

**Westlake School District**  
**Levy Project – 2006**

**Appendices**

**A Benchmark Study of Levy**  
**Issues, Players and Trends in**  
**Ohio**

by

**Westlake Citizens Advisory Committee (CAC)**  
**April 2006**



# **Westlake Citizens Advisory Committee**

## About Us

The Westlake Citizens Advisory Committee (“CAC”), established over 40 years ago as a voluntary advisory committee to the Westlake Board of Education, is comprised of a diverse group of Westlake residents and community representatives. The CAC focuses on ways to continually enhance all aspects of education for students in the Westlake City Schools. The CAC’s mission is to serve the Westlake community, the Westlake City Schools and the Board of Education as a visible and proactive link between these interdependent parties.

CAC members work as a collaborative team with the Board of Education to:

- Seek out and understand school-related issues of high importance to all constituencies within the Westlake community
- Evaluate opportunities and challenges related to these issues and define projects that will have a meaningful impact on the Westlake Community and / or Westlake City Schools
- Develop recommendations and action plans for consideration by the Board of Education
- Support the Board of Education in implementing approved action plans
- Serve as a proactive and visible liaison between all parties interested in issues relating to the Westlake City Schools

For additional details on the Westlake Citizens Advisory Committee (“CAC”), see the following website: <http://www.westlake.k12.oh.us/CAC/AboutUs.html>

## **Purpose of the CAC Research Study**

**Assemble information, data and other material to document what happens to a school district and its community when an Ohio tax levy for education does not pass.**

**Provide insights using published materials and other secondary research sources, as well as conduct one-on-one interviews and other primary research, to document the potential impact on Westlake's education program, lifestyle, property values, community and culture as it relates to the upcoming proposed tax levy in May 2006.**

**Compare other similar Ohio school districts and their experience with tax levy and bond issues.**

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## Appendix A

### SCHOOL FUNDING DEFINITIONS<sup>1</sup>

#### **Assessed valuation**

The percentage of valuation that is subject to taxation. For example, Class I and Class II property are assessed at 35%, most personal tangible at 25% and public utility property at either 25% or 88%, depending on the type of utility.

<b>Example:</b>	<b>Property Value</b>	<b>Assessment Rate</b>	<b>Assessed Value/Tax Value</b>
	\$100,000	X 35%	= \$35,000

#### **DeRolph I**

March 24, 1997, Ohio Supreme Court decision where the court ruled, by a 4-3 vote, that Ohio's school-funding system was unconstitutional. The court allowed the state one year to craft a new funding system.

#### **DeRolph II**

May 11, 2000, Ohio Supreme Court decision where the court ruled, again by a 4-3 vote, that the new funding system created by the General Assembly in response to the DeRolph I ruling was still unconstitutional. The state was given until June 15, 2001, to again overhaul the funding system.

#### **DeRolph III**

Sept. 6, 2001, Ohio Supreme Court decision where the court ruled, again by a 4-3 margin, though with a different group of justices comprising the majority, that the funding system incorporated in HB 94 would

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<sup>1</sup> <http://www.avonlakeschools.com/district/treasurer/financial-information.shtml> accessed February 2006.

be constitutional pending a series of changes specified by the court. The state requested reconsideration of the decision.

**DeRolph IV**

On Dec. 11, 2002, the Ohio Supreme Court, in a 4-3 ruling, found Ohio's school-funding system once again unconstitutional and restated its decisions in DeRolph I and II, which required the state legislature to fix the school- funding system. The court also relinquished jurisdiction over the case and essentially ended the suit.

**Effective mills**

The actual rate of taxation realized when the tax reduction factor reduces the taxes charged by a voted levy. It equals the taxes charged divided by the taxable value of the class of property against which they apply.

**Floor**

Rate below which voted mills will not be reduced under the property tax reduction factor. Established by the General Assembly. Currently set at 20 mills.

**Foundation formula**

Method of funding schools through a combination of state and local aid. Based on the ability of school districts to raise tax revenues as well as the state-determined minimum amount necessary per student to provide an adequate education.

**Millage**

Factor applied to the assessed, aka, taxable, valuation of real and personal tangible property to produce tax revenue. A mill is defined as one-tenth of a percent or one-tenth of a cent (0.1¢) in cash terms.

(Note: The above definitions are from Avon Lake City Schools Treasurer's Office Financial Information.<sup>2</sup>)

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<sup>2</sup> <http://www.avonlakeschools.com/district/treasurer/financial-information.shtml> accessed February 2006.

## **Appendix B**

### **Types of Levies<sup>3</sup>**

#### **CURRENT EXPENSE LEVY**

Levy used primarily for district operating purposes.

