula will necessitate a staggered and well-planned strategy over the next three biennia at a minimum. Additionally, there is recognition that the global demands on our students and our educational system will not remain at a standstill during this time and that the formula proposed today may need to be further modified throughout the implementation timeline to reflect those changes. It is our intent that this recommendation be viewed not as a rigid perfected proposal but as a template that will continue to be modified and adapted by the legislature to continue to reflect the change needs of the educational system.

Core teachers: School districts have flexibility to use allocated funds to hire a combination of classroom teachers and instructional aides, for example, to provide instruction and services, even though the allocation model is based on “teachers.” Because teacher allocations will be calculated using the Salary Allocation Model (which includes Learning Improvement Days for professional development), the allocations presume funding for professional development for instructional aides.

- Elementary schools, grades 4-6: Class size of 25.
- Elementary schools, grades K-3: Class size of 15.
- High and middle schools: Class size of 25 (average across the school).
- Career and technical education (CTE) Exploratory, laboratory science, and Advanced Placement (AP) and International Baccalaureate (IB) courses: staffing ratio 19:1. Assumptions: 10 percent of all course offerings; 7-12 grade span for CTE, 9-12 grade span for AP, IB, and lab sciences; 6 percent non-employee related costs (NERC) enhancement.
- CTE Preparatory programs: staffing ratio 16:1. Assumptions: lead to industry certification, apprenticeship, or postsecondary placement; 10 percent of all course offerings; 9-12 grade span; 10 percent NERC enhancement.
- Skill Center Preparatory programs: staffing ratio 16:1. Assumptions: lead to industry certification, apprenticeship, or postsecondary placement; 2 percent of 9-12 population growing to 3.5 percent with new skill centers; 11-12 grade span; 12 percent NERC enhancement; administration, classified, grounds, maintenance, and other enhancements at the same level of prototype high schools.

- Consider basing student enrollment drivers on a three-year rolling average.
- Class size adjustments for schools with more than 50 percent of students eligible for free and reduced price meals with an additional adjustment factor to correct for lower reporting rates for eligibility for free and reduced priced meals in middle and high schools.

Educational Staff Associates

- Per prototype school, based on a 400 student elementary (K-6) school; a 432 student middle (7-8) school; and a 600 student high (9-12) school.
- Teacher-librarians, a function that includes information literacy, technology, and media to support school library media programs: 1
- Nurses and social workers: 1
- Guidance counselors/parent outreach: 1.5
- Professional development coordinator (instructional coach): .75
- Per prototype school, principals and other building-level administrators:
 - Elementary 1.2 FTE
 - Middle school 1.3 FTE
 - High school 1.8 FTE

Classified Staff: The Legislature needs to ensure that the combination of policies regarding classified staff (flexibility in staffing between teachers and classified; allocations for office, maintenance, and security staff; and a block-grant allocation for Central Office Administration) are sufficient for school districts to maintain classified staffing that reflects current levels. These levels are estimated below per prototype school, based on a 400 student elementary (K-6) school; a 432 student middle (7-8) school; and a 600 student high (9-12) school.

- Office support and non-instructional aides: 3
- Custodians and facilities maintenance: 4
- Student and staff safety: 1

Non-employee Related Costs

3.B. Task Force Recommendations: Allocate NERC funding by category and provide a staffing allocation for Central Office Administration, based on a percentage of the core allocation in the Basic Education Instructional Program, not including the categorical programs.

Key Details: Allocate NERC funding per student FTE by category as follows:

- Student technology: \$200
- Utilities: \$216
- Curriculum, textbooks, library materials, and instructional supplies: \$155
- Instructional professional development: \$103
- Other building-level costs including maintenance, custodial, and security: \$102
- Central office administration: \$310

Central Office: Due to significant differences in administrator and classified staffing needs of school districts depending on their size, the Task Force proposal is to provide a flat percentage allocation for staffing costs rather than identify discrete types of central office staff. However, it is the intent of the Task Force to ensure, with further analysis if necessary, that the percentage allocations are sufficient for school districts to maintain central office classified and certificated administrator staffing that reflects levels of central office staffing reported by districts in Programs 01, 31, 45, and 97.

Instruction for Underachieving Students

3.C. Task Force Recommendation: Provide funding for instruction for underachieving students as a categorical program allocation.

Funding allocations in the school models for underachieving students shall remain defined as the state's basic education responsibility and remain as a categorical program allocation replacing the Learning Assistance Program funding formula.

Instruction for English Language Learners

3.D. Task Force Recommendation: Provide funding for instruction for English language learners as a categorical program allocation.

Funding allocations in the school models for English language learners shall remain defined as the state's basic education responsibility and remain as a categorical program allocation replacing the Transitional Bilingual Instructional Program funding formula.

Special Education

3.E. Task Force Recommendation: Maintain current policy, assuming a broader base of basic education funding.

