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MEMORANDUM

TO: School District Superintendents

FROM: Jim Horne

DATE: June 11, 2003

SUBJECT: Implementation of Class Size Reduction Requirements

This memorandum provides background information on the Class Size Reduction Amendment and the class size reduction implementing legislation (Senate Bill 30A). In addition, attached is a report providing the Baseline Class Size Averages for each district. The Baseline Class Size Averages will be used to determine each district's compliance with the class size reduction requirement beginning in October 2003.

In summary, the baseline information indicates most districts are below the maximum district class size average of 25 students per class at the 9-12 grade group. Three districts exceed the maximum in this grade group.

In Prekindergarten through 3 and 4-8 grade groups, many districts exceed the maximum district class size averages. In Prekindergarten through 3 grade group, 60 districts exceed the maximum class size average of 18 students per class. In the 4-8 grade group, 41 districts exceed the maximum class size average of 22 students per class.

District level and school level averages will be used to determine compliance with the class size reduction requirement through 2007-2008. In 2008-2009 compliance will be determined at the individual classroom level. Therefore, budget and program decisions on how best to reach the constitutional mandate to reduce class sizes will require careful, ongoing analyses of class size averages to ensure planned class size reductions will enable the district to meet the individual class size maximums.

Determination of Baseline Class Size Averages

To determine the baseline data for each district, the Department established a one-time, special collection of information from districts to update the February 2003 student membership survey. Because the data system for reporting was not originally designed to accommodate the collection of information either at the classroom level or for pullout classes, a major change was made to the collection formats to add three data elements for reporting and calculating the average class size data. These new elements include the following:

1. Classroom Identification Number as reported in the Florida Inventory of School House (FISH);
2. Scheduling Method; and
3. Day of Week Scheduled.

The Baseline District Class Size Averages include only core courses. Core courses are courses defined as mathematics, language arts/reading, science, social studies, foreign language, English for Speakers of Other Languages, exceptional student education, and courses taught in traditional self-contained elementary school classrooms.

BACKGROUND INFORMATION

Constitutional Requirement

Section 1 of Article IX of the State Constitution was amended in November 2002 establishing, by the beginning of the 2010-2011 school year, the maximum number of students in core-curricula courses assigned to a teacher in each of the following three grade groupings: (1) Prekindergarten through grade 3, 18 students; (2) grades 4 through 8, 22 students; and (3) grades 9 through 12, 25 students. Beginning with the 2003-2004 fiscal year, the Legislature shall provide sufficient funds to reduce the average number of students in each classroom by at least two-students-per-year until the number of students per classroom does not exceed the maximum. Payment of the costs associated with reducing class size to meet these requirements is the responsibility of the state and not of local school districts.

Implementing Legislation—Quality Education Act (SB-30A)

The Legislature enacted SB-30A specifically implementing the reduction of the average number of students in each classroom by at least two-students-per-year beginning with the 2003-2004 fiscal year until the maximum number of students per classroom does not exceed the 2010-2011

maximum. If a district's class size does not meet the required maximum, the district must reduce to the constitutional maximum in each of the three grade groupings or the average number of students in each of the three grade groupings by at least two-students-per-year as follows:

- 2003-2004, 2004-2005 and 2005-2006 at the **district** level
- 2006-2007 and 2007-2008 at the **school** level
- 2008-2009 at the **classroom** level

SB-30A includes five key principles:

- **Clarity**—districts should have clear goals and definitions for class size reduction
- **Efficiency**—districts should implement class size reduction in the most efficient means possible
- **Flexibility**—districts will have complete flexibility to reduce class size
- **Equity**—funding for class size will maintain equity among districts
- **Accountability**—the State will hold districts accountable for meeting the reduction goals

Fundamental Policies

- The State provides funds to pay the cost of reducing the statewide average number of students in each of the three grade groupings by two-students-per-year.
- The class size reduction funds, both operating and capital outlay, are allocated equitably among all districts based on established operating and capital outlay formulas.
- State operating funds are provided as a categorical allocation within the Florida Education Finance Program (FEFP) with each district receiving its proportionate share of the state total.
- State capital outlay funds are provided for class size reduction facilities that are in excess of the facilities in the district's 5-year capital facilities plan.
- Each district is responsible for determining the details of how it will meet the class size requirement and is provided flexibility to meet this requirement.
- When a district has met the required maximum class size or the two-students-per-year reduction requirement, it may use its class size categorical funds for other purposes, while giving priority to using the funds to increase teacher pay and implementing the salary career ladder.

Clarity

SB-30A provides clear definitions, procedures, and goals for reducing the average number of students per classroom by at least two-students-per-year until the maximum class size provided in the Constitution is reached.

- Core-curricula courses are defined. (s. 1003.01 (14) F.S.)
- Each school district's February 2003 student membership survey updated to include classroom identification numbers is the baseline to determine whether a district meets the maximum class size requirement and to measure each district's reduction by at least two-students-per-year in the number of students per classroom for each of the three grade groupings. (s. 1003.03 (2), F.S.)
- Each district's compliance with the maximum class size requirement or the reduction of at least two-students-per-year will be determined each year by the Department of Education based on the October student membership survey.
- If a district fails to achieve the class size reduction requirement, a portion of the district's class size reduction operating funds will be transferred to the district's class size reduction capital outlay fund.