- Operating levy
- Expressed in mills
- Up to 5 years or for continuing period of time
- Subject to HB 920 reduction
- Can be renewed or replaced

#### **Renewal of current expense levy**

Voter approval to extend the term of a limited levy when it expires. The renewal levy must state the same purpose as the original levy. The effective rate of the renewal begins from the point where the original levy ends. A renewal levy proposal can combine with a proposal to raise additional millage.

#### **Replacement of current expense levy**

Like a renewal levy in that it seeks voter approval to extend the term of a limited levy when it expires. Replacement levies differ from renewal levies because the replacement begins with an effective rate equal to the original effective rate of the levy which it replaces. In this way, a replacement levy allows a district to obtain the benefit of growth in the real property tax since the approval of the replaced levy. Replacement levies cannot be used for an emergency levy and cannot be combined with other changes in millage in a single proposed levy.

#### **Continuing levy**

Levy proposing millage rate or school district income tax that is assessed indefinitely, unless the tax is revoked by the voters or the school board instructs the county auditor not to assess it.

#### **EMERGENCY LEVY**

- Operating levy
- Expressed in dollars
- Up to 5 years – cannot be for a continuing period of time
- Not subject to HB 920 reduction
- Renew but not replace

#### **PERMANENT IMPROVEMENT LEVY – cannot be used for daily operations**

- For improvements with an expected life of 5 years or more
- Expressed in mills
- Up to 5 years or for a continuing period of time
- Subject to HB 920 reduction
- Renew or replace

#### **BOND LEVY - cannot be used for daily operations**

- For buildings, building improvements, or land acquisition
- Pay debt charges on outstanding debt
- Expressed in mills
- For period of related bond issue
- Not subject to HB 920 reduction

(Note: The above definitions are from Avon Lake City Schools Treasurer's Office Financial Information.<sup>4</sup>)

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<sup>3</sup> <http://www.avonlakeschools.com/district/treasurer/financial-information.shtml> accessed February 2006.

## **Appendix C**

### **What Is a Mill Anyway? <sup>5</sup>**

The following information is from Avon Lake City Schools Treasurer's Office Financial Information website:<sup>6</sup>

“What exactly is a mill anyway? Have you ever asked that question? Many citizens really do not understand the concept of tax Millage and how their property taxes are calculated.

First there is the distinction between appraised value and assessed value of your property. The appraised value is the “real value” of your property, or what the property would sell for in the open market. The county auditor has the task of appraising all taxable property in the county. Assessed value is the value of the property that Millage rates are applied to. In Ohio, the assessed value of the property is set at 35% of appraised value. For example, if your home is appraised at \$100,000 it is taxed at the assessed value of \$35,000 ( $\$100,000 \times .35$ ).

A mill is one-tenth of a penny. To make that fact more understandable, a mill produces \$1 in property tax income for every \$1,000 of assessed property value it applied against. To carry our example further, on your \$100,000 home, one mill would produce \$35 of property tax income ( $\$35,000 \times .001$ )

However it does not end there. Through the years the State of Ohio has enacted various credits that reduce the amount you pay for real estate taxes. The 10% rollback which has been in existence for many years directly reduces your tax bill by 10%. The Homestead exemption enacted in 1979 increases the rollback by an additional 2.5% if the owner lives in the taxable property. For example these credits would reduce the tax bill by \$4.38 or a total of \$30.62. These credits do not represent lost revenues for schools as the state picks up your savings and reimburses the school for them.

If you have any question concerning Millage, appraised value, assessed value or how our taxes are calculated, your county auditor and county treasurer are a good resource for additional information.”

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<sup>4</sup> <http://www.avonlakeschools.com/district/treasurer/financial-information.shtml> accessed February 2006.

<sup>5</sup> <http://www.avonlakeschools.com/district/treasurer/financial-information.shtml> accessed February 2006.

<sup>6</sup> <http://www.avonlakeschools.com/district/treasurer/financial-information.shtml> accessed February 2006.

## Appendix D

### WHY ARE DISTRICTS ON THE BALLOT ALL THE TIME?

The following information is from Avon Lake City Schools Treasurer's Office Financial Information website:<sup>7</sup>

**1) Lack of Local Tax Growth**

All districts receive some additional local revenue from new construction. It is the increase in property values due to inflation that doesn't result in school districts receiving substantial additional revenue.

When property values rise due to inflation, the voted millage is reduced to freeze revenue from those same property values.

This lack of substantial growth in revenue due to inflation of property values results in districts needing operational levies to meet inflationary expenditure pressures.