Key Details:

- Maintain the current multiplier (special education funding per student is the core allocation multiplied by .9309 for children in K-12, and multiplied by 1.15 for children ages 3-5, in special education).
- Continue the safety net process.

Early Learning

3.F. Task Force Recommendation: Add early learning for pre-school children at risk for not meeting state learning standards to the definition of basic education.

Key Details:

- Define "full funding" of Basic Education to include funding for a Basic Education preschool program for all eligible children aged 3 and 4 who choose voluntarily to enroll in the program.
- "Eligible children" means children in families at or below 130 percent of federal poverty level.
- The Basic Education preschool program is patterned after the federal Head Start preschool program, which requires:
 - Provision of comprehensive child development services, including health, nutrition, social/physical/emotional development, and parental involvement services;
 - Provision of education to develop literacy, numeracy, reasoning, problem-solving, and decision-making skills that are the foundation for school readiness;
 - A minimum of 448 hours per year;
 - Required home visits and parent conferences;
 - Maximum class size:
 - 20 for classes of predominantly 4-year olds and
 - 17 for classes of predominantly 3-year olds; and
 - Minimum staffing requirements:
 - At least 2 staff per classroom, one of whom must be a Preschool Teacher.
 - Preschool Teachers:
 - By 2011 must have AA in Early Childhood Education; and
 - By 2013 at least 50% statewide must have BA in Early Childhood Ed.
- The 2008 Legislature directed the Department of Early Learning to develop a proposal for implementing a statewide preschool program based on Head Start standards (2SHB 3168). DEL's recommendations (due December 1, 2009) can form the basis of the Basic Education preschool program.
- Funds are appropriated on a per-student basis (initially based on current Head Start level) to public schools to either provide preschool programs directly or contract with ESDs and/or community-based providers to serve eligible children.
 - Basic Education preschool programs (school, ESD, or community-based) must be approved by the Department of Early Learning.
 - Districts may not contract with, nor may any program be provided by or on the premises of, any religious or sectarian organization.
- A statewide kindergarten readiness assessment should provide accountability for Basic Education preschool.

- The legislature should examine service delivery, program, and funding options for providing preschool services for eligible children aged Birth to 3 and make recommendations on how and to what extent these should be considered part of a Basic Education.

Highly Capable Students

3.G. Task Force Recommendation: Provide enhanced funding for supplemental learning opportunities for highly capable students, as identified by school districts. There is not an entitlement to services for any individual child.

Key Details:

- There are multiple definitions of “highly capable,” from intellectual to academic to artistic. The research literature strongly supports using multiple measures to identify highly capable children.
- No single method should be proscribed for identifying highly capable children. Access to accelerated and enhanced instruction should not be construed as an individual entitlement for any particular child.
- Funding should be provided for the top 2 percent of each school district's population, identified as most highly capable by the district through use of multiple objective measures. The funding formula assumes (for prototypical schools):
 - Extended school day of 2 instructional hours per week in classes of 5 students.
 - Extended school year of 10 instructional hours per week for 4 weeks in classes of 5 students.
- Funds are for allocation purposes only; it is up to the school and district to determine how supplemental instructional opportunities will be offered.

4. SCHOOL EMPLOYEE COMPENSATION

Salary Allocation Model

4.A. Task Force Recommendation: Adopt the legislators' proposal as amended by the Task Force.

- Remove educational credits and degrees from the salary allocation model (SAM).
- Replace education columns on the SAM with a career ladder using the following categories: residency, professional, and master (NBPTS) certification.
- Adjust salaries to be competitive in regional labor markets.
- Teachers who serve as mentors or peer evaluators receive higher pay.
- Current teachers can remain in the current SAM or opt into the new system.

Draft legislation for this section is on page A-5. Exhibit 4 displays a sample salary schedule based on the principles outlined above.

Exhibit 4
Sample Salary Schedule

Professional Status	Experience (years)	Base Pay	Mentor Stipend	Peer Reviewer Stipend	Hard-to-Staff Supplement	School Performance Bonus	Regional Wage Adjustment
Residency	1	\$XX,XXX				\$X,XXX	(by district)
Residency	2	\$XX,XXX				\$X,XXX	(by district)
Residency	3+	\$XX,XXX				\$X,XXX	(by district)
Professional	1	\$XX,XXX				\$X,XXX	(by district)
Professional	2	\$XX,XXX				\$X,XXX	(by district)
Professional	3	\$XX,XXX				\$X,XXX	(by district)
Professional	4	\$XX,XXX				\$X,XXX	(by district)
Professional	5	\$XX,XXX				\$X,XXX	(by district)
Professional	6	\$XX,XXX				\$X,XXX	(by district)
Professional	7	\$XX,XXX				\$X,XXX	(by district)
Professional	8+	\$XX,XXX				\$X,XXX	(by district)
Master	1	\$XX,XXX	\$1,500	\$1,500	\$3,000	\$X,XXX	(by district)
Master	2	\$XX,XXX	\$1,500	\$1,500	\$3,000	\$X,XXX	(by district)
Master	3	\$XX,XXX	\$1,500	\$1,500	\$3,000	\$X,XXX	(by district)
Master	4	\$XX,XXX	\$1,500	\$1,500	\$3,000	\$X,XXX	(by district)
Master	5	\$XX,XXX	\$1,500	\$1,500	\$3,000	\$X,XXX	(by district)
Master	6+	\$XX,XXX	\$1,500	\$1,500	\$3,000	\$X,XXX	(by district)

