



*Parent Press*, Fall 2004  
**Real Parents Make Real Differences**  
[Expanded Chapter Stories on School Finance Work]

In communities across the nation, parents and other concerned citizens give countless hours to make sure their public schools have the money needed to teach children. They monitor spending, ask questions and make recommendations to encourage fiscal responsibility. Over time these parents become quite knowledgeable about their local and state funding processes. They also understand the political “ins and outs” of bond elections and levy votes.

To learn from some of these experts, *Parent Press* contacted members of four PPS chapters. These are regular people. They have families to care for, jobs to do, community responsibilities...AND they have a commitment to their public schools. Their zeal is evident in the stories. More importantly, they prove that committed parents working together can be the difference between success and failure for critical school funding issues.

### **Portland, Oregon**

Members of *Community & Parents for Public Schools* (CPPS) were involved in school funding issues before becoming a PPS chapter. Two of these long-time activists are past CPPS president **Bill Hallmark** and **Scott Bailey**, current CPPS president and a PPS national board member.

One of the reasons they organized as a PPS chapter was to address school quality concerns like parent involvement in decision-making, smaller class sizes and instructional issues. They have been successful but learned that parents can't ignore financial issues. As Bailey says, “How could parents live with themselves if they stood on the sidelines and watched their public schools crumble? What difference would it make to work on other school quality issues without enough money? We have to engage.”

Hallmark distinguishes between the work of the PPS chapter and the work done by many of the same people on various ballot measures. They even form separate organizations to handle the political side of the work. Hallmark likes this approach because it eliminates concerns about violating IRS regulations for tax-exempt organizations. It also helps maintain CPPS's reputation as the group that focuses on issues of teaching and school quality, not just funding issues.

Asked to describe differences in the kinds of work each group does, Hallmark notes, “Campaigns are like sprints. We have lots of organizing and energy and coordinating of supporters. We shoot out the gate at full speed and go full steam until the end when we're exhausted but hopefully successful. CPPS's work on school quality issues is more like a marathon. We're going all the time, but we are constant and pacing ourselves for the long haul.”

While the public may not see that the same people are doing work in both arenas, the school district certainly does. This helps parents gain credibility with district people. They learn that they need parents to be successful in both areas.

### **School Funding Crisis**

Organized parent involvement in school funding issues grew out of two significant changes in Oregon—property tax limitation measures and a successful school funding equity lawsuit.

The result was a shift from local to state responsibility. This reduced funding for Portland public schools where voters had always supported the schools well beyond the level of support by other Oregon communities. Add to this “perfect storm” the impact of the recession and in 2003 Portland was looking at a \$57 million deficit and a teacher union strike over health benefits.

With the prospect of cutting 24 days off their children’s school year, parents insisted that city, school and county officials, business, education and parent leaders work together to address the crisis. Getting these people together was a big deal. Not everyone readily came on board. But the spontaneous uproar of parents made it politically unpopular to oppose the plans, which included a temporary surcharge on business license fees, the teachers volunteering to work ten days without pay, and a temporary county-wide tax measure to fund schools, human services and public safety. These results are a clear example of how important organized parents can be. When parents and others demanded that those with the power do something, leaders were forced to lead and not simply criticize others’ ideas.

### **Get Out the Vote**

HOPE (Help Out Public Education), the political organization that parents formed, used a variety of strategies to educate voters on the importance of their support for this measure. HOPE volunteers used phone banks to identify “yes” voters and then followed up with reminder calls after ballots were mailed to all registered voters.

Other strategies included sending speakers to community organizations, walking door to door, volunteering to pick up ballots at schools, and calling for more ballot drop-off locations.

In a show of community support this critical funding measure passed by a 57% margin even during the recession. Bailey says of this huge effort, “The hours of hard work paid off in real benefits. I am convinced that we saved our school district last spring. That means something!”

This temporary tax has been challenged for repeal, which puts it before voters again in the fall of 2004. The PPS chapter has developed a PowerPoint presentation on school budget basics that is being shown at school functions and to civic groups. Polling shows that voters supported funding public schools, but many mistakenly think as much as 25% of the district budget is spent on administration. The facts as presented by these parents show that only 3% is spent on administration. Accurate information like this presented by informed parents makes it possible for voters to see the real needs of their public schools.

### **Other Ways They Impact School Budgets**

Working on ballot measures is not the only option for parents in Portland. PPS also works to get principals to include parents in their budget planning process. And the chapter trains parents to understand school budgets and see how spending impacts student achievement.

After a district-wide audit, joint parent/citizen/district committees formed to make budget saving recommendations. Also, parents serve on the Citizens Budget Review Committee, providing access to all district budget information.