**2) Erosion of the Tax Base**

The property tax base used by districts as a source of local revenue is eroding as a stable source of revenue

- Public Utility – Property Values

Deregulation resulted in a lower assessment rate. Tax cases brought before the appeal procedure has resulted in lower appraisals. The result is less revenue from a source that was once increasing dramatically.

- Personal Property Values

The assessment of inventory personal property values has declined from 88% to the current 23% and is scheduled by law to decrease to 0%.

- Tax Abatements

The forgiveness of taxes in return for economic growth is a widely accepted tool in economic development. The promise of additional jobs is a clear goal. However the taxes forgiven are 70% from local school districts who don't always share in additional revenue from new jobs.

**3) Some Previous Operating Levies Approved for a Limited Time**

Some operating levies, permanent improvement levies, or emergency levies are approved by the voters for a limited time. When they expire they need to be renewed by voting in order for the school district to receive the same revenue as before.

**4) State Funding That Doesn't Work**

The current formula established a formula amount for each student that is a combination of state and local revenue.

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<sup>7</sup> <http://www.avonlakeschools.com/district/treasurer/financial-information.shtml> accessed February 2006.

The local share is determined by property values at a prescribed millage rate. As property values rise, the local share increases. This assumes the district received more revenue locally and therefore has less need from the state.

Remember, property value increases due to inflation do not automatically result in more actual revenue, thus a disconnect results in what the state assumes the local district has, plus the share the state provides.

**5) State Aid Increases That Aren't What They Seem**

The state formula amount per pupil has increased 2.2% each year the past two years. The local share of that amount has increased 5 – 6% each year in the average district.

The local “assumed” share grew faster than the actual formula, and as a result, many districts did NOT receive an increased amount of state aide anywhere near the 2.2% factor.

**6) Need for New Programs**

Every district is faced with decisions about whether to serve additional needs of students with new initiatives:

Advanced Placement Classes (AP Classes) are classes that can be made available to high school students to help prepare them for the rigors of college classes, in some cases they even receive college credit for these classes

Intervention assistance to help students meet state required testing

Limited English proficient students are increasing in enrollment in many districts

Meeting special needs of students with disabilities. If special needs students are entitled to services under the law, the district MUST provide it, no matter what the cost.

All day, every day kindergarten, pre-school programs and reduced class sizes in the primary grades have all proven to be successful in helping children learn.

**7) Inflation Pressures on Expenditures**

Schools experience inflationary pressures too. Over 25% of a school district's budget experiences major increase each year from inflation. These include insurance costs, energy costs, health care costs, instructional materials costs, and equipment costs. It is estimated that 25% of the budget

increases have been averaging 15 – 20% a year. If 2% of the budget increases 16% per year, the total budget increases 4% a year BEFORE any new programs are initiated and BEFORE any salary increases are given.

## Appendix E

### Ohio Department of Education's Local Report Cards<sup>8</sup>

<b><u>District and School Local Report Card Ratings Search</u></b>	Quick search for schools and districts to find the rating and results on statewide assessments, graduation, and attendance rates.
<b><u>District and School Local Report Cards</u></b>	View Local Report Card PDFs, create reports, or download Excel files with data for all districts and schools in the state of Ohio.
<b><u>Annual Report on Educational Progress in Ohio</u></b>	2004-05 and historical <b>Annual Reports on Educational Progress in Ohio</b> . Includes information on major racial/ethnic students, students with disabilities, and limited English Proficient students.
<b><u>Guide for Ohio's Report Card System</u></b>	Updated for 2004-05. Information about Ohio's accountability system, key terms and definitions, as well as other communication tips. (PDF)
<b><u>Similar Districts</u></b>	Find your list of similar districts, as well as the characteristics that go into the calculation to create the list.
<b><u>Career/Tech Planning Districts Performance Reports</u></b>	Find performance reports on Ohio's Career/Tech Planning Districts
<b><u>No Child Left Behind Act</u></b>	Information about the federal No Child Left Behind Act and options for parents.
<b><u>Key Terms and Definitions</u></b>	Ohio's new accountability plan includes state indicators, a performance index, and Adequate Yearly Progress. Definitions of each term and information about the calculations are found here.

