

AN ABSTRACT OF THE DISSERTATION OF

Maryalice Russell for the degree of Doctor of Education presented on July 30, 1996. Title: A Study of the Relationship Between School Board Leadership Behavior and Advancement of Instructional Quality.

Abstract Approved: *Redacted for Privacy*
—  Joanne B. Engel ✓

This study was an investigation of school board leadership behavior, as defined by the Oregon School Boards Association (OSBA) perceiver-based Quality Leadership Inventory (QLI), and the advancement of instructional quality (IQ), as defined by components of the Oregon Education Act for the 21st Century, (HB2991).

As a single district case study, this investigation's field interview questions were designed to reveal 1) perceived contribution of the QLI (vision, structure, accountability, and advocacy) on school board leadership behavior, 2) perceiver congruence between school board members and site council chairs of the use of QLI traits by school board members and the influence on three components (site councils, self evaluation and the Certificate of Initial Mastery) of the Oregon Education Act for the 21st Century, HB2991.

The research instrument developed for this study included both Likert scale questions as well as open-ended questions. Data collected through interviews with five school board members and five site council chairs were analyzed using qualitative methodologies and produced in the form of frequency tables and illustrative descriptive figures.

Results demonstrated that board leadership behavior can be defined by the QLI traits of vision, structure, accountability and advocacy. Both Board and site chairs interviewed described these traits as board leadership behaviors. This study also concluded that board leadership behavior advances instructional quality. Both board and site chairs interviewed described board leadership behavior as having an impact on instructional quality through site councils, self-evaluation, and the Certificate of Initial Mastery.

Advocacy emerged as the QLI Board leadership trait that was perceived to have an unqualified, positive interactive effect, on all three instructional quality components. Vision was perceived to have a positive interactive effect

on site councils and CIM. Accountability and Structure were perceived to have a limited positive interactive effect on one instructional component. The study also found disconfirming anecdotal evidence on an introductory open-ended interview question for all interactions except for vision.

A Study of the Relationship Between
School Board Leadership Behavior
and Advancement of Instructional Quality

by

Maryalice Russell

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Doctor of Education thesis of Maryalice Russell presented on July 30, 1996.

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✓ Maryalice Russell, Author

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This thesis is dedicated to my parents,
Marcia and James Russell, and
to my husband, Dave, and
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Chapter 1: Nature and Scope of the Study

Introduction:

One of the major functions of leadership for school board members is the advancement of instructional quality and, by that, the increase of student learning and achievement. The recent work of Gaul, Underwood, and Fortune (1994) and Rallis and Criscoe (1993) depicted the conflicting perceiver analysis of the effect of school board leadership on this outcome. Rallis and Criscoe (1993) concluded that school board members were not instrumental in advancing the outcome, while Gaul, Underwood and Fortune (1994) suggested that they do advance instructional outcomes. National and state school boards associations continued to spend hundreds of thousands of dollars on conventions, training, lobbying, and publications and depicted the relationship between board and instructional outcome attainment as a centerpiece for improving the quality of public schools.

In states such as Oregon, where the legislative assembly has preempted much of local control, the relationship became more critical with respect to questions of role, power, and authority. Many school board members entered this milieu without a clear understanding of educational theory. This made the role of the school board member even more confusing and susceptible to legislative management. The work of Hoy and Miskel (1978) offered a structure for conceptualizing the notion of organizational role in a complex, decentralized system, where the nomothetic represents the organizational dimension, the ideographic the personal dimension, and the transactional the intergroup

dimension. This model could be used to represent the universe of all organizational thought and decision making.

Leadership practices of community-elected policy makers in the area of improving student learning should be viewed as an important contribution to the mission of public education. An investigation of such behaviors within the context of the Oregon reform movement was the focus of this study.

Statement of the Problem:

Kerlinger (1973) described three criteria for problem statements: 1) it should express a relationship, 2) it should be stated concisely and unambiguously in question format and 3) it should suggest the potential for empirical testing (p. 17-18). Borg, Gall, and Gall (1993) noted that the goal of qualitative research is to create an understanding of people and events in a natural setting, considering the real world context. Qualitative researchers, therefore, try to understand the "phenomenological reality" of studied subjects and the socio-cultural settings in which they function. "Phenomenological reality" meant an subject's perceptions of personal experiences interacting with the world (p. 194-195).

The problem statements, then, for this study were: 1) "Can Board leadership behavior (based on the Oregon School Boards Association's (OSBA) adaptation of the National School Boards Association (NSBA) Quality Leadership Inventory--the QLI) be described by the traits of vision, structure, accountability and advocacy?" 2) "Does school board leadership behavior as perceived by school board members and site council chairs (on three measures

defined by the Oregon Education Act for the 21st Century) advance instructional quality?”

Purpose and Methodology:

This case study examined perceived congruence and/or divergence between two groups (school board members and site council chairs) on four QLI traits: vision, structure, accountability, and advocacy as they relate to instructional quality. Instructional quality was defined as implementation of site councils, self-evaluation, and guidelines for the Certificate of Initial Mastery. While there were many reform components written into the 1995 Oregon Education Act, the Oregon State Board of Education and the Oregon Department of Education identified these three items as evidence of effective schooling which would be assessed during school standards visits. The researcher identified those components to be indicators of instructional quality. The three indicators of instructional quality selected for this study were chosen because of all HB2991 components, site councils, self-evaluation and CIM would be most commonly known to all Oregon school systems during the time of the study.

While there were some measurement instruments dealing with local school board leadership behavior (Gaul, Underwood, and Fortune, 1994), the researcher opted to use the Oregon School Boards (OSBA) version of the Quality Leadership Inventory (QLI) in order to link QLI traits and HB2991. The QLI represents a self-design consensus model created by a committee of school board members from across the nation (See appendix A).

The case-study “field-interview process” was identified as a way to examine the relationship, dominance, interaction, and order of influence of the

four leadership traits within the OSBA model on school board behavior and their relationship to advancing three components of instruction within the Oregon Education Act for the 21st Century.

Furthermore, it was used to examine the interaction between the board and its site council chairs within this context. Open and closed ended questions framed the interview process (See appendix F).

Assumptions of Study:

The study was developed under the following assumptions:

- 1) That a case study approach would yield a true profile of respondent behavior.
- 2) That respondents would be familiar with HB2991 and commonly used educational terminology.
- 3) That the 1996 funding crisis in the Portland Public Schools and the pending legislative elections would not bias the study.
- 4) That the researcher, a central office supervisor in the district, would not bias the study.

Delimitation of Study:

The study was restricted to an Oregon K-12 school district composed of nine elementary schools, three middle schools, two high schools and an alternative schooling center. The student population of 10,600 came from households within three incorporated cities and unincorporated county developments with an average median income for all areas of \$55,000. The population was predominantly Caucasian with a minority component of 3 percent with Hispanics and Asians composing most of the minority population.

The percent of students who continue to postsecondary educational experiences was at 62%.

Generalizability of Study:

The results from this study's sample population were not generalizable. The sample gathered was from a single district with 100% of board members participating and with selected school site chairs. The sample size of 10 cannot be a reliable predictor of responses from a different sample. There was no guarantee that the population was representative of a larger group. The implications of the study's processes and the study's subsequent training model was generalizable. The 21 item interview questionnaire and researcher coding system can be used with other board/site chair groups to determine levels of congruence regarding the interaction of board leadership behavior and instructional quality. Information collected from groups should be utilized to design training for improved understanding of QLI and IQ.

Definition of Terms:

Using the OSBA model, the four traits of school board leadership were defined by Carnes' (1996).

Vision

A focus on school district organization, as evidenced by board adoption of a mission statement, district goals, and public involvement in the creation of same.

Structure

The existence of processes that ensured representation of all demographic groups in the development of district and school improvement plans which include efficiencies, orderly environment, staff development, and program content.

Accountability

The existence of processes which ensured regular evaluations of vision, structure, and advocacy.

Advocacy

The existence of proactive behaviors which demonstrated support for public education and school improvement.

Oregon Education Act for the 21st Century

The 1995 legislative revisions as found in HB 2991 and codified in ORS Chapters 327, 329, 332, and 339 (See appendix B).

Site Councils

An elected group of professionals, parents and community members charged with implementation of the Oregon Educational Act for the 21st Century, as defined in Section 39 of the Act (See Appendix B).

Certificate of Initial Mastery

A certificate awarded by schools to students at about grade 10. Based on a rigorous general academic program, the certificate represented a student's cumulative learning accomplishments. A measure of student achievement, and by inference, of school district instructional reform, as defined in Section 23 of the Act (See Appendix B).

Self-Evaluation

A requirement that school districts conduct a regular review and evaluation of instructional and reform practices, as defined in Section 11 of the Act (See Appendix B).

Summary

The need to study school board leadership behavior and its influence on and interaction with education reform and instructional quality was essential for policy makers and practitioners. The value in determining which school board behaviors have a positive effect on reform and learning was a first step in defining effective school board leadership and in developing training models for both school boards and site council chairs.

Chapter 2 reviews the literature, tracing the development of board leadership and educational reform. Chapter 3 explained the study design procedures used for data collection. Chapter 4 presented the results and in Chapter 5 the conclusions and recommendations for further study were made.

Chapter 2: Review of Literature

Introduction:

The researcher traced the history of boardsmanship and reform, with an emphasis on the areas included in the study. It became evident that the literature was limited in terms of current authority. In other instances, such as in organizational theory and school reform, seminal work, such as that of Hoy and Miskel (1978), remained as a foundation for current thinking in a vast arena of writing. In both instances the literature was narrowed by the QLI traits and the IQ components.

The role and the current dilemma of local school boards was summarized by Conley (1993) as a “cherished and unique institution” in our nation’s public schooling system. Boards represent the fundamental concept of local control that binds families, schools, and the community together. But immense challenges face boards. They are so great that Conley suggested school board “goals, purposes, procedures, and even its continued existence may be called into question” (p. 68).

In Oregon the legislature, through the Oregon Education Act for the 21st Century, extended the dilemma by giving decentralized statutory authority to school site councils in the 1993 version and then clouded decentralization with the 1995 version. It was the paradox of freedom and order that Wheatley (1992) described for self-organizing systems and that Peters (1987) predicted for self-managing structures.

This dilemma was given a conceptual solution by Bennis and Nanus (1985), who described the major task of leadership as being the management

of attention. In a world made up of fragmented systems, Gardner (1990) suggested that leadership provides a voice for the “common good and leadership skills that knit together multiple needs as a primer for public boards and executives” (p. 93).

Given this uncertain state of leadership for elected boards (Bogdan and Biklen, 1992), superintendents, and site chairs, it was valuable to trace major theoretical movements that have influenced educational governance in four areas: School board leadership, site council leadership, reform legislation, and leadership components.

Area 1: School Board Leadership:

Early colonial schools established the locus of control with school committees which were given the authority to tax for school operations, hire teachers, and oversee curriculum. But Bacharach (1990) noted that “while local control is embedded in historical precedent, the authority of local boards has been constantly eroded almost since their institution” (p.68). Yet a general review of secondary sources found little about the decline of governance by school boards until the so-called “Progressive Era” at the turn of the century when the goal was to reduce the size of school boards on the thinking that smaller boards with appropriate members would enable them to function in ways similar to corporate boards of directors (Button and Provenzo, 1989).

According to their research, boards had reached membership numbers of twenty and even forty. The St. Louis board was reduced from twenty-eight to twelve; the New York City board from forty-six to seven.

The result was an efficiency model described by Button and Provenzo (1989) that saw pupils as material, learning as product, and teachers as labor. Membership on boards of upper class “reformers” increased who were bent on keeping politics out and decision-making in the hands of experts--notably the superintendent’s staff (p. 211).

The “expert” as decision maker remained through the scientific management period of Taylor which was characterized by command organizations and, in its later iterations, division of labor, or the notorious “bureaucracy” of Blau (1956).

Beginning with the emergence of humanism as a behavioral and philosophic reaction to the rational-bureaucratic systems, school board governance took on a more proactive role, largely due to collective bargaining. The result, according to Rubin (1980) was that school boards gradually assumed greater autonomy and bargained away a good measure of the administrator’s customary power. The passing of unilateral decision-making power of elected boards and their chief executive officers and staff established the “facilitator-collaborator” role that Wise (1979) described as a multi-faceted organizational and governance state where “in practice formal educational policy was developed at local, state, and national branches of government. Indeed, no less than ten official bodies in addition to local boards can and do make educational policy” (p. 51).

Wise (1979) went on to conceptualize another dilemma for governance which remains today and which may explain this current period of educational reform: “(School) productivity questions are intrinsically more difficult than equity to solve because they arise not out of a political impasse but from a

fundamental lack of knowledge about how to teach. And lack of progress then mobilizes change because of the belief that the operating system (the school) is incapable of changing itself” (p. 53-54). Wise (1979) concluded this condition produces “hyperrationalizations” and labeled twelve variations:

- 1) Excessive prescription--overcontrolling inputs, processes and outcomes without consideration for attainment.
- 2) Procedural complexity--shared decision making without actual delegation.
- 3) Inappropriate solutions--answers without a match to context.
- 4) First order solutions--restating the problem with a remedial system.
- 5) Wishful thinking--unattainable goals setting.
- 6) Scientism--dependence on researcher solutions and languaging.
- 7) Common sense rationality--insufficient knowledge to solve complex problems, the “common experience” phenomenon of knowing.
- 8) Professional rationality--depending on administrator and teacher “lore”, of which there is no reliable corpus of knowledge.
- 9) Economic rationality--dollar analysis as a tool to reveal solutions.
- 10) Scientific rationality--dependence on normed factual data to reveal solutions.
- 11) Legal rationality--dependence on the wisdom of courts to resolve problems.
- 12) Combined rationality--linkages for a mix of “efficiencies” and solutions. (p.67-68)

Within this milieu school boards encountered, in the decades of the seventies, eighties, and nineties severe criticism for their actions, or perceived inaction. It was an image damage that remains today. The tenor of the criticism reached its high water mark with writers like Ivan Illych who proposed

“Deschooling Society” (1970) because the “institutionalization of values leads inevitably to physical pollution, social polarization, and psychological impotence.” Clark, Lotto, and Astuto (1989) reported that “school boards and communities appear to be more effective at preventing change than promoting it. . .by far, the most prevalent case is that school boards and communities do not initiate or have any major role in deciding about innovative programs” (p. 411).

More generally, Liberman (1986) stated that “In the folklore of education, the organization of public schools is supposed to foster local initiative and accountability. In practice, it actually fosters inertia and buck-passing” (p. 120). Noblit and Pink (1987) reported an absence of school board involvement in charting reform, a gap that was acknowledged by a National School Boards Association report by Shannon (1986) which found that “school boards have been systematically overlooked as participants in school reform processes” (p.7).

Such findings suggested a comprehensive revamping of school board organization. Wynn and Wynn (1988) reported, “Some studies have indicated that political oriented boards tend to be more responsive to the public. The political arena provides a necessary forum for debate on critical school issues and political parties are endowed with a mantle of accountability” (p.369). Other writers attempted to support the role of boards and place policy shortcomings on organizational structural failures. Goodlad, for example, (1984) found that parents, even during this three decade period of meltdown, continued to perceive board members as those who make important decisions about their schools and Kirst (1983) saw the trend earlier from a planner’s point of view: “In

the effective schools literature, very little attention is given to the crucial role that a school board plays in mobilizing school sites and leading the reform effort” (p. 234).

Altbach, Arnove, and Kelly (1982) captured the failed planning cycle as well: “Something seems to have gone wrong with educational planning. Both the assumptions on which it was based and the models which guided its efforts have come into serious questioning; the gap between the theory and practice of educational planning has become so vast as to raise serious questions about the continued utility of this craft” (p. 105). The Institute for Educational Leadership (1986) lamented that school boards spend too much time in “operational details” and not enough time on “systematic planning” thereby creating long term organizational problems. Elmore (1990) placed the operational details entanglement at the feet of “federal legislation, court actions, collective bargaining, and, most recently, state initiatives” (p. 220).

What, then, was the proper role of school boards in governance and its leadership functions such as planning and decision-making? The beginning of an answer, though it could be seen as an afterthought, may be found in the famed Nation At Risk (1980) report which concluded, “state and local officials, including school boards, governors and legislators have the primary responsibility for the finance and governance of schools and should incorporate the reforms we propose in education policies and fiscal policies” (p. 32).

The reformer role was seen as two-pronged by many researchers: one of facilitator and one of delegator. Greenwalt (1994) recommended that “It is the local school boards that can best bring together in our democracy all of the community--parents, community groups, and all others concerned about

schooling--in an effective and responsible way to initiate and sustain reform of the schools" (p. 35). Cetron and Gayle (1991) commended Oregon's delegation to site-based management as one of nine lessons learned to raise public education standards and Bullard and Taylor (1993) connected it to effective schools research with this statement: "School boards should look to site based management as the structure that best serves students, teachers and staff" (p. 345). Fiske (1991) borrowed the term "perestroika" (p. 45), applied it to public school restructuring, and urged "school boards to decentralize" and to "create a more porous system" for decision making (p. 261).

Sergiovanni (1992) saw an almost religious relationship between facilitator and delegator:

If self management is our goal, then leadership will have to be reinvented in a fashion that places 'fellowship' first. At the operational level, leadership is about two things: trying to figure out what needs to be done and trying to figure out how to get people to do them. When leadership and fellowship are joined, the traditional hierarchy of schools is upset...no one is at the apex; that position is reserved for ideas, values, and commitments of the heart of fellowship (p. 68).

In another, earlier, work, Sergiovanni (1990) described such a relationship as "value added" (p. 96) leadership. Value was added, he wrote, when the district empowered (delegates), enabled (provides resources with delegation) and enhanced (rewards). Bullard and Taylor (1993) had concluded that boards must dare to change the status quo in order to maintain a sense of participation in a decentralized organizational world. With the role of school boards established as facilitator and delegator in an age of rapid change and reform, the remaining question became how to reform?

Area 2: Site Council Leadership:

The most compelling pathway for reform was the giving up of “authority” to local decision makers, or, in the Oregon model, site councils. Goodlad (1984) called for schools to be “self-directing” (p. 323), to establish a capacity for renewal and develop mechanisms to respond to problems as they emerge. He described decentralization as schools linked to the district office and to each other and that the unit of improvement was each individual school. Additionally he proposed that genuine decentralization included delegation of authority and responsibility. Mitchell (1990) agreed and noted that “site based management cannot work without the school board’s active involvement and determined support” (p. 88). The transference of decision making to site councils creates, according to a “local culture” which can be invigorating if all aspects-- economics as well as social--were allowed to develop. Similarly the Oregon Education Association’s Handbook for Restructuring (1993) emphasized the importance of local culture and recommended that “Every school must create its own set of understandings for its specific conditions” (p. 11).

Patterson (1993) declared that leadership in business, education and industry is changing. Once characterized by power and control, leading for tomorrow should be regarded as a process - one which influences others to achieve mutually agreed upon goals for the organization. “The eye at the top of the pyramid is often blind to the realities of the workplace” (Patterson, 1993). Taylor (1993) noted that a marriage of both bottom up and top down decision making was essential for restructuring to succeed, and Gaul, Underwood, and Fortune (1994) found that board authority and power did not decline because of reform and in some cases actually increased and that district reform agendas

will continue to focus on increasing autonomy at school sites in regard to personnel and budgets.

Wohlstetter (1990) defined decentralization as the restructuring or exchange of power. It is further described as a tool to open up school systems to outsiders and that we can expect schools to be more successful if they are more responsive to their clients and their publics. Wohlstetter's underlying assumption of empowerment to schools was a simple formula: Greater autonomy equals an increase in student achievement. According to Gleason, Donahue and Leader (1996), site councils that understand important educational issues and how to apply concepts and practices associated with the issues can manage the educational direction of their schools.

But not all writers agreed: Weiss (1993) found that teachers involved in site council work enjoy increased authority and collegiality but their work on the council does not result in an increased emphasis on teaching. To minimize the negative, Conway and Calzi (1996) urged that restructuring maintain a focus on improving what goes on in the classroom in terms of methodology and learning.

Consistent with Gleason, Donahue and Leader (1996) and Conway and Calzi (1996), Wohlstetter (1995), noted that restructuring in curriculum and instruction is essential to "high performing school based management" teams. School organization must go beyond a change in governance, it must introduce changes that actually affect teaching and learning. Decentralization must focus on professional development, student performance, and principal leadership. School-based management will fail if adopted as an end-point without planning. (Wohlstetter, 1995).

In conclusion, the basis for site councils was well founded in business and education reform. School boards, noted Strike (1993) should minimize

their roles as originators of policy. Their chief roles are to function as the voice of the public in the deliberations of the local school community and to be the sovereign of last resort.

Area 3: Reform legislation:

Educators have difficulty responding to new legislation typically because it is changing continuously. Often it conflicts with old or existing requirements and is placed on the shoulders of districts, schools and teachers to implement without sufficient support or assistance from the state. Goodlad (1984) reported that most legislators are ignorant about how new bills impact the time and resources available to schools and that new legislation takes little or no account of existing requirements in the education code.

Legislative acts have influenced school reforms for many years. Even now, systems reflect legislative action implemented from the mid 1960's. "The 88th and 89th Congresses enacted legislation to support education from cradle to grave" (Goodlad, 1984, p. 3). Congress has relied on schools to deal with poverty, unemployment, crime, discrimination, and more. Free and reduced lunch programs, career education, refusal skill curriculum and integration activities were just a few implementations that illustrate the influence of legislative work in schools.

Goodlad (1984) asserted that government should articulate policy related to four educational goal areas (academic, civic and social, vocational and personal studies), and that each state should assist districts gather data to assess student progress in each goal area. States need to assist with balancing imbalances among any of the four goal areas (through modified legislative action or changes in higher education entrance requirements for

example) and states must take the lead in educating the community at large that schools cannot do it all.

The Oregon Education Act (1995) defined responsibilities for the State Board of Education that includes a mandate to provide public discussions about the legislation to lead the state with necessary curriculum revisions, and to play an integral role in student assessment. The bill required districts to engage in self evaluation processes that include updating local district improvement plans. Representatives from schools and the public are to be part of the process. The document included as Appendix B within this report, identifies academic, social and vocational requirements for district implementations consistent with three of the four broader goals referred to by Goodlad (1984).

Keeping with Goodlad's findings about legislative requirements - The Oregon Education Act (1995) served up a large menu of expectations for schools - creating safe schools, parent involvement, school-to-work and second language opportunities as a few among several new requirements for Oregon School Districts. At the national level, via school board survey results reported by Gaul, Underwood and Fortune (1994) board members report to do just that: To initiate curriculum and instructional reforms.

Dlugosh and Sybouts (1994) reported that district officials (superintendents and boards) view restructuring less positively from smaller school districts than do those from larger districts. Key words used to describe reform by respondents from Missouri, Iowa, South Dakota, Nebraska, Kansas, Colorado and Wyoming were outcome-based education, strategic planning, cooperative learning, site-based decision making and total quality management. Overall approximately 1/3 of the board members perceived the restructuring movement would serve as a long range strategy to change when asked the question, "Will school restructuring introduce a process that will serve

as a long range strategy to change the American public education system?" (Dlugosh and Sybouts, 1994).