State-funded Contract Days

4.B. Task Force Recommendation: Increase the number of Learning Improvement Days (LIDs) from two to ten as part of the SAM.

Key Details: The number of contract days for teachers is 180 instructional days plus 10 LIDs, for a total of 190 days. State funding for LIDs must be used for professional development or other district-directed activities and may not be used for salary increases. Draft legislation for this section is on page A-5.

Salary Survey/Labor Market Analysis

4.C. Task Force Recommendation: The state should collect information about compensation in occupations comparable to teaching and other school employee positions.

The state should collect information about compensation in occupations comparable to teaching and other school employee positions, including educational staff associates (ESA) and school building administrators. The salary survey shall include information about:

- regional labor market differences in compensation;
- different job descriptions/duties (e.g., math, science, special education, ELL teachers), based on other occupations; and
- health, pension, and other benefits.

Draft legislation for this section begins on page A-5.

Pay for Performance, Knowledge, and Skills

4.D. Task Force Recommendation: Continue bonuses for teachers who receive National Board for Professional Teaching Standards (NBPTS) certification. Also, provide stipends for mentor and evaluator teachers.

Key Details: Continue providing a \$5,000 bonus (adjusted for inflation in 2009 and beyond) to teachers on the current SAM who achieve NBPTS certification. Continue providing a \$5,000 bonus (adjusted for inflation in 2009 and beyond) to NBPTS-certified teachers on the current SAM who work in high-poverty schools.

Provide a \$XX bonus for teacher mentors and teachers who perform peer evaluations under the new certification system (described in section 5 of this report).

4.D.2. Task Force Recommendation: Implement school-wide building bonuses based on student achievement measures.

Key Details: Develop an incentive compensation program that awards a monetary bonus to all school staff for building-level student academic achievement. Awards shall be determined based on multiple measures of student performance, including standardized test scores and student retention in secondary schools.

4.D.3. Task Force Recommendation: Provide a stipend for teachers on the current salary allocation model who obtain professional certification.

Key Details: Provide an education stipend of \$1,000 to offset the educational costs of obtaining the Professional Certificate to teachers paid via the current salary allocation model. This stipend recognizes that the current salary system does not compensate teachers for the investment they make to meet state requirements.

Loan Forgiveness

4.E. Task Force Recommendation: Provide loan forgiveness for teachers and ESAs in documented shortage areas such as math, science, bilingual instruction, and special education.

Key Details: Add funding to the future teachers conditional scholarship and loan repayment program (RCW 28B.102) for teachers and educational staff associates (ESA) degree candidates in documented shortage areas such as math science, bilingual instruction, and special education. Draft legislation for this section is on page A-6.

Supplemental Pay

4.F. Task Force Recommendation: Restrict supplemental pay for teachers to activities that require additional time.

Key Details: Refine the Time, Responsibilities, and Incentive (TRI) pay law so that supplemental pay can only be provided for additional time. Supplemental contracts must specify the minimum amount of additional time required, its purpose, and the amount of the contract. This information must be reported in a common format to OSPI to improve transparency and analysis. Draft legislation for this section is on page A-6.

Continuing Contracts

4.G. Task Force Recommendation: Require teachers to achieve professional certification within five years to be eligible for continuing contracts.

Key Details: Currently, teachers are employed on a provisional basis for two years. This change amends provisional status to last for up to five years or until professional certification is attained (whichever comes first).

Collective Bargaining

4.H. Task Force Recommendation: Make no changes to collective bargaining.

The Task Force recommendations include a revamped Salary Allocation Model that replaces salary increases for credits and degrees with salary increases based on demonstrated performance, measured by an objective assessment and aligned with the overall system of teacher certification. Additional bonuses would be available for assignment as a mentor or evaluator and for master teachers in hard-to-serve schools. The purpose of supplemental contracts is clarified to reflect additional time, and there will be a significant increase in transparency and the ability of the state to monitor these contracts. Current salary controls for base salaries would be maintained.

Data from labor market surveys will enable creation of a fair, objective regional wage adjustment for certificated, classified, and administrative staff. The labor market surveys can also be used to determine competitive base salaries for teachers, as well as monitor competitiveness of the salary allocations for classified and administrative staff.