ODE provides a variety of services and communications materials with Local Report Card information. Much of our information has been updated for 2004-05 - more will be brought online as it becomes available

<sup>8</sup> Ohio Department of Education's 2004-2005 Local Report Cards at <http://www.ode.state.oh.us/reportcard/>

## Appendix F

### Ohio Associations & Other State School Board Associations

The following is a list of Ohio associations that was accessed via their OSBA websites at <http://www.osba-ohio.org/associations.htm>:

#### Ohio Associations

[Education Tax Policy Institute](#)  
[Buckeye Association of School Administrators](#)  
[National School Public Relations Association-Ohio Chapter](#)  
[Ohio Association of School Business Officials](#)  
[Ohio Association of Elementary School Administrators](#)  
[Ohio Association of Secondary School Administrators](#)  
[Ohio Parents-Teachers Association](#)  
[Ohio School Facilities Commission](#)  
[Ohio School Funding](#)  
[Ohio School Leaders Community of Practice](#)  
[Ohio High School Athletic Association](#)

#### Other state school board associations

[Alabama Association of School Boards](#)  
[Association of Alaska School Boards](#)  
[Arizona School Boards Association](#)  
[Arkansas School Boards Association](#)  
[California School Boards Association](#)  
[Colorado Association of School Boards](#)  
[Connecticut Association of Boards of Education](#)  
[Delaware School Boards Association](#)  
[Florida School Boards Association](#)  
[Georgia School Boards Association](#)  
[Hawaii State Board of Education](#)  
[Idaho School Boards Association](#)  
[Illinois Association of School Boards](#)  
[Indiana School Boards Association](#)  
[Iowa Association of School Boards](#)  
[Kansas Association of School Boards](#)  
[Kentucky School Boards Association](#)  
[Louisiana School Boards Association](#)  
[Maine School Boards Association](#)  
[Maryland Association of Boards of Education](#)  
[Massachusetts Association of School Committees, Inc.](#)  
[Michigan Association of School Boards](#)  
[Minnesota School Boards Association](#)  
[Mississippi School Boards Association](#)  
[Missouri School Boards Association](#)  
[Montana School Boards Association](#)  
[Nebraska Association of School Boards](#)

[New Hampshire School Boards Association](#)  
[New Jersey School Boards Association](#)  
[New Mexico School Boards Association](#)  
[New York State School Boards Association](#)  
[North Carolina School Boards Association](#)  
[North Dakota School Boards Association](#)  
[Oklahoma State School Boards Association](#)  
[Oregon School Boards Association](#)  
[Pennsylvania School Boards Association](#)  
[Rhode Island Association of School Committees](#)  
[South Carolina School Boards Association](#)  
[Associated School Boards of South Dakota](#)  
[Tennessee School Boards Association](#)  
[Texas Association of School Boards](#)  
[Utah School Boards Association](#)  
[Vermont School Boards Association](#)  
[Virginia School Boards Association](#)  
[Washington State School Directors' Association](#)  
[West Virginia School Boards Association](#)  
[Wisconsin Association of School Boards](#)  
[Wyoming School Boards Association](#)

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## Appendix G

### **List of Twenty-one (21) Ohio School Districts** **Having “Excellent Ratings for Past Six** **Consecutive Years**

Of the 613 public school districts in Ohio, including from the 31 districts in Cuyahoga County, twenty-one (21) school districts have achieved an excellent educational rating for six consecutive years to include:

1. New Bremen (Auglaize County)
2. Beachwood (Cuyahoga County)
3. Brecksville-Broadview Heights (Cuyahoga County)
4. Chagrin Falls (Cuyahoga County)
5. Solon (Cuyahoga County)
6. Chardon (Geauga County)
7. Westlake (Cuyahoga County)
8. India Hills (Hamilton County)
9. Maderia (Hamilton County)
10. Mariemont (Hamilton County)
11. Sycamore Community (Hamilton County)
12. Wyoming (Hamilton County)
13. Granville (Licking County)
14. Canfield (Mahoning County)
15. South Range (Mahoning County)
16. Highland (Median County)
17. Fort Recovery (Mercer County)
18. Centerville (Montgomery County)
19. Oakwood (Montgomery County)
20. Revere (Summit County)
21. Mason (Warren County)

#### **Ohio Report Cards**

Currently, there are a total of twenty-three (23) indicators for Ohio school districts: #1-21 are based on the results of state-mandated tests in grades 3 through 10; #22 is the attendance rate for all grades; #23 is the Graduation Rate for the 2003-04 school year. Additionally, the testing data in reading and mathematics are disaggregated to specifically assess the performance of students in various groupings, i.e. by ethnicity, economics, English proficiency, and academic disabilities. This is required by the U.S. Government’s “No Child Left Behind Act” and is reported as Adequate Yearly Progress or AYP. Finally, a Performance Index Score is calculated to report how well a school or district is performing over time. This score is the weighted average of all tested subjects

for every student tested in grades 3,4,5,6,7,8,10. The state has created a scale of 0-120 points, with 100 being the goal. Each district's Report Card presents the results for the district, similar districts and the state. Oakwood's Comparison Group includes 20 other districts such as Bexley, Bay Village, Chagrin Falls, Indian Hills, Madeira, Ottawa Hills, and Wyoming. All are roughly similar in size, family income, and poverty rates. (Comment: To view the Ohio 2004-05 Local Report Card for Ohio School Districts and Buildings click on the following website at: [http://www.ode.state.oh.us/reportcard/.](http://www.ode.state.oh.us/reportcard/))