Reform was not new to the field of education. The movements have been labeled to fit history and groups: from the Progressive Education Movement of the 1930's, to the administrator driven NASSP Trump Plan of the 50's and 60's, and finally the historic era of federal entitlements are large scale examples of reform efforts to improve education and, ultimately, our society (Dlugosh and Sybouts, 1994). Many recent reforms have resulted from the National Commission on Excellence in the 80's. The movement spread during that decade to many western nations who implemented educational improvement plans (Middleton, 1992). Decentralization for example, can be linked to business and industry as well as earlier proponents of improvement in education. Conway and Calzi (1996) reported increased worker satisfaction with decentralization in business and industry. Dewey (1903) called for every teacher to be represented to "register judgment" in matters of educational importance. School based management existed prior to efforts to restructure education in the latter half of the 1980's. Florida adopted legislation mandating advisory committees for schools in 1983 (Ogawa, 1994). The school-based management system has since been adapted and introduced by school systems in almost every state in the union: from Washington to Florida and from California to Massachusetts (Ogawa, 1994).

Area 4: Leadership Components:

The National School Boards Association's "four cornerstones" of leadership were identified after a consensus inventory of local school board roles and successful practices was conducted by the association. They included accountability, structure, vision, and advocacy.

Accountability

Goodlad (1984) notes that accountability is necessary at all levels involved in education including the country, state, District, school, and individuals within the school and community at large. The state should hold the district accountable for communicating the state's goals (balanced curriculum, qualified teachers, school improvement and equity in resource distribution). State officials should be accountable for articulating educational goals to the district. The superintendent and board should concern themselves with the balance of curriculum versus school to school uniformity. Schools should be accountable to plan improvements and to report those plans to the board in the review process. Goodlad (1984) shared a definition of accountable as that which is capable of being accounted for and subject to giving account (p. 274).

Structure

Goodlad (1984) asserted that centralized or decentralized structures do not produce results. The key rests within efforts to improve programs for students in school regardless of the structure. Taylor (1993) employed educators to keep the focus of decision making on curriculum and pedagogy in order to make a difference in schools. Personnel and budgets as stand alone items are not important except as they relate to curriculum pedagogy. Gaul, Underwood and Fortune (1994) identified curriculums and instructional reforms as the most prevalent in districts: Over 91% of districts surveyed from a 1,347 respondent questionnaire identified instruction related reform as working and promoting the advancement of instructional quality within their schools. Areas of successful reforms identified were similar to the Oregon Education Act mandates (1995) and identified improvement needs in Goodlad's "A Place Called Schools" (1984).

Technology, second language and site-based management were improvements cited. Ogawa (1994) noted that general institutional theory of social organization explains individual behavior as the result of the influence of the institution rather than internally derived goals, that structural elements of organization are institutionalized. Individuals responsible for the development of institutionalized structures tend to be organized. Some organizations adopt institutionalized structural elements to legitimize the organization. School board management was developed and promoted by policy groups and teachers unions as a structure to include in the nations reform agenda.

Vision

Stogdill (1965) delineated a dimension of system-oriented leadership as an initiation of formal structures. The leaders clearly defined their roles and let followers know what is expected of them. Another dimension is defined as tolerance of freedom and was described as staff members taking initiative, making decisions and taking action. Rallis and Criscoe (1993) did not see boards as the group to clearly define roles to create a framework for the actualization of the organizational mission. They believed that boards lack the ability to articulate the vision. Barriers such as lack of information about teaching and learning, symbolic behavior requirements, and investments in serving the “constituency” prevented them from behaving in a proactive manner. In their view, the terms boards, leadership and restructuring were “incompatible”.

Gaul, Underwood and Fortune (1994) stated that school board members are the most likely leaders of school reform second only to school superintendents. Based upon responses from an American School Board

Journal survey, board members identified themselves together with superintendents as the impetus to curricular and instructional reforms (Gaul, Underwood, and Fortune, 1994). Bennis and Nanus (1985) described vision as an image which may be abstract or concrete, with specific goals and mission statement.

A vision they concluded always looks to the future and provided the leader with a structure to connect the organization's past, present, and potential (Bennis and Nanus, 1985). Stillerman (1992) called vision a process that creates a state of being for the individual, group, and organization.

Advocacy

Johnson (1995) best described the need for advocacy when she summarized the condition of American education as lacking support, as something dangerously fragile. Although many people may voice initial approval of their own local schools, this support disintegrates at the slightest probing. Berliner and Biddle (1996) however "debunk the studies that pointed to a crisis in American education" (p. 34) and instead pointed to a concerted effort by politicians and others with a political agenda to misinform the citizens about the state of and the successes in public schooling. Grass roots advocacy, they noted, along with accurate data is a fundamental part of being a school board member. It is an activity that must be accompanied with business partnerships noted Uchida, Cetron and McKenzie (1996) as "citizens make education a priority and work to retool public schooling" (p. 50).

The role of the school board member was once again that of facilitator in this process, according to former National School Boards president Boyd

Boehlje (1994): "Boards should scrutinize national reports, editorial comments, and political rhetoric to separate truth from fallacy and be prepared to respond publicly to exaggerated and fallacious claims. (They) should publish balanced information and then stem the misplaced top-down erosion of the public's confidence in our nation's schools" (p. 44).

Problem Statement:

The review of literature lead to the questions of interest for this study previously cited in Chapter One.

- 1) Can board leadership behavior be described by the QLI traits of vision, structure, accountability and advocacy?
- 2) Does school board leadership behavior (based on the OSBA's QLI Inventory) as perceived by school board members and site council chairs advance instructional quality (defined by HB2991)?

Summary:

The researcher selected titles for reading and review which provided an historical tracing of the reform movement and the evolution of school boards.

The literature produced a picture of continuous change in both areas. For school board policy makers, the change was one of decentralization concurrent with a focus on specific role behaviors after the OSBA/NSBA model. For practitioners, the change was one of empowerment mixed with new requirements that are often legislated as opposed to innovated.

Chapter 3: Design

Introduction:

The study design was classified as a qualitative case study. According to Borg, Gall and Gall (1993):

In qualitative research, the researcher deliberately interacts in a personal way with each individual in the study. Thus, the researcher's data collection procedures are open to modification depending on how the individual acts. Furthermore, the researcher is free to use her intuition and judgment as a basis for deciding how to frame questions or how to make observations. Similarly, the individual being studied may be given opportunities to volunteer ideas and perceptions and even to participate in the analysis of the data (pg.196).

This case study employed field interviews conducted by the researcher with ten respondents: five school board members and five site council chairs. The interviews were designed to identify school board and site council chair perceptions of board leadership behavior and its relationship to the advancement of instructional quality.

The research instrument included questions relating to board and site chair perceptions of their experience with board leadership in regard to four leadership categories (vision, structure, accountability, and advocacy) as adapted by OSBA (Oregon School Boards Association) and three components of the Oregon Education Act for the 21st Century (site councils, self-evaluation and Certificate of Initial Mastery) in one Oregon K-12 district.

Subjects:

The ten respondents were selected according to role and level. All of the district's board members were interviewed. The site chairs were from each of the district's two high schools, two middle schools, and one randomly selected elementary school.

Research Instrument:

Subjects answered a 21 item interview questionnaire designed to assess the participant's perceptions of board leadership behavior exhibited by board members in the district. A copy of the instrument is in Appendix F. The research instrument developed for this study incorporated a dual method approach, including both Likert scale questions as well as open-ended questions. Items of the instrument involved several 7-point Likert scale questions dealing with the frequency of experience with, knowledge of, or observation of board leadership behavior (BLB) and the advancement of instructional quality (IQ).

The scale with corresponding interactive response value was:

1 = no experience with BLB and advancement of IQ

2 = rare experience

3 = little experience "Low Level" --3 or less=no effect

4 = some experience "Mid Level" --4=some effect

5 = more experience "High Level"--5 or more=positive effect

6 = regular experience

7 = frequent experience with BLB and advancement of IQ

High Level scores determined dominance and order of influence.

The scale was utilized to serve as an indicator to the researcher of where the respondent stood with respect to a probing question. It was, therefore, utilized as a guide and not an end in itself.

Questions investigated leadership traits used by the Oregon School Boards Association's modification of NSBA's Quality Leadership Inventory (Appendix A) and their interaction with instructional quality (IQ) features of the Oregon reform act (Appendix B). OSBA aligned the NSBA's QLI model with the Oregon reform act to create a reform training structure for Oregon school boards members.

The linkage of Board leadership behavior in the areas of structure, accountability, vision and advocacy to the Oregon Education Act for the 21st Century has not been described or researched in the literature.

Several studies linked board member perception of leadership and reform but very few addressed site council perception of board leadership. None drew a relationship between board and site council perceptions about board leadership specific to components of HB2991.

This study contributed to the body of qualitative research surrounding board leadership, reform and site councils in terms of increasing our understanding of "attributes, values, norms, and beliefs" (Jacobs, 1989) about these issues.

The interview questionnaire was developed based on the QLI (Quality Leadership Inventory), HB2991, and by consultation with colleagues. The questionnaire was approved by the University Human Subjects' Committee (Appendix G) and was subsequently used with the districts' superintendent and two district teachers as part of a field test to increase instrument reliability.

Field test participants were invited to review the research instrument and provide comments pertaining to any part of its design. Minor revisions were made to the research instrument as a result of the field test in terms of question clarity and number. As a result of the field test, the total number of questions were reduced from 38 to 21.

Another reliability check was a direct mail of the instrument to all other site chairs in the district. The researcher received an 80% return. The mail responses did not warrant any other changes to the instrument.

Procedure:

All subjects were mailed a letter inviting them to meet with the researcher at a time and location of their choice to be interviewed regarding their perceptions of board leadership behavior and the advancement of instructional quality. Subsequently interview sessions were scheduled through a phone contact between the researcher and each subject.

Participants took, on average, one hour to complete the interview. To maintain uniformity of instruction and procedures the researcher wrote the interview questionnaire in a script format and read directly from the instrument during each interview.

At the beginning of each interview, the researcher read an informed consent document in addition to mailing one with the initial invitation to subjects to participate (see Appendix G).

Data Analysis Procedures:

Data were collected according to qualitative research constant comparative guidelines; 1) collect data, 2) look for key issues that become categories of focus, 3) collect data with an eye focused toward various dimensions of the developing categories, 4) write about and describe the categories, 5) work with the data to develop social processes and relationships, and 6) code, analyze and write about the data again as related to the core categories (Glaser, 1978). This methodology permitted categories, themes, and theory to be constructed directly from the data.

Constant comparative analysis provided the researcher with a structure for categorizing words, phrases, and examples and for assigning values to them that would then be used to determine if there had been an interactive effect.

Data collected resulted in themes describing board leadership behavior according to the leadership cornerstones of structure, vision, accountability and advocacy; and instructional quality--site councils, self-evaluation, and certificate of initial mastery resulting in a study that could be classified as predominantly qualitative case study (Borg, Gall and Gall, 1993).

Qualitative Methods:

The purpose of qualitative research was to understand attitudes, values, norms, and beliefs (Jacobs, 1989). To that end, the researcher analyzed narrative data for values, norms, and beliefs in relationship to QLI traits and IQ components after Borg, Gall and Gall, (1993) who noted that qualitative researchers “try to expose the values that are embedded in the context being studied.”

For the purpose of this study, the subjects' qualitative responses were analyzed by means of coding (Borg, Gall and Gall, 1993). Codes that summarized the respondents' perceptions regarding QLI traits and HB2991 components were categorized as “Yes/No” responses based on the respondent's ability to describe at least one example of the QLI trait and IQ components. Coding categories resulted from key issues and the relationship of those issues (Glaser, 1978).

Summary:

The researcher's case study focused on a single school district with an N of 10 respondents, five school board members and five site council chairs. The interview instrument was field tested for reliability and modifications were made. The 21 items in the interview instrument included closed-ended Likert Scale questions and several open-ended questions. Coding of responses were based on researcher analysis using constant comparative guidelines.

Chapter 4: Results

Introduction:

The study yielded two types of data: Frequency tables which revealed perception patterns in terms of relationship, dominance, interaction, and order of influence of the four board QLI leadership traits--vision, structure, accountability, and advocacy--and their advancement of three measures of HB 2991 instructional quality--site councils, self-evaluation and Certificate of Initial Mastery.

Secondly, the data produced a comprehensive anecdotal record which, when coded by the researcher, created qualified perceptual analysis for the same.

The frequency data was reported as Tables. The anecdotal data, in the form of Figures, was reported as illustrative responses. Both data were considered by the researcher in drawing conclusions found in Chapter 5.

When developing the frequency tables, the researcher established a qualitative coding of "High Levels" of perceived leadership effect for Likert scale responses of 5 (more experience) or above.

The first table, 4.1, was based on a foundational question that tested interaction between board members and site council chairs, where board members self-assessed their overall leadership interaction and site chairs assessed experience with board initiated leadership. Subsequent tables, 4.2-4.17, address the QLI and HB 2991 instructional quality relations.

Frequency and perceived leadership effect of board behavior between school board members and site council chairs.

The reported range was “rare” to “regular” experiences, with 30% of the respondents (3 out of 10) reporting the interaction at a High Level (Likert rating of 5 or more). Of the three High Level perceiver ratings, the highest (Likert rating 6) was from a site chair; conversely, the lowest rating (Likert rating 2) was from a board member. The majority rating of eight respondents scored the interaction as a mid to High Level interaction.

Table 4.1 Frequency of response for interaction between boards and site council chairs.

Level of Frequency & Likert Scale	Board Members # (%)	Site Council Chairs # (%)	Raw # Total
1 No Experience			
2 Rare Experience	1		1
3 Little Experience		1	1
4 Some Experience	2	3	5
5 More Experience	2		2
6 Regular Experience		1	1
7 Frequent Experience			
No Response			
Total # of Respondents:	5	5	10

QLI TRAIT 1: VISION AND INSTRUCTIONAL QUALITY:

The first QLI trait assessed produced data that measured the influence of board leadership behavior on vision and the impact of vision leadership on site councils. The data was reported in Tables 4.2 and 4.3.

Frequency and perceived leadership effect of board behavior on QLI vision trait.

The data produced a range of “little” to “frequent”, with the low Likert perceiver rating given by a site council chair and the high Likert rating given by a board member. High Level perceiver ratings (Likert 5 or more) were reported by 80% of the respondents, with four of the eight respondents being board members.

Table 4.2 Frequency and perceived leadership effect of QLI vision trait.

Level of Frequency & Likert Scale	Board Members # (%)	Site Council Chairs # (%)	Raw # Total
1 No Experience			
2 Rare Experience			
3 Little Experience		1	1
4 Some Experience	1		1
5 More Experienced	3	1	4
6 Regular Experience		3	3
7 Frequent Experience	1		1
No Response			
Total # of Respondents:	5	5	10

Data for the perceived effect of QLI vision trait on site council chairs was the matching interaction question and was reported as Table 4.3.

Frequency and perceived leadership effect of QLI vision trait on site councils.

The data produced a range of “some” to “frequent”, with a clustered High Level perceiver ratings (Likert 5 or more) consisting of five board members and four site council chairs, with the highest Likert scores coming from site council chairs.

Table 4.3 Frequency and perceived leadership effect of QLI vision trait on site councils.

Level of Frequency & Likert Scale	Board Members # (%)	Site Council Chairs # (%)	Raw # Total
1 No Experience			
2 Rare Experience			
3 Little Experience			
4 Some Experience		1	1
5 More Experience	3	1	4
6 Regular Experience	2	1	3
7 Frequent Experience		2	2
No Response			
Total # of Respondents:	5	5	10

Table 4.4 reported the interaction between self-evaluation, the second HB 2991 quality instruction component, and the QLI vision trait.

Frequency and perceived leadership effect of QLI vision trait on self-evaluation.

The data produced a range of “rare” to “frequent”, with both the lowest and the highest Likert ratings reported by a site council chair. The board rating was a clustered four-out-of-five High Level Likert scale of 6.

Table 4.4 Frequency and perceived leadership effect of QLI vision trait on self-evaluation.

Level of Frequency & Likert Scale	Board Members # (%)	Site Council Chairs # (%)	Raw # Total
1 No Experience			
2 Rare Experience		1	1
3 Little Experience			
4 Some Experience	1	2	3
5 More Experience			
6 Regular Experience	4	1	5
7 Frequent Experience		1	1
No Response			
Total # of Respondents:	5	5	10

Table 4.5 reported the interaction between the Certificate of Initial Mastery (CIM), the third HB 2991 quality instruction component, and the QLI vision trait.

Frequency and perceived leadership effect of QLI vision trait on Certificate of Initial Mastery.

The data produced a range of “little” to “frequent”, with site chair responses being clustered at a High Level, with the highest Likert score reported by a site council chair.

Table 4.5 Frequency and perceived leadership effect of QLI vision trait on CIM.

Level of Frequency	Board Members #	(%)	Site Council Chairs #	(%)	Raw # Total
No Experience					
Rare Experience					
Little Experience			1		1
Some Experience	1				1
More Experience	3		1		4
Regular Experience	1		1		2
Frequent Experience			2		2
No Response					
Total # of Respondents:	5		5		10

QLI TRAIT 2: STRUCTURE AND INSTRUCTIONAL QUALITY:

Table 4.6 charted the reporting of the interaction between the second QLI trait, structure, and its effect on leadership and the three components of instructional quality. Table 4.6 was based on a foundational question that tested interaction between board members and site council chairs, where board members self-assessed their overall leadership interaction on this trait and site chairs assessed experience with board initiated behavior of the trait.

Frequency and perceived leadership effect of board behavior on QLI structure trait.

The data produced a range of “little” to “frequent”, with the low Likert rating given by a board member. High Level perceiver ratings (Likert 5 or more) were reported by six out of ten. One participant had no response to this item.

Table 4.6 Frequency of response for interaction between boards and site council chairs on QLI structure trait.

Level of Frequency & Likert Scale	Board Members # (%)	Site Council Chairs # (%)	Raw # Total
1 No Experience			
2 Rare Experience			
3 Little Experience	1		1
4 Some Experience	1	1	2
5 More Experience		1	1
6 Regular Experience	2	1	3
7 Frequent Experience	1	1	2
No Response		1	1
Total # of Respondents:	5	5	10

Data for the perceived effect of QLI trait structure on site council chairs was the matching interaction question and is reported as Table 4.7.

Frequency and perceived leadership effect of QLI structure trait on site councils.

The data produced a range of “little” to “frequent”, with the lowest Likert scale rating reported by a board member and the High Level Likert rating given by site council chairs. A clustered High Level rating by seven respondents was reported. One site chair had no response.

Table 4.7 Frequency and perceived leadership effect of QLI structure trait on site councils.

Level of Frequency & Likert Scale	Board Members # (%)	Site Council Chairs # (%)	Raw # Total
1 No Experience			
2 Rare Experience			
3 Little Experience	1		1
4 Some Experience		1	1
5 More Experience	2		2
6 Regular Experience	2	2	4
7 Frequent Experience		1	1
No Response		1	1
Total # of Respondents:	5	5	10

Table 4.8 reported the interaction between self-evaluation, the second HB 2991 quality instruction component, and the QLI structure trait.

Frequency and perceived leadership effect of QLI structure trait on self-evaluation.

The data produced a range of “rare” to “frequent”, with the low Likert rating given by a site council chair and a High Level clustered rating of all board members and four site council chairs.

Table 4.8 Frequency and perceived leadership effect of QLI structure trait on self-evaluation.

Level of Frequency & Likert Scale	Board Members #	(%)	Site Council Chairs #	(%)	Raw # Total
1 No Experience					
2 Rare Experience			1		1
3 Little Experience					
4 Some Experience					
5 More Experience	1				1
6 Regular Experience	2		2		4
7 Frequent Experience	2		2		4
No Response					
Total # of Respondents:	5		5		10

Table 4.9 reported the interaction between the Certificate of Initial Mastery (CIM), the third HB 2991 quality instruction component, and the QLI structure trait.

Frequency and perceived leadership effect of QLI structure trait on Certificate of Initial Mastery.

The data produced a range of “little” to “frequent”, with the lowest and highest Likert rating given by a site council chair. A clustered High Level Likert rating was reported by 70% of the respondents, with four-of-five board members reporting a High Level rating and three-of-five site council chairs doing the same.

Table 4.9 Frequency and perceived leadership effect of QLI structure trait on CIM.

Level of Frequency & Likert Scale	Board Members #	(%)	Site Council Chairs #	(%)	Raw Total
1 No Experience					
2 Rare Experience					
3 Little Experience			1		1
4 Some Experience	1		1		2
5 More Experience	3				3
6 Regular Experience	1		1		2
7 Frequent Experience			2		2
No Response					
Total # of Respondents:	5		5		10

QLI TRAIT 3: ACCOUNTABILITY AND INSTRUCTIONAL QUALITY:

Table 4.10 charted the reporting of the interaction between the third QLI trait, accountability, and its effect on leadership and the three components of instructional quality.

Table 4.10 was based on a foundational question that tested interaction between board members and site council chairs, where board members self-assessed their overall leadership interaction on this trait and site council chairs assessed experience with board initiated behavior of the trait.

Frequency and perceived leadership effect of board behavior on QLI accountability trait.

The data produced a range of “little” to “regular”, with the lowest Likert scale rating reported by a site council chair and the High Level Likert cluster rating of four-of-five board members.

Table 4.10 Frequency of response for board behavior toward establishing accountability.

Level of Frequency & Likert Scale	Board Members # (%)	Site Council Chairs # (%)	Raw # Total
1 No Experience			
2 Rare Experience			
3 Little Experience		1	1
4 Some Experience	1	2	3
5 More Experience	2	2	4
6 Regular Experience	2		2
7 Frequent Experience			
No Response			
Total # of Respondents:	5	5	10

Frequency and perceived leadership effect of QLI accountability trait on site councils.

The data produced a range of “rare” to “frequent”, with 80% (8 out of 10) respondents giving a High Level Likert rating. Of the eight High Level responses, five were from board members. The three site council chairs rating the item high, gave it a Higher Likert score than the board members. Site council chairs scored accountability as “frequent” as opposed to “more” or “regular” by board members.

Table 4.11 Frequency and perceived leadership effect of QLI accountability trait on site councils.

Level of Frequency & Likert Scale	Board Members # (%)	Site Council Chairs # (%)	Raw # Total
1 No Experience			
2 Rare Experience		1	1
3 Little Experience		1	1
4 Some Experience			
5 More Experience	2		2
6 Regular Experience	3		3
7 Frequent Experience		3	3
No Response			
Total # of Respondents:	5	5	10

Table 4.12 reported the interaction between self-evaluation, the second HB 2991 quality instruction component, and the QLI accountability trait.

Frequency and perceived leadership effect of QLI accountability trait on self-evaluation.

The data produced a range of “rare” to “frequent”, with 80% (8 out of 10) respondents giving this item a High Level Likert score. All five board members reported High Level scores. Of the three site chairs, two rated it higher than board members.

Table 4.12 Frequency and perceived leadership effect of QLI accountability trait on self-evaluation.

Level of Frequency & Likert Scale	Board Members #	Site Council Chairs #	Raw # Total
1 No Experience			
2 Rare Experience		2	2
3 Little Experience			
4 Some Experience			
5 More Experience		1	1
6 Regular Experience	5		5
7 Frequent Experience		2	2
No Response			
Total # of Respondents:	5	5	10

Table 4.13 reported the interaction between Certificate of Initial Mastery (CIM), the third HB 2991 quality instruction component, and the QLI accountability trait.

