



PreK-12 Appropriations Committee

February 10, 2009
10:15 a.m. – 5:00 p.m.
404 House Office Building

Action Packet

Anitere Flores
Chair

COMMITTEE MEETING REPORT

PreK-12 Appropriations Committee

2/10/2009 10:15:00AM

Location: 404 HOB

AMENDED

Attendance:

	<i>Present</i>	<i>Absent</i>	<i>Excused</i>
Anitere Flores (Chair)	X		
Ellyn Setnor Bogdanoff			X
Dwight Bullard	X		
Gwyndolen Clarke-Reed	X		
Erik Fresen	X		
Martin Klar	X		
John Legg	X		
Kelli Stargel	X		
Totals:	7	0	1

Committee meeting was reported out: Tuesday, February 10, 2009 4:54:44PM

COMMITTEE MEETING REPORT

PreK-12 Appropriations Committee

2/10/2009 10:15:00AM

Location: 404 HOB

AMENDED

Workshop

Budget Workshop

Base Budget Review

Appearances:

Deputy Chancellor Mary Jane Tappen, K-12 Instruction and Student Services (State Employee)

(At Request Of Chair) - Information Only

FCR STEM & SUN LINK K-12 Resource Sharing

Florida Department of Education

325 West Gaines Street

Tallahassee FL 32399

Phone:(850) 245-0818

Presentations

Florida's Textbook Adoption Process

School Board Investments and Bonding

Department of Education Information Technology Services

Department of Education Assessment and Evaluation

Appearances:

Ash Williams, Executive Director & CIO (Lobbyist) (State Employee) (At Request Of Chair) -

Information Only

Local Government Investment Pool

State Board of Administration

1800 Hermitage Boulevard

Tallahassee FL 32308

Phone:(850) 413-1253

Buzz Ellis, Consultant (At Request Of Chair) - Information Only

Florida Textbook Adoption Process

McGraw-Hill Education/AAP

3108 Straoa Bella Court

Naples Florida 34119

Dr. Cornelia Orr, Administrator, Office of Assessment and School Performance (State Employee)

(At Request Of Chair) - Information Only

State Assessment Program

Florida Department of Education

245 West Gaines Street

Tallahassee Florida 32399

Phone:(850) 245-0507

Dr. Eric Smith, Commissioner (Lobbyist) (State Employee) (At Request Of Chair) - Information

Only

State Assessment Program

Florida Department of Education

245 West Gaines Street

Tallahassee FL 32399

Phone:(850) 245-0507

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COMMITTEE MEETING REPORT

PreK-12 Appropriations Committee

2/10/2009 10:15:00AM

Location: 404 HOB

AMENDED

Herb Stanley, Vice President (At Request Of Chair) - Information Only

Florida Textbook Adoption Process/Depository Role

Florida School Book Depository

1121 North Ellis Road

Jacksonville Florida 32254

Phone:(904) 781-7191

J. Ben Watkins, Director (Lobbyist) (State Employee) (At Request Of Chair) - Information Only

Funding For School Construction

SBA: Division of Bond Finance

1801 Hermitage Boulevard Hermitage Centre, Suite 200

Tallahassee Florida 32308

Phone:(850) 488-4782

Jim Hamilton, Consultant (Lobbyist) - Information Only

LGIP

Hillsborough County Schools

4031 Teal Way

Pensacola Florida 32507

Phone:(813) 624-2171

John Newman, Sr. Policy Advisor to the Commissioner (Lobbyist) (State Employee) (At Request Of Chair) - Information Only

DOE: Information Technology

Florida Department of Education

1505 Turlington Building

Tallahassee Florida 32399

Phone:(850)245-9610

Louis Greco, Director for Instructional Materials & Media Services (At Request Of Chair) - Information Only

Florida Textbook Adoption Process/School Distrists

St. Johns County School District; FADSS

40 Orange Street

St. Augustine Florida 32084

Phone:(904) 547-3947

Mary Jane Tappen, Deputy Chancellor, K-12 Curriculum Instruction & Student Services (State Employee) (At Request Of Chair) - Information Only

Instructional Materials Adoption

Florida Department of Education

325 West Gaines Street

Tallahassee Florida 32399

Phone:(850) 245-0818

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INTRODUCTION TO THE **SBA & LGIP**

FEBRUARY 2009

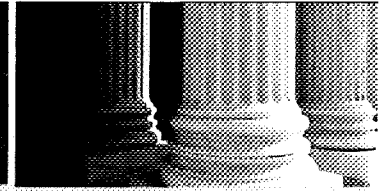
investing for
FLORIDA'S
future



TRUST • PERFORMANCE • INTEGRITY

STATE BOARD OF ADMINISTRATION

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13 Local Government Investment Pool	15 Fund B Surplus Funds Trust Fund	17 LGIP & Fund B School Board Balances					

The SBA is a leader among PUBLIC PENSION FUNDS

Creating Value

Founded over 60 years ago, today's SBA is one of the nation's leading public pension funds.