## Appendix H

### Ohio School Boards Association (OSBA)

#### OSBA - Who to Call List

##### OSBA Mission Statement<sup>9</sup>

**OSBA's mission is to unite boards of education and to provide information, services and representation to its members. OSBA accomplishes this by:**

- Promoting the importance of public education and the role of school boards;
- Providing training programs and workshops for board members and administrators;
- Assisting school boards in solving the management problems facing school districts;
- Being an effective advocate for the legislative program adopted by the membership;
- Informing board members about current and future issues and their impact on public education;
- Maintaining an effective and efficient organizational structure and human resource management for the association;
- Building interest and pride in association participation.

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##### OSBA – Who to Call List<sup>10</sup>

### OSBA is ready to serve you

Call when you need help or have a question  
(614) 540-4000 or (800) 589-OSBA  
FAX (614) 540-4100

Phone and voice mail extensions are listed for each staff member

- **Address Changes:** Ann Herritt (111), Burke Hill (112)
- **Administrative Salary Analysis:** Van Keating (241)
- **All-Ohio School Board:** Rick Lewis (271), Kris Jesse (270), Jeff Chambers (273)
- **Arbitration Referral Service:** Van Keating (241), Renee Byers (243)
- **Auditing:** Van Keating (241)
- **Award Of Achievement:** Al Meloy (275), Judy Morgan (280)
- **Board Candidates:** Rob Delane (276), Al Meloy (275), Kathleen LaSota (274), Rick Lewis (271)
- **Board In-Service Programs, Customized Workshops:** Al Meloy (275), Rob Delane (276), Kathleen LaSota (274), Judy Morgan (280)

<sup>9</sup> <http://www.osba-ohio.org/ms.htm>

<sup>10</sup> <http://www.osba-ohio.org/wtc.htm>

- **Board Leadership Institute:** Rob Delane (276), Judy Morgan (280), Jeff Chambers (273), Laurie Miller (284)
- **Board Presidents:** Al Meloy (275), Rob Delane (276), Kathleen LaSota (274), Rick Lewis (271)
- **Board/Superintendent Relations:** Rob Delane (276), Al Meloy (275), Kathleen LaSota (274), Rick Lewis (271)
- **Board/Treasurer Relations:** Rob Delane (276), Al Meloy (275), Rick Lewis (271)
- **Bonds, Treasurer and Position:** Sue Kazanjian (202), Janice Smith (201)
- **Briefcase:** Gary Motz (278), Cari Hinkle (277), Scott Ebright (272); voice mail for announcements to be published (330)
- **Business Meeting:** John Brandt (211), Fred Pausch (231), Maryse Gonzalez (230)
- **Capital Conference Housing:** Laurie Miller (284)
- **Capital Conference Program:** Rob Delane (276), Judy Morgan (280), Rick Lewis (271)
- **Capital Conference Registration:** Ann Herritt (111), Burke Hill (112)
- **Capital Conference Trade Show:** Robin Charles (282), Kris Jesse (270), Chris Daugherty (285)
- **CLE Credits:** Susan Czeh (220)
- **CommunicationPlus:** Kris Jesse (270), Cari Hinkle (277), Scott Ebright (272)
- **Communication Training:** Scott Ebright (272), Gary Motz (278), Cari Hinkle (277)
- **Consumer Directed Health Care:** Janice Smith (201), Rick Lewis (271), Chris Daugherty (285)
- **Council of Urban Board Solicitors:** Rick Dickinson (221), Susan Czeh (220), Patrick Schmitz (222), Hollie Reedy (223)
- **Early Retirement Incentive Program:** Van Keating (241), Renee Byers (243), Rick Lewis (271)
- **Education Tax Policy Institute:** John Brandt (211), Maryse Gonzalez (230)
- **Electricity Purchasing Co-op:** Rick Lewis (271), Chris Daugherty (285)
- **Enrollment Projections:** Van Keating (241)
- **Executive Searches:** (Superintendent, treasurer, business manager, principal): Rob Delane (276), Al Meloy (275), Kathleen LaSota (274), Judy Morgan (280), Debby Hoopes (281)
- **Facts in a Flash:** Jennifer Economus (232)
- **Federal Relations Network:** Maryse Gonzalez (230), Jennifer Economus (232), Fred Pausch (231), Michelle Francis (233)
- **Financial Forecasting:** Van Keating (241)
- **Human Resources:** Donna Williams (245)
- **Impasse:** Van Keating (241), Renee Byers (243)
- **Insurance Trust:** Janice Smith (201)
- **Invoices:** Janice Smith (201), Sue Kazanjian (202)
- **Job Description CD Service:** Melanie Price (250), Renee Byers (243)
- **Journal:** Scott Ebright (272), Gary Motz (278), Cari Hinkle (277)
- **Journal Advertising:** Chris Daugherty (285), Cari Hinkle (277), Scott Ebright (272)
- **Kids PAC:** Jennifer Economus (232), Maryse Gonzalez (230), Fred Pausch (231), Michelle Francis (233)
- **Labor Relations:** Van Keating (241), Renee Byers (243)
- **Legal Assistance Fund:** Rick Dickinson (221), Patrick Schmitz (222), Hollie Reedy (223), Susan Czeh (220)
- **Legal Information:** Rick Dickinson (221), Patrick Schmitz (222), Hollie Reedy (223)
- **Legislation:** Fred Pausch (231), Jennifer Economus (232), Maryse Gonzalez (230), Michelle Francis (233)
- **Legislative Report:** Fred Pausch (231), Michelle Francis (233)