Frequency and perceived leadership effect of QLI accountability trait on Certificate of Initial Mastery.

The data produced a range of “no” to “frequent”, with High Level Likert scores reported by four-out-of-five board members. Of the one site council chair that rated this item as High Level, the rating was greater than that of all board members.

Table 4.13 Frequency and perceived leadership effect of QLI accountability trait on CIM.

Level of Frequency & Likert Scale	Board Members # (%)	Site Council Chairs # (%)	Raw # Total
1 No Experience		1	1
2 Rare Experience		1	1
3 Little Experience			
4 Some Experience	1	2	3
5 More Experience	3		3
6 Regular Experience	1		1
7 Frequent Experience		1	1
No Response			
Total # of Respondents:	5	5	10

QLI TRAIT 4: ADVOCACY AND INSTRUCTIONAL QUALITY:

Table 4.14 charted the reporting of the interaction between the fourth QLI trait, advocacy, and its effect on leadership and the three components of instructional quality. Table 4.14 was based on a foundational question that tested interaction between board members and site council chairs, where board members self-assessed their overall leadership interaction on this trait and site council chairs assessed experience with board initiated behavior of the trait.

Frequency and perceived leadership effect of board behavior on QLI advocacy trait.

The data produced a range that reached both ends of the Likert scale: “no” to “frequent”, with the lowest Likert score reported by a site council chair. All five board responses were clustered as High Level.

Table 4.14 Frequency of response for board behavior toward advocacy.

Level of Frequency & Likert Scale	Board Members #	(%)	Site Council Chairs #	(%)	Raw # Total
1 No Experience			1		1
2 Rare Experience			1		1
3 Little Experience			1		1
4 Some Experience			1		1
5 More Experience	1				1
6 Regular Experience	1				1
7 Frequent Experience	3		1		4
No Response					
Total # of Respondents:	5		5		10

Data for the perceived effect of QLI advocacy trait on site council chairs was the matching interaction question and is reported as Table 4.15.

Frequency and perceived leadership effect of QLI advocacy trait on site councils.

The data produced a range of “some” to “frequent”, with a High Level Likert score cluster from all board members and four-out-of-five site council chairs.

Table 4.15 Frequency and perceived leadership effect of QLI advocacy trait on site councils.

Level of Frequency & Likert Scale	Board Members #	Board Members (%)	Site Council Chairs #	Site Council Chairs (%)	Raw # Total
1 No Experience					
2 Rare Experience					
3 Little Experience					
4 Some Experience			1		1
5 More Experience	2				2
6 Regular Experience	2		1		3
7 Frequent Experience	1		3		4
No Response					
Total # of Respondents:	5		5		10

Table 4.16 reported the interaction between self-evaluation, the second HB 2991 quality instruction component, and the QLI advocacy trait.

Frequency and perceived leadership effect of QLI advocacy trait on school self-evaluation.

The data produced a range of “rare” to “frequent”, with the lowest Likert scale rating from a site council chair. All five board members reported High Level Likert ratings and four site council chairs reported the same, with three of the four highest scores given by site council chairs.

Table 4.16 Frequency and perceived leadership effect of QLI advocacy trait on school self-evaluation.

Level of Frequency & Likert Scale	Board Members #	(%)	Site Council Chairs #	(%)	Raw # Total
1 No Experience					
2 Rare Experience			1		1
3 Little Experience					
4 Some Experience					
5 More Experience	1				1
6 Regular Experience	3		1		4
7 Frequent Experience	1		3		4
No Response					
Total # of Respondents:	5		5		10

Table 4.17 reported the interaction between the Certificate of Initial Mastery (CIM), the third HB 2991 quality instruction component, and the QLI advocacy trait.

Frequency and perceived leadership effect of QLI advocacy trait on Certificate of Initial Mastery.

The data produced a range of “no” to “frequent”, with the lowest Likert scale rating reported by a site council chair, and 80% (8 out of 10) of respondents reported High Level scores. Of the four highest “frequent” ratings, three were from site council chairs.

Table 4.17 Frequency and perceived leadership effect of QLI advocacy trait on CIM.

Level of Frequency & Likert Scale	Board Members # (%)	Site Council Chairs # (%)	Raw # Total
1 No Experience		1	1
2 Rare Experience			
3 Little Experience			
4 Some Experience	1		1
5 More Experience	1	1	2
6 Regular Experience	2		2
7 Frequent Experience	1	3	4
No Response			
Total # of Respondents:	5	5	10

BOARD AND SITE COUNCIL CHAIR ANECDOTAL REPORTING:

The anecdotal record of selected descriptors was presented in Figures, numbered from Figure 4.1 to Figure 4.14.

As figure 4.1 illustrated board and council chairs reported 5 categories that matched (vision, community, student orientated, professional support, and big picture focus) and reported several other board leadership traits that were not consistent between board members and site chairs or within their own group. Some participants based their report on their perception of the “ideal” leadership traits that a board member should demonstrate and others based their comments on their perception of leadership demonstrated by board members in the district studied.

Vision, accountability, structure and advocacy were the four cornerstones of board leadership as defined by the National and Oregon School Board's Associations.

Vision was the only QLI trait identified by both board and council participants prior to additional questioning during the interview.

Accountability was mentioned by one school board member.

The description of board leadership provided by participants encompassed a broad spectrum of adjectives and phrases.

BOARD DESCRIPTORS OF LEADERSHIP:	#	SITE CHAIR DESCRIPTORS OF LEADERSHIP:	#
MATCHING COMMENTS			
Vision	3	Vision	1
Sense of community	3	Sense of community	1
Student oriented	1	Student oriented	2
Supportive of professionals	2	Supportive of professionals	2
Ability to focus on district as a whole (big picture)	1	Ability to focus on district as a whole (big picture)	1
SINGLE COMMENTS			
Interest in education	1	Confusing	1
Policy setting	1	Disorganized	1
Financial and educational (accountability)	1	Well-meaning	1
Do more, better, faster (efficiencies)	1	Uninformed	1
Non-special interest	1	Affective	1
Ability to work with other people	1	Two way communication	1

Figure 4.1 Board and council chair descriptors for school board leadership

Board and council chair descriptors of board-council involvement

Figure 4.2 demonstrated that all board members could describe involvement with site council through attendance of site council meetings. Site council chairs referred to more than involvement at site council meetings and include examples of involvement with the board to be summits, action plans, validations, newspaper and board meeting activities.

EXAMPLES OF BOARD RESPONSES		EXAMPLES OF SITE CHAIR RESPONSES	
"A site council chair asked me to sit down with her for about an hour. We talked about site council identity and role."	Y	"All things the board does involve me as a site council member. I think we are involved with them all the time. Examples: the Summit Conference, revised improvement plan, opportunities to provide the board with information, action plans, validation."	Y
"I go to their site council meetings and I guess that's about the extent of it."	Y		
"Some individual involvement, site council summit, and site council meetings. I get a reminder and agenda of the meeting. I'm there to observe the process and as a resource. I feel bad if I miss a meeting."	Y	"They visited our site council. I have attended a few board meetings. I read the newspaper. Those are my personal experiences."	Y
"Involved in discussions about business resources for the high school. Not as much as I would like to be."	Y	"I have done presentations before the board."	Y
"It's been very high because of previous membership. Each board member has attended some."	Y	"Last spring I was involved in making a presentation."	Y
		"The beginning of last year when I had to make a presentation about the report card."	Y

Figure 4.2 Board and council chair descriptors of board-council involvement.

Board and council chair descriptors of the impact of vision on site councils

Figure 4.3 illustrated that the board equates vision with goals or tasks, this matches the QLI definition of vision (focus on Rigor), specifically - setting goals. Site chairs also responded to vision impact on site councils in relationship to goals. Site councils, a component of instructional quality, were described to be involved with implementing goals and/or board vision.

EXAMPLES OF BOARD RESPONSES		EXAMPLES OF SITE CHAIR RESPONSES	
"Setting goals. I believe all schools followed the district goal of preventing violence and spelled out the consequences of breaking rules."	Y	"One example is it became clear that the board wanted an action plan regarding standardized test scores. We had to divide our attention between what we prioritized and the board prioritized. It worked out well."	Y
"The board's input on technology. The board's input on test scores and how we are going to improve them. I think board goals have a significant impact on site councils. They take them into account and it makes a difference."	Y	"Our building goals are a direct reflection of the district goals. I thought it was made direct by administration, that they need to match up. If the direction was not there, we as teachers may have selected another goal."	Y
"I think our goals fairly articulate the mission. I think those goals have very much impacted site councils. A strong part of the board's vision--encouraging autonomous behavior of site councils."	Y	"Some site councils in the district re-wrote their goals after what they heard what the board goals were. Our site council didn't think we were independent. It's hard to separate the stated version from how they behave. The vision is good - the way they act is different. The fact that their vision is confused impacts site council, because they are not clear in their own minds. It leaves us feeling ineffective."	Y
"I'm not sure if its the board as much as the grades (student achievement). It seems there is a deeper appreciation among site councils, principals and teachers in terms of where they sat in the last grading system."	Y	"The goals sent down don't actually relate to site councils except the charge to make sure we are working toward goals."	Y
"Vision impacts the tasks that site councils have the responsibility to address."	N	"Nothing sent down that says site councils will...."	Y

Figure 4.3 Board and council chair descriptors of the impact of vision on site councils.

Board and council chair descriptors of the impact of vision on self evaluation

Figure 4.4 showed four out of five board member examples of vision and self-evaluation referred to the validation process, a process conducted internal to the district but external to the school where teams of administrators, staff and community members visit school sites for a day and provide verbal and written feedback to the school about observations, goal implementation and student achievement. All site council chairs referred to the same process as an example of board vision impacting self evaluation. Self evaluation, a measure of instructional quality as outlined by the Oregon Education Act, was described by this population to be impacted by vision via the validation process.

EXAMPLES OF BOARD RESPONSES		EXAMPLES OF SITE CHAIR RESPONSES	
"This year we implemented the validation process. The board spelled out what they (validation team) looked at. It's a review of how they relate to overall goals of the school district."	Y	"It has to be validation, very clearly."	Y
"I'd have to refer to the validation visits and preparing site councils for those visits."	Y	"Validation visits were an attempt but really extremely surface. Does anyone ever come into a classroom, I would say no. I think these are some things with reform that our board does not support."	Y
"Previously the school profiles, this year the validation process. In the area of student achievement we provided data analysis and training. I see a need to provide training and resources to have an impact on self-evaluation."	Y	"I think the board needs to help us to self-evaluate. We complain about it but its good. One thing that came out of the validation visit was the need for teachers to talk more. Next year the site council will recommend that teachers spend one 45 minute prep per week visiting someone else's classroom. That was something that came out of the validation process. It's definitely increased from where it used to be."	Y
"Recognizing that the state will place requirements of schools and in turn the board. The discussions about foreign language impact site councils--if not there before, it is now driven by law. In terms of achievement--where do their kids stand?"	Y	"I think the impetus for having validations came from the board."	Y
"Only because the board has in its vision/mission the validation tasks that have established new expectations."	Y	"Validation teams, that's what we were looking for."	Y

Figure 4.4 Board and council chair descriptors of the impact of vision on self-evaluation.

Board and council chair descriptors of the impact of vision and CIM

Figure 4.5 showed board members related vision to CIM as board goals for academic achievement, portfolio implementation and new diploma requirements. Site chairs described it similarly.

EXAMPLES OF BOARD RESPONSES	EXAMPLES OF SITE CHAIR RESPONSES
<p>"The board created a mechanism to implement CIM throughout the district via the CIM Task Force. The board's goal of academic achievement ties in very closely with the CIM. The board would like to see all graduates achieve as much potential as they can, and that ties to the CIM. I love the concept of benchmarks."</p>	<p>"Aligning the curriculum with content standards. The board's decision to use portfolios for performance based assessment."</p>
<p>"So far we are doing real well, portfolios, diploma requirements, benchmarks and academics."</p>	<p>"What comes to mind is technology and portfolios. The board has supported both of these. Time has been allowed at inservice. I see all of this coming from the district and board."</p>
<p>"What we are doing with student achievement fits within the CIM. I think the work we did with graduation requires that. We have a lot of work to do but we are working in the right direction."</p>	<p>"With the portfolios, the new graduation requirements where students must demonstrate that they can perform at a certain level--they (the board) have done it."</p>
<p>"Vision impacts what the diploma requires and the mechanisms to get that."</p>	<p>"The board's decision to offer both CIM and the diploma says a lot about how the board impacts CIM. A lot of districts have backed off. In our district our board said we believe and we are going to offer a CIM. They see the value in reform."</p>
<p>"All elements of our vision supports the objectives of CIM--students will meet certain performance."</p>	<p>"Academic achievement--state wide assessment."</p>

Figure 4.5 Board and council chair descriptors of the impact of vision and CIM.

Board and council chair descriptors of the impact of structure on site councils

Figure 4.6 demonstrated that board members refer primarily to validation and policy as examples of structures that impact councils. One board member referred to summits (annual meetings between board/site chairs and other school leaders and “meetings” with the board - board meetings). Site chair responses were similar.

EXAMPLES OF BOARD RESPONSES		EXAMPLE OF SITE CHAIR RESPONSES	
“The validation process, the board goals.”	Y	“The board directly determines, sets the make-up of building site councils. They charge the council with the task of implementation of HB2991 and long range instructional improvement.”	Y
“We have policy that allows access to site councils but other than that I don’t know what other structures we have in place.”	N		
“Set site council composition through board policy. The site council summits have made a difference. I think policy, vision, opportunities for meetings with the board, and summits have all had an impact on site councils.”	Y	“If site council wants to focus on portfolios we have the support of the district on board policy or both. But if we wanted to get rid of something like advisory-- we can’t because of board policy.”	Y
“The validation process.”	Y	“Not sure.”	N
“Policy that provides guidelines for site councils. The board provides performance expectations for the students.”	Y	“They put site councils in charge of planning inservices and that’s been good for us to plan inservices as we need to.”	Y
		“I think it started out strong because we used to have summit meetings. I think it has slipped a little bit but they started out strong.”	Y

Figure 4.6 Board and council chair descriptors of the impact of structure on site councils.

Board and council chair descriptors of the impact of structure on self-evaluation

Figure 4.7 illustrated that board members describe validation as a structure for self evaluation. Structure was defined by QLI as “focus on relevance”, described as “improvement plans to achieve goals”, “efficiencies” and more. Other categories (focus groups, achievement, etc.) were provided as examples of self-evaluation as well.

EXAMPLES OF BOARD RESPONSES		EXAMPLES OF SITE CHAIR RESPONSES	
“The validation process, the focus groups three years ago. Both of those processes lets us look at what we do.”	Y	“The four member validation team. The site council minutes turned in after each meeting.”	Y
“Validation teams.”	Y	“Someone will always say we have a board policy but I never feel the board is there watching over us. I don’t feel they evaluate our buildings or our classrooms very much.”	N
“The whole validation process made a major impact on self-evaluation this year. It gave us a focus. I think looking at achievement score data--student performance--has impacted both the board and site council levels. Also, the board looks annually at the number of students expelled each year.”	Y	“The structures are set up for us to self-evaluate. The fact that we have parents and community members on the site councils--that forces us to explain or look at what we do.”	Y
“It goes back to the validation process.”	Y	“The validation team.”	Y
“Student assessment at the benchmark levels.”	N	“Similar to what I said before, validation. We started that and I would like to see it continue.”	Y

Figure 4.7 Board and council chair descriptors of the impact of structure on self-evaluation.

Board and council chair descriptors of the impact of structures on CIM

Figure 4.8 included descriptions from board and site council chairs that describe the CIM task force (a committee to focus on implementation of requirements for the certificate of initial mastery), policy, and portfolios as structure that impact CIM. Structures related to the instructional quality component of CIM are described to be in place.

EXAMPLES OF BOARD RESPONSES	EXAMPLES OF SITE CHAIR RESPONSES
<p>"The board created a task force which translates what it means. Without the task force I'm not sure we would be at the place we are now. We can move into it (CIM) very comfortably without a great community uproar because they have been part of the planning."</p>	<p>"Portfolios." Y</p> <p>"The CIM task force does a good job of dissemination of information. The summit is very helpful. A lot is needed in terms of time and money for professional development. All of these things are connected." Y</p>
<p>"I think the involvement of all the different task forces."</p>	<p>"Portfolio committee. CIM Task Force. Just the fact that they are saying we will go forward on CIM. The portfolio piece is very important. Some workshops that the board supported." Y</p>
<p>"Board policy addressing second language expectations because we have flexibility from the state to design that. CIM is defined for us by the state."</p>	<p>"Concerns over student achievement and state testing." N</p>
<p>"Some will be impacted by how we allocate staff. We have not addressed if we all have the where with all to do it all."</p> <p>"Structures impact CIM to some extent but we may not have sufficient structures in place yet to do it all."</p>	<p>"The board is moving one direction with a value on standardized assessments. CIM is more than standardized assessments. It is harder." N</p>

Figure 4.8 Board and council chair descriptors of the impact of structure on CIM.

Board and council chair descriptors of the impact of accountability on site councils

Figure 4.9 illustrated that validation is regarded as an accountability component that impacts site councils. Accountability (focus on results), defined by the QLI to include “district and school self-evaluation”, “student performance review”, “a process to prepare a CIM plan”, etc., appeared to be understood by both board and site council chairs as evidenced by the range of examples in which accountability is described to impact site councils (board goals, student achievement, staff development plans, technology, curriculum development and validation).

EXAMPLES OF BOARD RESPONSES	EXAMPLES OF SITE CHAIR RESPONSES
<p>“Each of us is assigned 3-4 site councils to attend. We call to touch base. I feel principals feel comfortable to talk to the board. We meet every fall with site councils, PSO’s and administration to talk about things. We had high school and middle school site council level meetings to discuss issues of mutual concern--block schedules for example.”</p>	<p>“Our staff will discuss goal construction and target setting in June. The validation report will assist us to see our concerns as a council and focus on energy.”</p> <p>“Can’t think about a whole lot other than validation for self-evaluation. Teachers never rate the board.”</p>
<p>“Setting and responding to board goals. The validation process is part of this.”</p>	<p>Don’t know about accountability processes that are in place. It seems they can come out of left field and hold you accountable for what you didn’t know you could be held accountable for--like the site council presented a plan to the board and it was just</p>
<p>“I like the validation process. Student achievement requirements. I’ve not seen broader accountability for site councils, like parent surveys.”</p>	<p>knocked down. We never know what we will be held accountable for until it just happens--like last years board goals. They were established after ours already were developed. I felt the board evaluated on the basis of good and bad phone calls.”</p>
<p>“The validation process.”</p>	<p>“Validation.”</p>
<p>“Staff development plans define frequency and focus of staff development activities. Site responsibility to implement technology, student achievement. Site responsibilities for curriculum development and articulation between the levels.”</p>	<p>“Each year the issue is brought up--check yourself. A concern is its too easy, no one checks on us.”</p>

Figure 4.9 Board and council chair descriptors of the impact of accountability on site councils.

Board and council chair descriptors of the impact of accountability on self-evaluation

Figure 4.10 identified the district's validation process and student achievement expectations as accountability. Accountability for self-evaluation was associated with goal setting and self reflection.

EXAMPLES OF BOARD RESPONSES		EXAMPLES OF SITE CHAIR RESPONSES	
"Reports to the board about block schedule."	Y	"We used this year's validation to move us into student outcomes--to apply a data base to our efforts. That's our self-evaluation. We can evaluate ourselves based on student outcome rather than good intentions. Validation gives us the structure to implement that practice--it was easier because of validation."	Y
"New teacher goal in top 25% - a board goal for 2 or 3 years. The goal of student achievement--to improve test scores. We are accountable for kids in the basic range."	Y	"If the board impacts self-evaluation it is not well known, not frequent, not regular. Evaluation for the board really comes when they are elected on or off the board. Teachers get formal evaluations. Site council review of these goals is kind of an evaluation. There is not a lot of administrator evaluation other than what is absolutely required."	Y
"Set expectations for student achievement, safe environment and share improvement which all requires self-reflection. Sometimes less formal - set your building goals, work on your budget; sometimes more formal - validation. I think the board does quite a bit in this area."	Y	"The only way I can see is through the validation team. the school board has not followed up with us after the validation visit to find out what we are going to do about what the validation team said. If a council wants to do something about it they can. If they don't want to, they can just file the report and no one will hold them accountable. Something needs to come from it. Maybe principals are being held accountable for it but I'm not aware of it."	Y
"Everyone has a clear view that the board wants it in the worst way."	N	"It's an overlap of validation."	Y
"We established expectations for site councils that there are important areas--assessment and student achievement. We established areas for site councils to focus on."	Y	"If no one checks on us it does not happen."	N

Figure 4.10 Board and council chair descriptors of the impact of accountability on self-evaluation.

Board and council chair descriptors of the impact of accountability on CIM

Figure 4.11 described test scores, portfolios and graduation requirements (recently updated within the district--winter 1996) to impact accountability for CIM. Accountability (focus on results) included "test score review" and "the whole area of measurement." Board member responses cited more examples of the QLI leadership traits than did site chairs.

EXAMPLES OF BOARD RESPONSES	EXAMPLES OF SITE CHAIR RESPONSES
<p>"To earn CIM by 10th grade we need to monitor students at each grade level and at benchmark levels. I want us to put additional help in for students that fall behind. Board sets up accountability along the way. Test score review building by building. We want to see all students move from basic to proficient to advanced."</p>	<p>"Portfolios. Certainly our building could not be as aware and concerned for portfolio items had that not been a big ticket item for the validation."</p>
<p>"We have talked about portfolios. Second language, technology--proficiencies as part of graduation requirements. The fact that we require a CIM."</p>	<p>"Can't think of one example."</p>
<p>"We look at how students achieve at 2nd and 3rd grade. It's the board's goal that every student will achieve the CIM. We have to address concerns early to make an impact. The board has not had much impact on the state level--raising the bar, that could be devastating. We should work on everyone passing the same bar first and raising it later."</p>	<p>"The portfolio exchange between middle and high school. Need to build on more consistent expectations of portfolios, for PASS. I don't see the school board demanding any evidence. The graduation requirements is an area of accountability."</p>
<p>"Committees (task force) look at what we are going to provide for the CIM."</p>	<p>"To the extent CIM was part of validation--CIM and graduation requirements. It will be an accountability issue if kids don't meet the standard for CIM."</p>
<p>"The whole area of measurement and evaluation needs to be reviewed and put in place."</p>	<p>"Not sure who is really responsible for the standards being put in place. That's unclear to me."</p>

Figure 4.11 Board and council chair descriptors of the impact of accountability on CIM.

Board and council chair descriptors of the impact of advocacy on site councils

Figure 4.12 illustrated examples of advocacy including meeting attendance and presentations, student achievement, financial resources, technology, CIM and staff development. Advocacy (support for public education and school improvement) was described by all respondents as a leadership trait demonstrated by the board.

