

**CLASS SIZE REDUCTION BACKGROUND INFORMATION  
AND  
PLANS TO IMPLEMENT LEGISLATION FOR CLASS SIZE  
TARGETS FOR 2003-2004**

**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-30-A)**

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 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 principals:**

- **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 equitable 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.

## 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, 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-student-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. 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 measure.

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.

### **PLANS TO IMPLEMENT LEGISLATION FOR CLASS SIZE TARGETS FOR 2003-2004**

The Commissioner recently approved and announced the class size calculations that will serve as baseline data for the implementation of Amendment 9 (copy of report is attached). This release provides school districts with the required information to make budget and program decisions on how best to reach the constitutional mandate to reduce class size averages by two students each year until the constitutional maximum is reached.

The Department of Education has been working since passage of the amendment to restructure data collection and analysis to support assistance and monitoring of implementation. The Department will continue to play an active role, in cooperation with the Governor's Office and Legislature to ensure that school districts have accurate information and options for efficient implementation. Additionally, the Department will collect data to ensure a proper accounting of the status of each school district and will provide all parties information on effective strategies to reduce class size.

#### **Activities completed (November, 2002 through May, 2003):**

- Updated Florida Inventory of School Facilities.
- Conducted on-site visits to validate facilities inventory data in selected districts.
- Modified facilities database system to comply with new class size maximums.
- Modified student database system for reporting of data elements needed to determine compliance with new class size maximums.
- Conducted special survey to update February 2003 student membership survey to include classroom identification numbers.
- Developed necessary programs to edit and calculate annual class sizes.
- Calculated 2003 baseline District Class Size Averages.

### **Activities for 2003-2004:**

- Provide internal guidance as called for in SB 30A within expected timeframes.
- Calculate and distribute class size reduction funding allocations for 2003-2004.
- Conduct training at annual conferences/workshops for district staff.
- Provide on-site technical assistance to school districts as needed.
- Expand Class Size Reduction web site.
- Calculate district class sizes in October 2003 and February 2004 to determine district compliance with class size reduction requirement.
- Conduct on-site monitoring of data reported by districts for determining class sizes as follows:

Monitoring the reporting of class size 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 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 class room 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.