- **Liability Insurance/Ohio School Plan:** John Brandt (211), Rick Dickinson (221), Rick Lewis (271)
- **Mailings:** Ann Herritt (111), Burke Hill (112)
- **Management Development In-Service:** Greta Gardner (244), Van Keating (241), Renee Byers (243)
- **Media Relations:** Scott Ebright (272), Gary Motz (278), Cari Hinkle (277)
- **Medicaid Reimbursement:** Jeff Chambers (273), Patrick Schmitz (222)
- **Membership:** Ann Herritt (111), Burke Hill (112)
- **New Board Member Relations:** Al Meloy (275), Kathleen LaSota (274), Rob Delane (276), Rick Lewis (271)
- **No Child Left Behind:** Rob Delane (276), Greta Gardner (244), Hollie Reedy (223), Van Keating (241), Scott Ebright (272)
- **NSBA Convention:** Debbie Beckman (210)
- **NSBA National Affiliate Program:** Rick Lewis (271)
- **NSBA Relations:** John Brandt (211), Debbie Beckman (210)
- **Ohio Council Of School Board Attorneys:** Rick Dickinson (221), Patrick Schmitz (222), Hollie Reedy (223), Susan Czeh (220)
- **Ohio Policy Services:** Greta Gardner (244), Donna Williams (245), Laura Kohler (248), Jeannette Radcliff (252)
- **OSBA Dues:** Jeff Chambers (273), Ann Herritt (111), John Brandt (211)
- **OSBA Finances:** Janice Smith (201), John Brandt (211)
- **OSBA General Information & Governance:** John Brandt (211), Debbie Beckman (210)
- **Paperless Board Meetings:** Jeff Chambers (273), Chris Daugherty (285)
- **Parliamentary Procedure:** Rick Dickinson (221), Patrick Schmitz (222), Hollie Reedy (223)
- **Plaque Orders:** Burke Hill (112), Ann Herritt (111)
- **Policy Updates:** Greta Gardner (244), Donna Williams (245), Laura Kohler (248), Jeannette Radcliff (252)
- **Publication Orders:** Burke Hill (112), Ann Herritt (111)
- **Regional Activities:** Rick Lewis (271), Kris Jesse (270), Jeff Chambers (273)
- **Research Library:** Robin Charles (282)
- **Safety training:** Bill Wilcox (247), Chris Daugherty (285)
- **Safety Video Library:** Melanie Price (250), Bill Wilcox (247)
- **Salary Studies:** Van Keating (241)
- **Sample Policies:** Greta Gardner (244), Donna Williams (245), Laura Kohler (248), Jeannette Radcliff (252)
- **School Finance:** Van Keating (241)
- **School Management News:** Renee Byers (243), Linda Photos (240)
- **School Safety Program:** Bill Wilcox (247), Van Keating (241)
- **Search Candidate File Confirmation:** Debby Hoopes (281), Judy Morgan (280)
- **Small School District Advisory Committee:** Debbie Beckman (210)
- **State Employment Relations Board:** Van Keating (241), Renee Byers (243)
- **Student Achievement Fair:** Kathleen LaSota (274), Rob Delane (276), Debby Hoopes (281), Judy Morgan (280)
- **Student Achievement Leadership Team:** John Brandt (211), Rob Delane (276), Greta Gardner (244), Scott Ebright (272), Rick Lewis (271), Debbie Beckman (210), Bill Wilcox (247), Jeff Chambers (273), Fred Pausch (231)
- **Thank-A-Boss Program:** Debbie Beckman (210)
- **The Link:** Jennifer Economus (232), Maryse Gonzalez (230)

