

Appendices A-E

FINAL REPORT OF THE STUDY OF ADEQUACY OF FUNDING FOR EDUCATION IN MARYLAND

Prepared for

Maryland State Department of Education

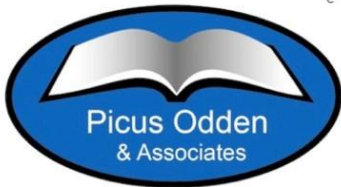
By

APA Consulting

November 30, 2016



AUGENBLICK,
PALAICH AND
ASSOCIATES



MARYLAND
EQUITY PROJECT
ADVANCING EDUCATIONAL OPPORTUNITIES

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Appendix A

Previously Released Reports

Below is a list of suggested citations for previously released reports for the Maryland adequacy study. All the information (meeting information, reports, and supplemental materials) pertaining to the study can be found at <http://marylandpublicschools.org/Pages/adequacystudy/index.aspx>.

Aportela, A., Picus, L., Odden, A. & Fermanich, M. (2014). *A Comprehensive Review of State Adequacy Studies Since 2003*. Denver, CO: Augenblick, Palaich & Associates. Retrieved at: http://marylandpublicschools.org/Documents/adequacystudy/AdequacyReviewReport_rev_091214.pdf

Humann, C. & Fermanich, M. (2014). *Summary of School Size Report*. Denver, CO: Augenblick, Palaich & Associates. Retrieved at: <http://marylandpublicschools.org/Documents/adequacystudy/SchoolSizeReportr091114.pdf>

Fermanich, M., Picus, L. O. & Odden, A. (2014). *Proposed Methodology for Establishing Adequate Funding Levels in the State of Maryland*. Denver, CO: Augenblick, Palaich & Associates. Retrieved at: <http://marylandpublicschools.org/Documents/adequacystudy/ProposedMethodsEstablishingAdequacyFundingLevelsMD.pdf>

Humann, C. & Griffin, S. (2014). *Preliminary Report on the Impact of School Size*. Denver, CO: Augenblick, Palaich & Associates. Retrieved at: <http://marylandpublicschools.org/Documents/adequacystudy/PreliminaryImpactofSchoolSize.pdf>

Fermanich, M. L. & Picus, L. O. (2015). *Adequacy Cost Study: An Interim Report on Methodology and Progress*. Denver, CO: Augenblick, Palaich & Associates. Retrieved at: <http://marylandpublicschools.org/Documents/adequacystudy/InterimAdequacyStudyReport-071015Final.pdf>

Croninger, R. G., King Rice, J. & Checovich, L. (2015). *Evaluation of the Use of Free- and Reduced-Price Meal Eligibility as a Proxy for Identifying Economically Disadvantaged Students: Alternative Measures and Recommendations*. Denver, CO: Augenblick, Palaich & Associates. Retrieved at: <http://marylandpublicschools.org/Documents/adequacystudy/EvaluationFRPMEligibilityProxyEconomicDisadvantage.pdf>

Humann, C., Palaich, R., Fermanich, M. and Griffin, S. (2015). *Final School Size Study Report: Impact of Smaller Schools*. Denver, CO: Augenblick, Palaich & Associates. Retrieved at: <http://marylandpublicschools.org/Documents/adequacystudy/SchoolSizeReport071615.pdf>

Hartman, W. & Schoch, R. (2015). *Final Report of the Study of Increasing and Declining Enrollment in Maryland Public Schools*. Denver, CO: Augenblick, Palaich & Associates. Retrieved at:

<http://marylandpublicschools.org/Documents/adequacystudy/MDEnrollmentReportFinal-071815.pdf>

Imazeki, J. (2015, November). *A Geographic Cost of Education Adjustment for Maryland*. Denver, CO: Augenblick, Palaich & Associates. Retrieved at:

<http://marylandpublicschools.org/Documents/adequacystudy/APA-POA-GCEI-Report-Rev-11232015.pdf>

Glenn, W. J., Griffith, M., Picus, L.O., & Odden, A. (2015). *Analysis of School Finance Equity and Local Wealth Measures in Maryland*. Denver, CO: Augenblick, Palaich & Associates. Retrieved at:

<http://marylandpublicschools.org/Documents/adequacystudy/APA-POA-MarylandWealthEquityReport-Rev121115.pdf>

Wool, S., Fermanich, M., & Reichardt, R. (2015, December). *The Effects of Concentrations of Poverty on School Performance and School Resource Needs: A Literature Review*. Denver, CO: Augenblick, Palaich & Associates. Retrieved at:

<http://marylandpublicschools.org/Documents/adequacystudy/ConcentratedPovertyLitReviewFinalDraft-071015.pdf>

Workman, S., Palaich, R., & Wool, S. (2016, January). *A Comprehensive Analysis of Prekindergarten in Maryland*. Denver, CO: Augenblick, Palaich & Associates. Retrieved at:

<http://marylandpublicschools.org/Documents/adequacystudy/MDPreKComprehensiveAnalysis011316.pdf>

Imazeki, J. (2016, June). *A Comparable Wage Index for Maryland*. Denver, CO: Augenblick, Palaich & Associates. Retrieved at:

<http://marylandpublicschools.org/Documents/adequacystudy/APAPOAGCEIFinalReport070716.pdf>

Augenblick, Palaich & Associates. (2016, September). *Adequacy Study: Draft Final Report*. Denver, CO: Author. Retrieved at:

<http://marylandpublicschools.org/Documents/adequacystudy/AdequacyStudyDraftReport09302016.pdf>

Appendix B

Professional Judgment Panel and Evidence-Based Panel Materials

Appendix B.1: Professional Judgment Panel and Evidence-Based Panel
Membership and Participants

Table B.1
CHARACTERISTICS AND COUNTS OF MARYLAND PROFESSIONAL JUDGMENT PANEL PARTICIPANTS

Panel Type						Numbers of Participants by Role								
Panel Number	Level	School Type	Student Type	Time Needed (Days)	Location of Panel Meeting	Teacher/ Coordinator	Principal	District Superintendent or Instructional Leader	Director of Special Ed, ELL, ECE or Student Services	Tech Specialist or Director	CFO or Business Manager	School Board Member	Representative of MSDE, the Division of Early Childhood Development (Office of Childcare)	Total Participants per Panel
1	School	Preschool	Regular, At-Risk	1.0	Balt.	2 Preschool Teachers/Coordinators	3 Elementary Principals	1	1 Director of Preschool /ECE		1		1	9
2	School	Elementary	Regular, At-Risk	1.5	Balt.	2 Elementary Teachers	3 Elementary Principals	1		1	1			8
3	School	Middle	Regular, At-Risk	1.5	Balt.	2 Middle School Teachers	3 Middle School Principals	1		1	1			8
4	School	High School	Regular, At-Risk	1.5	Balt.	2 High School Teachers	3 High School Principals	1		1	1			8
5	Special Need	Elementary, Middle, HS	ELL	1.0	Balt.	1 Elementary ELL Lead Teacher Coordinator 1 Middle School ELL Lead Teacher/Coordinator 1 High School ELL Lead Teacher/Coordinator	1 Elementary Principal, 1 Middle School Principal, 1 High School Principal	1	1 Director of ELL		1			9
6	Special Need	Elementary, Middle, HS	Special Education	1.0	Balt.	1 Elementary SpEd Lead Teacher/Coordinator 1 Middle School SpEd Lead Teacher/Coordinator 1 High School SpEd Lead Teacher/Coordinator	1 Elementary Principal, 1 Middle School Principal, 1 High School Principal	1	1 Director of Special Ed		1			9
7	District	All	All	2.0	Balt.	1	1 Elementary Principal, 1 Secondary Principal	3	1 Director of Student Services	1	1	1		10
8	CFO	All	All	1.0	Balt.						6			6
9	Statewide	All	All	1.0	Balt.	1	1 Elementary Principal, 1 Secondary Principal	3	1		2	1		10
TOTAL PARTICIPANTS						16	22	12	5	4	15	2	1	77

Table B.2
CHARACTERISTICS AND COUNTS OF MARYLAND EVIDENCE-BASED PROFESSIONAL JUDGMENT PANEL PARTICIPANTS

Panel Type						Numbers of Participants by Role								
Panel Number	Level	School Type	Student Type	Time Needed (Days)	Location of Panel Meeting	Teacher/ Coordinator	Principal	District Superintendent or Instructional Leader	Director of Special Ed, ELL, ECE or Student Services	Director or Assistant Supt. of Curriculum	Tech Specialist or Director	CFO or Business Manager	School Board Member	Total Participants per Panel
1	Multiple	Multiple	All	1.5	North Bel Air	1 Elementary Teacher 1 Middle School Teacher 1 High School Teacher 1 Preschool Teacher 1 SpEd Teacher 1 ELL Teacher 1 Lead Teacher - for example teacher team leader 1 Instructional Coach 1 Tutor	1 Elementary Principal 1 Middle School Principal 1 High School Principal	1	2	1	1	1	1	19
2	Multiple	Multiple	All	1.5	South Largo	1 Elementary Teacher 1 Middle School Teacher 1 High School Teacher 1 Preschool Teacher 1 SpEd Teacher 1 ELL Teacher 1 Lead Teacher - for example teacher team leader 1 Instructional Coach 1 Tutor	1 Elementary Principal 1 Middle School Principal 1 High School Principal	1	2	1	1	1	1	19
3	Multiple	Multiple	All	1.5	East Chestertown	1 Elementary Teacher 1 Middle School Teacher 1 High School Teacher 1 Preschool Teacher 1 SpEd Teacher 1 ELL Teacher 1 Lead Teacher - for example teacher team leader 1 Instructional Coach 1 Tutor	1 Elementary Principal 1 Middle School Principal 1 High School Principal	1	2	1	1	1	1	19
4	Multiple	Multiple	All	1.5	West Cumberland	1 Elementary Teacher 1 Middle School Teacher 1 High School Teacher 1 Preschool Teacher 1 SpEd Teacher 1 ELL Teacher 1 Lead Teacher - for example teacher team leader 1 Instructional Coach 1 Tutor	1 Elementary Principal 1 Middle School Principal 1 High School Principal	1	2	1	1	1	1	19
TOTAL PARTICIPANTS						36	12	4	8	4	4	4	4	76

Table B.3
PROFESSIONAL JUDGMENT PANEL PARTICIPANTS

Panel	LEA	Role	First Name	Last Name	Title	
CFO	Carroll	CFO or Business Manager	Chris	Hartlove	Chief Financial Officer	
	Frederick	CFO or Business Manager	Leslie	Pellegrino	Central Office	
	Garrett	CFO or Business Manager	Larry	McKenzie	Director of Finance	
	Prince George's	CFO or Business Manager	John	Pfister	Director of Budget and Management Services	
	Queen Anne's	CFO or Business Manager	Robin	Landgraf	CFO, CO	
	St. Mary's	CFO or Business Manager	Tammy	McCourt	Assistant Superintendent, Finance	
District	Frederick	District Superintendent or Instructional Leader	Kevin	Cuppett	Central Office	
	Garrett	District Superintendent or Instructional Leader	Barbara	Baker	Assistant Superintendent of Educational Services	
	Carroll	CFO or Business Manager	Chris	Hartlove	Chief Financial Officer	
	Kent	Director of Student Services	Darlene	Spurrier	Supervisor of Student Services	
	Washington	Tech Specialist or Director	Jim	Corns	Chief Operations Officer Instructional Technology	
	Anne Arundel	Principal	Nuria	Williams	Principal, Crofton	
	Howard	Principal	James	LeMon	Principal, Wilde Lake HS	
	Baltimore County	Teacher/Coordinator	Orly	Mondell	Teacher, New Town High School	
	MABE	Board Member	William	Phalen	Board Member	
	ELL	Dorchester	Director of ELL	Theresa	Connors	Supervisor of English/ELL
		Frederick	Principal	Kathy	Swire	Myersville Elementary
		Harford	Principal	Larissa	Santos	Principal/Edgewood
Washington		Principal	James	Aleshire	Principal, North Hagerstown High	
Anne Arundel		Teacher/Coordinator	Cheryl	Menke	Teacher Specialist	
Cecil		Teacher/Coordinator	Enid	Lum	Teacher, ESOL multi-school	
Montgomery		Teacher/Coordinator	Sonja	Bloetner	Secondary ESOL	

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Panel	LEA	Role	First Name	Last Name	Title
Elementary	Washington	District Superintendent or Instructional Leader	Peggy	Pugh	Associate Superintendent for Curriculum and Instruction
	Calvert	Tech Specialist or Director	Jon	McClellan	Director of Instructional and Informational Technology
	Harford	CFO or Business Manager	Eric	Clark	Director of Budget
	Harford	Principal	Patty	Mason	Principal/Magnolia
	Howard	Principal	Maisha	Strong	Principal, Swansfield ES
	Kent	Principal	Dawn	VanGrin	Principal of Galena Elementary
	Allegany	Teacher/Coordinator	Dana	Reinhardt	Third Grade Teacher - George's Creek Elementary School; 2014-15 Teacher of the Year
	Baltimore City	Teacher/Coordinator	Katrina	Kickbush	Wolfe Street Academy
	High School	Cecil	District Superintendent or Instructional Leader	Carolyn	Teigland
Garrett		Tech Specialist or Director	Jeff	Gank	Director of Information Technology
Howard		CFO or Business Manager	Beverly	Davis	Executive Director, Budget and Finance
Allegany		Principal	Stephanie	Wesolowski	Assistant Principal/Academic Dean - Mountain Ridge High School
Somerset		Principal	Sidney	Hankerson	Principal (Washington H. S.)
Baltimore County		Teacher/Coordinator	Sean	McComb	ELA, Patapsco High School and Center for the Arts
Prince George's		Teacher/Coordinator	Effie	Hillian	English Dept. Chair, Oxon Hill High School
Middle School		Anne Arundel	District Superintendent or Instructional Leader	Jolyn	Davis
	Caroline	CFO or Business Manager	Erin	Thornton	Comptroller
	Caroline	Teacher/Coordinator	Heather	Harper	Teacher, Colonel Richardson Middle School
	Howard	Tech Specialist or Director	Shelly	Barnett	Manager, Enterprise Systems
	Allegany	Principal	Tessa	Fairall	Assistant Principal at Washington Middle School
	Baltimore City	Principal	Najib	Jammal	Principal, Lakeland Elem./Middle
	Montgomery	Principal	Monifa	McKnight	Ridgeview MS
	Washington	Teacher/Coordinator	Jaime	Mason-Lego	2010 Teacher of the Year, Clear Spring Middle