All together, these recommendations should be sufficient to address the problems of the previous compensation system. No additional changes to collective bargaining are necessary.

5. TEACHER PREPARATION

Certification

5.A. Task Force Recommendation: Develop and implement a career ladder system of certification that includes peer reviews.

Key Details:

Career Ladder System of Certification

- A career ladder with residency, professional, and master certification levels linked with the salary allocation model.
- Educator preparation programs must align with state learning standards.
- For residency certification:
 - Teachers must pass an evaluation (not conducted by college).
 - Certificate good for 5 years only–non-renewable.
- For professional certification:
 - Teachers must teach for 2 years and pass peer reviews.
 - Teachers must achieve professional certification within 5 years to stay certified.
 - Continuing professional certification is based on professional growth plan.
- For master-level certification:
 - For teachers, master level is National Board for Professional Teaching Standards (NBPTS) certification.
 - For educational staff associates (ESAs), certification will be defined as equivalent to NBPTS.

Peer Reviews

As the state salary schedule is modified through career ladders and certification, the evaluation system must be adjusted to provide a meaningful reflection of good instruction. The principal is the lead evaluator and, as such, is able to use data from peer reviews.

- Peer reviews are to be conducted by state-certified evaluators (the state establishes standards and provides for training and a process to certify evaluators).
- Common and standardized review process using multiple forms of evidence, including student performance on formative assessments, in-class visits, reviews of artifacts such as lesson plans, and possibly video of actual teaching.
- Peer reviewers:
 - are trained in evaluating the practice of teaching and use a common, structured rubric;
 - teach the same or similar subject as the teacher being reviewed;

- come from outside the district¹ so there is no conflict of interest ; and
 - are at the highest step in the performance and compensation system.
- The system would be overseen by the Professional Educator Standards Board (PESB) and delivered through regional networks managed by Educational Service Districts.

Mentoring for New and Early Career Teachers

5.B. Task Force Recommendation: Develop and implement a mentoring professional development program for near and early career teachers.

Key Details:

- Provide a mentoring-based professional development program for new and early career teachers.
- Intensive support for first year, with progressive decrease in intensity based on need.
- Mentoring provided for up to 5 years (or until teachers attain professional certification).
- Mentoring from state-certified mentors.
- The PESB to establish standards and provide training and a process to certify mentors.
- Mentors cannot be peer evaluators in their own districts.

Draft legislation for this component is on page A-6.

¹ Members discussed modifying this requirement to provide for avoiding conflicts of interest but not necessarily restricting peer reviewers to out-of-district teachers, and/or possibly exempting small school districts from this requirement.

6. FUNDING AND OVERSIGHT

I-732

6.A. Task Force Recommendation: Keep I-732 as is, which is to provide cost-of-living adjustments in the salary allocation models and for administrator/classified salary allocations.

I-728

6.B. Task Force Recommendation: Fold I-728 funds into basic education core allocations and remove I-728 as a separate funding source.

Small School Districts Funding Enhancements

6.C. Task Force Recommendation: Maintain small school districts funding enhancements.

Levy Authority and Equalization

6.D Task Force Decision: Local levies, along with local effort assistance for property-poor districts, should continue to be a feature of overall funding for public schools. A technical team should develop a new local levy and equalization system with a rational basis for both excess levies and equalization.

Key Details: While the state has the responsibility of providing a “general and uniform system of public schools,” diversity in the public education system is also important. Any successful system of public education must provide for variation to respond to what local communities desire of their public education system beyond the basic education system.

Further, the definition of basic education must evolve with changes in our state. The ability of local districts to experiment with extensions to basic education will be central to that evolution. The willingness of local communities to invest in education also provides additional pressure on the legislature to adequately fund basic education.

Consequently, local levy authority remains an important component of public education and developing an equitable and contemporary system of public education.

Local levies must be permitted, but limited and equalized to ensure basic equity across the state. Unlike the current system, the new levy system should be based on how much local support is

permitted per student, not on either local property values or the revenues generated by the district. Equity requires both an equitable base (local funding per student) and a mechanism for property tax poor districts to have extensions similar to any other district.

These are complex and technical questions. Consequently, the task force does not have the ability to design both the local levy system and an equalization system. The legislature should create and empower a technical team to develop a new local levy and equalization system for implementation in the 2011-13 biennium and later. The system must allow local districts to define their local levy authority from a factor based on a statewide, per student average, as well as a system to provide districts with lower taxing authority state aid to provide equitable extensions. Yet any method of equalizing the ability of local districts to provide extensions must be constrained. Taxpayers in the district must demonstrate their commitment to supporting public education by providing a local “level of effort” which state revenues can match. This equalization should not be considered a part of basic education; equalization is, by definition, not a part of basic education.