- **Urban Commission:** Maryse Gonzalez (230), Michelle Francis (233)
- **Vendorbook:** Chris Daugherty (285), Cari Hinkle (277)
- **Vendorlink:** Robin Charles (282), Chris Daugherty (285)
- **Web Site:** Jeff Chambers (273), Robin Charles (282), Maryse Gonzalez (230)
- **Workplace Safety:** Bill Wilcox (247)
- **Workers' Comp Program:** Van Keating (241), Linda Photos (240), Bill Wilcox (247)
- **Workshop Registration:** Laurie Miller (284), Registration by voice mail (300)

## Appendix I

### Sycamore School Levy Fact - 2004

The Sycamore School Levy Fact Sheet was produced by CLASS, Susan Johnstal & Connie Lindsay, co-chairs in order to assist in their levy campaign in 2004 and available at <http://www.lwvcincinnati.org/voting/sycamorelevy.htm>.<sup>11</sup>

## SYCAMORE SCHOOL LEVY FACT SHEET

10/13/04

A strong community needs strong schools – schools that deliver an outstanding return on your investment of tax dollars by increasing property values, attracting healthy businesses, and producing outstanding future leaders, workers, parents and citizens.

This 5.5 mill, temporary levy is 30 percent lower than the one placed on the ballot on August 3, 2004. It will expire in five years, and will cost a property owner \$168 for every \$100,000 of property value. To find the assessed value of your home go to [www.hamiltoncountyauditor.org/realestate/](http://www.hamiltoncountyauditor.org/realestate/)

### Support this levy – do it for *your* future

There has been, and will continue to be, an exodus of businesses and residents from Hamilton County to outlying counties, which offer cheaper land and homes as well as strong schools.

In order to attract new residents, and prevent the erosion of our property values and community standard of living, we must remain one of the state's premier school systems.

*Sycamore is one of only 23 Ohio school districts (out of 607) to be rated "excellent" for five consecutive years! Furthermore, in 2004, Sycamore had more National Merit scholars, more Advanced Placement scholars, higher ACT scores and higher SAT math scores than any other area school system with an excellent rating.*

### Taxes for schools – a return on your investment.

A study by the National Bureau of Economic Research finds that every additional tax dollar put into public schools increases property values by \$20. Therefore, you can expect the following return on your tax dollar investment in the Sycamore schools:

Home Market Value	Annual	Monthly	Daily	Return*
\$100,000	\$168.44	\$14.04	\$0.46	<b>\$3,368.80</b>

<sup>11</sup>Sycamore School Levy Fact Sheet, dated 10/13/04, and accessed via <http://www.lwvcincinnati.org/voting/sycamorelevy.htm>.

\$200,000	\$336.88	\$28.07	\$0.92	<b>\$6,737.60</b>
\$300,000	\$505.31	\$42.11	\$1.38	<b>\$10,106.20</b>

\*Property value increase based on National Bureau of Economic Research

According to local real estate agents, homebuyers willingly pay up to *40 percent more* for a home in the Sycamore school district than in many other districts, including some that are rated excellent by the state.

## Why the levy is needed

Only 15% of our revenues come from the state, so 85% must come from local property taxes. Inflation has driven up our expenses, while local tax revenue has remained flat for five years, and actually declined this year. In addition, state funds are being lost as a result of the phase-out of Ohio's inventory tax, which provided 9% of Sycamore's operating revenues.

## Listening to the community – cuts *are* being made

Sycamore has cut \$6.1 million from the operating budget since this summer, reducing the number of administrators, teachers, and support staff; cutting programs and services, and reducing investment in key learning tools such as technology and textbooks.

Even if the levy passes, an additional \$2.2 million will be cut in the 2005-2006 school year, and student fees will be implemented for academics, athletics and after-school activities. Sycamore also will implement and monitor cost-savings programs and a five-year financial plan that includes salary management and cost containment measures.

If the levy fails, deeper cuts will be necessary. At that point, Sycamore schools will be hard-pressed to maintain its excellent rating.

