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INTERVIEWER: We sat down today with Susan Moffitt, Director of the Taubman Center for American Politics and Policy, and Susanna Loeb, Director of Brown University's Annenberg Institute for School Reform to talk about getting down to facts two. An in-depth status report on California's K through 12 education system, recently released by Stanford University and a national consortium of researchers. The report is a follow up to one released in 2007.

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SUSANNA LOEB: About 2007, Arnold Schwarzenegger was governor of California, and his administration, as well as the legislature and the assembly, requested a set of studies that would give them a sense of where California was, the facts, as a starting place for figuring out where to go forward from there. And after quite a bit of time, the studies that we did at that time, getting down to facts one, really did contribute to the changes that went on in California.

It took us a bit of time then because the recession hit California hard and there were other priorities, but particularly when Governor Brown came in, he implemented a lot of the reforms that that came from the facts that we presented in the first round. Now that his administration is almost over and we're going into a new administration after the elections in November, we thought, we being a whole bunch of grassroots efforts from across the state, that this was a good time to, again, see where we were, what had happened in the past 10 years, and what had the effects been so that the new administration was in a really good spot to build on what had occurred in the past. So that's how we got getting down to facts two.

INTERVIEWER: And tell me a little bit about the scope. How many researchers and how many institutions were involved? It's pretty immense, right?

SUSANNA LOEB: Yeah, we have 36 technical reports, so 36 studies and about 100 researchers on those studies, and then from them, we've gotten it down to about 19 research briefs. So we took the studies and combined them and made them more accessible, but it's still quite a number, and we really spanned a wide range of areas on education policy.

INTERVIEWER: One of the areas of focus of getting down to the facts two is the Common Core State Standards. Implemented in California and other US states, the Common Core is a set of

guidelines for what California students should be learning in each respective grade. The report not only looks at these standards, but also at the state success in supporting and implementing them over the past 10 years.

SUSAN MOFFITT: The Core State Standards we see as really the most ambitious effort at instructional improvement to date, not just for California but for the nation, these are very ambitious content standards, and they're linked with trying to address fundamental educational inequities. So partnering both more ambitious instruction with reducing inequities, is a fundamental shift.

We wanted to get at this because the Common Core, as you know, has been very controversial nationally. Lots of states have moved away from them. That's not the case in California. Our survey research found strong support among teachers, not just for the standards in an abstract, but majorities of teachers felt like the standards were appropriate for their students' learning needs. They felt like their professional learning opportunities are more aligned with the standards.

In the past, these things have been disconnected. The standards, the materials, the instructional support, and professional development have been disjointed, and so one of the key elements of the Common Core is to try and bring better alignment among those things.

INTERVIEWER: Well just hearing you talk about those studies echoes the tone overall of the report, which I find tempered. Positive-ish, but we still have a ways to go. Can you talk a little-- am I right in this?

SUSANNA LOEB: Yes, I think that's right. I think the Brown administration did some very ambitious policies. Not only did they putting new standards and align assessments with them, but they redid the school funding formula. When we looked at it 10 years ago, it was really difficult to understand why some districts got some money and others got-- others that look very similar got a very different amount. And so now it's all been rationalized, and more money's been targeted to low-income districts and other districts with higher needs.

INTERVIEWER: In 2013, California enacted a policy that dramatically changed the way the state distributes fundings to its schools. The policy resulted in moving from a generalized federal model of funding, to something a bit more tailored. It's known as Local Control Funding Formulas.

SUSANNA LOEB: Prior to the change in the funding, districts received a certain amount of funds from the state and that's how much they got, and it was based on some formula from 1977, and it had just

been adjusted over time. So what happened in local control funding formulas, they made an equation based on the characteristics of students, the age range of students, characteristics like that, so that each district would know how much they got and it was very clear.

Then, the other thing that separated California from other states before is that the money tended to come in what are called categorical grants that told the district what they were supposed to do with it. So they got this much money for professional development, and this much money for textbooks, and the money was quite specified. The local control funding formula, as it said, both rationalized how much districts got with more emphasis on giving money to districts with many high needs students, and it gave districts the ability to use the funds as they desired.

SUSAN MOFFITT: And I want to underscore the importance and the significance of abolishing categoricals as extremely hard to do politically. I'm hard-pressed to think of another example in recent memory where a state has abolished is it 35? Anyway, a large number of categorical funding streams. That was a very difficult political move to make.

SUSANNA LOEB: In the first getting down to facts, we highlighted how much the funds were coming in categorical programs and how difficult that made it for districts to address the needs that they have. There are about 1,000 districts in California, and they range from tiny to Los Angeles, which is huge, and they just have very different opportunities to help their students and very different needs. So there are clearly a lot of benefits of allowing local control and allowing them to use the money the way that they see to reach the goals for their students.

However, there are a couple of concerns with that, and one is that some districts have the capacity to use it well, and other districts don't. So some districts know what good programs are that they could bring in and who could help them create a program that would help their English learners or help groups, their special Ed students, or improve their fourth grade math curriculum.