EXAMPLES OF BOARD RESPONSES	EXAMPLE OF SITE CHAIR RESPONSES
<p>"The board defines for the community what site councils are. The board spent a lot of time defining board and site council roles. The board's belief in site councils gives them (members) a sense of security."</p>	<p>"Change comes from the board for instructional improvement, project based performance tasks and accountability."</p>
<p>"Attending site council meetings and summits. Phone calls, trips to the legislature--advocacy for public education."</p>	<p>"It is board policy to have site council. They allow us to submit waivers. That's good but they hold all the cards."</p>
<p>"When the board speaks out at a board meeting or chamber meeting and defends what the district is doing--that impacts site councils. Money, achievement, and policy have an impact. It's a message--that this is an important area."</p>	<p>"The school board believes that site councils are evidence of support for public education. The fact that we have money in the bond for technology, the fact that the board supports CIM because they believe it will be good for kids."</p>
<p>"Consistent dialogue to urge them to keep ahead. Board involvement that is hands on--right there with them."</p>	<p>"The board is very supportive of site councils. I got the sense from the board that they see site councils as a viable body in schools. Our board liaison has been to several site council meetings."</p>
<p>"The vision and mission of the board to improve staff development, academic performance, curriculum and technology--All of these are examples of actions of the board that site councils work to advance. I think the linkage between what the board does and site council is not always clearly communicated or recognized by the council. Because the work of the board is not always visible--site council members get messages through word of mouth and there may be uncertainty about what the board really means."</p>	<p>"They do support site councils, it's mandated."</p>

Figure 4.12 Board and council chair descriptors of the impact of advocacy on site councils.

Board and council chair descriptors of the impact of advocacy on self-evaluation

Figure 4.13 showed responses for communications about data, priorities and validation.

Advocacy was described to impact self-evaluation by all but one respondent.

EXAMPLES OF BOARD RESPONSES	EXAMPLES OF SITE CHAIR RESPONSES
<p>"If we want the community to support public education then we have to make sure that the board has statistical information to do that with. The hardest critic can be offset by hard data and information."</p>	<p>"Self evaluation in terms of validation. The purpose is to please the community and patrons."</p>
<p>"To advocate for public education we have to show that it works, that it's good. When we evaluate our goals or our test scores--that's all with the public in mind--to show that public schools are worthwhile institutions."</p>	<p>"Something like validation was a good example for advocacy for school improvement but there is no accountability for those who choose not to participate."</p>
<p>"When the board speaks out about its priorities--high achievement, site councils that work in school improvement--that's giving the message (advocating for self-evaluation)."</p>	<p>"Validation teams. The inservices that we are having."</p>
<p>"Everything we have done to get in line with state requirements. Validation and self assessment, we do more now than we ever did before."</p>	<p>"It's back to validation teams."</p>
<p>"We want continual academic improvement. Continual improvement is an advocacy message. We have to help the community to understand why things are the way they are."</p>	<p>"It overlaps with validation."</p>

Figure 4.13 Board and council chair descriptors of the impact of advocacy on self-evaluation.

Board and council chair descriptors of the impact of advocacy on CIM

Figure 4.14 showed advocacy for CIM was defined as “CIM task force” and “portfolio” primarily. “Advocacy supports the achievement of benchmarks” summed up the descriptors illustrating board behavior of this leadership trait.

EXAMPLES OF BOARD RESPONSES		EXAMPLES OF SITE CHAIR RESPONSES	
“If we want to change the way we deliver instruction and outcomes for students the board needs to advocate and explain to the community and site councils so that everyone is on the same page.”	N	“The 100% buttons, that we will graduate 100% of our students. That students will receive a high school diploma in addition to the CIM and have a portfolio. These are definitely CIM accountability, proactive moves so that students can demonstrate they meet the content standards.”	Y
“We have the CIM Task Force.”	Y		
“We are engaged in portfolio study, the CIM Task Force, also second language. We plan to address the arts in the fall.”	Y	“If we choose not to push--we would not be as far along as we are. By pushing it I mean technology, CIM and portfolio committees, and the summit. Somebody must be doing something right--because the high schools now have portfolios and CIM projects. All of these things happen because of support. If the district or board did not support, we probably would not have gone as far as we have.”	Y
“The sum of the parts make the total-- we are putting lots of parts in place. When the several pieces of the pie are filled in we will have CIM.”	Y		
“Advocacy supports the achievement of benchmarks and the standards of performance. CIM is founded on the board’s mission and structures put in place-- pointed at students achieving standards of performance.”	Y	“We need someone from outside the building to say do it. I would rate school board advocacy on being their strongest element but we need to clarify the vision and follow up on things we tell people to do or they won’t believe they have to do it the next time.”	Y
		“The board shows strong support for CIM through diploma policy and portfolio plan.”	Y
		“Don’t have enough information.”	N

Figure 4.14 Board and council chair descriptors of the impact of advocacy on CIM.

Summary:

The study produced two types of data: Frequency tables which revealed perception patterns in terms of relationships, dominance, interaction, and order of influence of the four QLI traits and their advancement of the three components of IQ. Secondly, the data produced a comprehensive anecdotal record which the researcher coded for trends.

The data revealed advocacy was a dominant trait followed by vision. Structure and accountability were less interactive. The data also produced a record of open-ended disconfirming anecdotes for structure and accountability .

Chapter 5: Conclusions

Introduction:

The purpose of this investigation was to examine board member and site council chair perceptions of board leadership behavior and the advancement of instructional quality.

The researcher used the Oregon School Boards Association (OSBA) adaptation of the National School Boards Association's (NSBA) Quality Leadership Inventory (QLI) to assess the interaction between four school board behaviors and three components of instructional quality as defined by the Oregon Education Act for the 21st Century, version HB 2991. Probing questions were utilized during interviews with ten volunteer respondents--five school board members and five school site council chairs to more fully develop the case study anecdotal record. Results of the interview questionnaire were analyzed using qualitative methodologies as defined by case study research.

The study examined two basic questions:

- 1) Can board leadership behavior be defined as vision, structure, accountability and advocacy?
- 2) Does school board leadership behavior advance instructional quality?

The first procedure used in the study was a review of the literature pertaining to school board leadership in general and, specifically, in the four QLI traits--vision, structure, accountability, and advocacy. The literature review also traced the development of school reform. The researcher then selected the OSBA adapted format of the NSBA leadership inventory and field tested it with several volunteer subjects. In April and May, the researcher conducted interviews with the ten respondents in the study. The data were then analyzed

by the researcher, using qualitative methodologies and produced in the form of frequency tables and illustrative descriptor figures.

Findings:

The data were collected from two interview methods: QLI closed-ended questions and researcher open-ended questions. For the latter, the researcher's gestalt interpretation was applied to respondent comments. The study's conclusions are these:

Vision

1. Interacting with site councils contributed to High Levels of perceived board leadership on the QLI closed-ended questions and was supported by the anecdotal descriptors on the open-ended questions in terms of advancing this component of HB 2991 instructional quality.
2. Interacting with self-evaluation did not contribute to High Levels of perceived board leadership on the QLI closed-ended questions but was supported by the anecdotal descriptors on the open-ended questions in terms of advancing this component of HB 2991 instructional quality.
3. Interacting with Certificate of Initial Mastery contributed to High Levels of perceived board leadership on the QLI closed-ended questions and was supported by the anecdotal descriptors on the open-ended questions in terms of advancing this component of HB 2991 instructional quality.

Structure

4. Interacting with site councils contributed to High Levels of perceived board leadership on the QLI closed-ended questions and was

supported by the anecdotal descriptors on the open-ended questions in terms of advancing this component of HB 2991 instructional quality.

5. Interacting with self-evaluation did not contribute to High Levels of perceived board leadership on the QLI closed-ended questions, but was supported by the anecdotal descriptors on the open-ended questions in terms of advancing this component of HB 2991 instructional quality.

6. Interacting with Certificate of Initial Mastery did not contribute to High Levels of perceived board leadership on the QLI closed-ended questions, but was supported by the anecdotal descriptors on the open-ended questions in terms of advancing this component of HB 2991 instructional quality.

Accountability

7. Interacting with site councils contributed to High Levels of perceived board leadership on the QLI closed-ended questions, but was not supported by the anecdotal descriptors on the open-ended questions in terms of advancing this component of HB 2991 instructional quality.

8. Interacting with self-evaluation contributed to High Levels of perceived board leadership on the QLI closed-ended questions, but was not supported by the anecdotal descriptors on the open-ended questions in terms of advancing this component of HB 2991 instructional quality.

9. Interacting with Certificate of Initial Mastery contributed to High Levels of perceived board leadership on the QLI closed-ended questions and was supported by the anecdotal descriptors on the open-ended questions in terms of advancing this component of HB 2991 instructional quality.

Advocacy

10. Interacting with site councils, school self-evaluation, and the Certificate of Initial Mastery, contributed to High Levels of perceived board leadership on both measures (QLI closed-ended questions and researcher open-ended anecdotal descriptors) in terms of advancing these components of HB 2991 instructional quality.

Findings 1-10 Charted

<u>QLI Closed-Ended Questions</u>					<u>Researcher Open-ended Questions</u>				
High Levels of Positive Effect & B (Board) S (Site Chair) Tally					High Levels of Positive Effect & B (Board) S (Site Chair) Tally				
Vision									
Site Councils	Yes	B=5	S=4	90%	Yes	B=4	S=5	90%	
Self-Evaluation	No	B=4	S=2	60%	Yes	B=5	S=5	100%	
CIM	Yes	B= 4	S=4	80%	Yes	B=4	S=5	90%	
Structure									
Site Councils	Yes	B=4	S=4	80%	Yes	B=4	S=4	80%	
Self-Evaluation	Yes	B=5	S=4	90%	Yes	B=4	S=4	80%	
CIM	No	B=4	S=3	70%	No	B=3	S=3	60%	
Accountability									
Site Councils	Yes	B=5	S=3	80%	Yes	B=4	S=4	80%	
Self-Evaluation	Yes	B=5	S=3	80%	Yes	B=4	S=4	80%	
CIM	No	B=4	S=1	50%	No	B=3	S=3	60%	
Advocacy									
Site Councils	Yes	B=5	S=4	90%	Yes	B=5	S=5	100%	
Self-Evaluation	Yes	B=5	S=4	90%	Yes	B=4	S=5	90%	
CIM	Yes	B=4	S=4	80%	Yes	B=4	S=4	80%	

The “yes” statements charted for “closed-ended” questions indicated that 80% or more of respondents rated board leadership behavior traits of vision, structure, accountability or advocacy to impact the specific components of Instructional Quality noted.

The 80% threshold was selected by the researcher as a way to ensure that the positive effect measure included a majority of both groups.

The “yes” statements charted for “open-ended” questions illustrated the category of descriptions given by respondents where board leadership behavior was described to impact the advancement of Instructional Quality, thereby provided a visual summary of findings 1-10.

Board Leadership Descriptors

11. Vision, sense of community, student orientation, support of professionals and focus on the “big picture” were the most common anecdotal descriptors assigned to board leadership behavior on the researcher developed open-ended questions.

Discussion of Findings:

The researcher assigned an 80% of all respondents threshold--requiring a majority from each respondent group (board members and site council chairs) on QLI closed-ended trait questions to be considered as having a significant positive interaction effect with an instructional quality component of HB 2991. The researcher applied her own interpretative coding and assigned value to the anecdotal record which produced descriptors that she considered as representative of a significant interactive effect.

Advocacy emerged as the QLI board leadership trait that was perceived to have an unqualified, positive interactive effect, on all three instructional quality components. The order of influence was followed by vision and then by structure and accountability as having equal influence. It would appear that board leadership behavior is interactive with instructional advancement, but on a scale that is understood in limited scope by both board members and site council chairs. For example, a QLI trait may have a High open ended descriptor score but fail to meet the closed-ended Likert test. The charted summary of findings 1-10 on page 64 for example show that a low Likert score was given for

the board leadership trait of vision as having a no interactive effect on the advancement of self-evaluation yet respondents described positive effects in their open-ended responses. This “mixed message” from respondents was troubling in terms of policy-practitioner relationships and created what this researcher refers to as a communication--cooperation gap, a lack of common understanding among and between boards and site council chairs about the role of elected boards, leadership “cornerstone” traits and instructional quality components.

Discussion of Research Questions:

Question One

Can board leadership behavior be defined by the QLI traits as vision, structure, accountability and advocacy? Yes. Respondents attributed the traits of vision, structure, accountability and advocacy to board leadership behavior in both close-ended and open-ended responses.

Overall board members rated their demonstration of the leadership traits of vision, accountability and advocacy higher than site chairs rated their experience of board behavior with the same characteristics.

In most cases the examples of leadership matched the definitions for the same terms as defined by the QLI, in other cases it did not. In more cases than not board and site council chair examples for vision, structure, etc. were similar to each other.

Question Two

Does school board leadership behavior as defined by components of HB 2991 advance instructional quality? Yes. When board leadership behavior of

each leadership trait was applied to advancement of instructional quality components (site councils, self evaluation and CIM) the ratings and descriptions given indicated that board behavior impacted instructional quality.

Summary:

Board members and site chairs were aware of board leadership behaviors in these areas. Overall, the content of board member reports of leadership traits in each of the four areas was the same as the content of site council chair reports. For example, both groups referred to validation as an example of board vision impacting site council. In some cases there was a large difference in responses such as structure impact on self-evaluation and accountability impact on CIM.

The fact that board members and site council chairs could recognize and describe board leadership behavior of four leadership traits advancing instructional quality through impact of site councils, self-evaluation, and CIM lead to a second important conclusion - that board leadership behavior can be described as having an impact on instructional quality. Board members and site chairs were aware of board leadership behaviors that impacted each instructional quality category reviewed. Overall, the content of board member reports of impact on instructional quality in each of the 3 areas identified was the same as the content of site council chair reports.

Discussion of Limitations:

Both validity and reliability may be questioned when self-report methods are used however, this study increased its data collection reliability to a degree: The primary researcher was present for all data collection sessions and provided clarification of the instrument when needed. The researcher

attempted to control for bias of the subjects' responses by stressing the voluntary and anonymous nature of participation solicited for this purpose.

Nonetheless, a level of disconfirming anecdotal evidence emerged in the pre Likert scale open-ended question, as reported in Finding 11. The results suggested the need for a post Likert scale open-ended question to gage an interview "training effect". Were respondents learning something from the interview and thereby benefiting from the researcher's planned training model? Additionally, the question of inter-rater reliability must be raised. Would another researcher find the same results using this study's structure and processes?

Until similar studies were conducted to produce a base of comparison of research findings, these questions and the generalizability of this study's results can be argued when applied to populations other than the district studied.

Suggestions for Future Research:

A number of different replications of the study could be investigated in the future. More research needs to be conducted regarding research instrument development, data collection, and procedures for studying board leadership. Case studies of single QLI traits and its interaction with instructional advancement would be beneficial. Studies of board leadership and the advancement of instruction in districts in crisis would be important in a state such as Oregon where financial underpinnings are changing.

Future research needs to be conducted using a larger sample group. The subjects used in this study were from a single district. In order to create more generalizable results, similar studies need to be conducted through a Multi-district approach or even statewide.

Suggestions for board leadership training for skill development in the areas of quality leadership cornerstones and the advancement of instructional quality:

The study suggested that OSBA should conduct training in terms of how to advance instructional quality in each of the four QLI traits. Specifically, board members need to learn the “language” of education, especially in the QLI traits of structure and accountability, in order to communicate their interest in and support for instruction. The study also suggested that site council chairs primarily, but to a degree school board members as well, do not fully understand the role or the behaviors of elected boards.

The confusion over leadership roles and behavior created an “information/cooperation/efficiency gap” that ebbs and flows with the complexity of any one issue. A parallel to this gap was the so-called “educational lag” gap which describes the time delay in the adoption of proven technology and practices.

For the purposes of this study, the gap was given a name: the “Reform Gap” to describe the delay cycle in leadership within the QLI/2991 agenda. The “Reform Gap” can be illustrated as an oscilloscopic wave (Figure 5.1) to represent the changing conditions--gaps--and leadership responses to fill. This “Reform Gap” may be responsible for the disconfirming responses reported in Figure 4.1 and invites additional research on the same.

The development of a training model becomes essential when one considers the variance and the importance of policy-maker to practitioner communication, cooperation, and innovation in a time of reform and high performance expectations.

Changing Conditions of Leadership Between Boards and Site Councils

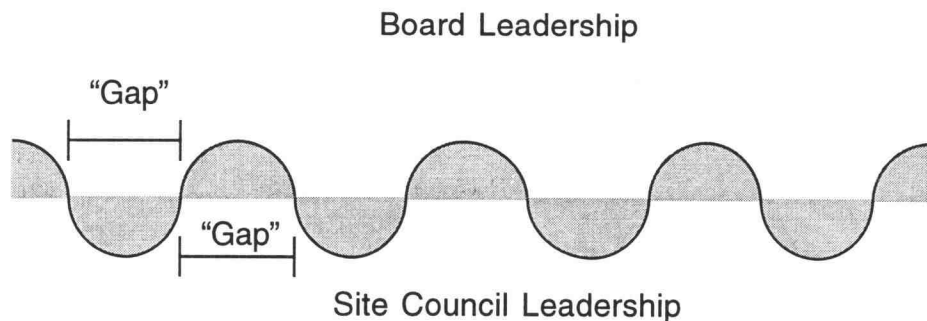


Figure 5.1 Reform Gap

Through increased communications surrounding roles and responsibilities in the advancement of instructional quality gaps of understanding may be reduced resulting in improved reform (Figure 5.2). Board and Site Council perception about group accountability for the reform may also be reduced (Figure 5.3).

Gap in Perception of Board Leadership Behavior Decreases with Improved Communication/Understanding.

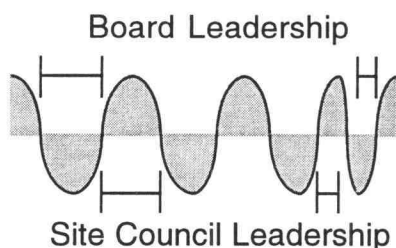


Figure 5.2
Gap of understanding

Differences in Perception of Accountability Decrease Depending Upon Improved Communication/Understanding.

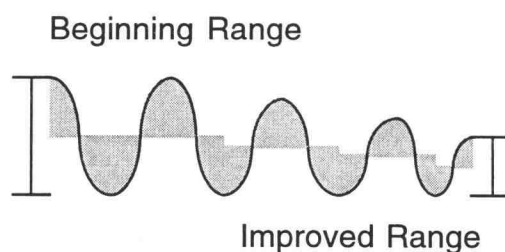


Figure 5.3
Range of accountability perception

Of specific benefit to the district studied will be “gap” training provided by the researcher at future board/site chair retreats and/or summit meetings.

Descriptors regarding board leadership behavior in the areas of vision, structure, accountability and advocacy toward the advancement of Instructional Quality will be presented in order to decrease misunderstandings among and between boards and site chairs in regard to the role of elected boards.

The researcher would use an original matrix which matches the six levels of complexity and knowing of Bloom’s Taxonomy to the QLI leadership traits and IQ instructional components (Figure 5.4).

The need for and the value of such training would be evident when a review of any district’s legislated reform agenda is examined. Oregon schools must comply with the standards of HB 2991. OSBA has already introduced its version of NSBA’s QLI as a vehicle to advance the IQ components. The stage is set for the researcher’s training model to be used as a tool to enhance reform training and advance instructional quality.

Additionally, collaboration among the four major educational policy organizations (the Oregon School Board’s Association, Confederation of Oregon School Administrators, the Oregon Education Association, and the Oregon Department of Education) needs to occur in order to develop teacher and board training programs that recognize and value school board behavior. The QLI agenda would be beneficial to closing the “Reform Gap”.

As a result of training models, such as outlined by the Leadership Training Matrix, school reform issues could be resolved.

LEADERSHIP TRAINING MATRIX

SIX LEVELS OF COMPLEXITY
(after Bloom's Taxonomy)
QLI TRAITS/IQ COMPONENTS

	V	S	A	A	SC	SE	CIM
Knowledge Rote memory skills (knowing facts, terms, procedures, classification systems).							
Comprehension The ability to translate, paraphrase, interpret, or extrapolate material.							
Application The capacity to transfer knowledge from one setting to another.							
Analysis Discovering and differentiating the component parts of a larger whole.							
Synthesis Weaving together component parts into a coherent whole.							
Evaluation Judging the value or utility of information using a set of standards.							

Figure 5.4 Leadership Training Matrix

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Appendices

Appendix A
Quality Leadership Inventory

QUALITY LEADERSHIP INVENTORY:

Oregon Educational Act for the 21st Century

For each statement, please circle the letter(s) which best describes your board:

Y = Yes, this accurately reflects our board's status
 N = No, our board has not accomplished this
 P = This is in progress at this time
 A = The board needs OSBA's assistance to do this

VISION: Focus on Rigor

- | | |
|---------|---|
| Y N P A | 1. The board has reviewed the Oregon Educational Act for the 21st Century, as amended by HB 2991. |
| Y N P A | 2. The board has developed and communicated to the public(s) processes and timelines for implementation of the Oregon Educational Act for the 21st Century. |
| Y N P A | 3. The board has established a district philosophy and/or vision statement that is consistent with the new educational goals established by the 1995 Legislature. |
| Y N P A | 4. The board has created a mission statement which clearly communicates the purpose of the school district to the public(s). |
| Y N P A | 5. The board develops local goals which align with its vision and mission at least every two years. |
| Y N P A | 6. The board involves the public in setting the goals. |

Y = Yes, this accurately reflects our board's status
 N = No, our board has not accomplished this
 P = This is in progress at this time
 A = The board needs OSBA's assistance to do this

STRUCTURE: Focus on Relevance

- Y N P A 1. The board has developed local district improvement plans to achieve its goals.
- Y N P A 2. The board has established a process which ensures that representatives from the demographic groups of their school population are invited to participate in the development of local district improvement plans to achieve the goals.
- Y N P A 3. The board, in its district improvement plans, includes local efforts to achieve efficiencies and make better use of resources.
- Y N P A 4. The board has established policies regarding a safe, educational environment.
- Y N P A 5. The board has implemented programs to achieve a safe, educational environment.
- Y N P A 6. The board has developed local district improvement plans which include the district's and school's short-term and long-term plans for staff development.
- Y N P A 7. The board, through its policies and procedures, maintains control over course content, format, materials and teaching methods.

Y = Yes, this accurately reflects our board's status
 N = No, our board has not accomplished this
 P = This is in progress at this time
 A = The board needs OSBA's assistance to do this

STRUCTURE (cont.)

- Y N P A 8. The board, through its policies and procedures, ensures that students receive instruction in:
- Mathematics · Economics · Health
 - Science · Civics · Physical Education
 - History · English · Second Languages
 - Geography · The Arts
- Y N P A 9. The board has established graduation requirements for purposes of issuing diplomas.
- Y N P A 10. The board issues diplomas to students as evidence that they have completed their public school education.
- Y N P A 11. The board has begun developing plans to provide a minimum of two years of second language instruction for students who will complete grade twelve in 2001-2002.
- Y N P A 12. The board, through policies and procedures, has established a 21st Century Schools Council at each school.
- Y N P A 13. The board has determined whether any school site is unable to fulfill the statutory requirements for school councils or if the needs of a school site require a different composition, and has established that school council in a manner that best meets the educational needs of the district.
- Y N P A 14. The board has determined whether or not it will establish a district site committee to assist in the administration of grants or in the district-wide coordination of programs.