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Panel	LEA	Role	First Name	Last Name	Title
PreK	Baltimore City	Director of Early Childhood	Perry	Gergen	Director of Early Education
	Washington	CFO or Business Manager	Eric	Sisler	Financial Budget Analyst
	Worcester	Tech Specialist or Director	Thomas	Mascara	Director, Technology
	Garrett	Principal	Candy	Maust	Route 40 Elementary
	Montgomery	Principal	Annette	Folkes	Roscoe Nix Elementary
Special Education	Calvert	District Superintendent or Instructional Leader	Daniel	Curry	Superintendent of Schools
	Carroll	Principal	Craig	Dunkelberger	Principal, Piney Ridge Elem.
	Queen Anne's	Principal	Amy	Hudock	Principal, CMS
	Garrett	Teacher/Coordinator	Katie	Lauder	Special Ed. Teacher
	Somerset	Teacher/Coordinator	Fern	Griffith	Special Ed. Teacher
	Worcester	Teacher/Coordinator	Jenifer	Heimer	Snow Hill Middle School
Statewide	Harford	District Superintendent or Instructional Leader	Barbara	Canavan	Superintendent
	Montgomery	District Superintendent or Instructional Leader	Maria	Navarro	Chief Academic Officer
	Queen Anne's	District Superintendent or Instructional Leader	Carol	Williamson	Superintendent
	St. Mary's	CFO or Business Manager	Tammy	McCourt	Assistant Superintendent, Finance
	Wicomico	CFO or Business Manager	Bruce	Ford	Business Manager
	Carroll	Principal	Eric	King	Principal, Winters Mill HS
	Frederick	Principal	Jenny	Powell	Thurmont Middle
	Baltimore City	Teacher/Coordinator	Ryan	Kaiser	Teacher of the Year
	MABE	Board Member	Christopher	Barclay	Board Member, Montgomery

Table B.4
EVIDENCE-BASED PROFESSIONAL JUDGMENT PANEL PARTICIPANTS

Panel	Role	District	First Name	Last Name
East	Elem.	Kent County	Tracy	Hodge
East	ELL	Prince George's County	Kristen	Ford
East	High	Dorchester County	Julie	Harp
East	Lead	Dorchester County	Natalie	Taylor
East	Middle	Wicomico County	Chad	Pavlekovich
East	Sped.	Anne Arundel County	Jenna	Freiberg
North	Elem.	Howard County	Maleeta	Kitchen
North	ELL	Montgomery County	Tamara	Henneman
North	High	Harford County	Amanda	Roberts
North	Lead	Harford County	Kelly	Mangum
North	Middle	Baltimore County	Barbara	Noppinger
North	Sped.	Prince George's County	Kelly	Moffett
South	Elem.	Charles County	Taniesha	Goulbourne
South	ELL	Montgomery County	Susan	Nerlinger
South	High	Calvert County	Jamie	Culp
South	Lead	Prince George's County	Timonious	Downing
South	Middle	Charles County	Joseph	Farrell
South	Sped.	Montgomery County	Shannon	Mitchell
West	Elem.	Washington County	Megan	Cornelius
West	ELL	Washington County	Nitzalis	Rivera
West	High	Carroll County	Jennifer	Wennell
West	Lead	Carroll County	Thomas	McHugh
West	Middle	Allegany County	Deborah	Jackson
West	Sped.	Frederick County	Pamela	Adams-Campbell

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Panel	Role	District	First Name	Last Name
East	After-school or extended learning professional	Dorchester County Public Schools	Regina	Teat
East	CFO or Business Manager	Worcester County Public Schools	Vince	Tolbert
East	Director of sped, ELL, SS, or ECE	Anne Arundel County Public Schools	Bobbi	Pedrick
East	Director of sped, ELL, SS, or ECE	Anne Arundel County Public Schools	Kelli	Reider
East	Director or Assistant Supt. of Curriculum	Queen Anne's County Public Schools	Anne	Thomas
East	District Superintendent, Chief Academic Officer or other Instructional Leader	Somerset County Public Schools	Tom	Davis
East	Elementary School Principal	Queen Anne's County Public Schools	Michelle	Carey
East	High School Principal	Dorchester County Public Schools	Lynn	Sorrells
East	Instructional Coach	Somerset County Public Schools	Tony	Bevilacqua
East	Middle School Principal	Somerset County Public Schools	Elizabeth	Marshall
East	Prekindergarten Teacher	Worcester County Public Schools	Lucy	Doherty
East	School Board Member	Worcester County Public Schools	Bob	Rothermel
East	Tech Specialist or Director	Wicomico County Public Schools	Robert	Langan
North	After-school or extended learning professional	Baltimore City Public Schools	Glenn	Starnes
North	CFO or Business Manager	Carroll County Public Schools	Chris	Hartlove
North	Director of sped, ELL, SS, or ECE	Baltimore City Public Schools	Alison	Perkins-Cohen
North	Director of sped, ELL, SS, or ECE	Cecil County Public Schools	Sarah	Farr

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Panel	Role	District	First Name	Last Name
North	Director or Assistant Supt. of Curriculum	Cecil County Public Schools	Carolyn	Teigland
North	District Superintendent, Chief Academic Officer or other Instructional Leader	Harford County Public Schools	Barbara	Canavan
North	Elementary School Principal	Baltimore County Public Schools	Jerry (Dwight)	Easterly
North	High School Principal	Cecil County Public Schools	Anne	Gellrich
North	Instructional Coach	Harford County Public Schools	Erin	Schisler
North	Middle School Principal	Harford County Public Schools	Joe	Mascari
North	Prekindergarten Teacher	Baltimore City Public Schools	Jody	Fleury
North	School Board Member	Harford County Public Schools	Nancy	Reynolds
North	Tech Specialist or Director	Baltimore City Public Schools	Bert	Ross
South	After-school or extended learning professional	Howard County Public Schools	Marty	Cifrese
South	CFO or Business Manager	Montgomery County Public Schools	Tom	Klausing
South	Director of sped, ELL, SS, or ECE	Howard County Public Schools	Lisa	Davis
South	Director of sped, ELL, SS, or ECE	Howard County Public Schools	Judy	Pattik
South	Director or Assistant Supt. of Curriculum	Montgomery County Public Schools	Niki	Hazel
South	District Superintendent, Chief Academic Officer or other Instructional Leader	Prince George's County Public Schools	Shawn	Joseph
South	Elementary School Principal	Howard County Public Schools	David	Larner
South	High School Principal	Baltimore County Public Schools	David	Lloyd

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Panel	Role	District	First Name	Last Name
South	Instructional Coach	Anne Arundel County Public Schools	Theresa	Gregory
South	Middle School Principal	Howard County Public Schools	Shiney	John
South	Prekindergarten Teacher	Howard County Public Schools	Dawn	Martinec
South	School Board Member	Montgomery County Public Schools	Philip	Kauffman
South	Tech Specialist or Director	Howard County Public Schools	Shelly	Barnett
West	After-school or extended learning professional	Allegany County Public Schools	Kate	Roberts
West	CFO or Business Manager	Garrett County Public Schools	Larry	McKenzie
West	Director of sped, ELL, SS, or ECE	Baltimore County Public Schools	Rebecca	Rider
West	Director of sped, ELL, SS, or ECE	Frederick County Public Schools	Kathy	Hartsock
West	Director or Assistant Supt. of Curriculum	Frederick County Public Schools	Kevin	Cuppett
West	District Superintendent, Chief Academic Officer or other Instructional Leader	Garrett County Public Schools	Janet	Wilson
West	Elementary School Principal	Allegany County Public Schools	Autumn	Eirich
West	High School Principal	Garrett County Public Schools	Jim	Maddy
West	Instructional Coach	Carroll County Public Schools	Jamie	Weaver
West	Middle School Principal	Carroll County Public Schools	James	Carver
West	Prekindergarten Teacher	Baltimore County Public Schools	Susan	Capron
West	School Board Member	Allegany County Public Schools	Edward	Root

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Panel	Role	District	First Name	Last Name
West	Tech Specialist or Director	Allegany County Public Schools	Nil	Grove

Appendix B.2: Participant Qualifications for Maryland’s Professional Judgment and Evidence-Based Panels: District-Based Panel Participant Qualifications

Below is a list of suggested qualifications for nominating district-based educators to serve on professional judgment and evidence based state, district- and school-level panels. This is a guideline to help the Maryland State Department of Education identify district-based educators who are effective in their positions and knowledgeable about resources necessary to educate all Maryland students to state standards. This is not intended to be an exhaustive or strict list of requirements for participation. Ultimately, it is up to the discretion of the Department to nominate those who it feels are most qualified to successfully fulfill the role of a district representative on the panels.

These are some suggested general guidelines when nominating participants:

- Participants should be experienced. Experience working in more than one school or district is desirable.
- Nominees should be recognized as being successful educators — those who have effectively contributed to the success of their students, schools, and districts.
- Participants should, in the aggregate, represent all regions of the State.
- Where possible, nominate administrators/educators possessing indicators of excellence such as past recognition as administrator or educator of the year (e.g. superintendent of the year, principal of the year, etc.), National Board for Teaching Standards certification, or active involvement or leadership in a professional association.

Below is a list of suggested qualifications for specific positions (or their equivalent):

- District Superintendent or Instructional Leader
 - 7 years of education experience
 - 3 years of district leadership experience
- School Board Member
 - 3 years serving on a school board
- Director or Assistant Superintendent of Curriculum
 - 7 years of education experience
 - 3 years of curriculum development experience
- Chief Financial Officer or Business Manager
 - 7 years of education experience
 - 3 years of school finance experience
- Director of Special Education, Limited English Proficient students, at risk programs, or Student Services
 - 7 years of education experience
 - 3 years of leadership in the specified field of special need

- Director of Prekindergarten or Early Childhood Education Programs
 - 7 years of education experience
 - 3 years of leadership in prekindergarten or early childhood education programs

- Technology Specialist or Director
 - 3 year minimum of experience working in a technology capacity in a school or district
 - Demonstrated knowledge of instructional technology needs for educational achievement

Appendix B.3: Participant Qualifications for Maryland’s Professional Judgment and Evidence Based Panels: School-Based Panel Participant Qualifications

Below is a list of suggested qualifications for nominating school-based educators to serve on professional judgment and evidence based state, district- and school-level panels. This is a guideline to help district leaders identify educators who are effective in their positions and knowledgeable about resources necessary to educate all Maryland students to state standards. This is not intended to be an exhaustive or strict list of requirements for participation. Ultimately, it is up to the discretion of Maryland’s education leaders to nominate educators who they feel are most qualified to successfully fulfill the role of school-based representatives on the panels.

These are some suggested general guidelines when nominating participants:

- Participants should be experienced. Experience working in more than one school or district is desirable.
- Nominees should be recognized as being successful educators — those who have effectively contributed to the success of their students and schools.
- Where possible, nominate educators possessing indicators of excellence, such as recognition as Educator of the Year (e.g. Principal of the Year, Teacher of the Year, etc.), National Board for Teaching Standards certification, or active involvement or leadership in a professional association.

Below is a list of suggested qualifications for specific positions:

- Teacher (Including general education teachers, prekindergarten teachers, LEP teachers, special education teachers, Title I teachers, etc.). Teachers are needed for all levels of schooling, e.g. elementary, middle and high school.
 - 5 years minimum of teaching experience, with at least 2 years in Maryland.
 - If the teacher being selected is for a specialized teaching position such as an LEP teacher or special education teacher, at least 1 year in the specialized role in addition to 4 years of general teaching experience.
- Teacher Leader/Coordinator (Including specialized teacher positions such as master teacher, teacher leader, prekindergarten program coordinator, LEP teacher leader/coordinator, special education lead teacher/coordinator, etc.). Teacher leaders/coordinators are needed for all levels of schooling, e.g. elementary, middle and high school.
 - 5 years minimum of teaching experience, with at least 2 years in Maryland.
 - If the teacher being selected is for a specialized position such as LEP or special education teacher leader or coordinator, at least 1 year in the specialized role in addition to 4 years of general teaching experience.
- Instructional Coach
 - 3 years minimum of instructional coaching experience
 - Possess a track record of increasing teacher quality

- Tutor
 - Should be a certificated teacher, not an aide or volunteer
 - 3 years minimum of tutoring experience
 - Possess a track record of increasing student performance

- Principal (Principals are needed for all levels of schooling, e.g. elementary, middle and high school).
 - 7 years of education experience
 - 3 years of experience in school-level administrative leadership roles, including at least one year as principal
 - Highly qualified assistant principals may be substituted if they possess the same level of experience, e.g. 7 years of education experience, 3 years of experience in school-level administrative leadership roles, and at least one year as an assistant principal

Appendix B.4: Professional Judgment and Evidence-Based Professional Judgment Panel Participant Nomination Memo

To: Maryland Education Leaders

From: Maryland State Department of Education on behalf of Augenblick, Palaich and Associates; Picus Odden and Associates; and Maryland Equity Project

Date:

Re: Nominating Educators to Serve on Professional Judgment and Evidence Based Panels

As you may be aware, the Maryland State Department of Education has contracted with Augenblick, Palaich, and Associates (APA), in partnership with Picus Odden and Associates (POA) and the Maryland Equity Project (MEP), to study the adequacy of school funding in the state of Maryland. Two of the approaches the research team will use for estimating adequacy are the professional judgment and evidence based approaches. Both of these approaches involve inviting educators to participate in a series of panels where they will share their expertise and experiences to help the research team understand the resources needed to educate students to Maryland's academic standards.

To ensure the success of the panels, we need your help in identifying experienced educators from schools that have been successful in educating all students or with a track record of individual success in working with students. You will find an attached document describing the preferred guidelines and criteria for nominating educators to participate on these panels. Please provide the name, position, school, district, phone number, and email of the nominee.

Once we have received your nominations, we will contact the nominees directly. Most teachers and principals will be asked to serve on panels for identifying school-based resources. One set of these school panels, which focuses on the evidence based approach, will be managed by POA and will be held this summer during the week of June 22-26. A second set of school panels focused on the professional judgment approach will be managed by APA and be held in the fall of 2015 after the start of the school year. A small number of teachers and principals will be asked to serve on panels that look at resources from a district or state perspective. These panels will be held later in the fall and winter. The exact dates, locations, and other details are still to be determined. Most panels meet for one day, while several panels meet for up to two days. Lunch will be provided whenever a panel meets past noon. We understand the time of educators is valuable, and will do everything in our abilities to minimize conflicts with work duties of the nominees in this process. We do not anticipate any educator being asked to serve on more than one panel. Your district will be reimbursed for the cost of substitute teachers if they are needed to provide release time for participating teachers. A stipend will be paid to teachers serving on panels held in June.

Please feel free to contact the Maryland State Department of Education (should add designated contact here) if you have any questions. Thank you very much for your cooperation in this process! We look forward to working with you.

Appendix B.5: Review of Maryland Requirements for Schools and Districts

The following is a brief review of key requirements for schools and districts in Maryland. All language is derived directly from the following sources: the Maryland State Department of Education and the State Board of Education (through the MSDE website and the Maryland Report Card website); and the 2014 Legislative Handbook Series Volume IX: Education in Maryland.

Compulsory Education and Minimum Days/Hours of Instruction¹

Maryland law requires all children between the ages of 5 and 16 who live in the state to attend school. Also, every child must attend kindergarten before entering grade one. A child may be excused from going to kindergarten if he or she is in a full-time licensed childcare center, a full-time registered family day-care home, or is in a Head Start five-year-old program part time.

Under the new Age of Compulsory School Attendance law (Senate Bill 362, signed into law in 2012), the age for compulsory school attendance will rise to 17 in the 2015-2016 school year, and to 18 in the 2017-2018 school year.

Public schools must be open at least 180 days over a 10-month period and must provide at least 1,080 hours of instruction for elementary and middle schools and 1,170 hours for high schools.