The above technical team should be instructed to define how extensions should be limited to provide every district the ability to extend basic education to an equal extent based on the number of students they serve and provide support for districts without the fiscal capacity to reach the limit but willing to tax themselves at least to the average of those districts reaching the limit for extensions.

Fiscal Accountability and Budgeting Data System

6.E. Task Force Recommendation: Require all school districts to use a common, state-developed and state-funded budgeting and fiscal accountability system.

Key Details: All school districts are required to use a common, state-developed and state-funded budgeting and fiscal accountability system. The system shall include:

- Separate accounting of state and local revenues and costs.
- A common, standardized structure for cost classifications.
- Costs linked with student outcomes data.
- Program costs reported at the school and district levels.

State funding shall support the development, implementation (including costs of necessary software products), training, and auditing of the data system, with no cost to districts.

Student Data System

6.F. Task Force Recommendation: The statewide student data system should include individual student standardized test performance, including scores on diagnostic and college readiness tests and a dropout early warning system.

Key Details: A state-provided common statewide student information system should have the capacity to connect information about students, test scores, teachers, and courses in real time. The system should include individual student scores on standardized tests, including diagnostic and college readiness exams. The system should also include a dropout early warning system.

Oversight and Accountability

6.G. Task Force Recommendation: Implement the accountability system principles proposed by the State Board of Education.

Key Details: Components of the SBE's proposed system include the following:

- Accountability index is established that uses multiple criteria to evaluate school and district performance.
- Schools with exemplary performance are identified as well as those experiencing problems.
- Voluntary targeted assistance provided to struggling schools.
- Timelines established for improvement.
- The State Board of Education will require districts to take specified actions in the event of no improvement .

Oversight Group

6.H. Task Force Recommendation: Appoint an oversight group to conduct further analysis and evaluation of the progress on Task Force recommendations.

Key Details: The Task Force also recommends an oversight/implementation group be appointed and tasked with further analysis and evaluation of progress on the Basic Education Finance Joint Task Force recommendations with periodic reports to the legislature and a six-year sunset.

7. PRELIMINARY COST ESTIMATE

Using the expenditure model developed by House of Representatives staff, Institute staff estimated the total costs of full implementation of the Task Force proposal detailed in this report. Given of the staffing, salary, NERC, and other increases contained in this proposal, the estimated total one-year increase in K-12 funding for Washington State is approximately \$X.X billion. This amount represents a XX percent increase over current funding levels.

8. PHASE-IN

8.A. Task Force Recommendation: Development of the funding formulas for the new Program of Education and the supporting compensation, personnel, and accountability systems should begin immediately and then be phased-in over a 6-year period, starting in the 2011-12 school year. The phase-in plan should be flexible but ensure that the legislature is committed to full and timely implementation.

The goal of this proposal is to be ready to implement the new funding formulas in 2011-12 in school districts, which requires authorization by the 2011 Legislature, and budget development beginning in mid-2010. It will take time for technical experts to develop the details of the formulas, and the 2010 Legislature will need an opportunity to review those details and provide additional statutory direction if necessary. Furthermore, the supporting systems of teacher compensation, certification, evaluation, mentoring, and accountability must be developed and ready to implement across the state.

Even given this timeframe, funding of the new Program will need to be phased-in. No school district can reasonably expect to hire in a single year the numbers of new teachers, aides, librarians, and other school staff that full funding will permit. The experience of California's class size reduction initiative provides valuable lessons about the educational costs, not gains, of rushed hiring of unprepared staff and lack of adequate facilities to house them. Our own previous experience with I-728 funding and Student Learning Improvement Grants (SLIGs) from the 1990's shows that there is value in giving school districts time to set priorities and craft high-quality programs when new resources are provided, rather than rushing to "spend the money."

The phase-in plan should be at a level of detail that permits flexibility to adapt to circumstances as they arise. However, the authorizing legislation should set parameters and priorities as guides for future Legislatures. The end goal has been clearly articulated and will be placed in statute.

Within the six-year phase-in, the funding priorities should be:

1. Cover the fundamental costs of operating a district with enhanced allocations for maintenance, supplies, and operating costs and adequate salary allocations for staff.
 - *The proposed funding model contains specific allocations, by category, for maintenance, supplies, and operating costs that can be adopted as soon as the new finance model is implemented and adjusted as needed for inflation.*
 - *The Office of Superintendent of Public Instruction (OSPI) will be directed to calculate the actual average salaries for the allocated categories of administrators and classified staff, plus authorized adjustments, to use when the new funding formula is implemented.*
 - *A working group, with legislative oversight, will develop a new salary allocation model (SAM) for the legislature's consideration. The new SAM will be aligned with the*

mentoring, evaluation, and certification system that OSPI and the Professional Educator Standards Board (PESB) will design and put into place by 2012.