Y = Yes, this accurately reflects our board's status
 N = No, our board has not accomplished this
 P = This is in progress at this time
 A = The board needs OSBA's assistance to do this

ACCOUNTABILITY: Focus on Results

- Y N P A 1. The board has established a process by which the district and schools conduct self-evaluations at least every other year.
- Y N P A 2. The board uses the district and school self-evaluations to update the local district improvement plan at least every other year.
- Y N P A 3. The board includes reviews of at least the following data in the self-evaluation process:
- demographics
 - student performance
 - student access to/utilization of educational opportunities
 - staff characteristics.
- Y N P A 4. The board conducts a self-evaluation of its own performance as part of the biennial self-evaluation process.
- Y N P A 5. The board has implemented a process to prepare a CIM plan for submission to the State Department of Education by July 1, 1997.
- Y N P A 6. The board has identified alternative learning options, for students working toward a CIM or diploma, to include in the CIM plan.
- Y N P A 7. The board has adopted local performance standards for assessing student proficiency in:
- second languages
 - the arts.

Y = Yes, this accurately reflects our board's status
 N = No, our board has not accomplished this
 P = This is in progress at this time
 A = The board needs OSBA's assistance to do this

ACCOUNTABILITY (cont.)

- Y N P A 8. The board has established a system to annually report student progress toward standards in grades 3, 5, 8, and 10.
- Y N P A 9. The board has adopted a grading system to report student achievement in course requirements of the district curriculum.
- Y N P A 10. The board has identified educational options that will be made available to students not meeting standards, and those who exceed standards.

Y = Yes, this accurately reflects our board's status
 N = No, our board has not accomplished this
 P = This is in progress at this time
 A = The board needs OSBA's assistance to do this

ADVOCACY: Focus on Relationships

- Y N P A 1. The board has established a process to explain and discuss local goals in relationship to school improvement with:
- parents
 - students
 - teachers
 - school employees
 - community representatives.
- Y N P A 2. The board makes district and school goals and improvement plans available to the public.
- Y N P A 3. The board has determined whether or not to provide services for children and families at the school site.
- Y N P A 4. The board has determined whether or not to request waivers or timeline extensions from the State Board of Education.
- Y N P A 5. The board has established an internal and external communications process for involving stakeholders in the discussions about the school improvement process and the Oregon Educational Act for the 21st Century at both the district and school levels.

Appendix B

Oregon Education Act for the 21st Century

House Bill 2991 Index

<u>Topic</u>	<u>Reference</u>
Age Parameters.....	Sec 46
Alternative Certificates.....	Sec 25 (1) / Sec 23 (2)
Alternative Learning Environments.....	Sec 5 (4(c)) / Sec 29 (4 & 5) / Sec 44
Assessment.....	Sec 29
CAM.....	Sec 5 (4(e)) / Sec 8 (2(g)) / Sec 25 (3) / Sec 28
CAM Timeline.....	Sec 27 / Sec 28 / Sec 43
Child Development Specialists.....	Sec 21
CIM Plans (District).....	Sec 23 (4)
CIM Requirements.....	Sec 23
Common Curriculum Goals.....	Sec 6
Deficient Schools.....	Sec 47a
Diploma.....	Sec 5(4(b)) / Sec 6 (1) / Sec 25
District Planning Committees.....	Sec 32
Early Childhood.....	Sec 20
Extended Year.....	Sec 7
Goal of Legislation.....	Sec. 5 (3)(4)
Grading System.....	Sec. 29 (3)
Head Start/Oregon Pre-K.....	Sec 17 / Sec 18 / Sec 19
Higher Education Duties.....	Sec 45 (4 & 5)
Home School/Private School.....	Sec 23 (6 & 7)
Middle Level.....	Sec 22
ODE Responsibilities.....	Sec 8
Oregon 21st Century Schools Advisory Comm.....	Sec 36
Oregon 21st Century Schools Program.....	Sec 31 / Sec 33
Oregon Report Card.....	Sec 13
Oregon Workforce Quality Council Duties.....	Sec 40
Parent Involvement.....	Sec 14
Pilot Programs.....	Sec 8(4) / Sec 35 (e & f)
Safe Schools.....	Sec 4(16) / Sec 11 (5)
School Choice.....	Sec 10
School Improvement and Prof. Dev. Program.....	Sec 35 / Sec 36 / Sec 49
School Improvement Visits.....	Sec 10(a)
School Profile Data.....	Sec 12
School-to-Work & post-secondary pgms.....	Sec 42
Second Language.....	Sec 26
Self Evaluation (District).....	Sec 11
Site Councils.....	Sec 39
Social Service Integration.....	Sec 15
State Job Training Partnership Admin Duties.....	Sec 45 (2)
Statewide Assessment Timeline.....	Sec 29 (1(b))
TAG.....	Sec 29 (4 & 5)
Teaching Methods (local control of).....	Sec 6 (1)
Waiver/Extension of Timelines.....	Sec 30
Workplace Exp. for Teachers.....	Sec 14 (4)

House Bill 2991 Index

<u>Topic</u>	<u>Reference</u>
Age Parameters.....	Sec 46
Alternative Certificates.....	Sec 25 (1) / Sec 23 (2)
Alternative Learning Environments.....	Sec 5 (4(c)) / Sec 29 (4 & 5) / Sec 44
Assessment.....	Sec 29
CAM.....	Sec 5 (4(e)) / Sec 8 (2(g)) / Sec 25 (3) / Sec 28
CAM Timeline.....	Sec 27 / Sec 28 / Sec 43
Child Development Specialists.....	Sec 21
CIM Plans (District).....	Sec 23 (4)
CIM Requirements.....	Sec 23
Common Curriculum Goals.....	Sec 6
Deficient Schools.....	Sec 47a
Diploma.....	Sec 5(4(b)) / Sec 6 (1) / Sec 25
District Planning Committees.....	Sec 32
Early Childhood.....	Sec 20
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Goal of Legislation.....	Sec. 5 (3)(4)
Grading System.....	Sec. 29 (3)
Head Start/Oregon Pre-K.....	Sec 17 / Sec 18 / Sec 19
Higher Education Duties.....	Sec 45 (4 & 5)
Home School/Private School.....	Sec 23 (6 & 7)
Middle Level.....	Sec 22
ODE Responsibilities.....	Sec 8
Oregon 21st Century Schools Advisory Comm.....	Sec 36
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Enrolled House Bill 2991

Sponsored by Representative LUKE; Representatives OAKLEY, SNODGRASS

CHAPTER **00660**

AN ACT

Relating to Oregon Educational Act for the 21st Century; creating new provisions; amending ORS 327.006, 327.103, 329.015, 329.025, 329.035, 329.045, 329.075, 329.085, 329.095, 329.105, 329.115, 329.125, 329.150, 329.160, 329.165, 329.185, 329.237, 329.255, 329.445, 329.465, 329.475, 329.485, 329.555, 329.570, 329.585, 329.675, 329.690, 329.700, 329.855, 329.860, 329.900, 332.172 and 339.115 and section 6, chapter 667; Oregon Laws 1991, and sections 13 and 17, chapter 693, Oregon Laws 1991; and repealing ORS 329.055, 329.455, 329.495, 329.505, 329.535, 329.705, 329.753 and 329.935.

Be It Enacted by the People of the State of Oregon:

SECTION 1. Section 2 of this Act is added to and made a part of ORS chapter 329.

SECTION 2. As used in this chapter, unless the context requires otherwise:

- (1) "Academic content standards" or "academic standards" means expectations of student knowledge and skills in identified content areas adopted by the State Board of Education under ORS 329.045.
- (2) "Administrator" includes all persons whose duties require an administrative license.
- (3) "Board" or "state board" means the State Board of Education.
- (4) "21st Century Schools Council" means a council established pursuant to section 39 of this 1995 Act.
- (5) "Content areas" includes mathematics, science, history, geography, economics, civics, English, second languages and the arts. English includes, but is not limited to, reading and writing. The arts includes, but is not limited to, literary arts, performing arts and visual arts.
- (6) "Department" means the Department of Education.
- (7) "District planning committee" means a committee composed of teachers, administrators and public members established for the purposes of ORS 329.535 to 329.605.
- (8) "Parents" means parents or guardians of students who are covered by this chapter.
- (9) "School district" means a school district as defined in ORS 332.002, an education service district, a state-operated school or any legally constituted combination of such entities.
- (10) "School Improvement and Professional Development program" means a formal plan submitted by a school district and approved by the Department of Education according to criteria specified in ORS 329.675 to 329.745 and 329.790 to 329.820.
- (11) "Second languages" means any foreign language or American Sign Language.
- (12) "Teacher" means any licensed employee of a school district who has direct responsibility for instruction, coordination of educational programs or supervision of students and who is compensated for such services from public funds. "Teacher" does not include a school nurse, as defined in ORS 342.455, or a person whose duties require an administrative license.
- (13) "Work-related learning experiences" means opportunities in which all students may participate in high quality programs that provide industry related and subject matter related

learning experiences that prepare students for further education, future employment and lifelong learning.

SECTION 3. ORS 329.015 is amended to read:

329.015. (1) The Legislative Assembly believes that education is a major civilizing influence on the development of a humane, responsible and informed citizenry, able to adjust to and grow in a rapidly changing world. Students must be encouraged to learn of their heritage and their place in the global society. The Legislative Assembly concludes that these goals are not inconsistent with the goals to be implemented under this chapter.

(2) The Legislative Assembly believes that the goals of kindergarten through grade 12 education are:

(a) To demand academic excellence through a rigorous academic program that equips students with the information and skills necessary to pursue the future of their choice;

(b) To provide an environment that motivates students to pursue serious scholarship and to have experience in applying knowledge and skills and demonstrating achievement; and

(c) To provide students with lifelong academic skills that will prepare them for the ever-changing world.

SECTION 4. ORS 329.025 is amended to read:

329.025. It is the intent of the Legislative Assembly to maintain a system of public elementary and secondary schools that *[has]* allows students, parents, teachers, administrators, school district boards and the State Board of Education to be accountable for the development and improvement of the public school system. The public school system shall have the following characteristics:

(1) Provides equal and open access and educational opportunities for all students in the state regardless of their linguistic background, culture, race, gender, capability or geographic location;

(2) Assumes that all students can learn and establishes high, specific skill and knowledge expectations *[appropriate to the students' assessed learning rates]* and recognizes individual differences at all instructional levels;

(3) Provides special education, compensatory education, linguistically and culturally appropriate education and other specialized programs to all students who need those services;

(4) Provides students with a solid foundation in the skills of reading, writing, problem solving~~],~~ *listening, speaking, critical thinking]* and communication~~[across the disciplines];~~

(5) Provides opportunities for students *[to exhibit the capacity]* to learn, think, reason, retrieve information, use technology and work effectively alone and in groups;

(6) Provides for *[a high degree of mastery]* rigorous academic content standards and instruction in mathematics, *[and]* science, history, geography, economics, civics and English; -

(7) Provides students *[with a]* an educational background *[in social studies, foreign languages, the arts and the humanities]* to the end that they will function successfully *[and tolerantly]* in a constitutional republic, a participatory democracy and a multicultural nation and world;

[(8) Provides students with a background in the visual, performing and literary arts as unique forms of communication, expression and cultural knowledge;]

(8) Provides students with instruction in, but not limited to, health, physical education, second languages and the arts;

(9) Provides students with the knowledge and skills that will provide the opportunities to succeed in the world of work, as members of families and as citizens *[of a participatory democracy];*

(10) Provides students with the knowledge and skills to take responsibility for their decisions and *[to make appropriate]* choices;

(11) Provides opportunities for students to learn through a variety of teaching strategies *[that focus on an individual student's learning profile including but not limited to assessed strengths, weaknesses, learning style and interests, with appropriate intervention services];*

[(12) Organizes instructional groupings as heterogeneously as possible to promote the attitudes and skills necessary for democratic citizenship;]

[[13]] (12) Emphasizes involvement of parents and the community in the total education of students;

[[14]] (13) Transports children safely to and from school;

[[15]] (14) *[Assures]* Ensures that the funds allocated to schools reflect the uncontrollable differences in costs facing each district; *[and]*

[[16]] (15) *[Assures]* Ensures that local schools have adequate control of how funds are spent to best meet the needs of students in their communities; and

(16) Provides for a safe, educational environment.

SECTION 5. ORS 329.035 is amended to read:

329.035. The Legislative Assembly declares that:

(1) The State of Oregon believes that all students can learn *[when offered appropriate learning opportunities,]* and should be held to rigorous *[intellectual]* academic content standards and expected to succeed.

(2) Access to a quality education must be provided for all of Oregon's youth regardless of linguistic background, culture, race, gender, capability or geographic location.

(3) A restructured educational system is necessary to achieve the state's goals of the best educated citizens in the nation and the world. *[by the year 2000 and a work force equal to any in the world by the year 2010.]*

[[4]] Education programs and strategies that can substantiate a claim to the prevention of human and social costs are of highest priority to the state.]

[[5]] (4) The specific objectives of this chapter and ORS 329.900 to 329.975 are:

(a) To achieve *[educational]* the highest standards of academic content and performance *[and outcomes that match the highest of any in the world for all students];*

(b) In addition to a diploma, to establish the Certificates of Initial Mastery and Advanced Mastery as evidence of new high academic standards of performance *[standards]* for all students;

(c) To establish alternative learning environments and services *[which offer opportunities for those experiencing difficulties in achieving the knowledge and skills necessary to obtain the Certificate of Initial Mastery]* for students who experience difficulties in achieving state or local academic standards;

(d) To establish early childhood programs and academic professional technical programs as part of a comprehensive educational system; and

(e) To establish partnerships among business, labor and the educational community in the development of standards for academic professional technical indorsements and provide *[on-the-job training and apprenticeships]* work-related learning experiences necessary to achieve those standards.

SECTION 6. ORS 329.045 is amended to read:

329.045. (1) In order to achieve the goals contained in ORS 329.025[,] and 329.035 *[and 329.125]*, the State Board of Education shall regularly and periodically *[shall]* review and revise its Common Curriculum Goals. *[, including]* This includes Essential Learning Skills and rigorous academic content standards in mathematics, science, history, geography, economics, civics and English. School districts shall maintain control over course content, format, materials and teaching methods but shall ensure that students receive instruction in the academic content areas and in health and physical education. The *[common curriculum goals]* rigorous academic content standards shall reflect the knowledge and *[skill outcomes]* skills necessary for achieving *[a Certificate of Initial Mastery and a Certificate of Advanced Mastery]* Certificates of Mastery and diplomas pursuant to ORS *[329.035]* 329.025 and as described in section 25 of this 1995 Act. The regular review shall involve teachers and other educators, parents of students and other citizens and shall provide ample opportunity for public comment.

(2) The State Board of Education shall continually review all adopted standards and shall raise the standards in academic content areas to the highest levels possible.

(3) The Common Curriculum Goals reviewed and revised by the board under subsection (1) of this section shall also include goals in physical education and health. In accordance

with the Common Curriculum Goals, school districts shall offer instruction in content areas, physical education and health.

SECTION 7. Prior to implementation of an extended school year, the Department of Education shall study the fiscal, academic, societal and emotional impact of extended school year models being used in Oregon, the United States and other countries. The department shall report the findings of the study to the Legislative Assembly.

SECTION 8. ORS 329.075 is amended to read:

329.075. (1) The State Board of Education shall adopt rules, in accordance with ORS 183.025 and 183.310 to 183.550, as necessary for the statewide implementation of this chapter. The rules shall be prepared in consultation with appropriate representatives from the educational and business and labor communities.

(2) *[Beginning in the 1991-1993 biennium,]* The Department of Education shall be responsible for coordinating research, planning and public discussion so that activities necessary to the implementation of this chapter can be achieved. Actions by the department to fulfill this responsibility and to increase student achievement may include, but are not limited to:

(a) Updating Common Curriculum Goals to meet *[international]* rigorous academic standards;
(b) Developing criterion-referenced assessments including performance-based, content-based and other assessment mechanisms to test knowledge and skills;

(c) Establishing criteria for Certificates of Initial Mastery and Advanced Mastery, and for benchmarks at grades 3, 5, 8 and 10;

[(d) Researching and developing models for nongraded primaries;]

[(e)] (d) Establishing criteria for early childhood improvement programs;

[(f)] (e) Amending the application process for school improvement grants;

[(g)] (f) Researching and developing *[educational]* public school choice plans; *[and]*

[(h)] (g) Working with the Oregon Workforce Quality Council and the Office of Community College Services to develop no fewer than six broad *[occupational choices for Certificates of Advanced Mastery;]* career indorsement areas of study; and

[(i) Establishing criteria for the selection of distinguished Oregon Educators;]

[(j)] (h) Establishing criteria for learning options *[environments]* that may include alternative learning centers. *[: and]*

[(k) Working with the Wage and Hour Commission in consultation with the Workforce Quality Council and the State Board of Higher Education to propose rules for continuation of the education of minors seeking employment during the regular school year.]

(3) The State Board of Education shall create, by rule, a process for school districts to initiate and propose pilot programs. The rules shall include a process for waivers of rules and regulations and a process for approval of the proposed pilot programs.

(4) The Department of Education shall:

(a) Evaluate pilot programs developed pursuant to ORS 329.690 using external evaluators to provide data that specify the educational effectiveness, implementation requirements and costs of the programs and to describe what training, funding and related factors are required to replicate pilot programs that are shown to be effective;

(b) Present to the State Board of Education and the appropriate legislative committee an annual evaluation of all pilot programs; and

(c) Include funding for the implementation and evaluation of pilot programs in the Department of Education budget.

(5) As used in this section:

(a) "Criterion-referenced assessment" means testing of the knowledge or ability of a student with respect to some standard.

(b) "Content-based assessment" means testing of the understanding of a student of a predetermined body of knowledge.

(c) "Performance-based assessment" means testing of the ability of a student to use knowledge and skills to create a complex or multifaceted product or complete a complex task.

SECTION 9. Section 17, chapter 693, Oregon Laws 1991, is added to and made a part of ORS 329.005 to 329.165.

SECTION 10. Section 17, chapter 693, Oregon Laws 1991, is amended to read:

Sec. 17. The State Board of Education shall prepare *[by July 1, 1992, a proposed set of]* by July 1, 1996, guidelines and models to assist school districts *[that wish]* to pursue programs of public school choice. *[pursuant to ORS 329.485 and 329.475.]* The board shall *[pay particular attention to identifying obstacles that impede choice in terms of]* identify laws, rules, state and local policies and practices and transportation considerations that impede public school choice. No program of public school choice *[under this section]* shall permit segregation on the basis of race, gender, capability or disabling conditions. Public school choice plans shall give school districts, parents, teachers and students more freedom to design and choose among programs with different emphases, both among school districts and within school districts.

SECTION 10a. ORS 329.085 is amended to read:

329.085. (1) To facilitate the attainment and successful implementation of educational standards under ORS 326.051 (1)(a), 329.025 and 329.035, the State Board of Education or its designee shall assess the effectiveness of each public school district in an on-site visit no less than once every six years. Beginning in 1996, the on-site visits shall occur no less than once every three years. The findings of the assessment shall be reported to the school district no later than six months after the on-site visit.

(2) The board shall establish the standards, including standards of accessibility to educational opportunities, upon which the assessment is based.

(3) On a periodic basis, the board shall review existing standards and, after public hearings and consultation with local school officials, shall adopt by rule a revised set of standards.

SECTION 11. ORS 329.095 is amended to read:

329.095. (1) The State Board of Education shall require school districts and schools to conduct self-evaluations and update their local district improvement plans on a biennial basis. The self-evaluation process shall involve the public in the setting of local goals. The school districts shall *[insure]* ensure that representatives from the demographic groups of their school population are *[involved]* invited to participate in the development of local district improvement plans to achieve the goals.

(2) As part of setting local goals, school districts are encouraged to undertake a communications process that involves parents, students, teachers, school employees and community representatives to explain and discuss the local goals and their relationship to programs under this chapter.

[(2)] (3) At the request of the school district, Department of Education staff shall provide ongoing technical assistance in the development and implementation of the local district improvement plan. *[Staff members may be accompanied on their visits by Distinguished Oregon Educators.]*

(4) The local district improvement plan shall include district efforts to achieve local efficiencies and efforts to make better use of resources. Efficiencies may include, but are not limited to, use of magnet schools, energy programs, public and private partnerships, staffing and other economies.

(5) All school districts shall, as part of their local district improvement plan, develop programs and policies to achieve a safe, educational environment.

(6) Local district improvement plans shall include the district's and school's short-term and long-term plans for staff development.

[(3)] (7) Local district and school goals and district and school improvement plans shall be made available to the public.

[(4)] (8) The self-evaluations shall *[serve as a core component in the successful implementation of standards and shall]* include a review of demographics, student performance, student access to and

utilization of educational opportunities and staff characteristics. However, failure to complete the self-evaluation process shall not constitute grounds for withholding of state moneys.

SECTION 12. ORS 329.105 is amended to read:

329.105. *[(1) To assist school districts and schools in performing the duties described in ORS 329.085 and 329.095, the State Board of Education shall establish a comprehensive statewide school district and school information system to monitor outcomes, procedures and resources of public education. This system shall provide a measure of the achievement of students in the knowledge and skill areas specified in the common curriculum goals adopted by the board.]*

[(2)] (1) The Superintendent of Public Instruction shall collect data and produce annual school district and school profiles containing information on demographics, student performance in schools, student access to educational opportunities and staff characteristics described in this chapter. In addition, school district profiles shall include a concise budget report of the school district, including revenue and expenditures of the district.

[(3)] (2) The Superintendent of Public Instruction shall notify the public and the media by September 30 of each year as to the availability of school district and school profiles at school district and department offices. The superintendent shall also include notice that copies of school district and school self-evaluations can be obtained from the school districts.

SECTION 13. ORS 329.115 is amended to read:

329.115. (1) *[By September 30, 1992, and by each]* Prior to September 30 *[thereafter,]* of each year, the Superintendent of Public Instruction shall issue an Oregon Report Card on the state of the public schools and progress toward achieving the goals contained in ORS 329.025 and 329.035.

(2) The purpose of the *[annual report on the state of the public schools]* Oregon Report Card is to monitor trends among school districts and Oregon's progress toward achieving the goals stated in this chapter. The report on the state of the public schools shall be designed to:

(a) Allow educators and local citizens to determine and share successful and unsuccessful school programs *[the success of their own school programs];*

(b) Allow educators to sustain support for reforms demonstrated to be successful;

(c) Recognize schools for their progress and achievements; and

(d) Facilitate the use of educational resources and innovations in the most effective manner.

(3) The report shall contain, but need not be limited to:

(a) Demographic information on public school children in this state.

(b) Information pertaining to student achievement, including statewide assessment data, graduation rates and dropout rates, including progress toward achieving the education benchmarks established by the Oregon Progress Board, with arrangements by minority groupings where applicable.

(c) Information pertaining to *[student access to and utilization of educational and support services, including regular education programs, special education, compensatory education, bilingual and English as a second language programs, advanced course work, professional technical training, counseling services, library and media services and transportation and food services]* special program offerings.

(d) Information pertaining to the characteristics of the school and school staff, including assignment of teachers, experience of staff and the proportion of minorities and women represented on the teaching and administrative staff.

(e) Budget information, including source and disposition of school district operating funds and salary data.

[(f) Available information gathered on a sampling basis, in cooperation with the Occupational Program Planning System of the Employment Department, to monitor high school students in areas such as further education and training and labor market participation.]

