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November 18, 2013

Larry Clausen, Executive Director  
Arizona Developmental Disabilities Planning Council  
1740 West Adams, Suite 410  
Phoenix, AZ 85007

Dear Mr. Clausen:

Thank you for your interest in having WestEd assist the Arizona Developmental Disabilities Planning Council (Council) develop a primer that explains how special education programs and services are funded in the state of Arizona. We hope you find that WestEd is uniquely qualified to assist you with this important project.

## ABOUT WESTED

WestEd ([www.wested.org](http://www.wested.org)) is a preeminent educational research, development, and service organization with 600 employees and 17 offices nationwide, including two in Arizona. WestEd has been a leader in moving research into practice by conducting research and development programs, projects, and evaluations; by providing training and technical assistance; and by working with policymakers and practitioners at state and local levels to carry out large-scale school improvement and innovative change efforts. WestEd's mission—to work with education and other communities to promote excellence, achieve equity, and improve learning for children, youth, and adults—is addressed through a full range of projects. Over the past 45 years, WestEd and its two predecessors, Far West Laboratory for Educational Research and Development and Southwest Regional Laboratory, have carried out nearly 2,000 successful projects representing major contributions to the nation's R&D resources. WestEd has from 450 to 700 active contracts and grants at any given time. Current work extends to include most states in the nation and an increasing number of other countries.

## PROJECT APPROACH

The topic of education funding is notorious for its complexity. There's a tendency to use specialized budget terms and large numbers, which make it hard for the general public to understand and relate to. In approaching the design of a primer explaining special education funding in Arizona, we envision organizing the content around key questions that walk a reader through a logical progression of information that ends with a summary presented as quick funding facts. Furthermore, the information that's written will be relatively jargon free, and in situations where terminology cannot be avoided it will be clearly explained, with graphics that illustrate the concepts being shared.

An example may be helpful to illustrate our approach. WestEd is currently developing

narrated PowerPoints that explain California’s new education funding formula. Below is an image of one of the slides used to explain the new funding formula with the narrative that accompanies the slide.

Prior to the passage of the Local Control Funding Formula the state divided funding into slices for local educational agencies into two categories, revenue limits and categorical programs. In effect, the state told local education agencies through the former funding formula how big their slice was and what the filling would be.

Now the state slices the pie based on a relatively simple calculation, which funds local educational agencies the same amount per student with a handful of adjustments for grade levels and demographic characteristics. The state has largely handed over responsibility for determining the filling of each pie to local educational agencies. The expectation is that funding flexibility improves the ability of local educational agencies to meet student needs compared to the former system where the state tended to direct funding to specific activities.

The general outline envisioned for the primer includes the following:

- Introduction – explains the purpose, structure, and value of the primer
- What is special education? – leads with this question to establish context for funding
- How does a school determine what services to provide to a student with a disability – this will explain the process for goal and service determination through planning (i.e., IEPs) that contribute to the cost of special education services
- How does Arizona fund education for students with disabilities? – this will explain both federal, state, and local contributions for general education and special education services
- Quick funding facts – this will provide a summary of facts that help with understanding special education funding (e.g., how many students, how much is spent per student, breakdown of revenue by type [federal, state, local])

WestEd will develop a more detailed outline in consultation with the Council prior to developing content for the primer. A draft of the primer will be shared with the Council for review and comment before a finalized version is prepared. WestEd will produce a print-ready version of the primer that can be posted online and/or reproduced in hard copy for distribution. Specifications for the size, color, logos, etc. will be determined in consultation with the Council.

## OUR TEAM

This project will be co-led by Jannelle Kubinec, WestEd’s Director of the Comprehensive School Assistance Program and Ann Hern. Kubinec is a nationally recognized expert on the effective use of resources to support district and school improvement. She currently leads, on behalf of the California State Board of Education, the design and implementation of new policies and practices to overhaul California’s nearly \$40 billion education school finance

system. She has been involved in state-level education finance reviews and improvement projects in Colorado, Hawaii, and Nevada as well as review and support of school district finance projects throughout California.

Ann Hern is Education Finance Specialist for the Comprehensive School Assistance Program at WestEd. She works with national, state, and local education agencies to support district and school improvement through resource alignment, supports labor management research and technical assistance, and conducts cost-effectiveness and efficiency studies for program services such as special education, technology, and administration. She has over 20 years of experience supporting all aspects of school operations and finance.

Paul Koehler will serve as a key advisor to the project. Dr. Koehler is Director of the Policy Center at WestEd. The Policy Center is a voice at the state, regional, and national levels, keeping members of the U.S. Congress and other policy leaders informed of developments in research and practice. In addition, he serves as Director of the West Comprehensive Center, a technical assistance center funded by the U.S. Department of Education. The Center provides assistance to chief state school officers and their staffs in Arizona, Nevada, and Utah as they implement provisions of the federal Elementary and Secondary Education Act in their states.

## ANTICIPATED TIMELINES

Once a contract is in place, WestEd would initiate the project with a meeting to discuss content for the primer to inform the development of a detailed outline. Within four weeks of developing the outline a draft of the primer will be provided for review and comment. If helpful, during this period, weekly or biweekly check in calls can be scheduled to share progress and answer questions. Within two weeks of reviewing feedback to the final draft, a finalized version will be provided.

## COST OF PROJECT

Our fee for developing the print-ready special education primer is \$20,000 inclusive of all project staff time and expenses. The proposed price reflects an in-kind contribution from WestEd of approximately \$5,000 in additional support. After reviewing the proposal, if you decide the proposed scope should be expanded or contracted, we would be happy to make modifications and provide a revised estimated fee. Our proposal is valid for 60 days from the date of this letter.

We appreciate the confidence you have in WestEd and look forward to working with the Council on the upcoming project. If you have questions about our proposal, please contact Jannelle Kubinec at 916 492-4069 or [jkubinec@wested.org](mailto:jkubinec@wested.org).

Sincerely,



Jannelle Kubinec