Another way to influence financial matters exists because of the relationships that CPPS has developed with the school board and administration. In conversations with these leaders, parents are able to share their vision and goals for Portland public schools. This is one of the avenues that the chapter uses to make certain decisions impact all students, not just those who have advocates.

## **Two Tales from New York State**

Two New York PPS chapters have been involved in school funding issues at the local and state levels. *Parent Press* talked with **Linda Roberts**, founder of the Hudson Valley chapter and a PPS national board member, and **Pam Percival**, past president of the Syracuse PPS chapter.

Funding for public schools in New York can only be described as bizarre. For twenty consecutive years the legislature has missed the April 1<sup>st</sup> deadline for a state budget, which means school districts have no idea how much money they will receive for the upcoming fiscal year. The budget process depends almost entirely on “closed door” discussions between the governor, and the leaders in the Senate and State Assembly. Other legislators are included only at the end of the process.

Adding to this difficult situation, the five “Big City Schools” in the state—Buffalo, New York City, Rochester, Syracuse and Yonkers— are totally dependent on the state and local Common Council (city council) for their school funds. Their local school boards have no authority to raise public money. They must present a proposed annual budget to the Common Council, which determines how much local tax money actually will be allocated to the public schools. Only then can the school board and administration develop a true budget for the school year.

In 1993, New York City filed a lawsuit against the state to force more equitable funding formulas and to bring their district up to the level of a “sound basic education.” As this case moved through the courts, the Campaign for Fiscal Equity, Inc. (CFE) joined the suit, and it became clear that the impact of a decision would reach far beyond NYC. The political action arm of this effort is known as the Alliance for Quality Education and Citizen Action of NY (AQE).

In July 2003, the state’s highest court ruled that the state not only under-funded NYC schools but all high-needs districts in the state. Based on this ruling, State School Board Association and CFE asked researchers to determine how widespread the problem was and how much it would cost for these under-funded school districts to achieve a “sound basic education.” Their discovery was shocking with more than 500 districts inadequately funded to meet the state’s tougher educational standards.

Leadership by the governor has included a recommendation to use gambling money to supplement the education budget. This idea was not well-received. At one point Governor George Pataki declared that an 8<sup>th</sup> grade education was adequate for New York students and an interim court agreed.

Fortunately AQE refused to sit idly by. They planned demonstrations that converged on the state capital. Both Syracuse and Hudson Valley organized school busloads of parents and students. One Hudson Valley parent, who dropped out of school in the 8<sup>th</sup> grade, was quoted as saying that her daughter needed more...she knew that firsthand. Finally the governor withdrew from his position and the court reversed itself, saying that twelve years of schooling was needed.

The court’s verdict mandated the state legislature to come up with a new funding process by July 31, 2004. Unable to break the impasse, the legislature adjourned without meeting this deadline. Now the responsibility goes back to the courts, which will appoint masters to implement a plan. However, because only New York City was named in the lawsuit, any plan can only impact their financial situation. Percival notes, “the legislature should be doing much more. There is no sense of urgency around this issue. They could have used this ruling to make big changes, but they are choosing to do nothing.”

## **Hudson Valley, New York**

In this small rural district 90 miles north of NYC, PPS parents seized opportunities to engage in the Campaign for Fiscal Equity. Partnering with the local League of Women Voters, they gathered

information, developed strategies and looked for ways to make sure the needs of rural public schools were not overlooked.

When the League and CFE decided to hold study circles around the state to increase grassroots understanding of the funding issues, PPS volunteered to facilitate two—in the towns of Kingston and Hudson Valley. CFE’s final statewide report included specific comments made at the Kingston event.

PPS heard again and again that the average person could not comprehend a school budget—it was too complex. Yet the public is expected to vote annually to fund the proposed budget. And when voters with the most invested—parents—don’t understand the budget, they often ask the wrong questions. Uninformed voters tend to ask “How much will my taxes be?” rather than asking deeper questions like “What’s being done to close the achievement gaps between groups of students” or “How does the budget support district goals and improve learning for all students?”

In 2001 voters rejected the proposed budget, setting in motion some major cuts in programs and personnel. Roberts says, “We survived, but it was really tough. The upside is that parents and the teachers union were involved in helping decide where these deep cuts would be made.”

### **Local Issues**

Unfortunately, many parents have grown used to funding crises. They feel unable to impact the problem at the state level because their representatives and senators are kept out of the process until the end. This attitude trickles down to the school level where there is very little parent or community involvement in budget planning. PPS has had an impact on the thinking of the school board, which is helping to open the process.