Flexibility—Toolbox of Implementation Options

District flexibility is provided to meet the required maximum class size or to accomplish the required two-students-per-year reduction. (s. 1003.03 (3), F.S.) Wide ranges of options are available to assist all districts with meeting the class size requirement. Districts may do any of the following:

- Adopt policies to encourage qualified students to take dual enrollment courses at community colleges.
- Adopt policies to encourage students to enroll in courses from the Florida Virtual School.
- Repeal school board policies that require students to have more than the state-required level of 24 credits to graduate from high school.
- Adopt policies to allow students to graduate from high school as soon as they pass the grade 10 FCAT and complete the courses required for high school graduation.
- Use methods to maximize use of instructional staff, such as changing required teaching loads and scheduling planning periods; deploying district employees that have professional certification to the classrooms; and using adjunct educators.
- Use innovative methods to reduce the cost of school construction.
- Use joint-use facilities through partnerships with community colleges, state universities, and private colleges and universities.
- Adopt alternative methods of class scheduling, such as block scheduling.
- Redraw school attendance zones to maximize use of facilities while minimizing the additional use of transportation.
- Operate schools beyond the normal operating hours to provide classes in the evening or operate more than one session of school during the day.
- Use year-round schools and other nontraditional calendars that do not adversely impact annual assessment of student achievement.

- Review and consider amending any collective bargaining contracts that hinder the implementation of class size reduction.
- Use any other approach not prohibited by law.

Equity in Funding

The Legislature adopted a policy and funding formula for calculating the amount of state funds appropriated to pay the cost of reducing the statewide average number of students in each of the three grade grouping by two-students-per-year. (2003-2004 General Appropriations Act)

Each district, as a result of choices made in how it has used funds received annually under the Florida Education Finance Program (FEFP), has established the district's current class size. These choices in some districts have created class sizes near the constitutional maximum while in other districts they have created class sizes that are above the maximum. The allocation of state funds for class size reduction should neither reward nor penalize a district based on previous local choices made before the class size requirement was enacted. The funding and implementation of the class size requirement must be incorporated within the basic constitutional provision of a uniform system of free public schools; therefore, the operating funds provided for class size reduction must be allocated to all districts equitably based on the factors used for allocating operating funds.

The FEFP funds all students in a school district. If a district reduces its average class size by at least two-students-per-year, the district still has the same total number of students. Because all districts are entitled to equitable funding for all students, any funds provided to reduce class size must also be allocated to all districts equitably. Current classroom teacher costs are 55.98% of the statewide total annual operating expenditures by all districts. Classroom teacher costs are defined as expenditures limited to salary and benefits for classroom teachers and substitute teachers, and computer support for classroom teachers. State funds to reduce the statewide average class size by two-students-per-year are calculated using a class size reduction allocation factor based on classroom teacher costs of 55.98% of total operating expenditures and are allocated as a categorical fund within the FEFP.

Capital outlay funds are provided through a capital outlay bonding program and are allocated in two ways. One way is to provide funds to all 67 districts based upon base student enrollment (25%), growth in student enrollment (65%) and square footage and age of existing facilities (10%). The other way is to provide recognition funds to districts that have provided voted local funds from ½ cent school sales surtax, 1 cent local government infrastructure sales surtax or ad valorem millage. These funds are allocated based on each district's proportion of the total local voted revenue.

Accountability

Accountability begins with the 2003-2004 school year. (s. 1003.03 (4), F.S.) If a district's baseline class size, established by the February 2003 student membership survey updated to include classroom identification numbers as required by the Department of Education, is greater than the constitutional maximum, the district must reduce to the constitutional maximum or reduce the district-wide average for each of the three grade groupings by at least two students. The measurement of compliance with class size reduction will be a district's October 2003 student membership survey. If a district fails to meet the reduction requirement, a portion of its class size reduction operating categorical fund will be transferred to the district's class size reduction capital outlay fund. Failure to reduce its average class size by the required two students in the 2003-2004 school year does not relieve the district from the requirement to reduce its average in 2004-2005 from the February 2003 baseline by at least four students in each of the three grade groupings. The measurement of compliance with the four-student reduction requirement will be the districts' October 2004 student membership survey.

Beginning in the 2005-2006 school year, if a district has not complied with the required reduction of class size, it forfeits some of its flexibility and is required to implement one or more statutorily prescribed measures.

Beginning in the 2006-2007 school year, if a district has not complied with the required reduction of class size, it forfeits more of its flexibility and must implement a constitutional compliance plan developed by the Department of Education until the district class size complies with the Constitution in 2010-2011.