Priorities

Nearly 80% of the assets managed by the SBA are in the Florida Retirement System (FRS) Pension Plan Trust Fund.

Strong leadership, good public policy, investment performance and accountability are important to long-term success.

Managing Risk

The SBA has enhanced its risk management, compliance and oversight policies and continues to seek areas for improvement.

Performance

The SBA's focus on prudent cost-effective, risk-controlled and long-term investment strategies has produced good cumulative performance.

In 2008 Standard & Poors reported the FRS Pension Plan with the third highest ratio of actuarial valuation of assets to liabilities, or "funded ratio," among state retirement plans.

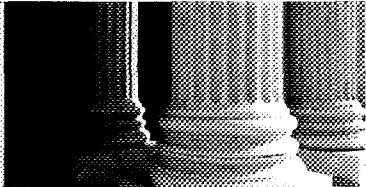
The FRS Pension Plan has remained fully funded for the past 11 years.

STATE RETIREMENT SYSTEMS FUNDED RATIOS	
FRS Pension Plan's Rank Among 50 of the Nation's Largest Public Retirement Plans	3rd best funded
Number of Plans With Surplus, including the FRS Pension Plan	5 (or only 10%)

Source: Standard & Poors February 20, 2008 Report

FRS ACTUARIAL VALUATION (As of July 1, 2008)	
FRS Pension Plan's Funded Ratio	106.7%
Size of the FRS Pension Plan Surplus	\$8.5 billion

Overview



The State Board of Administration (SBA) was originally created in 1943 by Section 16 of Article IX of the 1885 Constitution of the State of Florida to manage debt service investments for bond revenues secured by gasoline tax proceeds. The SBA has evolved to become the fourth largest and one of the most respected pension funds in the nation. As of December 31, we manage \$101 billion in qualified retirement funds and over \$21 billion in non-qualified assets. In addition, we administer several major statewide programs, including the Florida Hurricane Catastrophe Fund and the Public Employees Optional Retirement Program (PEORP).¹

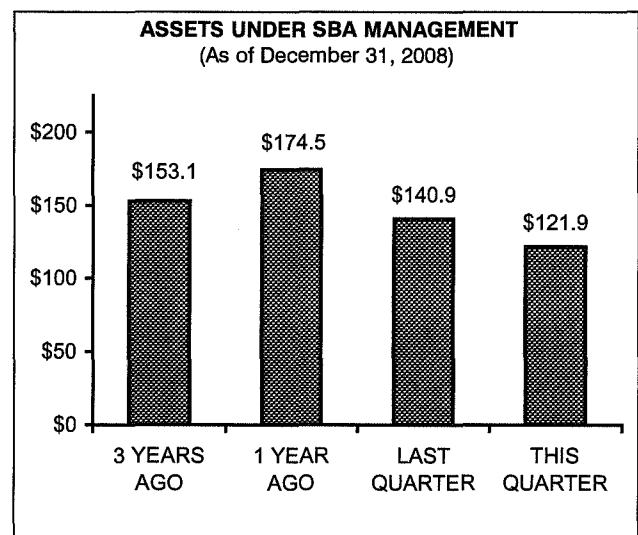
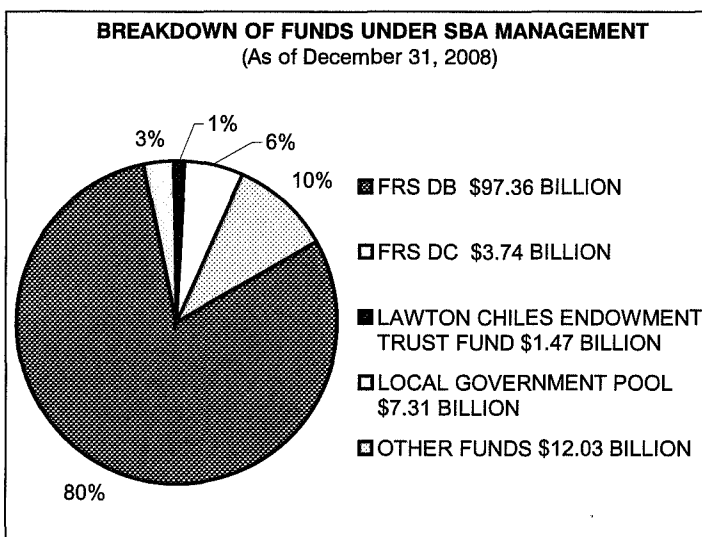
FOCUS ON... SBA's Mission
 The SBA is committed to providing superior investment and trust services while adhering to the highest ethical, fiduciary and professional standards.