Maryland College and Career Standards²

Schools across the State in 2013-14 have implemented Maryland's College and Career-Ready Standards. These standards incorporate the Common Core State standards. Maryland was one of the first states to adopt the standards in reading/English language arts and mathematics. The Maryland State Board of Education adopted the standards by unanimous vote in June 2010. The Next Generation Science Standards were also adopted in June 2013. These rigorous education standards establish a set of shared goals and expectations for what students should understand and be able to do in grades Kindergarten to grade 12 in order to be prepared for success in college and the workplace.

The Maryland State Department of Education had previously developed, and the State Board of Education had approved, a statewide curriculum or State standards that define what students should know and be able to do in the additional subject areas of fine arts, social studies, health, world languages, Limited English Proficient students, school-library media, financial literacy, environmental education, technology education, and physical education. For some of these curricula the standards, indicators, and objectives are written grade by grade, while others are written in three grade bands consisting of grade three through grade five, grade six through grade eight, and grade nine through grade twelve.

¹ Legislative Handbook

² Maryland State Department of Education website and legislative handbook

Graduation Requirements³

As of 2005, to be awarded a diploma, a student shall be enrolled in a Maryland public school system and have earned a minimum of 21 credits that include the following:

Subject Area	Specific Credit Requirements
English	4 credits
Mathematics	3 credits 1 in algebra, 1 in geometry, 1 in another area
Science	3 credits 1 in biology, 2 that must include lab experience in any or all of the following areas: earth science, life science, physical science
Social Studies	3 credits 1 in U.S. History, 1 in World History, 1 in local, state or national government
Fine Arts	1 credit
Physical Education	½ credit
Health	½ credit
Technology Education	1 credit
Other	2 credits in World Language or 2 credits in American Sign Language or 2 credits in Advanced Technology Education and 3 credits in electives <u>or</u> 4 credits in a state-approved career and technology program and 1 credit of elective

³ MSDE website

Additional Mathematics Course Requirement⁴

In addition to the Maryland College and Career-Ready Standards, the College and Career Readiness and College Completion Act of 2013 established further requirements for mathematics. Beginning with the grade nine class of the 2014-2015 school year, each student is required to enroll in a mathematics course during each year that the student attends high school. It is the law's goal that all students achieve mathematics competency in at least Algebra II by the time they graduate. Regulations published by the State Board of Education identify mathematics courses that will satisfy the four-year requirement to include Algebra II, Pre-calculus, Discrete Mathematics, Linear Algebra, Probability and Statistics, AP Computer Science (or a computer science course that is not AP if the local school system determines that the course meets other specified requirements), and AP Calculus.

Service Learning Requirements⁵

Students must also meet service learning requirements that vary by district. To fit with Maryland's Seven Best Practices for Service Learning, a high quality service learning experience will:

1. Address a recognized need in the community
2. Achieve curricular objectives
3. Reflect throughout the service learning experience
4. Develop student responsibility
5. Establish community partnerships
6. Plan ahead for service learning
7. Equip students with knowledge and skills needed for civic engagement

Assessments⁶

Partnership for Assessment of Readiness for College and Careers (PARCC) Assessments

Students in grades three through eight, and in English 10 and Algebra are to be assessed using the Partnership for Assessment of Readiness for College and Careers (PARCC) assessments. The new PARCC assessments are aligned to the Maryland College and Career-Ready Standards which were developed from the Common Core and were fully implemented during the 2013-14 school year. PARCC will provide comparability across states and be able to assess and measure higher order skills such as critical thinking, communications, and problem solving. The assessments are computer-based and include a mix of constructed response items, performance-based tasks, and computer-enhanced items. Paper and pencil PARCC state assessments will be available for at least three years during the transition to online testing, and will be available for special needs beyond the transition.

⁴ Legislative Handbook

⁵ MSDE website

⁶ MSDE website

Science and Social Studies Assessments

The science Maryland School Assessment will continue to be given in grades five and eight until the Next Generation Science Assessment is developed. The Government High School Assessment will continue to be required for graduation, and the Biology High School Assessment will be replaced with the Next Generation Science Assessment when it is completed.

Alternate Maryland School Assessment/National Center and State Collaborative Assessment

The Alternate Maryland School Assessment (Alt-MSA) and the National Center and State Collaborative (NCSC) Assessment are assessments in which students with the most significant cognitive disabilities participate if the IEP process has been determined they cannot participate in the MSA/PARCC assessments even with accommodations.

In compliance with state and federal law, MSDE has used the Alt-MSA to assess reading and math in grades three through eight and 10, and science in grades five, eight, and 10. Beginning with the 2015-2016 school year, the NCSC assessment will replace the Alt-MSA for reading and math.

The NCSC alternative assessment does not currently include a science component, so Maryland will continue to use the Alt-MSA for science only.

ACCESS for LEPs

The English Language Proficiency Assessment, ACCESS for LEPs, is administered to Limited English Proficient (LEPs) in grades Kindergarten through 12 annually. The assessment measures a student's English language proficiency in the areas of listening, speaking, reading, writing, comprehension, oral, and literacy. English Language Proficiency Assessment results are used by the State and the local education systems to report information related to the English language proficiency targets, referred to in the NCLB, Title III as Annual Measurable Achievement Objective (AMAO). AMAO I measures LEP students' progress in learning English; AMAO II measures the number of students who attain English proficiency during the school year.

Accountability⁷

Waivers from the Federal Elementary and Secondary Education Act⁸

The federal No Child Left Behind Act, the most recent reauthorization of the Elementary and Secondary Education Act of 1965, requires every state to meet certain annual benchmarks. A school that fails to meet the requirements of No Child Left Behind may be subject to strict penalties for noncompliance. Due to the strict penalties of No Child Left Behind, the U.S. Department of Education offered states an opportunity to apply for waivers from certain provisions of No Child Left Behind (flexibility waivers). In order to receive a flexibility waiver, states must outline their plans to improve educational outcomes for all students, close achievement gaps, increase equity, and

⁷ Maryland Report Card website

⁸ Legislative Handbook

improve the quality of instruction. A flexibility waiver applies to 10 No Child Left Behind requirements and up to three optional requirements that a state chooses.

Maryland received a flexibility waiver which allowed the State and its local education agencies to focus on implementing the Maryland College and Career-Ready Standards; transition to the Partnership for Assessment of Readiness for College and Careers assessments; provide support, recognition, and intervention to all Maryland public schools; and develop a teacher and principal evaluation system that incorporates student growth, measured by assessments, as a major component.

Maryland's Accountability Program

Maryland's new Accountability Program is comprised of three components, (1) School Progress, (2) School Progress Index (SPI), and (3) Differentiated Recognition.

The new Maryland School Progress Index is based on high expectations and multiple measures that include student achievement data in English/Language Arts, Mathematics, and Science; growth data in English/Language Arts and Mathematics; gaps, based on the gap score between highest-achieving and lowest-achieving subgroups in mathematics, reading, science, cohort graduation and cohort dropout rates. Maryland's Progress Index will differentiate schools into one of five strands which determine the district and state support schools receive. The State affords top performing schools greater flexibility while lower-performing schools receive progressively more prescriptive technical assistance, expectations, and monitoring.

The School Progress Index evaluates schools on a continuous scale based on the variables of Achievement, Growth, Gap Reduction, and College and Career Readiness. The indicators are specific to Elementary and Middle schools or High Schools. Each indicator is comprised of specific measures for Elementary and Middle schools or High Schools. SPI is compensatory so that a low value on one indicator can be balanced by a high value on another indicator. Each of the indicators comprising the Index are differentially weighted based on their importance in assessing overall school progress.

The Annual Measurable Objectives (AMOs) for each component of the Index are based on a trajectory toward the goal, the time by which each individual school is expected to reduce its percent of students that are not proficient by half for Achievement, reduce its students not showing Growth by half, reduce the gap between the lowest and highest performing subgroups by half, and reduce the number of students that are not completing the goals for College and Career-Readiness by half.

The School Progress Index results in a Strand classification of 1 (highest) to 5 (lowest) which in turn helps identify schools for intervention, supports, and recognition of schools achieving at high levels or making exceptional progress.

Requirements for Publically-funded Prekindergarten Programs⁹

The overall goal of the prekindergarten program is to provide learning experiences to help children develop and maintain school readiness skills necessary for successful school performance.

Local boards of education shall provide prekindergarten programs to accommodate all eligible four-year-old children seeking enrollment in public school programs. Eligible children include all four-year-old applicants who are from families with economically disadvantaged¹⁰ backgrounds or who are homeless; if vacancies remain after compliance with this regulation, a local school system may enroll four-year-old applicants who are not from families with economically disadvantaged backgrounds but who represent a student population that exhibits a lack of school readiness. A program for three-year-old children may also be established for children that fit these same criteria. A qualified vendor will: (1) Maintain state or national early childhood program accreditation; (2) Have the capacity to meet the responsibilities identified in this regulation; (3) Be licensed to operate a childcare center; and (4) Provide responses to Department requests for information and data related to the operation of the prekindergarten program.

Further, a local school system shall: (1) Develop and maintain a policy for determining the eligibility and selection of prekindergarten sites as well as the eligibility of four-year-old students for prekindergarten programs consistent with the requirements of this chapter; (2) Develop criteria that establishes procedures to include children in the prekindergarten program who are not economically disadvantaged; (3) Operate the prekindergarten educational program 5 days per week for a minimum of 2.5-hours per day consistent with the school calendar approved by the local board; (4) Analyze the Department-approved kindergarten assessment system information to evaluate the effectiveness of the prekindergarten program, and make necessary adjustments to the prekindergarten instructional program; (5) Provide data in the Bridge to Excellence Master Plan needs assessment to indicate progress on prekindergarten program goals; (6) Provide staffing for each session of prekindergarten to include a teacher who possesses a current state professional certificate in early childhood education and a para-professional with a minimum of a high school diploma, or its equivalent, or a CDA; (7) Align each prekindergarten program with the Maryland Common Core State Curriculum; (8) Based on the September 30 enrollment count, maintain an average staff to student ratio of 1:10 with an average of 20 students per classroom; and (9) Provide responses to Department requests for information and data related to the operation of the prekindergarten program.

Education of Students with Disabilities¹¹

Federal law requires states to provide a free appropriate public education to all students with disabilities through age 21 who are found to be in need of special education services. In order to

⁹ State Board of Education via MSDE website

¹⁰ Economically disadvantaged being 185 percent of poverty

¹¹ Legislative Handbook

meet the requirement, the education programs for disabled students must be designed to meet their individual needs and could include specially designed instruction in classrooms, at home, or in private or public settings. Examples of these services include speech, occupational, and physical therapy, psychological counseling, and medical diagnostic services that are necessary to a child's education. Teachers of students with disabilities are required to be trained in the instruction of disabled students. Services begin as soon as the child can benefit from them, regardless of whether the child is of school age.

*Maryland High School Certificate*¹²

This certificate is awarded to students with disabilities who do not meet the requirements for a diploma but who meet one of the following criteria:

1. The student is enrolled in a special education program for at least four years beyond Grade eight, or its age equivalent. The student is determined to have developed appropriate skills for the individual to enter the world of work, act responsibly as a citizen, and enjoy a fulfilling life by an Individualized Educational Program (IEP) Team, with agreement of the student's parents/guardians. The world of work includes, but is not limited to, gainful employment, work activity centers, supported employment, or sheltered workshops.
2. After being enrolled in a special education program for four years beyond Grade eight, or its age equivalent, the student reached age 21.

Teacher Certification¹³

The Maryland State Department of Education oversees the certification of teachers, principals, and other school personnel and evaluates and approves higher education programs that educate and prepare teachers and other certified school personnel, in collaboration with the Professional Standards and Teacher Education Board. In order to ensure teacher quality and that students are being taught by qualified, competent teachers, the Maryland State Department of Education is also responsible for state approval and national accreditation for all professional educator certification programs in Maryland's colleges and universities.

The federal No Child Left Behind Act requires that all teachers of core academic subjects be highly qualified. Core academic subjects include English, mathematics, reading or language arts, science, foreign languages, civics and government, economics, arts, history, and geography. To be highly qualified, a teacher must have at least a bachelor's degree, hold a license to teach in the State, have obtained full state certification, and have subject matter expertise. Schools are required by federal law to annually report on the number of teachers who are not highly qualified.

¹² MSDE website

¹³ Legislative Handbook

Teacher and Principal Evaluations¹⁴

Chapter 189 of 2010, the Education Reform Act, enhanced accountability measures for teachers and principals by requiring annual performance evaluations for non-tenured certificated teachers and principals that include student growth as a significant component. The law also added a third probationary year before teachers may receive tenure.

MSDE developed a statewide Teacher and Principal Evaluation (TPE) system. The state TPE system includes equally weighted measures of professional practices and student growth. Each district is responsible for evaluating its certified teachers and principals, using either the state system or a locally developed system that has been endorsed by both the State and local education agencies' collective bargaining units.

The State Board of Education regulations require that a District's teacher and principal evaluation system meet the minimum general standards set forth in the regulations. The general standards require at least two classroom observations (for teachers), claims and evidence that substantiate observed behavior, a professional development component, a mentoring component for ineffective-rated teachers and non-tenured teachers, and a measure of student growth that is a significant factor in the overall rating and is based on multiple measures. An evaluation must have a written report that is presented to the evaluated teacher or principal, a space for written comments by the evaluated teacher or principal, and a process for appealing a final rating and report.

The student growth component should count for 50 percent of an evaluation, may not be based solely on an existing or newly created exam, and must be based on multiple measures, such as aggregate class growth scores and student learning objectives and the schoolwide performance index. However, student growth data based on or derived from state assessments may not be used to make personnel decisions until school year 2016-17.

The professional practice component should also count for 50 percent of an evaluation. For teachers, this component includes planning and preparation, classroom environment, instruction, and professional responsibility. For principals, the professional practice component should include the outcomes in the Maryland Instructional Leadership Framework, which is comprised of eight domains: (1) school vision; (2) school culture; (3) curriculum, instruction, and assessment; (4) observation/evaluation of teachers; (5) integration of appropriate assessments; (6) use of technology and data; (7) professional development; and (8) stakeholder engagement. The professional practice component also should include outcomes developed by the Interstate School Leaders and Licensure Consortium, including (1) school operations and budget; (2) effective communication; (3) influence on the school community; and (4) integrity, fairness, and ethics.

¹⁴ Legislative Handbook and MSDE

Appendix B.6: Instructions to Maryland Professional Judgment Panel Members

Augenblick, Palaich and Associates

Denver, Colorado

[Panel Date]

The work you are doing today is part of an adequacy study being conducted in Maryland on behalf of the Maryland State Department of Education. It relies on your professional experience to identify the resources needed so that all students, schools, and districts can fulfill all state standards. Below you will find a number of instructions to help you in this process. It is important to remember that you are not being tasked to build your “Dream School.” Instead, you are being asked to identify the resources needed to meet the specific standards and requirements that the State expects students, schools and districts to fulfill. You should allocate resources as efficiently as possible without sacrificing quality. You are a member of a panel that is being asked to design how programs and services will be delivered in representative school settings. These panels are being used to identify the resources that schools with a particular set of demographic characteristics should have in order to meet a specific set of “input” requirements and “output” objectives.