According to Roberts, the greatest need in her district is a redistribution of existing money. With higher standards for all children, the current programs are not equipped to help students meet these greater expectations. When parents understand the district budget, they can challenge current practices that may be well-meaning but misguided. An example of this in Hudson Valley would be the huge expenditures for remediation in the 9<sup>th</sup> grade. Roberts challenges the wisdom for this when she asks, “Why not put more money for remediation into the earlier grades before it’s too late for so many students?”

One superintendent wanted to open the budget planning process. He named a task force to figure out how the budget got created. This group made several recommendations like training decision-makers early and opening meetings to the public. They called for each principal to present a campus budget that is tied to the school improvement plan and approved by the shared decision-making committee. This would help parents and the community see connections between the plans and the money. Now almost two years old, the recommendations haven’t yet been implemented, but the process is slowly beginning to change.

The most frustrating aspect of this work for PPS parents is the inability or unwillingness of some professionals to see why the community needs to understand the budget before they vote on it. Roberts believes, “Citizens, especially parents, have an obligation to understand the budget. By opening up the process schools can help voters meet this obligation and monitor their public schools for a good return on their investment.”

Roberts’ says that PPS’s goal is for parents and the public to see the public school budget as the mechanism to get the big picture. In Hudson Valley a concern for the poor and underachieving is still not great enough to drive some needed changes. The county is in the process of constructing a new

jail at a cost approaching \$100 million. Roberts and others like her hope that the new jail is never filled “because of the way Hudson Valley public schools educate and support all of our children.”

### **Syracuse, New York**

The State funds about 60-65% of the Syracuse City Schools budget. From 1993 to 2001 the schools saw no increase in local revenue, causing a growing point of contention between the city and state. In fact, the local contribution to the school budget was \$1.8 million less in 2003 than in 1993. During school budget season parents would line up at Common Council meetings and beg to have their taxes raised so that the public schools could have more local revenue.

The pleas fell on deaf ears for several reasons. As Percival, a psychologist, so aptly puts it, “We suffered through parallel non-interactive conversations each budget cycle. The city was not doing its share to fund public schools but blamed the public schools for being financially irresponsible. The public schools were not managing their finances well but blamed the city for not properly funding the public schools. Both were true, but no one ever talked about these issues together or acknowledged that the other side had valid points.” Also, few members of the Common Council had children in the public schools and many had no first-hand knowledge of the schools, so the desperate situation was not as real to them.

### **Some Changes for the Better...**

Several factors came together to break this logjam. The district hired a new chief financial officer, increasing confidence in the district’s financial management. New people were elected to the Common Council, including a former school board member, who were sympathetic to these concerns. The new mayor raised taxes three times to increase school funding. According to Percival, “The Common Council has coalesced around the public schools.” PPS claims some credit for the improvements by consistently pushing their message of constructive cooperation.

These changes also opened up the funding process. The Common Council Education Committee now publicizes its meetings. Parents, city and school district officials meet monthly rather than only during budget time. Council members visit schools and see the needs first-hand. More importantly, leadership recognizes the value of parents being engaged around this issue. PPS parents are finally at the decision-making table with “the big boys.” The prospects for continued cooperation look good on this local front.

Not wanting to wait for the legal issues to be solved, in 2000 PPS began raising issues about inequitable funding between Syracuse city schools and between districts in Onondaga County. [For details on this early work of the Equity Project, see the *Parent Press* issue, ***PPS in Action: Stories from the Field***, page 4.] Even more alarming, through Equity Project research and continued involvement in AQE, PPS learned that all the districts in Onondaga County were significantly underfunded when compared to downstate and Long Island public schools.

PPS newsletters report on the impact that the CFE lawsuit could have locally. They sponsored a postcard campaign to elected officials. They organized Rallies for MORE (Momentum Opportunities Resources Excellence) with the teachers union that brought out hundreds of citizens, including sympathetic parents from other districts who understand that funding shortages put Syracuse students at a disadvantage. Citizens were asked to expect more from each other, demand more from public officials and do more to make the schools successful.

### **...but Troubles Continue**

PPS supported an AQE protest in Albany in June. School board president Cynthia Kirby (a PPS’er) chastised the legislature for its inaction. She noted that Syracuse city schools face a \$33 million hole

in the 2004-05 budget that could lead to the elimination of as many as 750 jobs. “If Carrier Corp. were going to lay off 750 workers, everybody would be falling over each other to see what they could do.”

Kirby and two council members were arrested for civil disobedience. Pat Waelder, a former school board member and now on the Council (also a PPS'er) said of the experience, “All we have is our reputation to put on the line. I don't do this lightly.”

Percival says the continued funding struggles have hurt the city and the schools. In nineteen years 60,000 people have left Syracuse, many moving to suburban or private schools because of the city's long-standing financial problems. With no solution in sight, continued cuts will fuel this exodus.