[(g)] (f) Examples of exemplary programs, *[promising]* proven practices, programs designed to reduce costs or other innovations in education *[developing]* being developed by school districts in this state that show improved student learning.

[(h)] (g) Such other information as the superintendent obtains under ORS 329.105.

(4) In the second and subsequent years that the report is issued, the report shall include a comparison between the current and previous data and an analysis of trends in public education.

SECTION 14. ORS 329.125 is amended to read:

329.125. The Legislative Assembly recognizes that students in public elementary and secondary schools can *[only]* best reach the levels of performance expected under the provisions of this chapter with parental and community participation in the education process. It is, therefore, *[the policy of this state to]* recommended but not required that:

(1) *[Require]* School districts *[to]* provide opportunities for parents or guardians to be involved in establishing and implementing educational goals and to participate in decision-making at the school site;

(2) *[Expect]* Employers *[to]* recognize the need for parents or guardians and members of the community to participate in the education process not only for their own children but for the educational system; *[and]*

(3) *[Encourage]* Employers be encouraged to extend appropriate leave to parents or guardians to allow greater participation in that process during school hours; and *[.]*

(4) School districts enter into partnerships with business, labor and other groups to provide workplace-based professional development opportunities for their educational staff.

SECTION 15. ORS 329.150 is amended to read:

329.150. A school district may provide services for children and families at the school site. If the district chooses to provide services, the design of educational and other services to children and their families shall be the responsibility of the school district. School districts may coordinate services with programs provided through the local commissions on children and families to provide services to families. To *[insure]* ensure that all educational and other services for young children and their families *[afford]* offer the maximum opportunity possible for the personal success of the child and family members, it is the policy of this state that the following principles for serving children should be observed to the maximum extent possible in all of its educational and other programs serving young children and their families:

(1) Services for young children and their families should be located as close to the child and the family's community as possible, encouraging community support and ownership of such services;

(2) Services for young children and their families should reflect the importance of integration and diversity to the maximum extent possible in regard to characteristics such as race, economics, *[sex]* gender, creed, capability and cultural differences;

(3) Services should be designed to support and strengthen the *[family and be planned in consideration of existing family values, with the primary concern being the welfare of the child,]* welfare of the child and the family and be planned in consideration of the individual family's values;

(4) Services should be designed to assure continuity of care among care givers in a given day and among service plans from year to year;

(5) Service systems should *[be comprehensive in nature with the flexibility to identify and]* address the most urgent needs in a timely manner including health, intervention and support services; and

(6) Service providers and sources of support should be coordinated and collaborative, to reflect the knowledge that no single system can serve all of the needs of the child and family.

NOTE: Section 16 was deleted by amendment. Subsequent sections were not renumbered.

SECTION 17. ORS 329.160 is amended to read:

329.160. It is the policy of this state to implement~~ed~~, *[at the earliest possible time,]* programs for early childhood education, for parenting education including instruction about prenatal care, *[parenting education,]* for child-parent centers and for extended Oregon prekindergarten programs. By *[1996]* 1999, funding for programs shall be available for 50 percent of children eligible for Oregon prekindergarten programs, and, by *[1998]* 2004, full funding for programs shall be available for all eligible children. The Oregon prekindergarten program shall continue to be operated in coordination with the federal Head Start program in order to avoid duplication of services and so as to *[insure]* ensure maximum use of resources. The state shall continue funding Oregon prekindergarten programs with a goal to have full funding for all eligible children.

SECTION 18. ORS 329.165 is amended to read:

329.165. (1) In consultation with the advisory committee for the Oregon prekindergarten program, the Department of Education and the Office of Community College Services shall develop a long-range plan for serving eligible children and their families and shall report to each regular session of the Legislative Assembly on the funds necessary to implement the long-range plan, including but not limited to regular programming costs, salary enhancements and program improvement grants. The department shall determine the rate of increase in funding for programs necessary each biennium to provide service to all children eligible for the prekindergarten program by [1998] 2004.

(2) The Department of Education and the Office of Community College Services shall include in their budget requests to the Governor[*beginning with the 1993-1995 biennium,*] funds sufficient to implement each two-year phase of the long-range plan.

(3) Each biennial report shall include but not be limited to estimates of the number of eligible children and families to be served, projected cost of programs and evaluation of the programs.

SECTION 19. ORS 329.185 is amended to read:

329.185. When the federal Head Start program provides funding for programs for eligible children at at least the 1990-1991 per child level, as described in ORS 329.170 (3), eligibility for state funded prekindergarten programs shall be expanded to include programs for children whose family income exceeds the federal Head Start limits or who are in an underserved or unserved age category. After determining the increase in income limits or age level that would make children most in need of state programs eligible for them, the State Board of Education may direct expenditure of any unexpended or unobligated funds appropriated for the biennium for eligible children to be expended for the additional children considered to be most in need. In the following biennium, the State Board of Education shall include the cost of any added program for the children most in need in its biennial budget.

SECTION 20. ORS 329.237 is amended to read:

329.237. (1) The Department of Education shall administer the Early Childhood Improvement Program to assist public school districts in providing programs designed to improve educational services for children enrolled in kindergarten through grade three. Programs shall be based on research and proven successful practices [*in programs such as Head Start*].

(2) The programs shall include the following planned components:

(a) Targeted services for "at-risk" children [*and families*] that may be in cooperation with local commissions on children and families to provide services to families, which may include but are not limited to remedial and alternative academic programs, child care, parent participation and child development services.

(b) Efforts to improve the kindergarten through third grade curriculum and educational practices so that they:

(A) Are consistent with research findings on how children learn;

(B) Are sensitive to individual differences such as cultural background and learning styles; and

(C) Encourage parent participation. Such efforts may include but are not limited to adapting curricula and training administrators and other staff in early childhood education and child development.

(c) Comprehensive education, health care and social services for children to be provided through interagency agreements among school districts, health care and social service providers.

(d) Evaluation of programs by goals set by the district for the program.

(e) Planned transition from prekindergarten programs to kindergarten through grade three.

(3) In addition to the components listed in subsection (4) of this section, Early Childhood Improvement Programs may include but are not limited to the following components:

(a) Extended day services for school age children who need care or enrichment opportunities; and

(b) Programs designed to improve the adult to child ratios in kindergarten through grade three.

(4) The district application shall include:

(a) Plans developed by 21st Century Schools Councils at the school building level as described in [ORS 329.705] section 39 of this 1995 Act; and

(b) Demonstrated consistency with the local assessments and plans resulting from ORS 417.705 to 417.790 and 419A.170.

(5) Funds shall be available to districts with approved applications on a per child basis for the district's children enrolled in kindergarten through grade three. Funds not allocated shall be prorated to the districts with approved applications not later than the end of the fiscal year for which the allocation is made.

(6) If the district plan proposes use of innovative instructional materials, the State Board of Education, pursuant to ORS 337.050, may waive the use of such instructional materials as might otherwise have been required.

SECTION 21. ORS 329.255 is amended to read:

329.255. (1) The district school board of every school district operating any elementary schools may make the services of a child development specialist available to the pupils enrolled in the elementary schools and their families.

(2) A child development specialist shall provide primary prevention services directly or in cooperation with others in settings in addition to the school setting:

(a) To pupils enrolled in the elementary school, with priority given at the primary level, including kindergarten, to assist them in developing positive attitudes toward themselves and others in relation to life career roles and to [assure] ensure that [developmentally] appropriate assessment and screening procedures that recognize academic and individual differences are provided for the early identification of talents and strengths on which to base a positive learning experience for each child.

(b) To the professional staff of the elementary school to assist them in early identification of pupils enrolled therein with learning or developmental problems.

(c) To parents of pupils enrolled in elementary schools to assist them in understanding their children's unique aptitudes and needs and to aid in relating home, school and neighborhood experiences.

(d) To refer pupils enrolled in the elementary school and their families to appropriate state or local agencies for additional assistance as needed.

(e) To coordinate resources available through the community and the school.

(3) The district school board of every school district operating any elementary schools may make the services of a child development specialist, as described in subsection (2) of this section available to children four years of age or younger and their families residing in its district. If such children need assessment, the child development specialist shall [assure] ensure that [developmentally] appropriate assessment and screening procedures that recognize academic and individual differences are provided for early identification of barriers or needs that prevent successful transition to early education programs.

(4) School districts may provide the services authorized or required under this section by contract with qualified state or local programs.

SECTION 22. ORS 329.445 is amended to read:

329.445. The Department of Education shall [study and develop] review district improvement plans to [insure] ensure that the school restructuring efforts framed in this chapter address the unique learning and developmental needs of the middle educational levels between the early childhood education and Certificate of Initial Mastery levels detailed in this chapter. *[This shall be done in consultation with teachers, parents and administrators from schools serving middle level students.]*

SECTION 23. ORS 329.465 is amended to read:

329.465. (1) By the end of the [1996-1997] 1995-1996 school year, the State Board of Education shall revise and adopt standards and requirements for the Certificate of Initial Mastery and design a plan that enables school districts to phase in academic standards so that students have opportunities *[every student shall have the opportunity by 16 years of age or upon completing*

grade 40] to obtain a Certificate of Initial Mastery by no later than the 1998-1999 school year, in the manner designated in the state board's plan.

(2) The State Board of Education shall prescribe the standards, pursuant to ORS 329.025 and 329.035, that a student must meet in order to obtain a Certificate of Initial Mastery. The Certificate of Initial Mastery shall be based on a series of performance-based assessments and content assessments benchmarked to mastery levels at approximately grades 3, 5, 8 and 10. *[including but not limited to]* The assessment methods shall include work samples, *[tests and]* and tests and may include portfolios. The state board shall establish a certificate for students who, with additional services and accommodations, do not meet the Certificate of Initial Mastery standards. Students shall be allowed to collect credentials over a period of years, culminating in a project or exhibition that demonstrates attainment of the required knowledge and skills that have been measured by a variety of valid assessment methods.

(3) Requirements for the Certificate of Initial Mastery shall:

[(a) Assure that a student has the knowledge and skills to read, write, problem solve, think critically and communicate across the disciplines, at national levels by the year 2000 and at international levels by the year 2010; and]

(a) Ensure that students have the necessary knowledge and demonstrate the skills to read, write, problem solve, reason and communicate;

(b) [Assure] Ensure that students [exhibit the capacity] have the opportunity to demonstrate the ability to learn, think, [reason,] retrieve information and use technology; [and work effectively alone and in groups.]

(c) Ensure that students have the opportunity to demonstrate that they can work effectively as individuals and as an individual in group settings; and

(d) Ensure that student assessment is based on academic content standards in mathematics, science, history, geography, economics, civics, English, second languages and the arts.

[(4) A Certificate of Initial Mastery shall be required for entry into college preparatory and academic professional technical programs leading to the appropriate indorsement.]

[(5) On or before January 1, 1995, each school district shall present a plan to the Department of Education setting forth the steps the district has taken to insure that its curriculum meets the requirements necessary for the students of the district to obtain Certificates of Initial Mastery. Each district's plan shall include options for achieving the certificate through alternative educational programs, including but not limited to those offered at Learning Centers established pursuant to ORS 329.860.]

(4) Prior to July 1, 1997, school districts shall submit plans to the Department of Education setting forth the steps the district will take to ensure that its programs meet the requirements necessary for students to obtain a Certificate of Initial Mastery. Each district's plan shall demonstrate how alternative learning program options will be available for students working toward a Certificate of Initial Mastery and a diploma.

[(6)] (5) The provisions of this section may be applied individually as appropriate to students enrolled in special education programs under ORS chapter 343.

[(7)] (6) The Department of Education shall develop procedures to accommodate out-of-state students, students taught by a parent or private teachers pursuant to ORS 339.035, private school students transferring into public schools and migrant children from other states and countries.

(7) Nothing in this section is intended to apply the Certificates of Mastery programs or standards to private school students or students taught by a parent or private teachers pursuant to ORS 339.035.

SECTION 24. Sections 24a, 25, 26, 27 and 30 of this Act are added to and made a part of ORS chapter 329.

SECTION 24a. The State Board of Education shall submit Certificate of Initial Mastery standards, requirements and plans for implementation to the legislative interim committees on education for input and direction before administrative rules for the Certificate of Initial Mastery are adopted.

SECTION 25. School districts shall continue to issue diplomas to students as evidence that students have completed their public school education. At or before grade 12, a diploma shall be conferred upon all students completing the requirements established by the State Board of Education and the school districts. In addition to the diploma, the following shall be available:

(1) A certificate, to be conferred upon students who with additional services and accommodations do not meet the Certificate of Initial Mastery standards.

(2) Certificate of Initial Mastery, to be conferred upon all students meeting state and local standards and requirements required for the Certificate of Initial Mastery pursuant to ORS 329.465.

(3) Certificate of Advanced Mastery, to be conferred upon all students meeting state and local standards and requirements for the Certificate of Advanced Mastery in one of the areas pursuant to ORS 329.475.

(4) Career indorsements, which are focus areas that identify a high quality career related course of study which informs students about future choices and simultaneously prepares them for further education, lifelong learning and employment.

SECTION 26. (1) In the 21st century, all Oregonians should be able to communicate in a second language. School districts shall make available to all students the opportunity to achieve this goal.

(2) Prior to the end of the 2001-2002 school year, all students who have completed grade 12 shall have completed a minimum of two years of second language instruction and shall demonstrate a level of proficiency in a second language as determined by the school district board.

(3) Each school district board shall determine the method of implementation of the second language requirement under subsection (2) of this section. Individual students may be granted a waiver of the second language requirement under subsection (2) of this section based on criteria established by the school district board.

SECTION 27. Prior to March 1, 1997, the Department of Education shall submit any standards and rules for the Certificate of Advanced Mastery adopted by the State Board of Education pursuant to ORS 329.475 to the Legislative Assembly.

SECTION 28. ORS 329.475 is amended to read:

329.475. (1) *[Beginning with the 1997-1998 school year, any student who has received a Certificate of Initial Mastery shall be entitled to attend any public educational institution that enrolls the student and provides a program leading to the achievement of a Certificate of Advanced Mastery and a college preparatory or academic professional technical indorsement, or both, and meets the requirements of the State Board of Education.]* Within two school years after the State Board of Education adopts standards and rules for the Certificate of Advanced Mastery, each school district shall institute programs that allow students to qualify for a Certificate of Advanced Mastery with indorsements that prepare students for post-secondary academic pursuits and professional technical careers.

(2) School districts may implement the programs in a public education institution such as a public school, education service district, community college, public professional technical school or institution of higher education, or any combination thereof, that enrolls the student and meets the requirements of the State Board of Education.

(3) The programs must provide a combination of work-related learning experiences and study in accordance with ORS 329.855. The program shall include a comprehensive educational component that meets rigorous academic standards.

(4) All courses necessary for a Certificate of Advanced Mastery shall be available to all students.

(5) The State Board of Education shall adopt a framework for the programs and timelines for implementation of the programs for the school districts to follow as resources become available to the school districts.

[(2)] (6) In establishing the requirements for Certificates of Advanced Mastery with indorsements, the State Board of Education shall adopt rules that facilitate *[the]* movement *[between]* among the indorsements and shall encourage public school choice and mobility so as to enhance a student's opportunities *[to maximize exposure to the]* for a full range of educational experiences.

[(3)] (7) The public education institution shall be reimbursed for the student's tuition by the district in which the student resides pursuant to ORS 339.115 and rules of the State Board of Education, in an amount not to exceed the student's tuition or the amount the district receives for the student from state funds, whichever is less. A school district shall not receive state funds for the student in an amount that exceeds the student's tuition. Any adult who wishes to pursue an indorsement, or any student having earned the Certificate of Advanced Mastery or a diploma or who has attained 19 years of age and who wishes to continue a program, may do so by paying tuition. As used in this section, "public *[educational]* education institution" does not include a public school to which a student has transferred under ORS 329.485.

(8) Programs developed under this section shall meet the highest academic standards possible and provide students with opportunities for a broad range of quality work-related learning experiences.

[(4)] (9) A high school diploma issued by *[an accredited]* a private or out-of-state secondary school as signifying successful completion of grade 12 shall be considered *[acceptable in lieu of a Certificate of Advanced Mastery for purposes of any rights or privileges that attach to the holder of a Certificate of Advanced Mastery]* equivalent to a high school diploma issued by an Oregon public school.

SECTION 29. ORS 329.485 is amended to read:

329.485. (1)(a) The Department of Education shall implement *[an]* statewide a valid and reliable assessment system for all students~~], including performance-based assessment of the knowledge and skills necessary to achieve~~ that meets technical adequacy standards. The assessment system, to be completed by the year 2000, shall include criterion-referenced assessments including performance-based assessments, content-based assessments, as those terms are defined in ORS 329.075, and other valid methods to measure the academic content standards and to identify students who meet or exceed the standards for each mastery level leading to the Certificate of Initial Mastery and the Certificate of Advanced Mastery. However, until this plan is operational, assessment shall continue at grades 3, 5, 8 and 10.

(b) The Department of Education shall develop the statewide assessment system in:

(A) Mathematics, to be implemented by the 1995-1996 school year.

(B) English, to be implemented by the 1996-1997 school year.

(C) Science, to be implemented by the 1997-1998 school year.

(D) History, geography, economics and civics, to be implemented by the 1998-1999 school year.

(2) Prior to full statewide implementation of the assessment system pursuant to subsection (1) of this section, the State Board of Education by rule shall establish criteria for determining whether students have demonstrated the knowledge and skills necessary to perform successfully at each level in the manner described in ORS 329.465, 329.475 and 329.855~~], beginning with the 1994-1995 school year~~.

(3) Each year the resident district shall be accountable for determining the student's *[satisfactory progress, as set forth in subsection (4) of this section, or be responsible for finding alternative learning environments, with the concurrence of the student's parents or guardian]* progress toward achieving the standards at grades 3, 5, 8 and 10. Progress toward the standards shall be measured in a manner that clearly enables the student and parents to know whether the student is making progress toward meeting or exceeding the standards at grades 3, 5, 8 and 10. In addition, the district shall adopt a grading system based on the local school district board adopted course content of the district's curriculum. The grading system shall clearly enable the student and parents to know how well the student is achieving course requirements.

(4) If, at any point, a student [is not making satisfactory progress toward attainment of] has not met or has exceeded all of the [standard] standards at grades 3, 5, 8 and 10, [including the Certificates of Initial Mastery and Advanced Mastery,] the school district shall make additional services or alternative educational or public school options available to the student. [that may include but need not be limited to:]

[(a) A restructured school day;]

[(b) Additional school days;]

[(c) Individualized instruction and other alternative instructional practices; and]

[(d) Family evaluation and social services, as appropriate.]

(5) If the student to whom additional services or alternative educational options have been made available does not meet or exceed the standards within one year, the school district, with the consent of the parents, shall make an appropriate placement, which may include an alternative education program or the transfer of the student to another public school in the district or to a public school in another district that agrees to accept the student. [fails to demonstrate the knowledge and skills required at the mastery level within one year after the determination under subsection (2) of this section, even though the student would be or is promoted to the next level, the student shall be allowed to transfer to another public school in the district or to a public school in another district that agrees to accept the student.] The district that receives the student shall be entitled to payment. The payment shall consist of:

(a) An amount equal to the district expenses from its local revenues for each student in average daily membership, payable by the resident district in the same year; and

(b) Any state and federal funds the attending district is entitled to receive payable as provided in ORS 339.133 (2).

SECTION 30. (1) A school district may submit a request to the State Board of Education for a waiver or an extension of any timeline or timelines for program implementation in this chapter or chapter 693, Oregon Laws 1991. The request shall state the reasons the district needs the waiver or cannot meet the statutory timeline or timelines. The request must also include a written plan detailing the steps the district will take to achieve full implementation of the program or programs for which the waiver or extension is requested. The written plan shall be for a period of one or two years and shall include a method to measure the progress toward implementation of the program or programs for which a waiver or an extension is sought. The waiver or extension shall not exceed two school years.

(2) Upon receipt of a request for a waiver or an extension, the board shall grant the waiver or extension if it determines that the district has good cause to request a delay in the implementation of the program or programs and determines that the written plan is likely to achieve program implementation within the time requested for the waiver or extension.

(3) The board shall establish by rule the process for applying for and obtaining a waiver or an extension of a timeline, including the criteria for the approval of a written plan of implementation and the grounds constituting good cause for granting the delay in implementation of the program.

SECTION 31. ORS 329.555 is amended to read:

329.555. (1) There is established a program to [begin in the 1990-1991 school year] be known as the "Oregon 21st Century Schools Program."

(2) The purposes of this program include the following:

(a) To encourage the restructuring of school operations and formal relationships among teachers, administrators, other school personnel and local citizens for purposes of improving student achievement, including but not limited to modifications of the following:

(A) The length and structure of the school day and the school year;

(B) Curriculum requirements;

(C) Graduation requirements;

(D) The licensing, assignment and formal responsibilities of teachers, administrators and other school personnel;

(E) State statutes and rules and local policies and agreements relating to educational practices, with the exception of those that affect health, safety or constitutional rights under state or federal law;

(F) The formal and informal relationships between school districts and other entities, including community colleges, four-year colleges and universities, businesses and other institutions; and

(G) The integration of traditional services to kindergarten through grade 12 with public and privately sponsored [social] services, such as early childhood education, day care and assistance for teenage parents and other at-risk youth.

(b) To encourage educators, school districts and local citizens to establish measurable goals for educational attainment and increased expectations for student performance, including but not limited to improvement in such performance measures as:

(A) Student dropout rates;

(B) District, state and national standardized tests and other assessments of student learning and educational progress;

(C) The extent and nature of parental involvement in school activities;

(D) Student conduct and disciplinary actions;

(E) Student expectations and attitudes towards learning; and

(F) Student success in college, vocational and other post-secondary programs.

SECTION 31a. (1) The amendments to ORS 329.555 by section 31 of this Act are intended to change the name of the 21st Century Schools Program to the Oregon 21st Century Schools Program.

(2) For the purpose of harmonizing and clarifying statute sections published in Oregon Revised Statutes, the Legislative Counsel may substitute for words designating the 21st Century Schools Program, wherever they occur in Oregon Revised Statutes, other words designating the Oregon 21st Century Schools Program.

SECTION 32. ORS 329.570 is amended to read:

329.570. (1) To the extent practicable, the development of the application and the administration of programs under ORS 329.535 to 329.605 shall be delegated by the state and school districts to the 21st Century Schools Councils.

(2) If more than one school building is part of an application, the 21st Century Schools Councils may elect to establish a district planning committee to facilitate the development of its application. A district planning committee [constituted under ORS 329.535 to 329.605] shall consist of:

(a) Administrators and at least one school board member to be chosen by the school board;

(b) Teachers, chosen by the exclusive representative, in a number equal to those appointed under paragraph (a) of this subsection.

(c) At least three public members, chosen jointly by the other members of the committee.

(3) To participate in the Oregon 21st Century Schools Program, and prior to submission of an application by the school board, a school district shall have accomplished the following:

(a) Identified the school building or buildings and, if appropriate, the school district or districts on whose behalf the application is submitted.

(b) Established, in each school building affected by the proposal, a 21st Century Schools Council.

(c) Agreed, at the direction of the 21st Century Schools Councils and, if applicable, the district planning committee, upon the following:

(A) The major activities to be carried out as part of the project, including but not limited to the nature and extent of the restructuring of school operations and formal relationships as described in ORS 329.555 (2).