1. **[Description of prior panels held, example language here from final statewide panel]**
Previously, four school-level professional judgment panels were convened to address: (1) elementary schools; (2) prekindergarten programs; (3) middle schools; and (4) high schools. Each panel discussed more than one representative school for that grade configuration of varying size, and addressed resources needed to serve all students (“base” resources) and at risk students. Two additional panels were then held to review the work of the school-level panels and address the resources needed for (1) special education students, and (2) English Language Proficient (LEP). A district-level panel was also held to review the work of all prior panels, and identify the district-level resources needed to support schools. Finally, a CFO panel was held earlier this week to specifically review non-personnel costs at the school and district level.
2. **[Short description of current panel, example language here from final statewide panel]**
Today, you are serving on a statewide review panel to review the work of all prior panels and address any inconsistencies or outstanding issues.

3. The characteristics of each representative school(s) are identified, including: (1) grade span; (2) enrollment; and (3) the proportion of at risk students (based on those students eligible for free/reduced price lunch), LEP students, and special education students.
4. The “input” requirements and “outcome” objectives that need to be accomplished by the representative school(s) are those required by the State. These requirements or objectives can be described broadly as education opportunities, programs, services, or as levels of education performance. You will be provided a short summary of state expectations and performance standards; it is not meant to be exhaustive of all requirements that the State requires schools and districts to fulfill but instead should be considered a refresher or reminder.
5. In designing the representative school(s), we need you to provide some very specific information so that we can calculate the cost of the resources that are needed to fulfill the indicated requirements or objectives. The fact that we need that information should not constrain you in any way in designing the program of the representative school(s). Your job is to create a set of programs, curriculums, or services designed to serve students with particular needs in such a way that the indicated requirements/objectives can be fulfilled. Use your experience and expertise to organize personnel, supplies and materials, and technology in an efficient way you feel confident will produce the desired outcomes.
6. For this process, the following statements are true about the representative school(s) and the conditions in which they exist:

Teachers: You should assume that you can attract and retain qualified personnel and that you can employ people on a part-time basis if needed (based on tenths of a full-time equivalent person).








Facilities: You should assume that the representative school has sufficient space and the technology infrastructure to meet the requirements of the program you design.

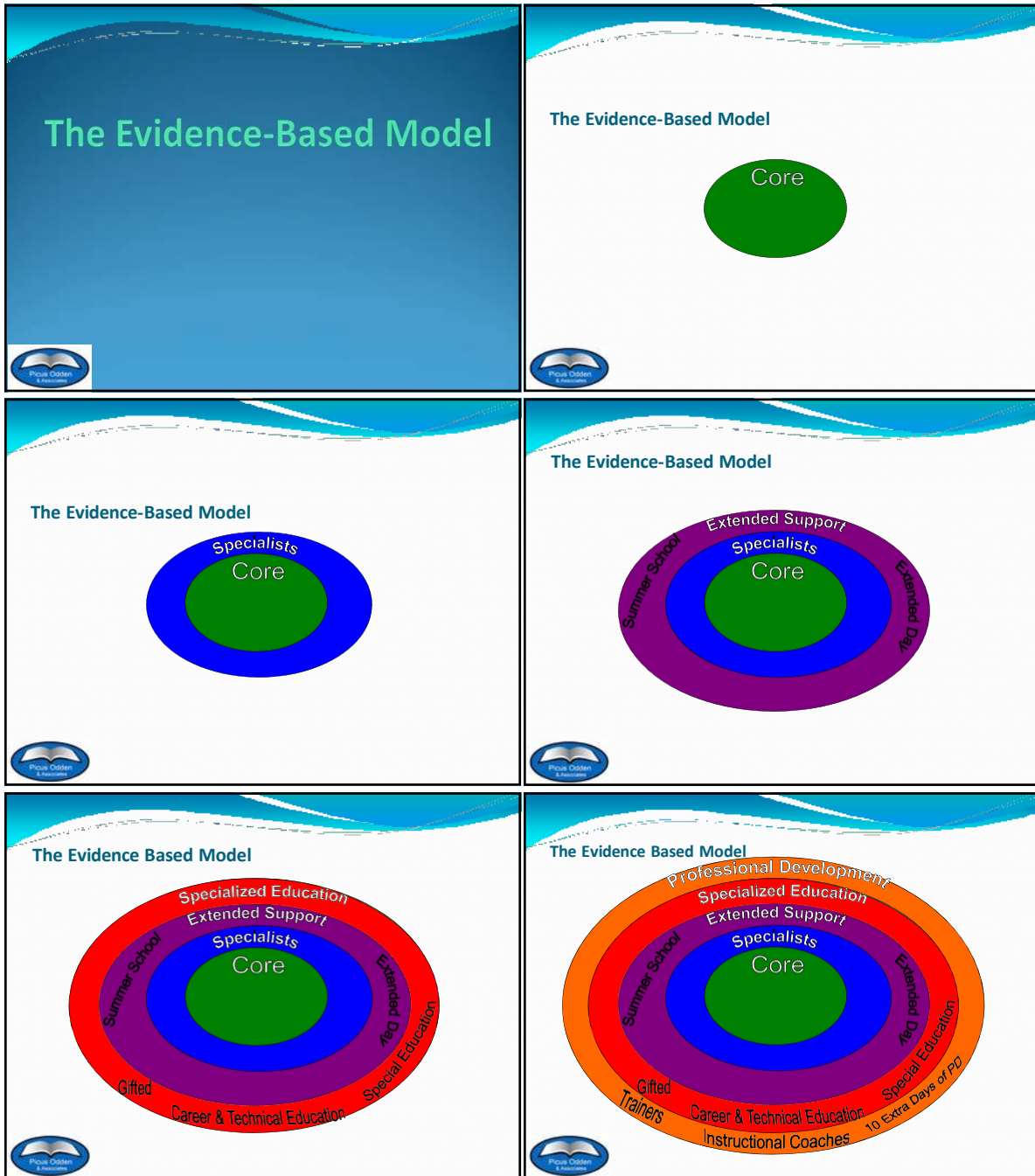
Revenues: You should not be concerned about where revenues will come from to pay for the program you design. Do not worry about federal or state requirements that may be associated with certain types of funding. You should not think about whatever revenues might be available in the school or district in which you now work or about any of the revenue constraints that might exist on those revenues.

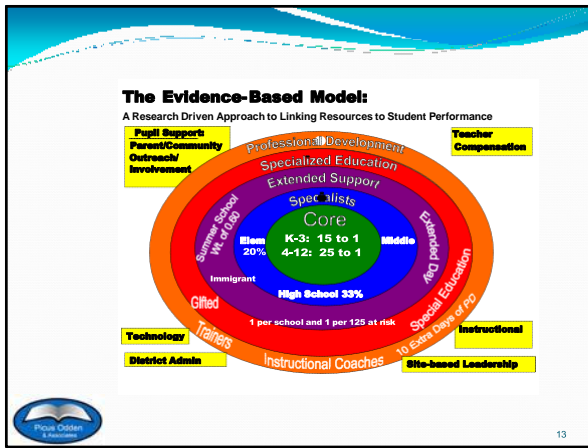
Programs: You may create new programs or services that do not presently exist that you believe address the challenges that arise in schools. You should assume that such programs or services are in place and that no additional time is

needed for them to produce the results you expect of them. For example, if you create after-school programs or prekindergarten programs to serve some students, you should assume that such programs will achieve their intended results, possibly reducing the need for other programs or services that might have otherwise been needed.

Appendix B.7: Evidence-Based Professional Judgment Panel’s Introduction to Evidence-Based Method

<p><i>Using the Evidence-Based Method to identify a Base Spending level and Pupil Weights for the Maryland School Funding System</i></p> <p>Professional Judgment Panel Meetings</p>  <p>Improving the way public resources for education are translated into improved student learning</p> 	<h3>Today's Agenda</h3> <ul style="list-style-type: none">• Introductions• The Evidence-Based (EB) Funding Model• The Improvement Model in the EB Model• Purpose of Professional Judgment Panels• Discussion of EB Model Elements 
<h3>Introductions</h3> 	<h3>Team Members</h3> <ul style="list-style-type: none">• Picus Odden and Associates<ul style="list-style-type: none">• Lawrence O. Picus• Allan Odden• Maryland Equity Project<ul style="list-style-type: none">• Amaya Garcia• Rebecca Grove• Kathleen Hoyer• Carl Sunderman 
<h3>Mission Statement</h3> <p>Picus Odden and Associates is an independent school finance consulting group whose mission is to work collaboratively with states and school districts to improve the way public resources for education are translated into improved student learning.</p> 	<h3>Overview of the Maryland School Funding Study</h3> <ul style="list-style-type: none">• Study Partnership with APA Consulting• Three approaches to estimating adequacy<ul style="list-style-type: none">• Professional Judgment• Successful Schools/Districts• Evidence-Based (Picus Odden & Assoc.)<ul style="list-style-type: none">• Evidence-Based report• Professional Judgment panel• Case studies 





The EB Improvement Model

- ### Strategies to Boost Performance
1. Conduct needs assessment
 2. Set high goals
 3. Adopt a new curriculum and identify effective instructional practices
 4. Commit to data-based decision making
 5. Invest in on-going professional development, with instructional coaches

- ### Strategies to Boost Performance
6. Focus class time more efficiently
 7. Provide multiple and timely interventions for students at risk of academic failure
 8. Create professional learning communities
 9. Empower leaders to support instructional improvement
 10. Take advantage of external expertise
- Manage Talent







The Challenge

Scale up these strategies in all schools by effectively and efficiently using resources provided by an adequately-oriented state funding model

Note: the EB funding model provides all the resources

Elements of the EB Model

Staff Resources for Core Programs

<h3>Heuristic Use of Prototypical School Sizes</h3> <ul style="list-style-type: none">• 450 elementary school, 75 students per grade• 450 middle school, 150 students per grade• 600 high school, 150 students per grade <p> All can be scaled up or down</p>	<h3>1a. Pre-Kindergarten</h3> <ul style="list-style-type: none">• Full day prekindergarten program• Staff at 1 teacher and 1 aide position for every 15 PreK students <p></p>
<h3>1b. Kindergarten</h3> <ul style="list-style-type: none">• Full day kindergarten program• Each kindergarten student counts as 1.0 pupil in the funding system. <p></p>	<h3>2. Core Teachers (Elementary)</h3> <ul style="list-style-type: none">• Student/Teacher Ratio<ul style="list-style-type: none">• 15:1 – Grades K-3• 25:1 – Grades 4-5 <p></p>
<h3>3. Core Teachers (Secondary)</h3> <ul style="list-style-type: none">• Student/Teacher Ratio<ul style="list-style-type: none">• 25:1 – Grades 6-12 <p></p>	<h3>4. Elective Teachers</h3> <ul style="list-style-type: none">• Elementary – 20% of Core Teachers• Middle – 20% of Core Teachers• High School – 33% of Core Teachers <p></p>

5. Instructional Coaches

- 1.0 FTE Instructional Coach position for every 200 students



6. Core Tutors

- One tutor position for each prototypical school

- Note: Additional tutors are provided through the at risk pupil count in element 22



7. Substitute Teachers

- 5 % of core and elective teachers, instructional coaches, tutors (and teacher positions in additional tutoring, extended day, summer school and LEP)



8. Core Guidance Counselors and Nurses

- 1 guidance counselor for every 450 K-5 students
- 1 guidance counselor for every 250 6-12 students
- 1 nurse for every 750 K-12 students



9. Supervisory Aides

- 2 for each prototypical 450-student elementary and middle school
- 3 for each prototypical 600-student high school



10. Librarians

- 1.0 librarian position for each prototypical school



11. Principal/Assistant Principal

- 1.0 principal for the 450-student prototypical elementary school
- 1.0 principal for the 450-student prototypical middle school
- 1.0 principal and 1.0 assistant principal for the 600-student prototypical high school



12. School Site Secretarial Staff

- 2.0 secretary positions for the 450-student prototypical elementary school
- 2.0 secretary positions for the 450-student prototypical middle school
- 3.0 secretary positions for the 600-student prototypical high school



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Elements of the EB Model



Dollar Per Student Resources

13. Gifted and Talented

- \$30 per ADM, inflated annually



14. Professional Development

- 10 days of student-free time for training built into teacher contract year
- \$125 per ADM for trainers inflated annually









This is in addition to instructional coaches

15. Instructional Materials

- \$190 per pupil for instructional and library materials



<p>16. Short Cycle/Interim Assessments</p> <ul style="list-style-type: none">•\$30 per pupil for short cycle, interim and formative assessments 	<p>17. Computer Technology and Equipment</p> <ul style="list-style-type: none">•\$250 per pupil for school computer and technology equipment 
<p>18. Career and Technical Education Equipment</p> <ul style="list-style-type: none">•\$10,000 per CTE teacher for specialized equipment 	<p>19. Extra Duty Funds and Student Activities</p> <ul style="list-style-type: none">•\$250 per student for co-curricular activities including sports and clubs 
<p>Elements of the EB Model</p>  <p>Central Office Staffing</p>	<p>20. Maintenance and Operations</p> <ul style="list-style-type: none">•Separate computations for custodians, maintenance workers and groundskeepers 

21. Central Office Staffing

- A dollar per student figure for the Central Office based on the number of FTE positions generated and the salary and benefit levels for those positions. It also includes a per pupil amount for miscellaneous items such as Board support, insurance, legal services, etc.



Elements of the EB Model



Resources for Struggling Students

22. Tutors

- One tutor position for every 125 at risk students (in addition to the one core tutor position in each prototypical school)
- These positions are provided additional days for professional development (Element 14) and substitute days (Element 7)



23. Additional Pupil Support

- One pupil support position for every 125 at-risk students
- These positions are provided additional days for professional development (Element 14)



24. Extended Day

- 1.0 teacher position for every 30 at-risk students or 3.33 FTE per 100 such students.
- Position paid at the rate of 25 percent of annual salary—enough to pay a teacher for a 2-hour extended-day program, 5 days per week.



This formula equates to 1 teacher position for every 120 at-risk students

25. Summer School

- 1.0 teacher position for every 30 at-risk students or 3.33 FTE per 100 such students.
- Position paid at the rate of 25 percent of annual salary—enough to pay a teacher for a six to eight week 4 hour per day summer school program and include adequate time for planning and grading
- This formula equates to 1 teacher position for every 120 at-risk students.



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26. Limited English Proficient Students

- 1.0 teacher position for every 100 identified LEP students.
- This provision is in addition to all the resources triggered by the at-risk student count, which includes all LEP students.



27. Alternative Schools

- One assistant principal position and one teacher position for every 7 ALE students.



