Governing lowa's public universities and special schools

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January 3, 2011

Mr. Michael E. Marshall Secretary of the Senate Second Floor, State Capitol Des Moines, IA 50319 Mr. Charles Smithson Chief Clerk of the House Second Floor, State Capitol Des Moines, IA 50319

Dear Mr. Marshall and Mr. Smithson:

In accordance with SF 470, the annual report for the statewide research and development school transition is hereby submitted to the General Assembly.

As you will note in the report, during the first year of the transition (2009-2010), the 15 member Transition Team met to define the vision, mission, and guiding principles of the school. The team reviewed enrollment targets, procedures, management models, governance structure, partnership roles and responsibilities, and school functions. The Transition Team also recommended that a separate committee be formed to draft the R & D school strategic plan.

Please let me know if there are any questions concerning this report.

Sincerely,

Robert Donley

Enclosure

cc:

Legislative Log Legislative Liaisons

dg/h/aa/legislog10-11/R&D.doc

Executive Summary: As a result of legislation in 2008, SF 2307, the Director of the Department of Education and the President of the University of Northern Iowa established a finance and funding committee and an implementation committee to develop detailed plans for expansion of the Price Laboratory School at the University of Northern Iowa as the State of Iowa research, development, demonstration, and dissemination (RDDD) school and submitted a report to the General Assembly in January 2009. The report was reviewed by the Board Office and approved by the Board President.

During the last two years, continuous progress has been made toward implementation of the statewide R & D school. As a result of legislation in 2009 (SF 470), the Director of the Department of Education and the President of the University of Northern Iowa were directed to create an Advisory Council and a Standing Institutional Research Committee and to establish a basic geographic boundary line agreement and student transfer policy. The legislation also required the completion of an Infrastructure Funding Study and a study to evaluate the condition of the current Malcolm Price Laboratory School, including determining an approximate cost both of renovating the current facility and of constructing a new facility. Furthermore, SF 470 specified that future work on the R & D school needed to adhere to the three-year timeline prepared by the Implementation Committee in the January 2009 report. The three-year timeline included a list of tasks to be completed during each year with the transition to a statewide R & D school completed by Fall 2012.

Background: During the first year of the transition (2009-2010), the 15 member Transition Team met to define the vision, mission, and guiding principles of the school. The team reviewed enrollment targets, procedures, management models, governance structure, partnership roles and responsibilities, and school functions. The Transition Team also recommended that a separate committee be formed to draft the R & D school strategic plan. Details regarding the work of this team are provided in Attachment A (Transition Team Report).

Other activities during 2009-2010 included the following:

- Completion of a Property Tax Analysis in Fall 2009. This report included the fiscal impact of SF 470 on the eight school districts that had students attending Malcolm Price Laboratory School, with a primary focus on the Waterloo and Cedar Falls school districts.
- Independent review of the state aid and property tax implications of the legislation.
- Completion of an independent report to identify potential access to different infrastructure funding sources for the statewide R & D school. The report also examined current revenue sources used by school districts and the University of Northern Iowa.
- Completion of a study by the architectural firm of Perkins & Will in Spring 2010 to analyze the current condition of Malcolm Price Laboratory School and to provide estimates to renovate the existing facility and to construct a new facility. The firm completed a process called space programming that considered the mission and function of the statewide R & D school.
- ♦ Creation of a 17 member Advisory Council and approval by the Board of Regents and State Board of Education in August 2010. The purpose of the Advisory Council is to review and evaluate educational processes and results of the R & D school. In the future, the Advisory Council will also provide annual reports to the Board of Regents, the State Board of Education, and the General Assembly. The Council will meet on December 10, 2010 and continue to meet on a quarterly basis.

♦ Formation of a strategic planning committee in Fall 2010 by the new Dean of the College of Education using the recommendations of the 2009-2010 Transition Team. The committee, which includes statewide leaders, will promote collaborations between the Department of Education, area education agencies, Regent universities, and PK-12 administrators and teachers. The committee met on October 29, 2010 and will meet again in December 2010 and January 2011. The committee's goal is to share the strategic plan with the Advisory Council no later than March 2011.