- *The Department of Personnel (DOP) will be directed to conduct labor market surveys so that the Office of Financial Management (OFM) can develop a regional wage adjustment schedule to be applied to the SAM and to administrator and classified salary allocations, also effective by 2011.*
2. Expand enhanced learning opportunities for underachieving and ELL students, as well as full-day kindergarten, to make progress in closing the achievement gap.
 - *The proposed funding model contains specific enhancements for underachieving and ELL students, which can be implemented as a priority over other enhancements.*
 - *A phase-in plan for full-day kindergarten has already begun and should continue.*
 3. As soon as a quality program can be clearly defined and the delivery system developed, early learning expansion should occur.
 - *The Department of Early Learning (DEL) is already scheduled to report back to the Legislature by December 1, 2009, with a proposed plan for a state preschool program that better aligns with the federal Head Start.*
 - *In the meantime, resources could be provided for school districts to conduct outreach, build partnerships, and provide curriculum and professional development in the early learning community.*
 4. Class size reduction should start in the early grades.
 - *The legislature has already demonstrated years of commitment to enhanced staffing for early grades and this must continue as a priority.*
 5. Core 24 shall be phased in according to the State Board of Education's detailed plan.

While the details of the phase-in plan have not yet been articulated, it is understood that the very act of placing into statute a detailed description of the Program of Education as detailed in this report, along with a commitment to a 6-year phase-in timetable, obligates the legislature to demonstrate an educational, rather than purely financial, rationale for future modifications.

Appendix A: Draft Legislation

1. Basic Education Definition

A basic education is an evolving program of instruction that must provide students with the opportunity to become responsible and respectful global citizens, to contribute to their economic well-being and that of their families and communities, to explore and understand different perspectives, and to enjoy productive and satisfying lives. Students must have the opportunity to learn the skills to:

- (i) Read with comprehension, write effectively, and communicate successfully in a variety of ways and settings and with a variety of audiences;
- (ii) Know and apply the core concepts and principles of mathematics; social, physical, and life sciences; civics and history, including different cultures and participation in representative government; geography; arts; and health and fitness;
- (iii) Think analytically, logically, and creatively, and to integrate different experiences and knowledge to form reasoned judgments and solve problems; and
- (iv) Understand the importance of work and finance and how performance, effort, and decisions directly affect future career and educational opportunities.

In order to have the opportunity to learn the basic education skills and knowledge, students must have the opportunity to complete graduation requirements of 24 credits, with course distribution requirements adopted by the state board of education that are intended to prepare students for postsecondary education, gainful employment, lifelong learning, and citizenship. Any change to graduation requirements proposed by the state board that would have a fiscal impact must be approved by the legislature before taking effect.

In order to provide this opportunity to students, the state must make available resources to the various school districts to enable them to provide the following program of education. Districts may find it appropriate to modify the model program to fit the unique circumstances of their population.

Instruction must be of sufficient quality to provide the students with the opportunity to learn the basic education skills and knowledge in the amount of instructional time provided by the model program. In addition to the resources necessary to fund the model program, the state must provide resources that enable districts to provide supplemental instruction to underachieving students, transitional bilingual instruction for English language learners, and special education services for students with disabilities so as to provide the students with a reasonable opportunity to meet the graduation requirements.

In order to take advantage of the program of basic education, some at-risk students will need early learning instructional programs.

2. Instructional Program of Basic Education

The minimum instructional program of basic education offered by school districts must be designed to provide every student the opportunity to achieve the basic education goals.

- (1) Each school district's kindergarten through twelfth grade basic educational program shall be accessible to all students who are five years of age and less than twenty-one years of age;
- (2) Each school district shall make available to students the following minimum instructional offering each school year:
 - (a) For students enrolled in grades 7 through 12: 1,080 instructional hours;
 - (b) For students enrolled in grades 1 through 6: 1,000 instructional hours;
 - (c) For students enrolled in kindergarten: 450 instructional hours (which shall be increased 1,000 for voluntary full-day kindergarten) ; and
 - (d) For students in authorized institutional and/or residential programs: 1,320 instructional hours.
- (3) The instructional program of basic education provided by each school district shall include:
 - (a) Instruction in the essential academic learning requirements;
 - (b) Instruction that provides students the opportunity to meet the high school graduation requirements proposed by the state board of education (Core 24);
 - (c) Supplemental instruction and services for underachieving students;
 - (d) Supplemental instruction to learn English for students whose primary language is other than English; and
 - (e) For all special education students, the opportunity for an appropriate education at public expense;
- (4) Nothing in this section requires a school district to offer the required annual instructional hours based on a specified number of days in a school year.

3. Core Allocations for the Basic Education Instructional Program

Allocations, Not Mandate for Spending

- (1) The distribution formula in this section shall be for allocation purposes only. Nothing requires school districts to use basic education funds to implement a particular instructional approach or service. Nothing in this section requires school districts to maintain a particular classroom teacher-to-student ratio or other staff-to-student ratio or to use allocated funds to pay for particular types or classifications of staff. Nothing in this section entitles an individual teacher to a particular time period for planning or professional development.