Note: Resources also include other par staff

28. Special Education

- 1 teacher position for every 150 students in the school
- 1 aide position for every 150 students in the school



Deduction of Federal Title VIb funds

Elements of the EB Model



Staff Compensation



Staff Compensation

- Average salary by major staff positions of previous year
- For benefits:
 - Percentage Benefits:
 - Retirement or pension costs
 - Social Security and Medicare
 - Worker's Compensation
 - Unemployment Insurance
 - Fixed Benefits:
 - Health Insurance



Questions & Answers



<h2>Next Steps</h2> 	<h2>Contacts</h2> <ul style="list-style-type: none">• Lawrence O. Picus – lpicus@picusodden.com• Allan Odden – arodden@picusodden.com 
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Appendix B.8: Ingredient Prices for Professional Judgment and Evidence-Based Models

Table B.5

2014-15 Average Salary by Position (Evidence Based)

Position	Average Salary
School	
Principal	\$118,906
Assistant Principal	\$100,948
Teacher	\$65,440
Instructional Coach	\$81,131
Substitute Teacher	\$65,440
Guidance Counselor	\$72,415
Nurse	\$56,842
Instructional/Supervisory Aide	\$29,435
Library-Media Specialist	\$72,904
School Secretary/Clerical	\$43,943
Maintenance and Operations	
Custodian	\$42,607
Maintenance Worker	\$56,303
Grounds Maintenance	\$42,607
Central Office	
Superintendent	\$199,670
Business Manager	\$125,820
Director Personnel/HR	\$125,820
Asst. Supt. of Instruction	\$156,314
Director of Pupil Services	\$125,820
Director of Assessment	\$125,820
Director of Technology	\$125,820
Director of O&M	\$125,820
Secretary/Clerical	\$43,943
Network/Systems Supervisor	\$75,000
School Computer Technician	\$45,000
Speech Pathologist	\$74,608
Psychologist	\$86,404

Table B.6
2014-15 Average Salary by Position (Professional Judgment)

School Level	
Position Title	Salary
<i>Instructional Staff</i>	
Teachers	\$65,440
Instructional Facilitator (Coach)	\$65,440
Teacher Tutor/ Interventionist	\$65,440
Librarians/Media Specialists	\$72,904
Media Aide	\$32,677
Technology Specialists	\$72,904
Instructional Aides	\$29,435
<i>LEP Staff</i>	
LEP Coordinator	\$65,440
<i>Special Education Staff</i>	
Speech Pathologist	\$74,608
OT/PT Therapists	\$79,367
IEP Coordinator	\$65,440
<i>Pupil Support Staff</i>	
Counselors	\$72,415
Nurses	\$56,842
Health Aide	\$27,783
Psychologists	\$86,404
Social Worker	\$80,815
Student/Pupil Support Worker	\$95,564
Behavior Specialists	\$75,836
Family Liaison	\$43,943
Alternative/In School Suspension (Para)	\$29,435
Transition Coordinator	\$65,440
Job Coaches (Para)	\$29,435
<i>Administrative Staff</i>	
Principal	\$118,906
Assistant Principal	\$100,948
Dean	\$87,644
Athletic/Activities Director	\$87,644
Bookkeeper	\$43,943
Clerical/Data Entry	\$43,943
<i>Other Staff</i>	
IT Technician	\$53,667
Substitute	\$65,440
Coordinator	\$65,440

District Level	
Position Title	Salary
Superintendent	\$199,670
Assistant/Associate Superintendent	\$156,314
Executive Director	\$125,820
Director	\$125,820
Supervisor	\$105,039
Coordinator	\$105,371
Manager	\$105,371
Secretary/Clerk	\$43,943
IT Technician	\$53,667
Nurse	\$56,842
Specialist	\$75,836
Other Professional	\$75,836
Attorney (Systems and Board)	\$125,820
Database Admin/Programmer	\$53,667
Therapist/Specialist	\$70,551
Interpreter/Translator	\$43,943

Table B.7
2014-15 Employee Benefit Costs (Evidence-Based and Professional Judgment)

Employee Benefit	Rate
Social Security	6.20% (Up to \$118,500 of salary)
Medicare Insurance	1.45%
State Retirement (Certified)	4.560%
State Retirement (Classified)	8.170%
Workers Compensation (Certified)	0.550%
Workers Compensation (Classified)	2.18%
Unemployment Insurance	2.8%
Medical Insurance	\$8,537

Table B.8

2014-15 Technology Prices (Professional Judgment)

	Cost per Unit	Replacement Cycle	Annual Price
Administration/Main Office			
Computers	\$826	4	\$207
Laptops	\$1,124	4	\$281
Mobile Device	\$528	4	\$132
Printers	\$299	4	\$75
Copier	\$625	4	\$156
Faculty			
Computers	\$831	4	\$208
Laptops	\$1,124	4	\$281
Mobile Device	\$528	4	\$132
Classroom			
Computers	\$826	4	\$207
Printers	\$299	4	\$75
Visual Presentation System	\$1,948	4	\$487
Document Camera	\$450	4	\$113
Wireless Access Point	\$560	4	\$140
Computer Lab(s)-Fixed			
Computers	\$826	4	\$207
Printers	\$299	4	\$75
Visual-Presentation System	\$1,948	4	\$487
Computer Lab(s)-Mobile			
Laptops	\$840	4	\$210
Media Center			
Computers	\$820	4	\$205
Printers	\$299	4	\$75
Other			
Student Devices	\$429	4	\$107
Headphones	\$19	4	\$5
Protective Cases	\$25	4	\$6
LCD TV (Digital Signage)	\$843	4	\$211

Appendix C

Successful Schools Materials

Appendix C.1: Study of Adequacy of Funding for Education in Maryland Instructions for School Expenditure Data Collection Tool

OVERVIEW:

We are asking you to complete the accompanying Data Collection Tool(s) as part of the adequacy study APA Consulting is conducting for the Maryland State Department of Education. This study was required by the Bridge to Excellence in Public Schools Act, which enacted the recommendations of the Thornton Commission, to make recommendations for updating the state's school finance formula. The results of this and two other approaches to estimating the cost of an adequate education will be used to recommend a new base per pupil funding amount and weights for students with special needs in fall 2016.

The purpose of this survey is to collect the amount of money the selected school spends to provide its basic education program, that is, the general education program provided for all students enrolled in the school. This amount should exclude spending for supplemental programs and services for students who are at risk, Limited English Proficient students, or have an Individualized Education Program (IEP) through the special education program. This spending information will be used to help estimate a new per-pupil basic foundation amount.

Please complete a Data Collection Tool workbook for each school from your district selected for the successful schools study. Please note that if you are completing more than one Data Collection Tool (e.g. two or more schools from your district were selected for the study), you are only required to complete the district-level sections in the General Information and District Administration tabs once. If you do not see a cell for entering a school expenditure related to the school's general education program, please describe the expenditure and enter the amount in either the Notes or Questions box found at the bottom of each program area tab or the Comments tab.

The following applies to all data you will enter in the Data Collection Tool:

- *All data should be for the 2014-15 school year*
- *All student and staff information should be as of September 30, 2014*
- *Please report actual expenditures for 2014-15, not budgeted*
- *Do not include any expenditures for Category 206 – special education*
- *Please list the source for all information provided (E.g. budget, district/state data reporting system, required state or federal reports, etc.)*

Please read the instructions carefully as you complete the Data Collection Tool. If you have any questions please contact:

Mark Fermanich
APA Consulting
mlf@apaconsulting.net
720-227-0101

Thank you for your help!

GENERAL INFORMATION (INFO) TAB:

We will begin by asking for information about the selected school (the name of the school is part of the Microsoft Excel workbook file name).

All Student Counts should be taken from your September 30th, 2014 enrollment count. Staff information should also be based on staff working in the school and district as of September 30th, 2014.

- In cell C5, please use the drop-down menu to enter the lowest grade served by the school (for example, PK).
- In cell E5, please use the drop-down menu to enter the highest grade served by the school (for example, grade six).

If the drop-down menus are not compatible with your version of Microsoft Excel, please simply enter the lowest grade served in cell C5 and the highest grade served in cell E5.

- In cell B8, please enter the total number of FTE students enrolled in grades one through 12. We understand that most schools will not have this full grade span. We are requesting the count only of those students not in kindergarten or prekindergarten served by the school.
- In cell B9, please enter the total number of enrolled FTE full-day kindergarten students if any.
- In cell B10, please enter the total number of enrolled FTE half-day prekindergarten students if any.
- In cell B11, please enter the total number of enrolled FTE full-day prekindergarten students if any.

For the questions requesting information about teachers (cells B15, B17, B33, and B35), please include classroom, specialist (music, art, physical education, foreign language, etc.), Title I, special education, English language learner, long-term substitutes, and other certified staff with direct instructional responsibilities. Do not include other professional student support staff without instructional responsibilities such as media/librarians, guidance counselors, social workers, nurses, therapists, psychologists, etc.

- In cell B15, please enter the average years of experience of all teachers working in the identified school. When calculating the school's average years of experience, please enter the teachers' total teaching experience, not their years of experience working in this school or district.
- In cell B17, please enter the percent of teachers in the identified school who hold an APC or National Board of Professional Teaching Standards certification.

In the next section we request information about your entire district. ***If more than one school has been identified in your district and you have already provided this information you may skip this section.***

- In cell B22, please enter the total number of enrolled FTE half-day prekindergarten students if any.
- In cell B23, please enter the total number of enrolled FTE full-day prekindergarten students if any.
- In cell B24, please enter the total number of enrolled FTE full-day kindergarten students if any.
- In cell B25, please enter the total number of enrolled FTE elementary students in the district.
- In cell B26, please enter the total number of enrolled FTE middle school or junior high students in the district.
- In cell B27, please enter the total number of enrolled FTE high school students in the district.
- In cell B29, please enter the district's total operating expenditures for 2014-2015, this would include both restricted and unrestricted funds.

This amount should consist of actual 2014-15 expenditures reported in the Current Expense fund *excluding* any expenditures for transportation, food service, adult education, district payments for retiree benefits, and non-Current Expense Fund capital expenditures. (The amount should include capital expenditures from the Current Expense Fund).

- In cell B33, please enter the average years of experience for all teachers in the district.

Please follow the instructions for calculating the average years of experience for all teachers in the school listed above.
- In cell B35, please enter the percent of teachers in the district who hold an APC or National Board of Professional Teaching Standards certification.

DISTRICT ADMINISTRATION TAB:

If more than one school has been identified in your district and you have already provided this information you may skip this section.

All FTE and Personnel Costs data should be for staff working in the district as of September 30, 2014.

The first section addresses expenditures for General Support Services, identified in the Maryland *Financial Reporting Manual* with category code 20121. Please enter the full district cost for each area.

- In cell B9, please enter the total amount expended for salaries and wages for General Support Services.
- In cell C9, please enter the amount of employee fringe benefits reported in Fixed Charges (Category 212) that correspond to the salaries identified in cell B9, the salaries and wages for General Support Services. Fringe benefits should include the employer's share of FICA; Medicare; premiums for health insurance, life insurance, short- and/or long-term disability insurance, and workers' compensation insurance; and any other employee-related Fixed Charges. When reporting the employer's share of retirement contributions, please use 100 percent of the normal cost contributions for fiscal year 2017, assuming the teacher pension cost sharing as specified in the Budget Reconciliation Act of 2012 is fully phased in. The total for fringe benefits may be shown as an amount or as a percentage of total Salaries and Wages. Do not include any payments for retiree benefits.
- Cell D9 shows the total amount expended for salaries and wages and fringe benefits for General Support Services. Please enter this amount if the total does not calculate automatically.

The next section addresses expenditures for Business Support Services, identified in the Maryland *Financial Reporting Manual* with category code 20122.

- In cell B15, please enter the total amount expended for salaries and wages for Business Support Services.
- In cell C15, please enter the amount of employee fringe benefits reported in Fixed Charges (Category 212) that correspond to the salaries identified in cell B15, the salaries and wages for Business Support Services. Please see the instructions provided above for cell C9 for directions on how to calculate total fringe benefits.
- Cell D15 shows the total amount expended for salaries and wages and fringe benefits for Business Support Services. Please enter this amount if the total does not calculate automatically.

The next section addresses expenditures for Centralized Support Services, identified in the Maryland *Financial Reporting Manual* with category code 20123.

- In cell B21, please enter the total amount expended for salaries and wages for Centralized Support Services.
- In cell C21, please enter the amount of employee fringe benefits reported in Fixed Charges

(Category 212) that correspond to the salaries identified in cell B21, the salaries and wages for Centralized Support Services. Please see the instructions provided above for Cell C9 for directions on how to calculate total fringe benefits.

- Cell D21 shows the total amount expended for salaries and wages and fringe benefits for Centralized Support Services. Please enter this amount if the total does not calculate automatically.

The final section addresses costs associated with Instructional Administration and Supervision, identified in the Maryland *Financial Reporting Manual* with category code 20216. *Do not include any FTEs or expenditures for Instructional Administration and Supervision for special education programs (20616).*

Please see the instructions provided above for Cell C9 for directions on how to calculate total fringe benefits for cells B29 through F29.

- In cells B27, C27, D27, E27, and F27, please enter the total Full Time Equivalent (FTE) of people working in each designated area under Instructional Administration and Supervision. For example, a person working full-time is 1.0 FTE. A person working 40 percent of the time is .4 FTE.
- In cells B28, C28, D28, E28, and F28, please enter the district's total expenditure for salaries and wages for each personnel category for Instructional Administration and Supervision. This amount should not include any expenditure for employee fringe benefits (employee-related Fixed Charges).
- In cells B29, C29, D29, E29, and F29, please enter the district's total expenditure for employee fringe benefits for each personnel category for Instructional Administration and Supervision. This amount comes from Fixed Charges (Category 212). Please see the instructions provided above for Cell C9 for directions on how to calculate total fringe benefits. Expenditures reported here should exclude employee fringe benefits.
- In cells B30, C30, D30, E30, and F30, please enter the total FTE of people in each personnel category that work exclusively with Limited English Proficient (LEP) students or administration of LEP programs, or their portion of time spent exclusively in this area related to Instructional Administration and Supervision. For example, if reporting partial time for a person enter .4 for someone who spends 40 percent of their time with the LEP program.
- In cells B31, C31, D31, E31, and F31, please enter the total FTE of people in each personnel category that work exclusively with at risk students or administration of at risk programs, or their portion of time spent exclusively in this area related to Instructional Administration and Supervision. For example, if reporting partial time for a person enter .4 for someone who spends 40 percent of their time working with at risk programs.

By staff working with at risk students we mean staff who are funded through Title I or the State's Compensatory Education formula who provide supplemental services to students who are low-income, at risk of academic failure, or who have a record of disruptive behavior.

When entering teacher and other staff FTE, salary and wage expenditures, and fringe benefit expenditures for staff working with at risk students, if any of these staff are funded through Title I,

include only the Title I staff FTE and salary and benefit expenditures exceeding the school's federal comparability levels.

- In cell B37, please enter the total amount spent for Contractual Services (200) for programs 20121, 20122, 20123, and 20216.
- In cell C37, please enter the total amount spent for Supplies and Materials (300) for programs 20121, 20122, 20123, and 20216.
- In cell D37, please enter the total amount spent for Other Charges (400) for programs 20121, 20122, 20123, and 20216. Expenditures reported here should exclude employee fringe benefits.
- In cell E37, please enter the total amount spent for Equipment and Technology (554) for programs 20121, 20122, 20123, and 20216. Expenditures for Equipment and Technology should only include expenditures from the Current Expense Fund.

SCHOOL (MID-LEVEL) ADMINISTRATION TAB:

The questions in this tab only apply to expenditures for the Office of the Principal. Expenditures associated with this area are identified with category code 20215 in the *Maryland Financial Reporting Manual*. Do not include any FTEs or expenditures of School Administration related to special education programs (Category 206).