She worries that parents don't comprehend the extent of the crisis. Potential cuts could eliminate athletic and fine arts programs, many assistant principal and counselor positions, professional development funding, increase class sizes and much more. But no one really knows until the legislature passes a state budget.

The district is seriously considering suing the state because they see no other recourse. Meanwhile PPS continues to call for fair distribution of the dwindling resources and continued collaboration to sustain community support for its public schools.

### **Cincinnati, Ohio**

Cincinnati PPS has a powerful history of engagement on school funding issues. **Parent Press** visited with **Carolyn Turner**, the chapter's executive director and with chapter founder and former PPS national board president **Brewster Rhoads**.

Like other states, Ohio's school funding formulas have been challenged in the courts. Currently 60% of the cost to educate a student in Ohio comes from local property taxes. This causes variations from \$4,000 to \$12,000 in per-student funding, depending on local property wealth. The courts ruled that the formulas must be changed, but the state has been slow to act.

In 2003 the governor appointed a Blue Ribbon Task Force. At the same time the Ohio Fair Schools Campaign (OFSC) formed to keep grassroots pressure on the state. When the Task Force announced it would review current practice and make recommendations without public input, OFSC organized several public hearings.

### **Work at the State Level**

PPS helped organize and host the Cincinnati hearing. The effort strengthened PPS ties with its urban district, the unions, neighboring suburban districts and other organizations concerned about the funding structure. This coalition continues to meet and strategize.

The Task Force is not expected to recommend major changes to the state's over-dependence on property taxes. Rhoads reports, “What's needed is the political will to increase revenue from the state to equalize funding around the state. But this isn't there; the anti-tax/low tax voice is louder right now.”

### **Parents also do Local Work**

Fortunately for Cincinnati many parents aren't waiting to act. They have worked for years to make sure their public schools are properly funded.

After a string of defeated district-organized levy votes, parents, business leaders and other public school supporters organized Cincinnatians Active to Support Education (CASE). Since 1980 CASE has run a levy campaign almost every two years, most of which they have won. In May 2003 this group was instrumental in passing a \$1 billion bond levy for building renovations and construction. This same levy package had failed previously due to a lack of grassroots support.

Many of the leaders and volunteers in CASE are PPS members. These volunteers plan, coordinate workers, make speeches, stuff envelopes, do clerical work, run voter registration drives, door-to-door campaigns and phone banks. A campaign veteran, Rhoads says that the customers—parents—must be seen in the forefront of school ballot issues before "swing" voters in the general public can be expected to seriously consider raising their taxes for local public schools.

Most school levies in Ohio are good for five years, then must be renewed by the voters or replaced with a new levy that will bring in additional dollars. As school district expenses increase over time, revenue from levies remains constant. The result is a vicious cycle with voters being asked to increase their tax rates every 2-3 years so that revenue for schools keeps pace with inflation. Turner says, "People are sick of having so many levy votes. They're sick of watching their taxes go up and up. Parents are tired of working on campaigns year after year, but they keep volunteering to work because they don't want the kids to suffer."

The penalty for losing a campaign can be high. If the fall 2004 campaign to renew an expiring levy fails, the district would be forced to cut \$32 million from its budget for 2004-05 school year—the equivalent of 500 teachers, according to the district. If the 2005 levy vote fails, a total of \$65 million would have to be cut from the 2006-2007 school year - the equivalent of 15% of the district's annual budget!

While CASE works on levy campaigns, PPS continues its work on other school-related issues—even when the volunteers are the same people. Turner makes a good point, "As an organization PPS has to be careful not to push too hard for levies because some of our members may not want their taxes to go up any more. It's a fine line we walk to make sure parents understand the situation but are free to vote their conscience. All parents are welcomed in PPS because we have many issues parents can work on."

### **Other Avenues for Financial Impact**

PPS impacts the financial picture in other ways as well. The Cincinnati Public Schools (CPS) Budget Commission meets every spring to review the central office budget. PPS names parents to serve each year. Although some people continue to consider them outsiders, these parents question specific expenditures and the practices behind them.

According to Turner, poor monitoring of some expenditures and decreasing enrollment of about 2000 students per year for five years are major causes of the current budget crisis. CPS expects to pay \$11.8 million to other districts and institutions for special-needs students. PPS has called for tracking of these students and funds. In addition, local charter schools are growing and state law requires CPS to pay them approximately \$34 million in the coming year. PPS has challenged the district to "develop a plan to address the reduced enrollment and budgetary crisis facing the district." Turner said the district should adopt a parent-friendly recruitment and retention plan and find strategies to reduce the out-of-district tuition payments.

At the school level, parents can participate in budget planning through the shared decision-making councils. PPS offers training for these parents to strengthen their skills in this important work.