Monitoring Activities

The Department has worked since passage of the class size reduction amendment to restructure data collection and analysis to support assistance and monitoring of the implementation of this new requirement. The Department will continue to play an active role, in cooperation with the Governor's Office and Legislature to ensure that districts have accurate information for implementation of the class size reduction requirements. Additionally, the Department will continue to collect data and monitor the reporting of data to ensure a proper accounting of the status of each school district in relation to the class size reduction requirement.

The monitoring activities will be a cooperative process involving both the Bureau of Education Information and Accountability Services and the school district's MIS and facilities staff. Districts will be chosen for monitoring visits by a combination of an analysis of the calculated class size data and classroom utilization factors. Schools and classes from the selected districts will be randomly selected and districts will be notified as to the selections. District staff will be

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expected to provide items such as class rosters, teachers' grade books, and similar documentation to verify the accurate reporting of the student and teacher information used to calculate the class size. District staff will also be expected to provide evidence that the classroom being reported with that student is, in fact, the correct classroom. Acceptable evidence is the district's detailed facility information which will then be compared to the school's master bell schedule.

Districts which are not within acceptable tolerance (0.5 percent) will be asked to prepare a plan for bringing the data into tolerance. This plan will identify the steps the district will take to manage the data quality process which will result in a higher percentage of facility matches and schedule matches.

If you have additional questions on the implementation of the class size reduction requirements, please contact Jeanine Blomberg, Assistant Deputy Commissioner, Accountability, Research and Measurement at (850) 245-0437 or Jeanine.Blomberg@fldoe.org.

JH/JB

Attachment

Cc: Florida School District Board Chairpersons
School District Finance Officers
MIS Coordinators

**FLORIDA DEPARTMENT OF EDUCATION
2003 BASELINE DISTRICT CLASS SIZE AVERAGES**

DISTRICT	PK - 3	4 - 8	9 - 12
ALACHUA	20.57	21.55	22.91
BAKER	31.28	23.16	13.55
BAY	18.55	20.15	22.21
BRADFORD	22.24	22.06	20.81
BREVARD	22.61	24.27	24.71
BROWARD	28.42	30.62	27.78
CALHOUN	17.37	19.29	15.54
CHARLOTTE	13.79	22.30	21.61
CITRUS	20.76	22.38	15.32
CLAY	20.17	26.70	21.62
COLLIER	20.25	23.77	18.00
COLUMBIA	19.08	23.71	21.90
DADE	30.14	29.26	25.29
DESOTO	23.01	20.58	22.32
DIXIE	20.01	18.78	20.28
DUVAL	21.59	22.39	22.60
ESCAMBIA	21.45	22.93	24.68
FLAGLER	22.67	26.21	14.07
FRANKLIN	16.31	18.95	16.97
GADSDEN	20.86	24.87	20.74
GILCHRIST	20.80	20.99	9.36
GLADES	18.86	30.57	15.84
GULF	19.70	20.94	19.80
HAMILTON	15.33	18.24	20.18
HARDEE	17.09	19.50	21.59
HENDRY	21.37	22.55	23.29
HERNANDO	23.17	25.96	22.63
HIGHLANDS	21.06	22.50	22.27
HILLSBOROUGH	21.15	21.76	22.83
HOLMES	19.00	20.59	18.05
INDIAN RIVER	21.66	26.33	22.84
JACKSON	19.76	20.52	17.10
JEFFERSON	22.77	24.61	16.00
LAFAYETTE	16.56	21.03	17.74
LAKE	21.79	23.18	23.85
LEE	23.03	24.15	24.67
LEON	20.52	22.02	22.88
LEVY	21.07	21.72	19.28
LIBERTY	22.73	19.94	19.43
MADISON	18.81	21.67	20.93
MANATEE	22.28	23.76	24.53
MARION	13.80	19.26	18.88
MARTIN	21.89	22.27	24.45
MONROE	23.92	22.15	23.11
NASSAU	22.57	23.39	23.07
OKALOOSA	20.48	22.57	23.50
OKEECHOBEE	19.39	24.74	19.99
ORANGE	19.76	21.97	24.45
OSCEOLA	24.57	25.56	24.18
PALM BEACH	25.51	25.19	23.82
PASCO	19.54	24.10	22.09
PINELLAS	19.88	22.91	24.42
POLK	20.82	21.51	22.80
PUTNAM	18.96	19.33	19.64
SAINT JOHNS	22.89	24.04	20.96
SAINT LUCIE	23.38	26.80	23.40
SANTA ROSA	22.03	24.90	25.94
SARASOTA	21.27	23.14	21.87
SEMINOLE	20.48	22.52	23.56
SUMTER	19.92	21.86	19.08
SUWANNEE	20.34	25.32	23.58
TAYLOR	20.95	20.19	23.78
UNION	21.23	21.88	20.72
VOLUSIA	21.49	21.05	22.52
WAKULLA	21.51	23.07	21.55
WALTON	20.03	20.81	18.04
WASHINGTON	20.55	24.92	18.88
FSDB	4.86	6.88	6.75
FAU LAB	27.20	27.96	0.00
A/M LAB	21.28	18.80	18.66
UF LAB	24.10	29.64	21.69
STATE	23.45	24.54	23.58