The objectives outlined in the three-year timeline will be completed during Year Two (2010-2011). This includes convening the Advisory Council, completing the strategic plan, determining tools and processes for statewide demonstration and dissemination, and continuing to define the roles and responsibilities for partnerships with area education agencies and school districts. The process to consider individuals from across the state with research and educational expertise to serve on the 11-member Standing Institutional Research Committee will be begun. This committee will (1) serve as the clearinghouse for investigative and applied research; (2) create and approve research protocols, and (3) review research results.

The statewide R & D school, which will be fully implemented in Fall 2012, will provide significant value to the state of lowa. By undertaking research and advancing teaching practices, the state will gain readily available educational resources which will result in raising and sustaining the level of educational attainment for lowa students. The Research and Development School will be designed to meet the educational needs of an increasingly diverse state. It will also be a resource for pre-service students as well as career educators to enhance teacher preparation and initiate research that transforms practice.

Statewide Research & Development School Update 2009-2010 Transition Team Final Report September 2010



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Executive Summary

This report is a summary of the work completed by the 2009-10 Research & Development Transition Team. Also, the report incorporates some ideas and models from committees who researched and providing information about Research & Development schools prior to 2009. The report consists of recommendations and ideas for the future leadership teams of the statewide Research & Development school.

The Research & Development (R&D) School will serve the students and educators of the state of lowa. The interdependence of the University of Northern lowa and the lowa Department of Education is critical to the success and sustainability of the school. In balancing all of the needs and keeping foremost the future of PK-12 education in the state of lowa while nurturing professional respect for the work of educators to date, the R&D school is essential to all of lowa's next generations and the vitality of the state of lowa.

The R&D school will collaborate with educational stakeholders throughout the state and nation to leverage technology to overcome distance and increase access to high-quality teaching and learning in rural schools. State-of-the-art 21st century technological resources will be readily available to educators to access and combine content to their teaching, learning, and research environments. Successfully models of completing educational research, developing pedagogy, and demonstrating and disseminating effective teaching practices, throughout lowa will be developed.

The R&D school will serve as a place where integration of the applied research, the development of best practices, and the demonstration of effective teaching and learning will be disseminated throughout all schools in Iowa. A dissemination network will be developed and supported by the Iowa Department of Education, the University of Northern Iowa, and Area Education Agencies in partnership with all the Regent Institutions and state PK-12 schools.

Guiding principles for designing the statewide R&D school:

- 1. Raise and sustain the level of all lowa PK-12 students' educational attainment and personal development through innovative and promising practices. [PK-12 Focused]
- 2. Enhance the preparation and professional competence of lowa educators through collaborative inquiry and exchange of professional knowledge in teaching and learning. [Educator Focused]
- 3. Focus on research which transforms practice to meet the changing needs of lowa's educational system. [Evidence Based]

The four primary functions of the R&D school include:

Research: study and test new innovative teaching and learning practices

Development: determine effective pedagogical practices **Demonstration:** model effective teaching practices **Dissemination:** share effective instructional practice

Section A: Statewide Research & Development School

Vision

Through collaborative partnerships with post secondary institutions, AEAs, PK-12 schools, and the lowa Department of Education, the school serves as a hub to encourage and demonstrate the implementation of evidence based practices in teaching and learning. By focusing on the changing needs of lowa's educational system, the school works to ensure that each and every lowa student is prepared for life, work and post-secondary pursuits. The school is a resource through which pre-service through career educators grow in professional competence through collaborative inquiry and exchange of professional knowledge.