All FTE and Personnel Costs data should be for staff working in the school as of September 30, 2014. Please include as school expenditures, if possible, the proportional share of the cost of central office controlled school administration resources that are regularly assigned to this school. For example, if there is an administrator whose salary costs are assigned to the central office but who spends 25 percent of her time performing administrative tasks directly for the school (for example, an assessment coordinator who is assigned to multiple schools), include this person as a .25 FTE in the school.

- In cells B7 through I7, please enter the total FTE of people working in each designated position under the Office of the Principal. For example, a person working full-time is 1.0 FTE. A person working 40 percent of the time is .4 FTE.

If the school's principal is also assigned teaching responsibilities for part of the day on an ongoing basis please allocate his or her FTE, salary and wage expenditure, and fringe benefits expenditure between the Principal position on the School Administration tab and the appropriate position category on the School Instruction tab.

- In cells B8 through I8, please enter the school's total expenditure for salaries and wages for each personnel category for the Office of the Principal. This amount should not include any expenditure for employee fringe benefits.
- In cells B9 through I9, please enter the school's total expenditure for employee benefits for each personnel category for the Office of the Principal. This amount comes from Fixed Charges (Category 212).

Fringe benefits should include the employer's share of FICA; Medicare; premiums for health insurance, life insurance, short- and/or long-term disability insurance, and workers' compensation insurance; and any other employee-related Fixed Charges. When reporting the employer's share of retirement contributions, please use 100 percent of the normal cost contributions for fiscal year

2017, assuming the teacher pension cost sharing as specified in the Budget Reconciliation Act of 2012 is fully phased in. The total for fringe benefits may be shown as an amount or as a percentage of total Salaries and Wages. Do not include any payments for retiree benefits.

- In cells B10 through I10 please enter the total FTE of people for each personnel category that work exclusively with Limited English Proficient (LEP) students or administration of LEP programs, or the portion of time spent exclusively in this area under the Office of the Principal. For example, if reporting partial time for a person enter .4 for someone who spends 40 percent of their time with the LEP program.
- In cells B11 through I11, please enter the total FTE of people in each personnel category that work exclusively with at risk Students or administration of at risk programs, or the portion of time spent exclusively in this area under the Office of the Principal. For example, if reporting partial time for a person enter .4 for someone who spends 40 percent of their time working with at risk programs.

By staff working with at risk students we mean staff who are funded through Title I or the State's Compensatory Education formula who provide supplemental services to students who are low-income, at risk of academic failure, or have a record of disruptive behavior.

When entering teacher and other staff FTE, salary and wage expenditures, and fringe benefit expenditures for staff working with at risk Students, if any of these staff are funded through Title I, include only the Title I staff FTE and salary and benefit expenditures exceeding the school's federal comparability levels.

- In cell B17, please enter the total amount spent for Contractual Services (200) for the Office of the Principal.
- In cell C17, please enter the total amount spent for Supplies and Materials (300) for the Office of the Principal.
- In cell D17, please enter the total amount spent for Other Charges (400) for the Office of the Principal. Expenditures reported here should exclude employee fringe benefits.
- In cell E17, please enter the total amount spent for Equipment and Technology (554) for the Office of the Principal. Expenditures for Equipment and Technology should only include expenditures from the Current Expense Fund.

SCHOOL INSTRUCTION TAB:

TO AVOID DOUBLE COUNTING ANY FUNDS; PLEASE MAKE SURE THE COSTS REPORTED HERE ARE UNIQUE TO THIS SECTION.

The first section addresses Instructional Salaries, identified in the Maryland *Financial Reporting Manual* as Category 203. We want to build this cost by personnel type so we can exclude those who work identifiable amounts of time with Limited English Proficient or at risk students. *Do not include any FTEs or expenditures of School Instruction related to special education programs (Category 206).*

All FTE and Personnel Costs data should be for staff working in the school as of September 30, 2014.

Please include as school expenditures, if possible, the proportional share of the cost of central office controlled school instruction resources that are regularly assigned to this school. For example, if textbook purchases are assigned to the central office but you can identify the cost of textbooks purchased for this school in 2014-15, please report this expenditure as a school cost.

- In cells B6 through M6, please enter the total FTE of people working in each personnel category under Instructional Salaries. For example, a person working full-time is 1.0 FTE. A person working 40 percent of the time is .4 FTE.
- In cells B7 through M7, please enter the school's total expenditure for salaries and wages for each personnel category for Instructional Salaries. This amount should not include any expenditure for employee fringe benefits.
- In cells B8 through M8, please enter the school's total expenditure for employee fringe benefits for each personnel category for Instructional Salaries. This amount comes from Fixed Charges (Category 212).

Fringe benefits should include the employer's share of FICA; Medicare; premiums for health insurance, life insurance, short- and/or long-term disability insurance, and workers' compensation insurance; and any other employee-related Fixed Charges. When reporting the employer's share of retirement contributions, please use 100 percent of the normal cost contributions for fiscal year 2017, assuming the teacher pension cost sharing as specified in the Budget Reconciliation Act of 2012 is fully phased in. The total for fringe benefits may be shown as an amount or as a percentage of total Salaries and Wages. Do not include any payments for retiree benefits.

- In cells B9 through M9, please enter the total FTE of people in the school in each designated area that work exclusively with Limited English Proficient (LEP) students or the portion of time spent exclusively in this area under Instructional Salaries. For example, if reporting partial time for a person enter .4 for someone who spends 40 percent of their time working with the LEP program.
- In cells B10 through M10 please enter the total FTE of people in the school in each designated area that work exclusively with at risk students or the portion of time spent exclusively in this area under Instructional Salaries. For example, if reporting partial time for a person enter .4 for someone who spends 40 percent of their time working with at risk programs.

By staff working with at risk students, we mean staff who are funded through Title I or the State's Compensatory Education formula who provide supplemental services to students who are low-income, at risk of academic failure, or have a record of disruptive behavior.

When entering teacher and other staff FTE, salary and wage expenditures, and fringe benefit expenditures for staff working with at risk students, if any of these staff are funded through Title I include only the Title I staff FTE and salary and benefit expenditures exceeding the school's federal comparability levels.

- In cell B16 please enter the school's total expenditure for stipends to employees working extracurricular or cocurricular activities for Instructional Salaries.

By extracurricular or cocurricular activities we mean school-sponsored activities under the guidance of qualified adults designed to provide opportunities for students to participate on an individual basis, in small groups, or in large groups at school events, public events, or a combination of these for purposes such as motivation, enjoyment, and improvement of skills. Cocurricular activities normally supplement the regular instructional program and include such activities as band, chorus, choir, speech, debate, and school-sponsored athletics. Participation usually is not required, and credit is not given (*Financial Reporting Manual for Maryland Public Schools*, 2009).

- In cell C16, please enter the school's total expenditure for substitutes for Instructional Salaries.

The next section addresses the costs associated with Instructional Textbooks/Supplies, identified in the Maryland *Financial Reporting Manual* as Category 204.

- In cell B22, please enter the amount attributable to the specific school if identifiable if not, please enter the district's total expenditure for Category 204 in cell B24. Only enter a districtwide amount if you are not able to break out an amount for the school.

The final section addresses all Other Instructional Costs, identified in the Maryland Financial Reporting Manual as Category 205. Please include any expenditures from the Current Expenses Fund for instructional equipment or technology (Object 554, Other Equipment) here.

- In cell B29 please enter the amount attributable to the specific school if identifiable; if not, please enter the district's total expenditure for Category 205 in cell B31.

OTHER SCHOOL COSTS TAB:

The questions in this tab address all other operating costs of the school or district excluding food service (Category 213), transportation (Category 209), adult education (Category 20512), and special education (Category 206).

Please include as school expenditures, if possible, the proportional share of the cost of central office controlled resources that are regularly assigned to this school. For example, if there is a staff person whose salary costs are assigned to the central office but who spends 25 percent of her time performing tasks directly for the school, include this person as a .25 FTE in the school.

- In cell B6, please enter the total expenditure for salary and wage attributable to the specific school for Student Personnel Services, Category 207, if identifiable. If not, please enter the district's total expenditure for Category 207 in cell B19. Only enter a districtwide amount if you are not able to break out an amount for the school.

- In cell B7, please enter the total expenditure for employee fringe benefits attributable to the salary and wage amount entered in cell B6 for the specific school for Student Personnel Services, Category 207, if identifiable. If not, please enter the district's total expenditure for Category 207 in cell B20. Only enter a districtwide amount if you are not able to break out an amount for the school.

Fringe benefits should include the employer's share of FICA; Medicare; premiums for health insurance, life insurance, short- and/or long-term disability insurance, and workers' compensation insurance; and any other employee-related Fixed Charges. When reporting the employer's share of retirement contributions, please use 100 percent of the normal cost contributions for fiscal year 2017, assuming the teacher pension cost sharing as specified in the Budget Reconciliation Act of 2012 is fully phased in. The total for fringe benefits may be shown as an amount or as a percentage of total Salaries and Wages. Do not include any payments for retiree benefits.

- In cell C6, please enter the total expenditure for salary and wage attributable to the specific school for Student Health Services, Category 208, if identifiable. If not, please enter the district's total expenditure for Category 208 in cell C19. If there are outside sources that provide services for this area, please enter the total amount they provide under Contractual Services in cell B11. Only enter a districtwide amount if you are not able to break out an amount for the school.
- In cell C7, please enter the total expenditure for employee fringe benefits attributable to the salary and wage amount entered in cell C6 for the specific school for Student Health Services, Category 208, if identifiable. If not, please enter the district's total expenditure for Category 208 in cell C20. Please see the instructions provided above for Cell B7 for directions on how to calculate total fringe benefits. Only enter a districtwide amount if you are not able to break out an amount for the school.
- In cell D6, please enter the total expenditure for salary and wage attributable to the specific school for Operation of Plant, Category 210, if identifiable. If not, please enter the district's total expenditure for Category 210 in cell D19. Only enter a districtwide amount if you are not able to break out an amount for the school.
- In cell D7, please enter the total expenditure for employee fringe benefits attributable to the salary and wage amount entered in cell D6 for the specific school for Operation of Plant, Category 210, if identifiable. If not, please enter the district's total expenditure for Category 210 in cell D20. Please see the instructions provided above for Cell B7 for directions on how to calculate total fringe benefits. Only enter a districtwide amount if you are not able to break out an amount for the school.
- In cell E6, please enter the total expenditure for salary and wage attributable to the specific school for Maintenance of Plant, Category 211, if identifiable. If not, please enter the district's total expenditure for Category 211 in cell E19. Only enter a districtwide amount if you are not able to break out an amount for the school.
- In cell E7, please enter the total expenditure for employee fringe benefits attributable to the salary and wage amount entered in cell E6 for the specific school for Maintenance of Plant, Category 211, if identifiable. If not, please enter the district's total expenditure for Category 211 in cell E20. Please see the instructions provided above for Cell B7 for directions on how to calculate total fringe benefits. Only enter a districtwide amount if you are not able to break out

an amount for the school.

- In cell F6, please enter the total expenditure for salary and wage attributable to the specific school for Community Services, Category 214, if identifiable. If not, please enter the district's total expenditure for Category 214 in cell F19. Only enter a districtwide amount if you are not able to break out an amount for the school.
- In cell F7, please enter the total expenditure for employee fringe benefits attributable to the salary and wage amount entered in cell F6 for the specific school for Community Services, Category 214, if identifiable. If not, please enter the district's total expenditure for Category 214 in cell F20. Please see the instructions provided above for Cell B7 for directions on how to calculate total fringe benefits. Only enter a districtwide amount if you are not able to break out an amount for the school.
- In cell B11, please enter the total amount for Contractual Services (Object 200) attributable to the specific school in Categories 207, 208, 210, 211, and 214, if identifiable. If not, please enter the district's total expenditures for Object 200 in these Categories in cell B24. Only enter a districtwide amount if you are not able to break out an amount for the school.
- In cell C11, please enter the total amount for Supplies and Materials (Object 300) attributable to the specific school in Categories 207, 208, 210, 211, and 214, if identifiable. If not, please enter the district's total expenditures for Object 300 in these Categories in cell C24. Only enter a districtwide amount if you are not able to break out an amount for the school.
- In cell D11, please enter the total amount for Fixed Charges (Category 212) or Other Charges (Object 400 for Categories 207, 208, 210, 211, and 214) from the Current Expense Fund that have not already been entered elsewhere in the Expenditure Tool and are attributable to the specific school. This amount should not include any expenditures related to personnel costs, such as employee fringe benefits. If an amount for this specific school cannot be determined, please enter the district's total expenditures for Fixed Charges (Category 212) or Other Charges (Object 400 for Categories 207, 208, 210, 211, and 214) in cell D24. Only enter a districtwide amount if you are not able to break out an amount for the school.
- In cell E11, please enter the total amount for Equipment/Technology (Object 554) from the Current Expense Fund attributable to the specific school in Categories 207, 208, 210, 211, and 214, if identifiable. If not, please enter the district's total expenditures for Object 554 in these Categories in cell E24. Only enter a districtwide amount if you are not able to break out an amount for the school.
- In cell F11, please enter any other expenditures from the Current Expense Fund that have not already been entered elsewhere in the Expenditure Tool and are attributable to the specific school if identifiable. If not, please enter the district's total amount for these expenditures in cell F24. Please note what these expenditures were for in the Notes or Questions not box at the bottom of the page. Only enter a districtwide amount if you are not able to break out an amount for the school.

THANK YOU FOR YOUR TIME!