Other districts who don't know how to do this well and may respond to advertisements from programs that are out there, or pressures from certain groups within their community and not reach-- so miss out on what they really want to do. And so the state has begun to set up some supports for this, but certainly, it has not reached the full range of 1,000 districts. There is a particular concern here in issues of equity.

So you could imagine that groups that really need the support, don't have the power or

influence that they need to have the money put towards their own needs. So they've made a bunch of ambitious changes in the state. Those have set the stage for really positive improvements later on, but we're not there yet because there's still a bunch of capacity that needs to be built both on how these local areas allocate their resources given the new funds that they have, and how teachers and classrooms embrace and make use of the new standards. Then there are a couple of other areas that the current administration didn't address that we really need to get to.

INTERVIEWER: Such as?

SUSANNA LOEB: One thing that the studies show is a real need to target achievement gaps, and many of these achievement gaps are evident as soon as students enter kindergarten. So a lot of them appear in early childhood, and California has not been good, or as good as the rest of the country, at providing high quality early childhood education.

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INTERVIEWER: For those of us who imagine the wealth in areas like Beverly Hills or the booming tech industry in Silicon Valley when you think about California, it might come as a surprise that the state is actually below the national average for per school student spending. But taking a look at some of the obstacles and restrictions around policy that California faces might explain its lack of spending on schools.

SUSANNA LOEB: For a relatively high cost state, we don't spend very much on schools, and as a result, we have fewer adults in schools than other states do. So fewer teachers, fewer administrators, hardly any librarians or counselors, no health care in the schools. And so we did a number of studies to assess the adequacy given these ambitious goals, and we find that that California really needs to invest more.

So there's a basic level of investing, and then there were a couple of structural issues. Special education, for example, wasn't addressed in the new finance reforms, and that is of all of the chief business officers in the district that we interviewed identified that as one of their major challenges. So it's a good question about why California spends less.

One issue is that there are large restrictions on property taxes in California. So local areas do not have the ability to raise additional property taxes the way they do in many states across

the country. This happened as a result of proposition 13, so they're restricted to essentially a 1% tax, and they are forced to do that 1% tax. So everybody does a 1% tax, and as a result, you have to move to the state level to raise additional funds and you're left with taxes like the income tax and the sales tax, which are a bit more volatile than the property tax in general.

I don't know if I inferred correctly, but it sounds like it's not accidental or it's fortuitous maybe that this report is coming out at the time of year and in this year. Who do you want to read this report?

SUSAN MOFFITT: Well we very much hope that this report informs the next administration in California. But I will also say, taking a national perspective too, I think that there are lessons here for the nation. One in eight American public school students goes to school in California. There are more public school students in California than in the entire country of Canada.

INTERVIEWER: 6.2 million. Wow.

SUSAN MOFFITT: So the lessons that we can learn from California, can have a broader application. And so while I hope that there is a California specific audience, I think that there are lessons in this report nationally.

SUSANNA LOEB: 38% of the students enter schools as English learners, so it's also a population that's very interesting from an educational perspective. How do you provide the kind of education that had English learners need in order to succeed in the US? There is no silver bullet in education, so it's very important to understand where you are and try things out and see what's working and move on, and data systems, information systems are very important for that.

This is an area where California's actually improved a little over time. It wasn't that long ago where you couldn't follow students over time, so you couldn't see learning and you couldn't see them moving across districts. Now we can do that, but we have no early childhood system, and we haven't linked in, either the services that students receive or higher education, so we can really understand the effects of the services, the effects of the program on their long-term outcomes.

INTERVIEWER: Like social services, mental health services--

SUSANNA LOEB: Yes or even the programs they participate in in school.

INTERVIEWER: Have you had any initial reaction to the report?

SUSANNA LOEB: Generally, it's been quite positive that-- our goal was not to make concrete recommendations that would constrain where the debate went and where the policies went, but to provide evidence. Facts about where we are, facts about what other places have done, and how the effects there have been, so that the new administration is in the best position to work with all the stakeholders and constituents in coming up with a policy that works in the political environment.

Some of the things that we suggest are heavy lifts. Things like financing and pensions and early childhood, and so we'll just have to see where we go when the trade-offs really become evident.

INTERVIEWER: Though Loeb has left Stanford for Brown University, I asked her if she would continue to focus her work on California.

SUSANNA LOEB: And so I can't imagine not wanting to continue to work in California, but Rhode Island and New England and the whole East Coast also provide a new opportunity to learn about different areas. There are a whole bunch of mid-sized cities in the area that I'd really love to learn more about.

SUSAN MOFFITT: Like Susanna, I can't imagine not considering California in future research. It is an important educational terrain.

INTERVIEWER: Well, it's been so interesting to talk to both of you about this. Thank you so much for the great work, and thanks for coming in to talk to us about it.

SUSAN MOFFITT: Thank you, Sarah.

SUSANNA LOEB: Thank you.

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