Vision Concepts

- School must have a system for grouping and reorganizing students seamlessly and continuously (need to educate students – parents – about this system)
- Environment shift from school to wherever learning can take place
- Flexibility (flexible groups, environment, think outside the box, teacher mentor)
- Teacher as a mentor coach facilitator adults how to define?
- Planning for personal learning
- Data systems focused on growth and learning
- Valid assessment systems (assessment should meet accountability requirements)
- Should measure students' learning

Mission

Improve teaching and learning for Iowa students and educators.

The school will be a <u>resource</u> for pre-service through career educators. It will serve to help these individuals grow in professional competence through collaborative inquiry and exchange of professional knowledge.

Guiding Principles about the Statewide R&D School

Three guiding principles for the design and purpose of the statewide research, development, demonstration, and dissemination school, referred to as an <u>R&D</u> school.

The R&D school is to:

- 1. Raise and sustain the level of all lowa PK-12 students' educational attainment and personal development through innovative and promising practices. (PK-12 Focused)
- 2. Enhance the preparation and professional competence of lowa educators through collaborative inquiry and exchange of professional knowledge in teaching and learning. (Educator Focused)
- Focus on research which transforms practice to meet the changing needs of lowa's educational system. (Evidence Based)

Section B: Desired State of the R&D School

ADULTS-ENVIRONMENT-LEARNERS

Adults

- Adults will play the role of teacher, coach, facilitator, expert, a master teacher who
 understands best practices and is able to mentor and demonstrate the 21st century skills to
 students and other adults.
- The adults work in flexible, collaborative environments assigned to a group of students to provide teaching and learning opportunities.
- Adults will provide the systems of support for the whole learner (emotional, physical, social, cognitive) that incorporate other organizations, groups, and opportunities.
- Adults and students interact in caring and safe environments that will foster trusting relationships.

Environment

- The learning environment of the R&D school:
 - Provides flexibility for student learning that occurs anytime and anywhere based on progress and interest.
 - Relies on a comprehensive data system focused on learning and growth that is integrated into daily processes.
 - Nurtures and protects children and their families ensuring they are healthy, safe, challenged, supported, and engaged.
 - o Embeds technology to enhance teaching and learning.
 - Includes innovative and accountable assessment structures and plans.

Teaching/Learning Environment

- The educational program shall provide greater emphasis on the state of Iowa's educational priorities such as the Iowa Core Curriculum, and innovative and promising instructional practices while supporting the research and professional development needed by Iowa's students and practicing teachers. Development of the program is to be a collaborative effort among the school faculty and staff, the University of Northern Iowa, and the Iowa Department of Education.
- Teaching faculty shall meet lowa teacher licensing requirements for teaching and preferably possess National Board Teacher Certification. It is recommended that teachers in leadership roles have an advanced degree, and consideration shall be given for differentiated staffing patterns at the R&D school. Teaching faculty must demonstrate effective professional development skills, and, like the student body, bring diversity to the teaching/learning equation. There shall be a sufficient number of staff to accommodate the outreach activities. When appropriate, teachers new to the profession may participate in a ten month residency program at the school as a teacher practitioner, perhaps while working on an advanced degree.

Learners

- Every student will have a personalized learning plan that they have a voice in creating, monitoring, evaluating, and demonstrating progress.
- Every student will use a variety of tools to access information, collaborate with others, and evaluate and demonstrate his/her learning.
- Every student will demonstrate 21st century skills on a weekly basis and measure his/her growth.
- Every student will have a voice in deciding what, when, and how he/she learns.
- Every student will understand what he/she needs to learn and why. (skills, attitudes)
- Every student is enthusiastic about going to school and is fully engaged.
- Every student will be able to move to the next level of his/her learning.
- Every student will have adequate resources to support his/her learning to achieve at high levels.
- Every student's time in school is dependent on learning, not on the structure or calendar.
- Every student will be empowered to influence his/her learning environment.