Appendix C.2: Successful Schools Data-Collection Tool Tabs

GENERAL INFORMATION PAGE (Data will be entered in columns B-E and rows 5-35. Please see instructions for more information)			
School Information: (The questions in rows 5 - 17 refer to the identified school)			
	Lowest Grade	Highest Grade	
Grade Span	<input type="text"/>	<input type="text"/>	- In cells C5 and E5 please select the lowest (C5) and highest (E5) grades served by the identified school
Number of Students (FTE):	All Student counts should be from the September 30 th , 2014 enrollment count.		
- Grades 1-12	<input type="text"/>		- In cell B8 please enter the total number of students enrolled in grades 1-12.
- Full-day kindergarten	<input type="text"/>		- In cell B9 please enter the total number of enrolled full-day kindergarten students if any.
- Half-day kindergarten	<input type="text"/>		- In cell B10 please enter the total number of enrolled half-day kindergarten students if any.
- Full-day kindergarten	<input type="text"/>		- In cell B11 please enter the total number of enrolled full-day kindergarten students if any.
Teacher Characteristics:	Please see instructions for guidance on teachers to include here and throughout the report. Use teacher staffing counts as of September 30, 2014		
Average Years of Experience of All Teachers	<input type="text"/>		- In cell B15 please enter the average experience of all teachers working in the identified school.
% of Teachers with Advanced Professional Certificate (APC) or National Board of Professional Teaching Standards Certification	<input type="text"/>		- In cell B17 please enter the percent of all teachers working in the identified school who hold an APC or NBPTS certification.
District Info: (If your district has more than one school identified and you have already provided this information, please skip this section)			
Number of Students (FTE):	All Student counts should be from the September 30 th , 2014 enrollment counts.		
- Half-day kindergarten	<input type="text"/>		- In cell B22 please enter the total number of enrolled half-day kindergarten students if any.
- Full-day kindergarten	<input type="text"/>		- In cell B23 please enter the total number of enrolled full-day kindergarten students if any.
- Full-day kindergarten	<input type="text"/>		- In cell B24 please enter the total number of enrolled full-day kindergarten students if any.
- Elementary	<input type="text"/>		- In cell B25 please enter the total number of enrolled elementary students in the district.
- Middle/Junior	<input type="text"/>		- In cell B26 please enter the total number of enrolled middle school students in the district.
- High School	<input type="text"/>		- In cell B27 please enter the total number of enrolled high school students in the district.
Operating Expenditures:	<input type="text"/>		- In cell B29 please enter the district's total operating expenditures for 2014-2015.
Teacher Characteristics:	Please see instructions for guidance on teachers to include here and throughout the report. Use teacher staffing counts as of September 30, 2014		
Average Years of Experience of All Teachers	<input type="text"/>		- In cell B33 please enter the average years experience for all teachers in the district.
% of Teachers with Advanced Professional Certificate (APC) or National Board of Professional Teaching Standards Certification	<input type="text"/>		- In cell B35 please enter the percent of all teachers working in the district who hold an APC or NBPTS certification.
Notes or Questions:	<input style="width: 100%; height: 40px;" type="text"/>		

DISTRICT ADMINISTRATION PAGE (Data should be entered in columns B-F and rows 9-37)					
The number of FTE and Personnel Costs should be based on staff working in the district as of September 30, 2014.					
(If your district has more than one identified school and you have already provided this information, please skip this section.)					
General Support Services (20121)					
	Salaries and Wages 100	Fringe Benefits (Fixed Charges)	Total		
Total Personnel Costs			\$0		
Business Support Services (20122)					
	Salaries and Wages 100	Fringe Benefits (Fixed Charges)	Total		
Total Personnel Costs			\$0		
Centralized Support Services (20123)					
	Salaries and Wages 100	Fringe Benefits (Fixed Charges)	Total		
Total Personnel Costs			\$0		
Instructional Administration and Supervision (20216)					
	Curriculum Specialist	Supervisors of Guidance & Psychological Services	Media/ Technology Specialist	Other Administrators/ Supervisors of Instruction	Clerical Staff in Area
# of FTE (as of September 30, 2014)					
Total Salary and Wage Expenditure					
Total Fringe Benefits Expenditure (Fixed Charges)					
# FTE who only work with English Language Learner Students					
# FTE who only work with At-Risk Students					
Non-Personnel Costs (For program accounts 20121, 20122, 20123, and 20216)					

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	Contractual Services (Object 200)	Supplies/ Materials (Object 300)	Other Charges* (Object 400)	Equipment/ Technology (Object 554)
Total District Cost				
*Expenditures reported here for Other Charges (400) should exclude employee fringe benefits.				
Notes or Questions:				

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SCHOOL (MID-LEVEL) ADMINISTRATION PAGE (Data should be entered in columns B-I and rows 7-17)								
Office of Principal (20215)								
	Principal	Assistant or Vice Principals	Other School-Level Administrators	Business Managers	Secretaries/Clerks	Student Personnel Workers Account 20215	Aides in Expenditure Account 20215	Other Staff in Expenditure Account 20215
# of FTE (as of September 30, 2014)								
Total Salary and Wage Expenditure								
Total Fringe Benefits Expenditure (Fixed Charges)								
# FTE who only work with English Language Learner Students								
# FTE who only work with At-Risk Students								
Non-Personnel Costs (20215)								
	Contractual Services Object 200	Supplies/ Materials (Object 300)	Other Charges* (Object 400)	Equipment/ Technology (Object 554)				
Total School Cost								
*Expenditures reported here for Other Charges (400) should exclude employee fringe benefits.								
Notes or Questions:								

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SCHOOL INSTRUCTION PAGE (Data should be entered in columns B-M and rows 6-31)												
Instructional Salaries (Category 203)												
	Teachers*	Long-Term Substitute Teachers	Coaches, mentor teachers, specialist teachers	Teacher Aids or Teaching Assistants	Librarians/ Media	Guidance Counselors	Social Workers	Therapists (OT/PT/Speech/Other)	Psychologists	Itinerant Teachers	Other Paraprofessionals in Expenditure Account 203	Other Staff in Expenditure Account 203
# of FTE (as of September 30, 2014)												
Total Salary and Wage Expenditure												
Total Fringe Benefits Expenditure (Fixed Charges)												
# FTE who only work with English Language Learner Students												
# FTE who only work with At-Risk Students												
	*Do not include long-term substitute teachers in this column											
	Extracurricular	Substitutes										
			- In cell B16 please enter the school's total expenditure for stipends to employees working extracurricular activities for Instructional Salaries									
Total School Cost			- In cell C16 please enter the school's total expenditure for substitutes for Instructional Salaries									
Instructional Textbooks/Supplies (Category 204)												
	Total School											
Total School Cost		- In cell B22 please enter the amount attributable to the specific school if identifiable, if not please enter the district's total expenditure for Category 204 in cell B24.										
OR	OR											
Total Amount Spent by District for Category 204												
Other Instructional Costs (Category 205)												
Total School Cost		- In cell B29 please enter the amount attributable to the specific school if identifiable, if not please enter the district's total expenditure for Category 205 in cell B31.										
OR	OR											
Total Amount Spent by District for Category 205												
Notes or Questions:												

OTHER COSTS PAGE (Data should be entered in columns B-F and rows 6-24)					
	Student Personnel Services 207	Student Health Services 208	Operation of Plant 210	Maintenance of Plant 211	Community Services 214
Total School Cost					
Total Salary and Wage Expenditure					
Total Fringe Benefits Expenditure (Fixed Charges)					
Non-Personnel Costs	Contractual Services (Object 200)	Supplies/ Materials (Object 300)	Fixed/Other Charges* (Category 212/ Object 400)	Equipment/ Technology (Object 554)	Other Program Costs
Total School Cost					
*Expenditures reported here for Fixed/Other Charges (Category 212/Object 400) should exclude employee fringe benefits.					
OR - IF NOT AVAILABLE BY SCHOOL, PLEASE ENTER TOTAL AMOUNT SPENT BY THE DISTRICT FOR EACH CATEGORY					
Total District Cost					
Total Salary and Wage Expenditure					
Total Fringe Benefits Expenditure (Fixed Charges)					
Non-Personnel Costs	Contractual Services (Object 200)	Supplies/ Materials (Object 300)	Fixed/Other Charges* (Category 212/ Object 400)	Equipment/ Technology (Object 554)	Other Program Costs
Total District Cost					
*Expenditures reported here for Fixed/Other Charges (Category 212/Object 400) should exclude employee fringe benefits.					
Notes or Questions:					

Appendix D

Impact of Changes in the Formula

Table D.1
Impact of Enrollment Count Changes

Districts	Student Count Greater of Single or Rolling Average w. Prek	Student Count Single Year w. Prek	Difference	Student Count Greater of Single or Rolling Average w. Prek	Student Count Single Year	Difference	% Difference
Allegany	9,070	9,005	65	\$80,030,248	\$79,456,709	\$573,539	1%
Anne Arundel	79,263	79,263	-	\$956,378,725	\$956,378,725	-	0%
Baltimore City	85,890	85,890	-	\$996,155,844	\$996,155,844	-	0%
Baltimore	109,394	109,394	-	\$1,267,569,114	\$1,267,569,114	-	0%
Calvert	16,486	16,361	125	\$193,539,839	\$192,066,530	\$1,473,309	1%
Caroline	5,626	5,626	-	\$56,496,337	\$56,496,337	-	0%
Carroll	26,957	26,556	401	\$288,893,313	\$284,582,481	\$4,310,832	2%
Cecil	15,939	15,924	15	\$173,412,439	\$173,256,493	\$155,946	0%
Charles	26,841	26,662	179	\$308,093,992	\$306,031,706	\$2,062,286	1%
Dorchester	4,776	4,776	-	\$47,960,734	\$47,960,734	-	0%
Frederick	41,067	41,067	-	\$467,811,601	\$467,811,601	-	0%
Garrett	4,086	3,989	97	\$36,052,703	\$35,200,483	\$852,220	2%
Harford	38,397	38,264	133	\$448,260,424	\$446,699,967	\$1,560,457	0%
Howard	53,704	53,704	-	\$660,843,619	\$660,843,619	-	0%
Kent	2,216	2,196	20	\$22,256,851	\$22,055,169	\$201,682	1%
Montgomery	153,732	153,732	-	\$1,950,252,010	\$1,950,252,010	-	0%
Prince George's	125,957	125,957	-	\$1,547,189,187	\$1,547,189,187	-	0%
Queen Anne's	7,827	7,804	23	\$78,602,152	\$78,372,855	\$229,297	0%
St. Mary's	17,962	17,962	-	\$210,868,076	\$210,868,076	-	0%
Somerset	3,061	3,061	-	\$31,339,889	\$31,339,889	-	0%
Talbot	4,718	4,717	-	\$47,376,778	\$47,376,778	-	0%
Washington	22,855	22,855	-	\$237,971,479	\$237,971,479	-	0%
Wicomico	15,019	15,014	5	\$153,767,157	\$153,718,526	\$48,631	0%
Worcester	6,864	6,864	-	\$70,277,559	\$70,277,559	-	0%
Total	877,707	876,643	1,064	\$10,331,400,071	\$10,319,931,871	\$11,468,199	

Table D.2
Impact of Prekindergarten Count

District	Student Count w. Preschool	Student Count w.o. Preschool	Difference	% Change	Total Program w. Preschool	Total Program w.o. Preschool	Difference	% Change
Allegany	9,070	8,379	691	8%	\$106,193,944	\$100,092,899	\$6,101,045	6%
Anne Arundel	79,263	76,181	3,082	4%	\$1,161,936,991	\$1,124,752,118	\$37,184,873	3%
Baltimore City	85,890	79,352	6,538	8%	\$1,449,109,710	\$1,373,284,710	\$75,825,000	6%
Baltimore	109,394	104,358	5,036	5%	\$1,636,358,800	\$1,578,003,807	\$58,354,993	4%
Calvert	16,486	15,948	538	3%	\$225,294,976	\$218,979,937	\$6,315,039	3%
Caroline	5,626	5,235	391	7%	\$73,873,587	\$69,948,376	\$3,925,211	6%
Carroll	26,957	26,351	606	2%	\$338,196,159	\$331,698,563	\$6,497,596	2%
Cecil	15,939	15,114	824	5%	\$220,398,254	\$211,429,762	\$8,968,492	4%
Charles	26,841	25,703	1,138	4%	\$370,978,635	\$357,918,741	\$13,059,894	4%
Dorchester	4,776	4,505	271	6%	\$63,156,163	\$60,435,720	\$2,720,443	5%
Frederick	41,067	39,472	1,596	4%	\$560,038,906	\$541,861,372	\$18,177,534	3%
Garrett	4,086	3,882	204	5%	\$45,089,530	\$43,291,088	\$1,798,442	4%
Harford	38,397	37,189	1,209	3%	\$550,008,571	\$535,897,566	\$14,111,005	3%
Howard	53,704	51,630	2,074	4%	\$66,474,431	\$740,949,342	\$25,525,089	3%
Kent	2,216	2,015	201	10%	\$28,665,436	\$26,644,536	\$2,020,900	8%
Montgomery	153,732	147,462	6,269	4%	\$2,467,169,557	\$2,387,635,447	\$79,534,110	3%
Prince George's	125,957	119,281	6,676	6%	\$2,110,671,451	\$2,028,669,742	\$82,001,709	4%
Queen Anne's	7,827	7,494	333	4%	\$95,172,967	\$91,830,709	\$3,342,258	4%
St. Mary's	17,962	16,890	1,072	6%	\$252,865,758	\$240,281,110	\$12,584,648	5%
Somerset	3,061	2,727	334	12%	\$43,559,075	\$40,138,430	\$3,420,645	9%
Talbot	4,718	4,299	419	10%	\$58,485,958	\$54,275,748	\$4,210,209	8%
Washington	22,855	21,939	916	4%	\$300,346,598	\$290,810,101	\$9,536,497	3%
Wicomico	15,019	13,934	1,085	8%	\$203,312,762	\$192,205,571	\$11,107,190	6%
Worcester	6,864	6,249	615	10%	\$89,045,641	\$82,745,843	\$6,299,798	8%
Total	877,707	835,589	42,118	5%	\$13,216,403,859	\$12,723,781,238	\$492,622,622	4%

Table D.3a
Impact of CWI on Total Program Amount*

	Total Program Amount with CWI	Total Program Amount without CWI	Difference	% Difference
Allegany	\$106,193,944	\$130,941,978	\$(24,748,034)	-19%
Anne Arundel	\$1,161,936,991	\$1,047,733,987	\$114,203,005	11%
Baltimore City	\$1,449,109,710	\$1,359,389,971	\$89,719,738	7%
Baltimore	\$1,636,358,800	\$1,536,487,136	\$99,871,664	6%
Calvert	\$225,294,976	\$208,799,793	\$16,495,184	8%
Caroline	\$73,873,587	\$80,036,389	\$(6,162,802)	-8%
Carroll	\$338,196,159	\$343,346,354	\$(5,150,195)	-2%
Cecil	\$220,398,254	\$220,398,254	-	0%
Charles	\$370,978,635	\$351,638,517	\$19,340,118	5%
Dorchester	\$63,156,163	\$68,424,879	\$(5,268,716)	-8%
Frederick	\$560,038,906	\$534,898,669	\$25,140,237	5%
Garrett	\$45,089,530	\$55,597,447	\$(10,507,918)	-19%
Harford	\$550,008,571	\$512,589,534	\$37,419,036	7%
Howard	\$766,474,431	\$677,696,225	\$88,778,206	13%
Kent	\$28,665,436	\$31,056,810	\$(2,391,374)	-8%
Montgomery	\$2,467,169,557	\$2,115,925,864	\$351,243,693	17%
Prince George's	\$2,110,671,451	\$1,869,505,271	\$241,166,180	13%
Queen Anne's	\$95,172,967	\$103,112,640	\$(7,939,673)	-8%
St. Mary's	\$252,865,758	\$234,351,954	\$18,513,804	8%
Somerset	\$43,559,075	\$46,290,197	\$(2,731,122)	-6%
Talbot	\$58,485,958	\$63,365,068	\$(4,879,110)	-8%
Washington	\$300,346,598	\$313,841,795	\$(13,495,197)	-4%
Wicomico	\$203,312,762	\$216,060,321	\$(12,747,559)	-6%
Worcester	\$89,045,641	\$94,628,736	\$(5,583,095)	-6%
Total	\$13,216,403,859	\$12,216,117,789	\$1,000,286,071	8%

*Consists of the foundation, compensatory education, LEP, and special education programs.