Model Schools

The allocation to school districts to provide the instructional program of basic education shall be determined as follows and shall be subject to the phase-in schedule:

- (2) The distribution formula shall be based on minimum staffing and non-staff costs to support instruction and operations in prototypical schools serving high, middle, and elementary school students. Allocations shall be adjusted from the prototypes based on the actual number of FTE

students in each grade at each school in the district. The allocations shall be further adjusted from the school prototypes with minimum allocations for small schools.

(a) Prototypical schools are defined as follows:

- (i) A prototypical high school has 600 students in grades 9 through 12;
- (ii) A prototypical middle school has 432 students in grades 7 and 8; and
- (iii) A prototypical elementary school has 400 students in grades K-6.

(b) By the end of the phase-in, the minimum allocation for a prototypical high school shall be based on the number of classroom teachers needed to provide instruction over 1,080 annual instructional hours and provide at least one teacher planning period per school day, with the following average class size:

	Average Class Size
Basic class size	25.0
Basic class size in schools where more than fifty ² percent of the students are eligible for free and reduced price meals.....	22.0
For career and technical education courses approved by the office of the superintendent of public instruction	15.0
For laboratory science courses.....	15.0
For advanced placement and international baccalaureate courses.....	15.0

(c) By the end of the phase-in, the minimum allocation for a prototypical middle school shall be based on the number of classroom teachers needed to provide instruction over 1,080 instructional hours and provide at least one teacher planning period per school day, with the following average class size:

	Average Class Size
Basic class size	25.0
Basic class size in schools where more than fifty ³ percent of the students are eligible for free and reduced price meals.....	22.0

(d) By the end of the phase-in, the minimum allocation for a prototypical elementary school shall be based on the number of classroom teachers needed to provide instruction over 1,000 instructional hours and provide at least one teacher planning period per school day, with the following average class size:

	Average Class Size
Basic class size	25.0
Basic class size in schools where more than fifty percent of the students are eligible for free and reduced price meals.....	22.0
Class size in grades kindergarten through three.....	15.0

(e) By the end of the phase-in, the allocations above shall be enhanced with categorical allocations as follows to provide additional allocations for classroom teachers:

² To be adjusted for under-reporting in high school

³ To be adjusted for under-reporting in middle school

- (i) To provide supplemental instruction and services for underachieving students, allocations shall be based on the percent of students in each school who are eligible for free and reduced priced meals, except that the percent of students in a prototypical high school shall be adjusted to reflect under-reporting of free and reduced price meals eligibility.
 - (A) The minimum allocation for underachieving students shall provide an extended school day for each prototypical school as follows: Two instructional hours per week and an average class size of five.
 - (B) The minimum allocation for underachieving students shall provide an extended school year for each prototypical school as follows: Ten instructional hours per week for four weeks and an average class size of five.

- (ii) To provide supplemental instruction to learn English, allocations shall be based on the number of students in each school who are eligible for and enrolled in the transitional bilingual instruction program. The minimum allocation for supplemental instruction to learn English shall provide supplemental instruction with an average class size of eight for a prototypical school as follows:

	High School	Middle School	Elementary School
Percent of school day in supplemental instruction.....	14.0%	14.0%	20.0%

- (f) By the end of the phase-in, the minimum allocation for each prototypical school shall include allocations for the following types and number of staff in addition to classroom teachers: 1.0 principals, including assistant principals and other certificated building-level administration; 1.0 teacher-librarians, a function that includes information literacy, technology, and media to support school library programs; 1.0 student health services staff, a function that includes school nurses and social workers; 1.5 guidance counselors, a function that includes parent outreach; 3.0 office support and non-instructional aides; 4.0 custodians and facilities maintenance; 0.75 professional development coordinator; and 1.0 student and staff safety staff.
- (g) The minimum allocation for each school shall include allocations per annual average full time equivalent student for the following materials, supplies, and operating costs, subject to phase-in, which shall be enhanced for career and technical education courses approved by the office of the superintendent of public instruction and for laboratory science courses, and adjusted annually for inflation for the cost of each category:
 - Per annual average full time equivalent student
 - Student technology..... \$200
 - Utilities..... \$216
 - Curriculum, textbooks, library materials,
And instructional supplies..... \$155
 - Instructional professional development.....\$103
 - Other building-level costs including
maintenance, custodial, and security..... \$102
 - Central office administration.....\$310
- (h) The superintendent of public instruction shall increase the minimum allocation for institutions and residential education programs by an amount reflective of the increases in certificated instructional staff per 1,000 students for general education in prototype schools.

Central Office

- (3) The distribution formula shall include allocations to school districts to support central office administrative and classified staffing at a district-wide level. The minimum allocation shall be a percentage of the allocations for compensation under the of basic education instructional program in this section.