Student learning will be documented in multiple measures:

Continuous Improvement

Flexibility

Supportive Environment

Engagement of student, teacher, and family in facilitating learning

Learning also occurs outside the classroom

Student Enrollment

Targets

The PK-12 student population shall mirror lowa schools as much as possible. Diversity in the student body should include but not be limited to different cultures and ethnicity, English language learners, low socio-economic status, gifted and talented students, and students with Individualized Educational Plans (IEPs). The target enrollment for the R&D school is two sections or classrooms at each grade level.

Procedures

Students will complete an application for admission to the R&D school. Appropriate documentation will be required from families prior to student admission.

Management Model/Governance Structure

1. Detailed Governance Structure: Specific Roles and Responsibilities of the Following Entities

a. University of Northern Iowa

 The University of Northern Iowa, a professional partner, shall continue to be the governing entity of the school and will have responsibility for faculty, building, grounds, and staffing. UNI shall have responsibility for being a partial funding source. UNI will continue to report to the Board of Regents on the progress of the R&D school.

b. <u>lowa Department of Education</u>

• The lowa Department of Education as a professional partner shall be the accreditation agency. The school shall meet the programmatic and teacher qualification requirements of the state with waiver provisions for innovative practices provided by the Director of the Department of Education. The reporting responsibilities to the Department will focus on the primary functions of the school: research, development, demonstration, and dissemination as they relate to state initiatives such as the lowa Core Curriculum and innovative and promising practices. The state, through the K-12 funding formula, will be a source for partial funding.

c. Advisory Council

- To be composed of 17 members, including representation of the following:
 - i. Director of the School (ex-officio)
 - ii. Director of the Iowa Department of Education
 - iii. President of the University of Northern Iowa
 - iv. PK-6: One Teacher
 - v. 7-9: One Teacher
 - vi. 10-12: One teacher
 - vii. PK-12: Administrator
 - viii. AEAs: One representative
 - ix. Iowa State University: One representative
 - x. University of Iowa: One representative
 - xi. Parents of students: One representative
 - xii. Business/Industry: One representative
 - xiii. Private colleges: One representative
 - xiv. Four members of the general assembly servicing as ex-officio. (1 appointed by speaker of house of rep.) (1 appointed by the minority leader of the house of rep.) (1 appointed by majority leader of the senate) (1 appointed by minority leader of the senate)

- The Advisory Council member appointments shall represent balance in geographic distribution and length of term. At least one of the Advisory Council members should have expertise in technology. Recommendations for appointment to the Advisory Council will be made jointly by the President of the University of Northern Iowa and the Director of the Iowa Department of Education to the Board of Regents and the State Board of Education for approval.
- The role of the Advisory Council is to ensure the success of the school's mission and vision through oversight of the three major purposes and four major functions, the state of Iowa's major educational initiatives such as the Iowa Core Curriculum, and the implementation of innovative instruction and promising practices. The Advisory Council will be responsible for reviewing and evaluating the process and results of the school, and it will provide annual reports to the President of the University of Northern Iowa, the Director of the Iowa Department of Education, the Board of Regents, the State Board of Education, and the Iowa General Assembly.

d. Standing Institutional Research Committee

To be composed of eleven members appointed by the UNI President and the Iowa Department of Education Director:

- i. Director of Research at the R&D school (or person with designated responsibility)
- ii. One Representative each from UNI, ISU, and U of I
- iii. One member representing Business/Industry Representative
- iv. One representative of PK-6 public school teachers
- v. One representative of grades 7-9 public school teachers
- vi. One representative of grades 10-12 public school teachers
- vii. One representative of the board of school districts
- viii. One representative of the Iowa Department of Education
- ix. One representative of the private colleges in Iowa
- The Standing Institutional Research Committee (SIRC) shall be a clearinghouse for the investigative and applied research occurring at lowa's Regent Universities as the research applies to and promotes innovative educational practices and student learning at the school. As a clearinghouse, the SIRC will be a resource for providing matching opportunities between researchers, and appropriate venues for coordinating communication between and among researchers, the school, and lowa's classrooms. It will be responsible for creating the research protocols for the school, approving proposals for the school, reviewing quality and results of the performed research, and providing support for dissemination efforts. Members of the committee shall be appointed by the President of the University of Northern lowa in collaboration with the Director of the lowa Department of Education for term lengths to be determined that give continuity to the long-range functioning of the committee.