(B) The specified measures of student learning and [educational outcomes] achievement, including but not limited to those described in ORS 329.555 (2) for each building affected by the application.

(C) The process by which each 21st Century Schools Council and, where applicable, the district planning committee will collect data and assess the progress and final performance of its program.

(4) The local district school board shall be responsible for submitting the application and certifying that all appropriate requirements of ORS 329.535 to 329.605 have been met.

SECTION 33. ORS 329.585 is amended to read:

329.585. (1) In addition to the application described in ORS 329.575 for the Oregon 21st Century Schools Program or ORS 329.695 for the School Improvement and Professional Development program, a school district may submit proposals to:

- (a) Modify laws, rules or policies; and
- [(b) Establish nongraded school programs for students;]
- [(c) Extend the school year or teacher and student contact hours for all students in the district or for a specified group of students;]
- [(d) Integrate health and social services at the school site to meet the comprehensive needs of children and the families in which they live;]
- [(e) Substantially modify traditional methods of delivering and monitoring educational services, including but not limited to the elimination of the 55-minute class period and graded classrooms and the promotion of such strategies as the use of team teaching, student-to-student mentoring, bilingual tutoring programs and inclusion of special needs population;]
- [(f) Operate a team, small group model school with a team of teachers remaining with the same students over a period of several years using a variety of teaching techniques and research-based cooperative small groups;]
- [(g) Develop public school choice plans to give parents, students and teachers more freedom to design and choose among programs with different emphasis, both among school districts and within and among schools;]
- [(h) Restructure programs for students, including but not limited to applied academics, youth apprenticeships and other schoolwork models that involve, as a minimum, two-year programs;]
- [(i) Develop new programs integrating technology into the curriculum, instruction and student assessment;]
- [(j) Increase parent involvement in decision-making at the school site; and]
- [(k) Restructure programs for middle level students, including, but not limited to, heterogeneous groups, integrated curriculum and staffing and appropriate teaching strategies.]

(b) Implement district or school improvement plans.

(2) A district that applies under this section shall submit a proposal in accordance with rules adopted by the State Board of Education, including a requirement that the district form a district site committee composed of representatives from all affected school buildings]. When more than one school building is part of an application, the board may require a demonstration in the application process of coordination among such school buildings.

(3) A proposal submitted under this section shall be approved by the school district board [of directors] and by the exclusive representatives of the teachers in the district.

[(4) Notwithstanding ORS 329.675 to 329.745, the State Board of Education shall give preference to applications that involve one or more of the proposals described in subsection (1) of this section or other innovative models to meet the goals of this chapter.]

SECTION 34. ORS 329.675 is amended to read:

329.675. As used in ORS 329.675 to 329.745 and 329.790 to 329.820:

- [(1) "Administrator" includes all persons whose duties require administrative licenses.]
- [(2)] (1) "Beginning teacher" means a teacher who:
 - (a) Possesses a teaching license issued by the Teacher Standards and Practices Commission;
 - (b) Is employed at least half time, primarily as a classroom teacher, by a school district; and
 - (c) Has taught fewer than 90 consecutive days, or 180 days total, as a licensed teacher in any public, private or state-operated school.
- [(3) "District" means a school district or an education service district, or any legally constituted combination of such districts.]

[(4)] (2) "Educational goals" means a set of goals for educational performance, as formulated by the 21st Century Schools Councils and local communities, and adopted by district school boards, according to provisions of ORS 329.675 to 329.745 and 329.790 to 329.820, to encourage greater accountability between schools and the community, and better to assess the effectiveness of educational programs, including the professional growth and career opportunity programs, described in ORS 329.675 to 329.745 and 329.790 to 329.820.

[(5)] (3) "Index of teaching and learning conditions" means the system for the collection and analysis of relevant educational data by schools, districts and the state for the purpose of assessing the educational effectiveness of schools and programs.

[(6)] (4) "Mentor teacher" means a teacher who:

(a) Possesses a basic or standard teaching personnel service or administrative license issued by the Teacher Standards and Practices Commission;

(b) Is employed at the time of selection under contract primarily as a classroom teacher by a school district in this state;

(c) Has successfully taught for three or more years as a licensed teacher in any public school;

(d) Has been selected and trained as described in ORS 329.815; and

(e) Has demonstrated mastery of teaching skills and subject matter knowledge.

[(7)] "Parents" means parents or guardians of students currently enrolled in a public school providing education in prekindergarten through grade 12.]

[(8)] "School Improvement and Professional Development program" means a formal plan submitted by a school district and approved by the Department of Education according to criteria specified in ORS 329.675 to 329.745 and 329.790 to 329.820.]

[(9)] "School district" means a school district, an education service district, a state-operated school or any legally constituted combination of such entities that submits an application under ORS 329.695.]

[(10)] (5) "Support program" means a program provided by a mentor teacher to a beginning teacher that includes, but is not limited to, direct classroom observation and consultation, assistance in instructional planning and preparation, support in implementation and delivery of classroom instruction, and other assistance intended to enhance the professional performance and development of the beginning teacher.

[(11)] "21st Century Schools Council" means a body composed of teachers, classified district employees, administrators, parents of students and others, constituted under ORS 329.705.]

[(12)] "Teacher" means a licensed employee of a common or union high school district or an education service district who has direct responsibility for instruction, coordination of educational programs or supervision of teachers, and who is compensated for services from public funds. "Teacher" does not include a school nurse as defined in ORS 342.455 or a person whose duties require an administrative license.]

SECTION 35. ORS 329.690 is amended to read:

329.690. (1) Oregon hereby establishes a School Improvement and Professional Development program to encourage the following:

(a) The development of educational goals for individual schools and school districts;

(b) The assessment of the educational progress of school programs and students;

(c) The expansion of professional growth and career opportunities for Oregon teachers; [and]

(d) The restructuring of the school workplace to provide teachers with responsibilities and authority commensurate with their status as professionals; [.]

(e) The development and coordination of pilot programs to evaluate the viability of proposed rules, policies or recommendations that affect professional practices associated with teaching methods, curricula, instructional materials, instructional format and organization, assessment and testing related to this chapter; and

(f) The identification of validated educational research used to substantiate the rationale for initiating pilot programs.

(2) All programs in ORS 329.675 to 329.745 and 329.790 to 329.820 are subject to the availability of funds appropriated therefor.

SECTION 36. ORS 329.700 is amended to read:

329.700. (1) The State Board of Education shall appoint (a) an Oregon 21st Century Schools Advisory Committee to propose rules for the submission and approval of grants and programs, including but not limited to rules for the Oregon 21st Century Schools Program under ORS [329.555 to 329.753 and 329.790 to 329.820] 329.535 to 329.605, the School Improvement and Professional Development program under ORS 329.675 to 329.745 and the beginning teacher support program under ORS 329.790 to 329.820.

(2)(a) The advisory committee shall include teachers, who shall constitute a majority of the 15 members, and one member from each of the following groups, at least one of whom must be a member of a minority:

- (A) School administrators;
- (B) School board members;
- (C) Education school faculty;
- (D) Classified district employees;
- (E) Parents of children currently in prekindergarten through grade 12 of the public school system; and
- (F) Members of the business and labor community.

(b) The board may appoint other citizens as considered appropriate by the board.

(3) The deadline for applications submitted by districts for the School Improvement and Professional Development program under ORS 329.675 to 329.745 and the beginning teacher support program under ORS 329.790 to 329.820 shall be April 1 preceding the school year for which they are proposed. The Department of Education shall review all applications and shall approve or reject them no later than June 1 preceding the school year for which they are proposed.

(4) Districts that qualify for 21st Century Schools grants under ORS 329.535 to 329.605, School Improvement and Professional Development program grants under ORS 329.675 to 329.745 and beginning teacher support program grants under ORS 329.790 to 329.820 shall receive up to \$1,000 per year for every full-time equivalent teacher deemed eligible for this program.

(5) Subject to ORS 291.232 to 291.260, the Superintendent of Public Instruction shall distribute grants-in-aid to eligible school districts so that at least three-quarters of the allocation due to each eligible district is received no later than February 1 of each fiscal year and the remainder when all required reports are filed with the Department of Education. If underpayments or overpayments result, adjustments shall be made in the following year.

SECTION 37. (1) The amendments to ORS 329.700 by section 36 of this Act are intended to change the name of the 21st Century Schools Advisory Committee to the Oregon 21st Century Schools Advisory Committee.

(2) For the purpose of harmonizing and clarifying statute sections published in Oregon Revised Statutes, the Legislative Counsel may substitute for words designating the 21st Century Schools Advisory Committee, wherever they occur in Oregon Revised Statutes, other words designating the Oregon 21st Century Schools Advisory Committee.

SECTION 38. ORS 329.705 is repealed and section 39 of this Act is enacted in lieu thereof.

SECTION 39. (1) Nothing in this section shall interfere with the duties, responsibilities and rights of duly elected school district boards. There shall be established at each school a 21st Century Schools Council. The duties of a 21st Century Schools Council shall include but not be limited to:

- (a) The development of plans to improve the professional growth of the school's staff;
- (b) The improvement of the school's instructional program;
- (c) The development and coordination of plans for the implementation of programs under this chapter at the school; and
- (d) The administration of grants-in-aid for the professional development of teachers and classified district employees.

(2) A 21st Century Schools Council shall be composed of teachers, parents, classified employees and principals or the principal's designee, as follows:

- (a) Not more than half of the members shall be teachers;
- (b) Not more than half of the members shall be parents of students attending that school;
- (c) At least one member shall be a classified employee; and
- (d) One member shall be the principal of the building or the principal's designee.

(3) In addition, other members may be as the school district shall designate, including but not limited to local school committee members, business leaders, students and members of the community at large.

(4) Members of a 21st Century Schools Council shall be selected as follows:

- (a) Teachers shall be licensed teachers elected by licensed teachers at the school site;
- (b) Classified employees shall be elected by classified employees at the school site;
- (c) Parents shall be selected by parents of students attending the school; and
- (d) Other representatives shall be selected by the council.

(5) If a school district board determines that a school site is unable to fulfill the requirements of this section or if the needs of a school site require a different composition, the school district board shall establish the 21st Century Schools Council in a manner that best meets the educational needs of the district.

(6) All 21st Century Schools Council meetings shall be subject to the open meetings law pursuant to ORS 192.610 to 192.690.

(7) A school district may establish a district site committee to assist in the administration of grants or in the district-wide coordination of programs.

SECTION 40. Section 6, chapter 667, Oregon Laws 1991, is amended to read:

Sec. 6. (1) In cooperation with the Department of Education and school districts, the Oregon Workforce Quality Council *[shall]* may oversee the implementation of *[the following workforce development strategies:]*

[(1)] primary and secondary school reform as provided in *[chapter 693, Oregon Laws 1991]* ORS chapter 329, including but not limited to *[the following:]*

[(a)] overseeing reform of current primary and secondary education programs. *[as recommended by the National Center for Education and the Economy in "America's Choice: High Skill or Low Wages."] Existing educational curriculum and standards should be revised to enable students to achieve a higher level of basic competency in science, math and language skills. Achievement standards for education should be benchmarked to the highest international educational standards of developed countries. Certificates of Initial Mastery should be developed and awarded to students who achieve these competencies, and primary and secondary education programs should be designed to enable students to achieve certificates by 16 years of age.*

[(b)] Overseeing the development of learning centers, as provided in chapter 693, Oregon Laws 1991, which will provide alternative learning environments for students who have difficulty in school, drop out of school or are unable to achieve the Certificate of Initial Mastery by 16 years of age. Learning centers should offer students more individual attention and assistance with personal, health, social and family problems in addition to the education and training required to prepare them for achieving a certificate and enrolling in subsequent professional and technical or college preparatory programs.]

(2) The Oregon Workforce Quality Council shall oversee the implementation of the following workforce development strategies:

[(2)] (a) Professional and technical education reform, as provided in *[chapter 693, Oregon Laws 1991]* ORS chapter 329, and including but not limited to the following:

[(a)] (A) Overseeing the development of comprehensive professional and technical education programs, also described by "America's Choice: High Skill or Low Wages," that incorporate the following elements:

[(A)] (i) Programs that are responsive to the needs of the state's labor market, providing training in occupations that lead to employment with business and industry in this state.

[(B)] (ii) Programs that set industry accepted performance standards that are developed with and approved by business and industry.

[(C)] (iii) Curricula that includes significant, credited cooperative work experience and on-the-job training.

[(D)] (iv) Diplomas that are awarded to students who successfully complete the programs.

[(b)] (B) The programs developed under [paragraph (a) of this subsection] subparagraph (A) of this paragraph shall integrate into their curriculum and degree offerings the apprenticeship programs registered with the Bureau of Labor and Industries.

[(c)] (C) Overseeing the reform of secondary education programs statewide so that the programs offer students enrollment in professional and technical programs and college preparatory programs. [These programs should be available to any student who has achieved a Certificate of Initial Mastery and should require no less than two years of training and education.]

[(3)] (b) Adult worker training investment, including but not limited to the following, adopting the benchmarks for worker training investment established by the Oregon Progress Board and develop strategies for improving the level of business and industry investment in worker training.

[(4)] (c) Business, labor and education partnerships, including but not limited to promoting business and labor control of state programs to improve worker skills, business management practices and secondary and post-secondary education, especially professional and technical education. The council shall develop strategies to:

[(a)] (A) Raise employer awareness of student and worker training programs; and

[(b)] (B) Build the capacity of employers to assist the state in the design and delivery of training programs.

[(5)] (d) Centralized delivery of employment and training services at the local level in response to local needs, including but not limited to developing a plan for centralizing state supported employment and training services at the local level. The plan shall include strategies for centralization and for improving the quality of employment assistance, counseling, listing, placement and training programs statewide.

[(6)] (e) Developing goals and a comprehensive strategy for improving the quality of Oregon's workforce consistent with the Oregon Progress Board's Benchmarks for Exceptional People.

NOTE: Section 41 was deleted by amendment. Subsequent sections were not renumbered.

SECTION 42. ORS 329.855 is amended to read:

329.855. (1) The Department of Education, the Office of Community College Services and the Oregon State System of Higher Education in consultation with the Oregon Workforce Quality Council shall develop comprehensive education and training programs in accordance with ORS 329.475 for two-year to [five-year] six-year academic professional technical indorsements, [and] associate degrees and baccalaureate degrees.

(2) [In addition to the requirements of subsection (1) of this section,] There may be established a process for industrial certification and a sequence of advanced certification that could be obtained throughout a person's career.

(3) Work groups, including teachers, community members and representatives of business and labor, may be appointed to offer specialized information concerning knowledge and skill requirements for occupations.

(4) [Not later than January 1, 1994,] No fewer than six broad [occupational] career categories shall be identified, with additional categories added in future years. The education and training curriculum and achievement standards for each occupation and trade selected for students to achieve [academic professional technical] indorsements, [or] associate degrees or baccalaureate degrees in the occupational categories selected shall be developed and available for school districts, community colleges and other training sites.

(5) In addition to academic content, the curriculum developed for indorsements, [and] associate degrees and baccalaureate degrees [must] shall ensure that every student has the option of a high quality career related course of study that provides the student with experience in and understanding of future career choices. Career related studies shall include a structured

series of real or simulated activities that in combination with rigorous academic studies shall simultaneously prepare students for further education, lifelong learning and employment. These activities shall include but not be limited to: *[include, but need not be limited to, opportunities for structured work experiences, cooperative work and study programs, on-the-job training and apprenticeship programs in addition to other subjects.]*

- (a) Job shadowing;
- (b) Workplace mentoring;
- (c) Workplace simulations;
- (d) School based enterprises;
- (e) Structured work experiences;
- (f) Cooperative work and study programs;
- (g) On-the-job training;
- (h) Apprenticeship programs; or
- (i) Other school-to-work opportunities.

(6) In considering where a student can most effectively and economically obtain the knowledge and skills required for the indorsement or *[the associate degree]* post-secondary study, the Oregon Workforce Quality Council may recommend integrating 2 + 2 Programs, the Job Training Partnership Act program, apprenticeship programs and any other state or federal job training program.

(7) Until full statewide implementation, school districts are encouraged to use Certificate of Advanced Mastery programs that are currently being developed, but modified, if necessary, to best fit their students' and community's needs.

SECTION 43. (1) Prior to January 1, 1997, the State Board of Education shall submit the Certificate of Advanced Mastery standards, evaluation criteria and plans for implementation to the legislative interim committees on education for input and direction before administrative rules for the Certificate of Advanced Mastery are adopted.

(2) The State Board of Education shall submit a report to the Sixty-ninth Legislative Assembly that includes:

- (a) A Certificate of Advanced Mastery implementation timeline and projected cost;
- (b) An evaluation of assessment strategies and staff development opportunities;
- (c) Strategies for implementation of the Certificate of Advanced Mastery in small and rural schools;
- (d) A description of systems developed to monitor the academic standards accomplished by Certificate of Advanced Mastery students as well as student attainment in work and post-secondary study;
- (e) A description of the role of business and education partnerships; and
- (f) A description of the implementation of the six broad career indorsement areas of study.

SECTION 44. ORS 329.860 is amended to read:

329.860. (1) *[By January 1, 1995,]* The Department of Education in consultation with the Office of Community College Services and the Oregon Workforce Quality Council shall *[formulate an implementation plan for approval by the State Board of Education establishing learning environments]* develop models for school districts of alternative learning options that may include Learning Centers designed to assist students who have left school in obtaining the Certificate of Initial Mastery through the use of teaching strategies, technology and curricula that emphasize the latest research and best practice.

(2) The Learning Centers *[shall]* may also provide for the integration of existing local and community programs that provide any part of the services needed to assist individuals in obtaining the Certificate of Initial Mastery.

(3) *[The plan for]* The centers *[shall]* may promote means of identifying, coordinating and integrating existing resources and may include:

- (a) Day care services;
- (b) After-school child care;

- (c) Parental training;
- (d) Parent and child education;
- (e) English as a second language or bilingual services for limited proficiency students;
- (f) Health services or referral to health services;
- (g) Housing assistance;
- (h) Employment counseling, training and placement;
- (i) Summer and part-time job development;
- (j) Drug and alcohol abuse counseling; and
- (k) Family crisis and mental health counseling.

(4) Education service districts, school districts or schools, or any combination thereof, [shall] may contact any eligible elementary or secondary school student and the student's family if the student has ceased to attend school to encourage the student's enrollment [at a Learning Center] in an education program that may include alternative learning options. If the student or the family cannot be located, the name and last-known address shall be reported to the [Learning Center or] school nearest the address. The [Learning Center] school shall attempt to determine if that student or family is being provided services by this state and shall seek to assist the student or family in any appropriate manner.

[(5) The Department of Education shall monitor the Learning Centers and periodically report their progress to the State Board of Education and the Oregon Workforce Quality Council. The department may recommend integration of existing services if it determines that such services can be provided more effectively at the centers.]

[(6) The Learning Centers shall be entitled to payment by the district in which the student resides until the student reaches 21 years of age or has earned the Certificate of Initial Mastery, whichever occurs earlier, pursuant to the rules established by the State Board of Education. The payment shall be in an amount not to exceed the cost of the student's participation in the program. A school district shall not receive state funds for the student in an amount that exceeds the cost of the student's participation in the program. The payment shall consist of:]

[(a) An amount equal to the district expenses from its local revenues for each student in average daily membership, payable by the resident district in the same year;]

[(b) Any state and federal funds that the district is entitled to receive; and]

[(c) Any supplemental funds available to the resident district necessary to provide appropriate education services to the student consistent with any previous services provided by the resident district.]

[(7) Adults who wish to pursue a Certificate of Initial Mastery may attend a Learning Center and pay tuition for services.]

[(8) Learning centers may establish advisory committees involving representatives from the 21st Century Schools Councils in those districts, and including a majority of teachers.]

SECTION 45. ORS 329.900 is amended to read:

329.900. (1) To support implementation of the Oregon Educational Act for the 21st Century and pursuant to rules adopted by the State Board of Education, the Department of Education, in cooperation with the Office of Community College Services, shall develop programs that:

(a) Support effective implementation of the Oregon Educational Act for the 21st Century by providing pilot sites in secondary schools for education reform. The goal of the programs is to develop [four America's Choice] strategies within either a single or multiple school district setting by:

(A) Revising high school curricula to eliminate general studies programs after the sophomore year and replace the programs with college preparatory and professional technical education training programs.

(B) Restructuring curricula to integrate professional technical education and academic courses.

(C) Establishing the Certificate of Initial Mastery program to provide every student with an opportunity to attain mastery level at a high performance standard by approximately age 16 or grade 10.

(D) Developing professional technical education curricula, in consultation with business, labor and apprenticeship organizations and education, that offer training programs in professional technical occupations.

(E) Enrolling professional technical education students in significant structured work experiences designed to assist students in achieving job-specific competence and workplace readiness.

(F) Providing curricula that include significant *[outcomes]* academic achievements. *[in mathematics, science, language arts, history and other subjects.]*

(b) Develop an assessment system for the Certificate of Initial Mastery and provide training for school staff in implementation.

(c) Implement applied academic courses relevant to the six *[occupational strands]* career endorsement areas of study *[of the Certificate of Advanced Mastery]*.

(d) Provide for the expansion and further development of coordinated and connected professional technical instructional programs between high schools, community colleges, and apprenticeship and other training programs.

(e) Provide student leadership training and experience to students enrolled in professional technical education programs as an integral part of the program.

(2)(a) In cooperation with the Department of Education, the State Job Training Partnership Administration shall, by rule, provide for services that implement the Oregon Educational Act for the 21st Century. Grants made under this subsection shall be used to fulfill the requirement for matching federal funds allocated for education coordination under the Job Training Partnership Act.

(b) State funds may be used to match the Job Training Partnership Act education coordination federal allocation to insure that sufficient funds are available to local programs to effectively address the Oregon Workforce Quality Council's goals and benchmarks for workforce development and education reform. This pooling of funds shall leverage other local education program funds especially work based learning programs described in ORS 344.745 to 344.753 and 344.757 and provide increased services.

(3) Each regional work force quality committee created under section 7, chapter 667, Oregon Laws 1991, shall develop a plan for the implementation of the Oregon Educational Act for the 21st Century and the expenditure of grant moneys that may be received under subsection (2) of this section that includes:

- (a) Linkages between relevant education and training providers;
- (b) The development of a local plan of education coordination that links the Job Training Partnership Act with other education reform efforts prior to the distribution of funds;
- (c) Locally determined services and delivery;
- (d) Locally determined and measurable *[outcomes]* achievements addressing the particular needs of low income and minority students;
- (e) Pooled resources using Job Training Partnership Act funds and cash match;
- (f) Consolidation of administration of the program under the Department of Education; and
- (g) Equitable distribution of available funds.

(4) Pursuant to rules adopted by the State Board of Education and the State Board of Higher Education, the Office of Community College Services and the State System of Higher Education shall develop programs that bring together faculty, including but not limited to counselors, from high schools, community colleges and institutions of higher education with the participation and commitment of business to develop and promote the vision of the 21st Century workforce, to promote and provide state and regional professional development, and to provide the leadership required to implement the professional technical education components of the Educational Act for the 21st Century.

(5) The Office of Community College Services and the State System of Higher Education shall insure that programs under this section are coordinated with programs provided by the Department of Education and with any other local or state resources to avoid duplication.