4. School Employee Compensation

- (1) The legislature shall establish for each school year, beginning with the 20XX-XX school year, a statewide base salary allocation schedule for teachers and other certificated instructional staff. The base salary allocation schedules shall be for allocation purposes only and shall be used to distribute funds for the teachers and certificated instructional staff allocated under the basic education instructional program.
- (2) This section applies only to teachers and other instructional staff whose first employment with a school district commences with or after the 20XX-XX school year or who have transferred to the new compensation system.
- (3) Base salary allocations shall be calculated by determining the district's average base salary for teachers and other certificated instructional staff in the district who are subject to this section, using the statewide base salary allocation schedule.
- (4) The statewide base salary allocation schedule under this section shall be based on three tiers of demonstrated performance that align with the three levels of certification as defined by the professional educator standards board: residency, professional, and master (NBPTS). Each tier shall contain salary steps based on years of service. The salary allocation schedule shall not provide increased salaries based on continuing education credits or academic degrees.
- (5) The statewide base salary allocations for eligible school districts shall be adjusted based on a regional wage adjustment.
- (6) Beginning in the 20XX-XX school year, the distribution formula shall include allocations to school districts to support release time for state-certified mentors and new teachers to provide a mentoring and support program. The formula shall be based on the number of teachers in the district with five or fewer years of teaching experience, with the amount of release time significantly greater to support teachers in their first year of teaching service for whom the program is mandatory.
- (7) For instructional staff, who opt to remain in the current compensation system, an educational stipend of not less than \$1,000 shall be provided to compensate teachers who meet state Professional Certification requirements.

State-funded Contract Days (for school employee learning improvement days for professional development). The statewide base salary allocation schedule under this section shall include the equivalent of ten learning improvement days, subject to phase-in.

Salary Survey

- (1) The state shall conduct a comparative labor market analysis every XX years of salaries and other compensation for school district employees in Washington.

- (a) The comparative analysis shall examine salaries and other compensation for teachers, other certificated instructional staff, principals and other building-level certificated administrators, and the types of classified school employees for whom salaries are allocated.
 - (b) The comparative analysis shall be calculated at a statewide level and labor markets in Washington identified through the use of data from the United States bureau of the census and the bureau of labor statistics.
 - (c) The analysis shall also include a comparison of salaries and other compensation to the appropriate labor market for at least the following subgroups of educators:
 - (i) Beginning teachers;
 - (ii) Mathematics and science teachers; and
 - (iii) Types of educational staff associates.
- (2) For the purposes of this section, "salaries and other compensation" includes average base salaries, average total salaries, average employee basic benefits, and retirement benefits.

Loan Forgiveness

28B.102.040. Selection of participants — Processes — Criteria.

- (1) The [higher education coordinating] board may select participants based on an application process conducted by the board or the board may utilize selection processes for similar students in cooperation with the professional educator standards board or the office of the superintendent of public instruction.
- (2) If the board selects participants for the program, it shall establish a selection committee for screening and selecting recipients of the conditional scholarships. The criteria shall emphasize factors demonstrating excellence including but not limited to superior scholastic achievement, leadership ability, community contributions, bilingual ability, willingness to commit to providing teaching service in shortage areas, and an ability to act as a role model for students. Priority will be given to individuals seeking certification or an additional endorsement in math, science, technology education, special education, or bilingual instruction.

Supplemental Pay

Salaries and benefits for certificated instructional staff may exceed the limitations in subsection (3) of this section only by separate contract for additional time. Supplemental contracts shall specify the minimum amount of additional time required, the purpose or purposes of the additional time, and the amount of the contract using standard terms and definitions established by the office of the superintendent of public instruction. School districts shall submit the information on an annual basis in a common reporting format established by the office of the superintendent of public instruction and disaggregated for each individual receiving a supplemental contract. Supplemental contracts shall not cause the state to incur any present or future funding obligation. Supplemental contracts shall be subject to the collective bargaining provisions, shall not exceed one year, and if not renewed shall not constitute adverse change. No district may enter into a supplemental contract under this subsection for the provision of services which are a part of the basic education program.

Teacher Mentoring

Mentoring

By the 20XX-XX school year, school districts shall provide a system of mentoring for new and early career teachers with five or fewer years of experience. Peer mentors shall have professional certification and meet other criteria as defined by the professional educator standards board. The legislature shall fund an allocation formula that reflects the following assumptions at a minimum: XX certificated instructional staff as peer mentors per XX teachers employed with five or fewer years of experience teaching, with necessary allocations for nonsalary costs.

Appendix B: Zero-Based Option Developed by WSIPP

In SB 5627, the Legislature directed the Institute to include in its final report a funding formula option that is a “a redirection and prioritization within existing resources based on research-proven education programs.”

Details to be added: presented to the Task Force on December 8, 2008. Include technical analysis write-up and results.