Strategic Plan

It is recommended that a committee appointed by the UNI Dean of the College of Education select a statewide group of individuals to draft a preliminary strategic plan for the statewide R&D school. Input into the plan will be sought as needed from the R&D Advisory Council as well as from various educational stakeholders throughout lowa.

Partnerships Roles & Responsibilities

Partnerships shall be a key element in the school's sustainability of practice. The purpose for fostering partnerships is to enhance and sustain learning and teaching, expand budgetary resources, and increase awareness of the mission, vision, and practices of the school. Partnerships shall be mutually beneficial both in the short term through development of practice applications, and in the long term through economic and workforce development. Partnership outcomes include exposure to transformative practices, platforms for researching applications, and demonstrations of innovative and promising practice.

Functions

- Research the study and testing of innovative practices and analysis of data on the
 efficacy of instructional practices on both teaching and learning as applied in the
 classroom.
- Development the organization and delivery of effective pedagogical practices that improve instruction.
- Demonstration the modeling and presenting of effective practices in various observational formats within the school's classrooms that can be applied to other instructional scenarios.
- Dissemination the process by which effective instructional practices that have been developed and demonstrated are shared with professionals for the purpose of replication in lowa's classrooms.

The school shall serve as the place where integration of the applied research, the development of best practices, and the demonstration of teaching for learning can be disseminated to all of the schools in the state through a network supported by the lowa Department of Education, the University of Northern Iowa, and the Area Education Agencies in partnership with all of the Regent Institutions and the PK-12 schools of the state.

The recommendations address three major areas for the R&D school: 1) the governance structure including an Advisory Board and a Standing Institutional Research Committee; 2) the teaching and learning environment, including the students, teaching faculty, the educational program, technology, outreach, and dissemination; and 3) transition plans that include a three-year timeline with basic objectives.

Facility/Technology

- Leadership in Energy and Environmental Design (LEED) certification shall be sought at the highest level for construction of a new building or renovation. Sustainable practices should be utilized throughout building operations.
- The school facility shall be designed for 21st century learning. The spaces for teaching and learning shall be designed to allow for the flow of students, faculty, staff, college students, and visiting educators to observe, interact, and learn without interrupting the education of the PK-12 students.
- Required teaching and learning areas should include: collaborative areas for project based learning, inquiry based learning, interdisciplinary teaching, authentic intellectual work, differentiation, co-teaching, and modern laboratory facilities. Because the school also serves pre-service teachers as well as practicing teachers, larger or different areas such as observatoriums, lecture halls, and adult classrooms with supporting technology shall be included in the design.
- The quality and currency of the technology shall support and enhance learning and teaching and must demonstrate the state-of-the-art practice and utilization of technology for students and teachers. Technology infrastructure shall accommodate enough bandwidth for online learning, video streaming, audio/video communication, online assessment systems, and use of the ICN. In addition to teaching and learning, the technology should be used for collaboration and communication to off-site classrooms and schools and shall be considered integral to the outreach function of dissemination

Section C: Funding of the School

Research, Development, Demonstration, & Dissemination Funding

Once State Foundation aid is established to support ongoing school operations, UNI shall be encouraged to reallocate funding that it is currently spending on operations to support the research, development, demonstration, and dissemination functions of the R&D school. This is set forth as a goal, recognizing that the Regent's allocation to UNI fluctuates and must be appropriated annually.

If additional funding beyond that provided by UNI is needed for research, supplemental weighting should be provided to support the research, development, demonstration, and dissemination functions through the School Budget Review Committee (SBRC). This authority must be provided through legislation.