(6) Pursuant to rules adopted by the Vocational Rehabilitation Division of the Department of Human Resources, in cooperation with the Commission for the Blind and the Bureau of Labor and

Industries, the Vocational Rehabilitation Division shall develop models for school-to-work transition programs for students with vocationally significant disabilities. The program is to support a wide array of rehabilitation services; to include the development of work skills, job development and job coaching, independent living skills and crisis intervention; to coordinate individualized education plans, transition plans and rehabilitation plans; and to develop apprenticeship placements. The division shall leverage the maximum amount possible in federal funds.

(7) Pursuant to rules adopted by the State Board of Education, the Department of Education, in cooperation with the Business Education Compact of Washington County, the Linn-Benton Business Education Compact and the Coos County Business Education Compact, shall develop a plan and establish pilot projects to extend the Industry Initiatives for Science and Mathematics Education program statewide.

SECTION 46. ORS 339.115 is amended to read:

339.115. (1) Except as provided in ORS 339.141 authorizing tuition for courses not part of the regular school program, the district school board shall admit free of charge to the schools of the district all persons between the ages of 5 and 19 residing therein. The person whose 19th birthday occurs during the school year shall continue to be eligible for a free and appropriate public education for the remainder of the school year. However, a district school board may admit other non-resident persons, determine who is not a resident of the district and may fix rates of tuition for nonresidents.

(2) A district must admit an otherwise eligible person who has not yet attained 21 years of age prior to the beginning of the current school year if the person is:

(a) Receiving special education; or

(b) Shown to be in need of additional education in order to receive a [*Certificate of Initial or Advanced Mastery*] diploma.

(3) An otherwise eligible person under subsection (2) of this section whose 21st birthday occurs during the school year shall continue to be eligible for a free appropriate public education for the remainder of the school year.

[(2)] (4) The person [*shall*] may apply to the board of directors of the school district of residence for admission after the 19th birthday as provided in subsection (1) of this section. A person aggrieved by a decision of the local board may appeal to the State Board of Education. The decision of the state board is final and not subject to appeal.

[(3)] (5) Notwithstanding ORS 339.133 (1), a school district shall not exclude from admission a child located in the district solely because the child does not have a fixed place of residence or solely because the child is not under the supervision of a parent, guardian or person in a parental relationship.

[(4)] (6) A child entering the first grade during the fall term shall be considered to be six years of age if the sixth birthday of the child occurs on or before September 1. A child entering kindergarten during the fall term shall be considered to be five years of age if the fifth birthday of the child occurs on or before September 1. However, nothing in this section prevents a district school board from admitting free of charge a child whose needs for cognitive, social and physical development would best be met in the school program, as defined by policies of the district school board, to enter school even though the child has not attained the minimum age requirement but is a resident of the district.

SECTION 47. ORS 327.006 is amended to read:

327.006. As used in ORS 327.006 to 327.133:

(1) "Aggregate days membership" means the sum of days present and absent, according to the rules of the State Board of Education, of all resident pupils when school is actually in session during a certain period. The aggregate days membership of kindergarten pupils shall be calculated on the basis of a half-day program.

(2) "Approved transportation costs" means those costs as defined by rule of the State Board of Education and are limited to those costs attributable to transporting or room and board provided in lieu of transporting:

- (a) Elementary school students who live at least one mile from school;
- (b) Secondary school students who live at least 1.5 miles from school;
- (c) Any student required to be transported for health or safety reasons, according to supplemental plans from districts that have been approved by the state board identifying students who are required to be transported for health or safety reasons, including special education;
- (d) Preschool children with disabilities requiring transportation for early intervention services provided pursuant to ORS 343.224 and 343.533;
- (e) Students who require payment of room and board in lieu of transportation;
- (f) A student transported from one school or facility to another school or facility when the student attends both schools or facilities during the day or week; and
- (g) Students participating in school-sponsored field trips that are extensions of classroom learning experiences.

(3) "Average daily membership" or "ADM" means the aggregate days membership of a school during a certain period divided by the number of days the school was actually in session during the same period. However, if a district school board adopts a class schedule that operates throughout the year for all or any schools in the district, average daily membership shall be computed by the Department of Education so that the resulting average daily membership will not be higher or lower than if the board had not adopted such schedule.

(4) "Consumer Price Index" means the Consumer Price Index for All Urban Consumers of the Portland, Oregon, Standard Metropolitan Statistical Area, as compiled by the United States Department of Labor, Bureau of Labor Statistics.

(5) "Kindergarten" means a kindergarten program that conforms to the standards and rules adopted by the State Board of Education.

(6) "Net operating expenditures" means the sum of expenditures of a school district in kindergarten through grade 12 for administration, instruction, attendance and health services, operation of plant, maintenance of plant, fixed charges and tuition for resident students attending in another district, as determined in accordance with the rules of the State Board of Education, but net operating expenditures does not include transportation, food service, student body activities, community services, capital outlay, debt service or expenses incurred for nonresident students.

(7)(a) "Resident pupil" means any pupil:

(A) Whose legal school residence is within the boundaries of a school district reporting the pupil, if the district is legally responsible for the education of the pupil, except that "resident pupil" does not include a pupil who pays tuition or for whom the parent pays tuition or for whom the district does not pay tuition for placement outside the district; or

(B) Whose legal residence is not within the boundaries of the district reporting the pupil but attends school in the district with the written consent of the affected school district boards. However, such written agreements shall not apply to pupils attending high school under ORS 335.090.

(b) "Resident pupil" includes a pupil admitted to a school district under ORS 339.115 [(3)] (5).

(8) "Standard school" means a school meeting the standards set by the rules of the State Board of Education.

(9) "Tax" and "taxes" includes all taxes on property, excluding exempt bonded indebtedness, as those terms are defined in ORS 310.140.

SECTION 47a. ORS 327.103 is amended to read:

327.103. (1) All school districts are presumed to maintain a standard school until the school has been found to be deficient by the Superintendent of Public Instruction, pursuant to standards and rules of the State Board of Education.

(2) If any deficiencies are not corrected before the beginning of the school year next following the date of the finding of deficiency and if an extension has not been granted under subsection (3) of this section, the Superintendent of Public Instruction may withhold portions of State School Fund moneys otherwise allocated to the district for operating expenses until such deficiencies are corrected unless the withholding would create an undue hardship, as determined pursuant to rules of the State Board of Education.

(3) Within 90 days of the finding of deficiency, a school district found not to be in compliance shall submit a plan, acceptable to the Superintendent of Public Instruction, for meeting standardization requirements. A team of Department of Education staff, *with Distinguished Oregon Educators, when feasible, operating under the direction of the Department of Education,* shall visit the school district and offer technical assistance, as needed, in the preparation and implementation of the plan. When an acceptable plan for meeting standardization requirements has been submitted, the Superintendent of Public Instruction may allow an extension of time, not to exceed 12 months, if the superintendent determines that such deficiencies cannot be corrected or removed before the beginning of the next school year. However, no extension shall be granted if it is possible for a district to correct the deficiency through merger. For the period of the extension of time under this subsection, the school shall be considered a conditionally standard school.

(4) Any district failing to submit a plan for meeting standardization requirements within the time specified shall receive no further State School Fund moneys until a plan acceptable to the Superintendent of Public Instruction is submitted irrespective of the district's being given one year in which to comply.

SECTION 48. ORS 332.172 is amended to read:

332.172. (1) Subject to ORS [329.705 (6) and] 330.430, the district school board may permit the use of school buildings and grounds for civic and recreational purposes, including use for:

(a) Supervised recreational activities;

(b) Meeting places for discussion of all subjects and questions which in the judgment of the residents may relate to the educational, political, economic, artistic and moral interests of the residents, giving equal rights and privileges to all religious denominations and political parties; and

(c) Such other proper purposes as may be determined by the board.

(2) The district school board may appoint a special supervising officer to have charge of the buildings and grounds, preserve order, protect school property and do all things necessary in the capacity of a peace officer to carry out the provisions of this section.

(3) The district school board may establish a schedule of fees and collect fees pursuant to the schedule for use of school buildings and grounds and other facilities, including but not limited to gymnasium equipment, swimming pools, athletic fields and tennis courts.

(4) Expenses for light, heat, janitor services and services of the special supervising officer provided in connection with use of buildings and grounds under this section which are not covered by the fees charged under subsection (3) of this section shall be paid out of the county or special school funds of the district in the same manner that other similar services are paid.

(5) The district school board shall make rules governing the use of school buildings and grounds under this section.

SECTION 49. Section 13, chapter 693, Oregon Laws 1991, is amended to read:

Sec. 13. (1) [By 1996,] There is a high priority given to the Oregon 21st Century Schools Program under ORS 329.535 to 329.605 and the School Improvement and Professional Development program under ORS 329.675 to 329.745. Therefore, in addition to other funds available for the purposes of the Oregon 21st Century Schools Program [under ORS 329.535 to 329.605] and the School Improvement and Professional Development program, [under ORS 329.675 to 329.745, an amount equal to one percent of the State School Fund shall be used for the purposes of ORS 329.535 to 329.605 and 329.675 to 329.745 before any other distribution is made] as funds become available, an additional amount may be allocated by the Legislative Assembly for the purposes of these programs. The amount shall be distributed to eligible school districts at the same time and in the same manner as the State School Fund is distributed. The amount distributed to any eligible school district depends on the amount approved in the school district's application.

(2) [Out of the amount available for distribution under this section, an amount equal to five percent thereof shall be distributed to eligible school districts that demonstrate substantial progress in student performance as a result of changes made, taking into consideration such factors as the socioeconomic characteristics of the student population.] The decision to distribute funds under this [subsection]

section shall be made by the State Board of Education on advice of the Oregon 21st Century Schools Advisory Committee.

SECTION 50. ORS 329.055, 329.455, 329.495, 329.505, 329.535, 329.753 and 329.935 are repealed.

Passed by House March 23, 1995

Received by Governor:

Redacted for privacy
Ref

Pa:

Ref

Enrolled House Bill 2991

Appendix C
Letter of Consent, OSBA

April 8, 1996

Dr. Jim Carnes
OREGON SCHOOL BOARD'S ASSOCIATION
1201 Court Street N.E.
Salem, OR 97301-4126

Dear Jim,

As we discussed on the telephone I am requesting permission to utilize the "Quality Leadership Inventory" as an instrument to understand school board leadership relative to the Oregon Educational Act for the 21st Century. The modified QLI will be used with Board members, site council chairs and at least one superintendent in interviews and through focus groups to collect data for my dissertation regarding leadership for the advancement of instructional quality.

Results from the study will be made available to Oregon State University, study participants and the Oregon School Board's Association.

Thank you in advance for your assistance and do not hesitate to call should you have any additional questions regarding the use of this instrument.

Sincerely,
Redacted for privacy

✓ Mary Ann Carlson
Doctoral Student

MAR:km

April 8, 1996

Dr. Jim Carnes
OREGON SCHOOL BOARD'S ASSOCIATION
1201 Court Street N.E.
Salem, OR 97301-4126

Dear Jim,

As we discussed on the telephone I am requesting permission to utilize the "Quality Leadership Inventory" as an instrument to understand school board leadership relative to the Oregon Educational Act for the 21st Century. The modified QLI will be used with Board members, site council chairs and at least one superintendent in interviews and through focus groups to collect data for my dissertation regarding leadership for the advancement of instructional quality.

Results from the study will be made available to Oregon State University, study participants and the Oregon School Board's Association.

Thank you in advance for your assistance and do not hesitate to call should you have any additional questions regarding the use of this instrument.

Sincerely,
Redacted for privacy

✓ Maryalice Russell
Doctoral Student

4/9/96

MAR:km

Approval granted for use of Quality
Leadership Inventory.

Redacted for privacy

Appendix D

Sample Letter to Board Members

April 8, 1996

School Board Member
Address

Dear

In partial fulfillment of the requirement for Degree of Doctor of Education from Oregon State University I am in the process of writing my dissertation. The study is focused on school board leadership and the advancement of instructional quality as defined by the Oregon Educational Act for the 21st Century. I am using the Oregon School Boards Association Quality Leadership Inventory (QLI) as a framework to learn from board members and site chairs, their perceptions of leadership and advanced instructional quality.

I am requesting your voluntary participation in the study. I would like to schedule a time for you to discuss vision, structure, accountability and advocacy as related to HB2991 and board leadership. I will be contacting you by phone to determine your interest in participating and to set up a date to meet with you. If you prefer, you may contact me at my office 684-2222, or at my home 658-3511 as well.

For purposes of confidentiality all data represented in the dissertation will be absent of individual names. Results from the study will be made available to Oregon State University, study participants and the Oregon School Boards Association.

Again, your participation is completely voluntary. Thank you in advance for your consideration to participate.

Sincerely,

Maryalice Russell
Doctoral Candidate

Appendix E

Sample Letter to Site Council Chairs

April 11, 1996

Site Council Chair Name:
School:

Dear

In partial fulfillment of the requirement for Degree of Doctor of Education from Oregon State University I am in the process of writing my dissertation. The study is focused on school board leadership and the advancement of instructional quality as defined by the Oregon Educational Act for the 21st Century. I am using the Oregon School Boards Association Quality Leadership Inventory (QLI) as a framework to learn from board members and site chairs, their perceptions of leadership and advanced instructional quality.

I am requesting your voluntary participation in the study. I would like to schedule a time for you to participate as a member of a site council chair focus group to discuss vision, structure, accountability and advocacy as related to HB2991 and board leadership. I will be contacting you by phone to determine your interest in participating and to set up a date to meet with you. If you prefer, you may contact me at my office 684-2222, or at my home 658-3511 as well.

For purposes of confidentiality all data represented in the dissertation will be absent of individual names or identification of individual school sites. Results from the study will be made available to Oregon State University, study participants and the Oregon School Boards Association.

Again, your participation is completely voluntary. Thank you in advance for your consideration to participate.

Sincerely,

Maryalice Russell
Doctoral Candidate

Appendix F

Interview Questions

Board Member (*site council*) perceptions of the relationship between school board leadership behaviors and the advancement of three components of instructional quality of the Oregon Education Act for the 21st Century.

I would like to know your perception of the board's leadership behavior in 4 areas as it relates to 3 traits of the Oregon Education Act for the 21st Century, HB2991. The leadership and HB2991 components will be identified and defined throughout the survey.

In each case, you will provide a perceiver rating of the board's leadership behavior in that area. Your "perceiver rating" is defined as your experiences - what you have actually observed the board do at staff meetings and school board meetings for example and what you have learned about the board's leadership behavior from your peers, your association, and others. Your perceiver rating is a combination of personal experiences and formed experiences.

The perceiver rating is on a 7 point scale, with 1 being no experience, 4 being some experience, and 7 being frequent experience. The first 4 questions are demographic and baseline information gathering questions. Leadership in relationship to HB2991 questions will begin with question number 5.

1. How long have you served as a site council member for your school?

2. Why did you run for the site council?

3. What words do you believe describe school board leadership?

4. How would you describe your level of involvement with the board?

[illegible]

a) Please describe one example of involvement with the board.

5. The first area is called vision. In terms of school board leadership behavior, what is your perceiver rating with vision being the adoption of a mission statement, district goals, and public involvement in the creation of the same?

[illegible]

a) Based on your experience describe the adopted mission, goals, and public involvement solicited in creating them.

6. Using this definition of site councils - an elected group of professionals, parents and community members charged with implementation of the Oregon Educational Act for the 21st Century - does the board's vision impact site councils?

[illegible]

a) Please describe one example of how board vision impacts site council.

10. Using the same definition for site councils referred to earlier, do structures established by the board impact site councils?

[illegible]

a) Please describe one example of how structure has impacted site council.

11. Using the same definition for self-evaluation referred to earlier, do structures established by the board impact self-evaluation?

[illegible]

a) Describe one example of how structure impacts self-evaluation.

12. Using the same definition for CIM referred to earlier, do structures established by the board impact CIM?

1 2 3 4 5 6 7
No experience Frequent experience

a) Please describe one example of how board structure impacts CIM.

13. The third area is called accountability. In terms of school board leadership behavior, what is your perceiver rating with accountability being processes which ensure regular evaluations of vision, structure, and advocacy?

[illegible]

a) Based on your experience describe how the board regularly evaluates vision, structure, and advocacy.

14. Do accountability processes established by the board impact site councils?

[illegible]

a) Please describe one example of accountability impacting site councils.

15. Do accountability processes established by the board impact self evaluation?

[illegible]

a) Please describe one example of accountability impacting self-evaluation

19. Does board advocacy for public education and school improvement impact self-evaluation?

[illegible]

a) Please describe one example of advocacy impacting self-evaluation.

20. Does board advocacy for public education and school improvement impact CIM?

[illegible]

a) Please describe one example of advocacy impacting CIM.

21. Please feel free to provide any additional comments.

**A synopsis of this study will be available after August 30, 1996.
Thank you for your participation.**

Appendix G
Human Subjects Approval Form

APPLICATION FOR APPROVAL OF THE OSU INSTITUTIONAL REVIEW BOARD (IRB)
FOR THE PROTECTION OF HUMAN SUBJECTS

Principal Investigator* Joanne (Jodi) B. Engel, Ph.D.

Department Education Phone 7-5689

Project Title A Study of the Relationship Between School Board Leadership Behavior and Advancement of Instructional Quality

Present or Proposed Source of Funding None

Type of Project: Faculty Research Project

X Student Project or Thesis*

Student's name Marvalice Russell Phone 684-2222

Student's mailing address 20550 SE High Ridge Court - Boring, OR 97009

Type of Review Requested: X Exempt Expedited Full Board

The Oregon State University Institutional Review Board (IRB) for the Protection of Human Subjects is charged with the responsibility of reviewing, prior to its initiation, all research involving human subjects. The Board is concerned with justifying the participation of subjects in research and protecting the welfare, rights and privacy of subjects.

All material, including this cover sheet, should be submitted **IN DUPLICATE** to the Research Office, AdS A312. Please call x7-0670 if you have questions. The following information must be attached to this form with each item identified and addressed separately or the application will be returned without review.

1. A brief description (one paragraph) of the significance of this project in lay terms.
2. A brief description of the methods and procedures to be used during this research project.
3. A description of the benefits (if any) and/or risks to the subjects involved in this research.
4. A description of the subject population, including number of subjects, subject characteristics, and method of selection. Justification is required if the subject population is restricted to one gender or ethnic group.
5. A copy of the informed consent document. The informed consent document must include the pertinent items from the "Basic Elements of Informed Consent" and must be in lay language.
6. A description of the methods by which informed consent will be obtained.
7. A description of the method by which anonymity or confidentiality of the subjects will be maintained.
8. A copy of any questionnaire, survey, testing instrument, etc. (if any) to be used in this project.
9. Information regarding any other approvals which have been or will be obtained (e.g., school districts, hospitals, cooperating institutions).
10. If this is part of a proposal to an outside funding agency, attach a copy of the funding proposal.

Signed _____ Date _____
Principal Investigator*

*NOTE: Student projects and theses should be submitted by the major professor as Principal Investigator.

Title: A study of the Relationship Between School Board Leadership Behavior and Advancement of Instructional Quality.

1. Brief Description: Investigate Board and site council perception regarding board leadership behavior and the advancement of instructional quality. Instructional quality - components of the 1995 Oregon Education Act.
2. Methods and Procedures: Board members and site council chairs will be interviewed using questions keyed to the NSBA Quality Leadership Inventory (QLI). Questions intended for use in the study are attached. All information will be confidential.
3. Benefits/Risk: Information regarding Board leadership and implementation of the Oregon Education Act have implications for Board training programs and will be of benefit to Board associations and school districts. Additionally, an understanding of the role board members play in the advancement of instructional quality is important in regard to National and Local restructuring efforts.

Subjects involved in the research will not be exposed to any risk and will be welcome to a review of the results following completion of the study.

4. Population: Five board members and twenty site council chairs from a single district will be interviewed for this study. The district's superintendent and three other district representatives will also be interviewed and will compose the population intended for a field test of the interview questions. The Board members and site council chairs constitute all individuals within the district representing those positions. The population includes both genders, licensed staff, parents and professionals from other fields. All participants in the study will do so on a voluntary basis.
5. Consent Document: Attached.
6. Obtaining Consent: Participants will be mailed a personal letter from the researcher explaining about the study. In the same mailing, the attached consent form will be enclosed. One week following the mailing a phone contact from the researcher inviting participation and arranging for the interview will be made to each Board member and site council chair. Individuals agreeing to participate will sign and return the document to the researcher (either by mail or in person) prior to the start of the scheduled interview.
7. Confidentiality: Data will be kept in a locked file at the home of the researcher and kept confidential. No names will be used in any data summaries or publications.
8. Questionnaire: See attached.
9. Other Approvals: Tigard-Tualatin School District: Letter attached.
Oregon School Boards Association: Letter attached.
10. Funding: No outside funds.

INFORMED CONSENT DOCUMENT

Title of Research Project: A Study of the Relationship Between School Board Behavior and the Advancement of Instructional Quality.

Investigators: Joanne E. Engel, Ph. D. 541-737-5989
Maryalice Russell, Associate Superintendent - TTSD
(w) 503-684-2222 (h) 503-653-3511

Purpose of the Project: This study is designed to investigate the relationship between school board leadership and the advancement of instructional quality.

Procedures: I have received an oral and written explanation of the study and I understand that as a participant in this study the following things will happen:

1. I will participate in a focus group interview (site chairs) or individual interview (Board members) with the researcher.
2. During the interview I will be asked questions about leadership, the Oregon Education Act, boards, and site councils. I will also be asked questions to assist the researcher establish baseline information regarding participants such as length of service as a site chair or board member and other related experiences.

Confidentiality: I understand that any information obtained from me will be kept confidential. The only person that will have access to this information will be the investigators. No names will be used in any data summaries or publications. If questions or concerns arise contact Dr. Engel or M. Russell.

Voluntary Participation Statement: I understand that my participation in this study is completely voluntary and that I may either refuse to participate or withdraw from the study at any time without penalty or loss of benefits to which I am otherwise entitled.

My signature below indicates that I have read and understand the procedures. I give my voluntary and informed consent to participate in this study.

Participant Signature

Date

Researcher Signature

Date

Researcher Signature

Date

April 11, 1996

Human Rights Review Committee
Oregon State University
Administrative Services A312
Corvallis, OR 97331-5109

Dear Committee Members,

I have reviewed the research project to be conducted within my district by Dr. Jodi Engel and Maryalice Russell. I support the research and hope it will provide the district with insight in regard to board leadership and the Advancement of Instructional Quality.

Sincerely,

Superintendent

OFFICE
OF
DEAN OF RESEARCH



OREGON
STATE
UNIVERSITY

312 Administrative Services
Corvallis, Oregon
97331-2140

541-737-0670
FAX: 541-737-3093
INTERNET
nunnm@ccmail.orst.edu

May 3, 1996

Principal Investigator:

The following project has been approved for exemption under the guidelines of Oregon State University's Committee for the Protection of Human Subjects and the U.S. Department of Health and Human Services:

Principal Investigator(s): Joanne B. Engel

Student's Name (if any): Maryalice Russell

Department: Education

Source of Funding:

Project Title: A Study of the Relationship between School Board Leadership Behavior and Advancement of Instructional Quality

Comments:

A copy of this information will be provided to the Committee for the Protection of Human Subjects. If questions arise, you may be contacted further.

Sincerely,

Redacted for privacy

Sponsored Programs Officer

cc: CPHS Chair