## The facts about millage

The school tax rate in Sycamore is LOWER than most Hamilton County school districts:

### Hamilton County – Effective Residential Millage Rates – 2005

*Finneytown	42.77	
Mariemont	41.51	
Lockland	40.61	
Loveland	(has approved a 5 mill increase for '05)	39.30
Mount Healthy	39.02	
Cincinnati	38.84	

Milford	38.11
Madeira	(has approved a 6.87 increase for '05) 36.18
*Winton Woods	34.54
*Deer Park	34.36
St. Bernard	33.79
Wyoming	(also has 1.25% income tax) 33.49
Norwood	31.49
Forest Hills	30.47
*Sycamore	30.37
North College Hill	27.47
Oak Hills	26.86
*Northwest	26.85
*Reading	26.59
Princeton	25.99
*Three Rivers	25.80
Southwest	25.12
Indian Hill	23.78

*\* Has a school levy on the November 2 ballot*

## For more information

Contact [askclass@yahoo.com](mailto:askclass@yahoo.com), visit [www.yes2sycamore.com](http://www.yes2sycamore.com), or call our hotline at 791-1884.

**For higher property values – for decreased spending – vote FOR Sycamore Schools.**

*Produced by CLASS, Susan Johnstal & Connie Lindsay, co-chairs; 10361 Southwind, Cincinnati, OH 45242 10.13.04*

## Appendix J

### KnowledgeWorks Foundation<sup>12</sup>

The following information was obtained from KnowledgeWorks Foundation website:

“Founded in 1998, KnowledgeWorks Foundation is Ohio's largest public education philanthropy. Dedicated to removing barriers to higher education for all individuals, the Foundation provides funding, technical assistance, and other resources to initiatives that improve the effectiveness and efficiency of Ohio's public and higher education systems.

To support this goal, we've committed 85 million dollars in grants to research-based, education reform initiatives since our inception. We strongly believe the reforms we fund show great promise for supporting Ohio's education, and ultimately supporting the children and adults who are the economic future of Ohio.

### Our Work

Our work is grounded in four main areas: High Schools and School Improvement; Adult Learning; College Access & Success; and Communities & Schools. These areas currently support the following initiatives:

#### High Schools and School Improvement

Initiatives within the High Schools and School Improvement area address the challenges and shortcomings of Ohio's public schools, where only 7 in 10 students graduate every year. Most of our financial and human resources are invested in high schools, although our work also supports pre-kindergarten through post-secondary education. Initiatives include: [The Ohio High School Transformation Initiative \(OHSTI\)](#); [Project GRAD Ohio](#); and [Early College](#).

#### Adult Learning

Initiatives within the Adult Learning area support Ohio's low-wage workers, estimated at over 1 million, who have limited opportunities for increasing their skills and incomes. These initiatives support accessible postsecondary education for all low-wage workers, so they can escape poverty through higher-paying jobs. Initiatives include: [The Ohio Bridges to Opportunity Initiative](#) and [Career Pathways](#).

#### College Access & Success

Initiatives within the College Access & Success area work to ensure that every Ohioan has the option of postsecondary education at all levels-apprenticeship, certificate,

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<sup>12</sup> <http://www.nationalschoolsearch.org/aboutKWF/> accessed in February 2006.

associate's degree, and bachelor's degree. Our goal is to grant every Ohioan access to learning beyond high school and throughout their lives. Initiatives in this area include: [Ohio College Access Network \(OCAN\)](#) and [Achieving the Dream](#).

### **Communities & Schools**

The Communities & Schools area is encouraging school districts and communities to utilize state and national funding for school construction to make school facilities more conducive to learning, and more accessible to the entire community. We facilitate partnerships between communities and schools, so they can redesign school facilities that reflect the community's needs and values. Initiatives in this area include: [School as Centers of Community](#) and [School Facilities](#).

## **Our Approach**

### **Community Engagement — The Key to Healthier Schools**

All of our Foundation program areas support powerful community engagement that encourages community members to influence official decisions, and share ownership of their public schools. [Community Engagement](#)

### **Public Policy — The Key to Long-term Change**

Our Foundation only supports education reform initiatives that will lead to long-term change in the education system. An important part of ensuring that change lasts is for the state, federal, and local governments to enact legislation that supports and nurtures the change. To that end, we identify and advance policy changes that support the initiatives we fund. Learn more about our role in public policy within [High Schools](#), [Adult Learning](#), [College Access & Success](#), and [Communities & Schools](#).

### **The KnowledgeWorks Way**

We are unique in our approach to education philanthropy. We describe our method in three simple words: "Fund, Facilitate, and Do."

- By **funding** initiatives, we are strategically investing resources, including time, money, and people, into priority areas.
- By **facilitating** initiatives, we are bringing together people who might not traditionally work collaboratively to discuss issues and uncover new solutions.
- By **doing** some of the work ourselves, we are able to fill temporary gaps where there may not be an individual, team or community to take on a particular challenge.

### **History**

KnowledgeWorks Foundation was created in 1998 as a charitable foundation through the reorganization of the Student Loan Funding Corporation.