Infrastructure Funding

Senate File 470, Section 49, as passed and signed into law states the intent of the general assembly is to develop a new prekindergarten through grade 12 research and development school located at the University of Northern Iowa. The school is defined in the legislation as a "...research, development, demonstration, and dissemination school using facilities at the center for early development education, also known as the Price laboratory school, in Cedar Falls."

Section 55 of Senate File 470 also states "The Department of Education, in collaboration with representatives of the University of Northern Iowa, as designated by the president, shall create a report about potential access to various infrastructure funding for the research and development school."

Dr. Lee Tack, former Administrator, Financial and Information Services Division, Iowa Department of Education prepared an extensive report outlining the possible revenue sources and possible access to those sources. This report was submitted to the general assembly, the Iowa Department of Education, the Board of Regents, state of Iowa on January 15, 2010.

The potential infrastructure funding report is discussed from the perspective of obtaining access to funds for infrastructure needs. The current revenue sources available to school districts and UNI infrastructure needs are stated in the report as well as the possible limitations for accessing these sources is stated.

Building Analysis/Facility Study

Separate from the Transition Team report, the architectural firm, Perkins & Will completed a study analyzing the condition of the current Price Lab School facility, and provide estimates of both renovating the current facility and new construction. The report was completed June 15, 2010.

Two building options were developed for improvement of the school. A renovation option proposes to renovate and add on to the academic area of the existing school to meet the program, code and environmental requirements. A new construction option proposes to demolish the existing academic area of the school and to replace it with new construction to meet the needs identified in the space program. For each option, a sustainability assessment and preliminary budget were estimated and are included in the report.

Section D: Three-Year Transition Plan

A three-year timeline is proposed to give the University of Northern Iowa, in collaboration with the Iowa Department of Education, time and resources to develop a detailed plan incorporating the elements of the recommendation into a fully functioning school that will serve the students and educators of Iowa. It is also designed to allow the highest quality of education for the students of PLS while the school transforms itself fully into the envisioned R&D school of the future.

It is critical to the transition that the planned activities and benchmarks be continually evaluated for progress. Both the President of the University of Northern Iowa and the Director of the Department of Education will need updates through the transition phases of the school.

a. Year One (2009-2010)

Establish a Transition Team to make decisions within the parameters of both the Implementation and Finance and Funding Committees' recommendations subject to final review by the President of the University of Northern Iowa and the Director of the Iowa Department of Education. The team must be deeply knowledgeable and empowered to make decisions and allocate funding. It is their responsibility to:

- Work with those involved with the facility study.
- Establish student enrollment procedures reflecting a balanced student body in collaboration with surrounding districts to be approved by the lowa Department of Education.
- Redefine faculty/administrative roles and responsibilities within guidelines of the University and the Department of Education.
- Establish a management model that implements the school functions.
- Develop a strategic plan with progress monitoring that includes the lowa Core Curriculum implementation plan.
- Define roles/responsibilities for partnerships (AEAs, Institutions of Higher Education, and other Iowa schools).
- Report progress quarterly to the President of the University of Northern Iowa and the Director of the Iowa Department of Education who will then report to the Board of Regents and the State Board of Education.
- Establish reciprocal relationships with surrounding school districts.

b. Year Two (2010-2011)

- Determine tools and processes for demonstration and dissemination.
- Operation of the Advisory Board begins and they act on Year One recommendations.
- Implement Year One recommendations.
- Seek additional funding from grants and other funding opportunities.
- Report progress quarterly to the President of the University of Northern Iowa and the Director of the Iowa Department of Education who will then report to the Board of Regents and the State Board of Education.

c. Year Three (2011-2012)

- Standing Institutional Research Committee (SIRC) prepares research plans and processes (PLS, UNI, ISU, UI, DE).
- Engage in ongoing implementation and evaluation.
- Report progress quarterly to the President of the University of Northern Iowa and the Director of the Iowa Department of Education who will then report to the Board of Regents and the State Board of Education.

*Effective with the 2012-2013 school year, the PLS school should function as a statewide R&D school.