Table D.3b
State and Local Shares of CWI Impact on Total Program Amount*

District	State Share of CWI Cost	Local Share of CWI Cost	Total CWI Cost
Allegany	\$(26,342,068)	\$1,594,034	\$(24,748,034)
Anne Arundel	\$51,856,540	\$62,346,465	\$114,203,005
Baltimore City	\$75,048,020	\$14,671,718	\$89,719,738
Baltimore	\$37,010,482	\$62,861,182	\$99,871,664
Calvert	\$9,515,213	\$6,979,971	\$16,495,184
Caroline	\$(7,042,088)	\$879,287	\$(6,162,802)
Carroll	\$(16,620,941)	\$11,470,745	\$(5,150,195)
Cecil	\$(4,461,435)	\$4,461,435	\$0
Charles	\$11,322,577	\$8,017,542	\$19,340,118
Dorchester	\$(6,399,061)	\$1,130,345	\$(5,268,716)
Frederick	\$9,852,015	\$15,288,222	\$25,140,237
Garrett	\$(12,551,586)	\$2,043,668	\$(10,507,918)
Harford	\$20,881,905	\$16,537,131	\$37,419,036
Howard	\$50,319,902	\$38,458,303	\$88,778,205
Kent	\$(392,391)	\$(1,998,984)	\$(2,391,374)
Montgomery	\$161,887,137	\$189,356,557	\$351,243,693
Prince George's	\$203,781,931	\$37,384,249	\$241,166,180
Queen Anne's	\$(12,026,275)	\$4,086,602	\$(7,939,673)
St. Mary's	\$11,732,625	\$6,781,180	\$18,513,804
Somerset	\$(3,170,309)	\$439,187	\$(2,731,122)
Talbot	\$0	\$(4,879,110)	\$(4,879,110)
Washington	\$(18,936,520)	\$5,441,323	\$(13,495,197)
Wicomico	\$(15,226,658)	\$2,479,099	\$(12,747,559)
Worcester	\$0	\$(5,583,095)	\$(5,583,095)
Total	\$520,039,015	\$480,247,056	\$1,000,286,070

*Consists of the foundation, compensatory education, LEP, and special education programs.

Table D.4
Differences between Multiplicative and Additive Approaches*

District	Additive State Share	Multiplicative State Share	Difference	% Difference	Additive Local Share	Multiplicative Local Share	Difference	%Difference
Allegany	\$67,470,603	\$84,760,301	\$17,289,698	26%	\$38,723,341	\$21,433,643	\$ 17,289,698)	-45%
Anne Arundel	\$420,459,602	\$338,187,597	\$ (82,272,005)	-20%	\$741,477,389	\$823,749,394	\$82,272,005	11%
Baltimore City	\$1,088,759,048	\$1,255,260,400	\$166,501,352	15%	\$360,350,661	\$193,849,309	\$ 166,501,352)	-46%
Baltimore	\$794,951,043	\$805,808,718	\$10,857,675	1%	\$841,407,757	\$830,550,082	\$(10,857,675)	-1%
Calvert	\$110,284,633	\$132,316,345	\$22,031,712	20%	\$115,010,344	\$92,978,632	\$(22,031,712)	-19%
Caroline	\$49,824,768	\$62,256,061	\$12,431,293	25%	\$24,048,819	\$11,617,526	\$(12,431,293)	-52%
Carroll	\$157,671,389	\$182,371,694	\$24,700,305	16%	\$180,524,770	\$155,824,465	\$(24,700,305)	-14%
Cecil	\$130,470,625	\$160,424,468	\$29,953,843	23%	\$89,927,629	\$59,973,786	\$(29,953,843)	-33%
Charles	\$215,912,112	\$263,859,425	\$47,947,313	22%	\$155,066,523	\$107,119,210	\$(47,947,313)	-31%
Dorchester	\$37,173,179	\$48,221,525	\$11,048,346	30%	\$25,982,984	\$14,934,638	\$(11,048,346)	-43%
Frederick	\$300,624,988	\$358,044,072	\$57,419,084	19%	\$259,413,918	\$201,994,834	\$(57,419,084)	-22%
Garrett	\$7,911,706	\$17,831,996	\$9,920,290	125%	\$37,177,824	\$27,257,534	\$(9,920,290)	-27%
Harford	\$287,515,134	\$329,614,473	\$42,099,339	15%	\$262,493,436	\$220,394,097	\$(42,099,339)	-16%
Howard	\$316,411,856	\$284,723,521	\$(31,688,335)	-10%	\$450,062,575	\$481,750,910	\$31,688,335	7%
Kent	\$2,711,254	\$0	\$(2,711,254)	-100%	\$25,594,182	\$28,665,436	\$2,711,254	12%
Montgomery	\$781,964,849	\$210,685,890	\$(571,278,959)	-73%	\$1,685,204,708	\$2,256,483,667	\$571,278,959	34%
Prince George's	\$1,385,585,044	\$1,616,734,015	\$231,148,971	17%	\$725,086,407	\$493,937,436	\$(231,148,971)	-32%
Queen Anne's	\$28,601,540	\$31,948,463	\$3,346,923	12%	\$66,571,427	\$63,224,504	\$(3,346,923)	-5%
St. Mary's	\$137,894,021	\$162,528,290	\$24,634,269	18%	\$114,971,737	\$90,337,468	\$(24,634,269)	-21%
Somerset	\$30,765,317	\$37,756,339	\$6,991,022	23%	\$12,793,758	\$5,802,736	\$(6,991,022)	-55%
Talbot	\$0	\$0	\$0	0%	\$58,485,958	\$58,485,958	\$0	0%
Washington	\$182,441,600	\$228,453,419	\$46,011,819	25%	\$117,904,998	\$71,893,179	\$(46,011,819)	-39%
Wicomico	\$140,514,364	\$170,557,795	\$30,043,431	21%	\$62,798,398	\$32,754,966	\$(30,043,432)	-48%
Worcester	\$0	\$0	\$0	0%	\$89,045,641	\$89,045,641	\$0	0%
Total	\$6,675,918,675	\$6,782,344,807	\$106,426,132		\$6,540,485,184	\$6,434,059,051	\$(106,426,133)	

*Excludes student transportation.

Table D.5

Differences between Minimum State Aid Guarantees and No State Aid Guarantees*

District	Foundation State Share w. Minimum Aid Guarantees	Foundation State Share w.o Minimum Aid Guarantees	Difference	% Change	Special Need Weights State Share w. Minimum Aid Guarantees	Special Need Weights State Share w.o. Minimum Aid Guarantees	Difference	%Change
Allegany	\$63,005,569	\$63,005,569	-	0%	\$21,774,497	\$21,754,732	\$(19,765)	0%
Anne Arundel	\$312,445,304	\$312,445,304	-	0%	\$78,798,760	\$25,742,293	\$(53,056,467)	-67%
Baltimore City	\$844,621,834	\$844,621,834	-	0%	\$410,638,566	\$410,638,566	-	0%
Baltimore	\$618,319,525	\$618,319,525	-	0%	\$192,726,059	\$187,489,193	\$(5,236,866)	-3%
Calvert	\$119,925,434	\$119,925,434	-	0%	\$14,229,067	\$12,390,910	\$(1,838,157)	-13%
Caroline	\$47,414,797	\$47,414,797	-	0%	\$14,841,264	\$14,841,264	-	0%
Carroll	\$165,298,372	\$165,298,372	-	0%	\$24,701,378	\$17,073,321	\$(7,628,057)	-31%
Cecil	\$126,104,957	\$126,104,957	-	0%	\$34,540,375	\$34,319,511	\$(220,864)	-1%
Charles	\$223,682,886	\$223,682,886	-	0%	\$40,613,636	\$40,176,539	\$(437,097)	-1%
Dorchester	\$36,286,173	\$36,286,173	-	0%	\$11,963,375	\$11,935,352	\$(28,023)	0%
Frederick	\$309,910,150	\$309,910,150	-	0%	\$48,133,922	\$48,133,922	-	0%
Garrett	\$14,359,473	\$14,359,473	-	0%	\$4,089,044	\$3,472,523	\$(616,522)	-15%
Harford	\$273,958,856	\$273,958,856	-	0%	\$56,239,096	\$55,655,617	\$(583,479)	-1%
Howard	\$272,574,368	\$272,574,368	-	0%	\$39,775,514	\$12,149,153	\$(27,626,361)	-69%
Kent	\$3,338,528	-	\$(3,338,528)	-100%	\$2,643,025	-	\$(2,643,025)	-100%
Montgomery	\$292,537,802	\$149,422,769	\$(143,115,032)	-49%	\$207,945,893	\$61,263,121	\$(146,682,772)	-71%
Prince George's	\$1,161,073,185	\$1,161,073,185	-	0%	\$455,660,831	\$455,660,831	-	0%
Queen Anne's	\$28,219,832	\$28,219,832	-	0%	\$6,931,752	\$3,728,631	\$(3,203,121)	-46%
St. Mary's	\$139,565,742	\$139,565,742	-	0%	\$23,273,176	\$22,962,548	\$(310,628)	-1%
Somerset	\$26,803,830	\$26,803,830	-	0%	\$10,952,509	\$10,952,509	-	0%
Talbot	\$7,106,517	-	\$(7,106,517)	-100%	\$4,561,383	-	\$(4,561,383)	-100%
Washington	\$181,771,837	\$181,771,837	-	0%	\$47,159,608	\$46,681,582	\$(478,026)	-1%
Wicomico	\$128,162,261	\$128,162,261	-	0%	\$42,395,535	\$42,395,535	-	0%
Worcester	\$10,541,634	-	\$(10,541,634)	-100%	\$7,699,537	-	\$(7,699,537)	-100%
Total	\$5,407,028,866	\$5,242,927,154	\$(164,101,711)	-3%	\$1,802,287,803	\$1,539,417,653	\$(262,870,150)	-15%

*Consists of the foundation, compensatory education, LEP, and special education state aid programs.

Appendix E:
**An Estimate of the Cost of Providing
High-Quality Early Childhood
Education to
Low-Income Three-Year-Olds**

It is not a recommendation of the study team that the State should fund high-quality preschool for three-year-old low-income children. Though the research studies have identified a modest gain for low-income children receiving two years of quality preschool, that gain is significantly lower than providing a high-quality preschool experience for four-year-old children. The study team recommendation covers only four-year-old children. See Workman, S., Palaich, R., & Wool, S. (2016, January). *A Comprehensive Analysis of Prekindergarten in Maryland*. Denver, CO: Augenblick, Palaich & Associates.

That said, several requests have been made to the Maryland partners and the study team for an estimate of the cost of providing high-quality early childhood education to low-income three-year-olds. The study team had the data that could be used to generate this estimate, and the estimate is presented in this Appendix.

Several figures and underlying assumptions were accounted for in the process of generating the cost estimate for serving low-income three-year-olds. They include the following.

- The number of three-year-olds in the state. The study team used the same sources and procedures that were used to generate the number four-year-olds used in the prekindergarten report to estimate the cost of providing high-quality preschool services in the year before kindergarten. For this cost estimate we have created the three-year-old count in the same manner using census data. The statewide figure for three-year-olds was 76,635.
- An estimate of the percentage of the total number of children that come from families with low incomes. There are several ways of deriving this percentage and there are several counts on which it can be based. For the purpose of this estimate, the study team used the statewide average of the school-based FRPMs (free and reduced priced meals) count. On a statewide basis, 29.4 percent of the State's children are FRPMs eligible. Applying this percentage results in a figure of 22,531 low-income, three-year-old children.
- At this point, it is typical to remove the percentage of the students from families that would choose *not* to send their children to preschool or childcare. Statewide for all students, the figure used in the four-year-old cost analysis was 26 percent. For the sub-population of low-income families, we would expect a smaller percentage of families opting out of the opportunity. The study team selected a factor of 10 percent that would opt out of the service opportunity. This results in a figure of 20,278 low-income, three-year-old children likely to participate.
- The next factor that must be taken into consideration is the distribution of children across types of Early Childhood Education (ECE) sites. The choices include public schools, centers, family homes and Head Start sites. The study team applied the same distribution across these four types of sites as was found in the distribution of the general population. Forty-eight percent of the population would attend a public school program, 42 percent of the population would attend a center-based program, four percent would attend a program in a family home and six percent would attend a Head Start program. Since Head Start programs are funded independently, children attending these programs were removed from the funding analysis. This results in a figure of 19,061 likely to participate, low-income, three-year-old children.

- The final factor taken into consideration is the quality ratings used by the State, EXCELS. In the analysis of four-year-old prekindergarten students, only those children attending public-school prekindergarten programs or those attending private preschool which have received a rating of EXCELS Level 5 or have outside accreditation are eligible for state support. The estimate of this number is 11,437 children attending public or private settings that meet the high-quality criteria. This figure represents 60 percent of likely to participate, low-income, three-year-old children excluding Head Start.

Applying the per-child cost of quality figures by type of site reported in Table 40 of the study team's prekindergarten report, the cost of serving existing (60 percent), low-income three-year-olds in Maryland would be just under \$135 million. To fund 80 percent of those likely to participate (an additional 3,800 students), the additional cost would be approximately \$45 million. Table E1 illustrates the counts of children and the costs associated with the high-quality sites attended by the children from low-income families. These counts and costs are further distributed across districts using the number of four-year-old children by district developed in the prekindergarten report; see Table 2 of the study team's prekindergarten report.

Table E.1
Funding Required To Serve 60 or 80 Percent of Three-Year-Olds in High-Quality Programs

District	Estimated Three-Year-Old, Low Income Count	Estimated 60 Percent Three-Year-Old, Low Income Count	Estimated 80 Percent Three-Year-Old, Low Income Count	Estimated Cost for Current (60 Percent) Coverage	Estimated Cost for 80 Percent Coverage
Allegany	289	173	231	\$2,040,586	\$2,720,782
Anne Arundel	1,572	943	1,258	\$11,117,501	\$14,823,334
Baltimore City	2,432	1,459	1,945	\$17,195,951	\$22,927,934
Baltimore	2,569	1,541	2,055	\$18,166,567	\$24,222,089
Calvert	269	161	215	\$1,903,019	\$2,537,358
Caroline	190	114	152	\$1,340,010	\$1,786,681
Carroll	444	267	355	\$3,141,127	\$4,188,169
Cecil	316	190	253	\$2,236,747	\$2,982,330
Charles	535	321	428	\$3,785,657	\$5,047,542
Dorchester	105	63	84	\$743,884	\$991,845
Frederick	757	454	605	\$5,349,851	\$7,133,135
Garrett	71	43	57	\$504,415	\$672,553
Harford	733	440	586	\$5,181,713	\$6,908,951
Howard	1,002	601	801	\$7,082,184	\$9,442,912
Kent	67	40	54	\$476,392	\$635,189
Montgomery	3,205	1,923	2,564	\$22,660,442	\$30,213,922
Prince George's	2,601	1,561	2,081	\$18,395,846	\$24,527,794
Queen Anne's	150	90	120	\$1,057,233	\$1,409,643
Saint Mary's	424	254	339	\$2,998,464	\$3,997,952
Somerset	159	96	127	\$1,126,016	\$1,501,355
Talbot	155	93	124	\$1,092,898	\$1,457,198
Washington	460	276	368	\$3,250,672	\$4,334,229
Wicomico	349	210	280	\$2,471,122	\$3,294,829
Worcester	208	125	166	\$1,469,935	\$1,959,914
Statewide Totals	19,061	11,437	15,249	\$134,788,230	\$179,717,640

Source: APA calculations based on MSDE data

The estimates presented in Table E1 are not adjusted for existing or future funding streams. The majority of state and federal contribution were already accounted for in the four-year-old analysis presented in the “A Comprehensive Analysis of Prekindergarten in Maryland” report. Further parsing of existing funds would be problematic and is beyond the scope of this analysis.