The Florida Constitution mandates that we operate as a constitutional public body corporate governed by our Board of Trustees. The SBA's specialized responsibilities and fiduciary duties create a need for operational flexibility that has been recognized by Florida's courts and the Florida Legislature. For example, our budgets are set by the Board of Trustees and reported to legislative leadership. The Trustees authorize operating and capital expenditures as appropriate, to enable the SBA to operate cost-effectively and deliver favorable "bottom line" results. The SBA is also unique, relative to most other public entities, in that it has a measurable bottom line and benchmarks against which success and accountability can be assessed.

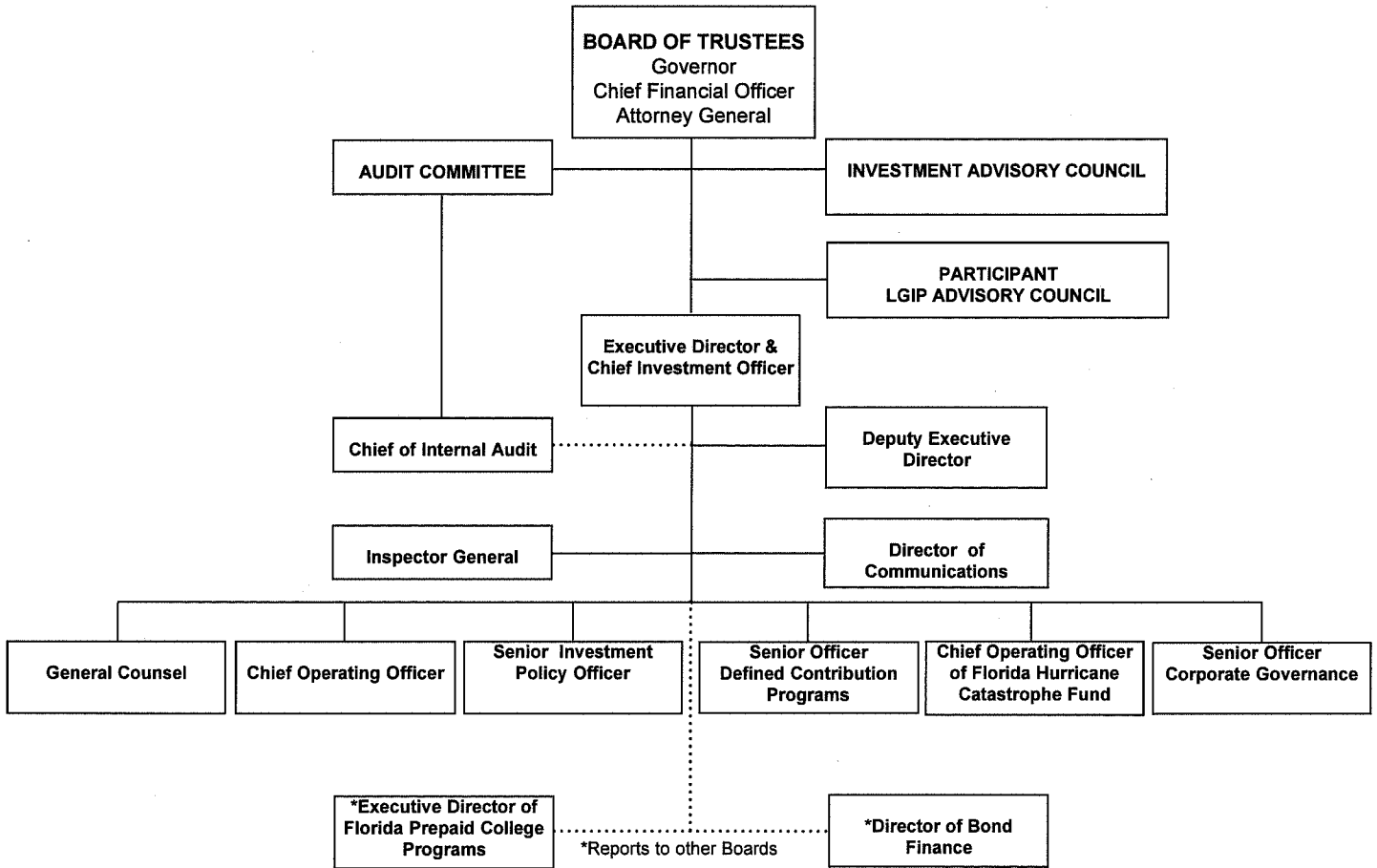
With the strong leadership and support of the Trustees, the SBA has used its status within state government to provide exceptional investment management and administrative services to 980,000 members and retirees of the FRS, as well as our other state and local government clients. In order to maintain our position as a recognized leader in the industry, we continue to strive to maximize the return on investments while prudently managing risk, controlling costs, and performing our duties ethically and in accordance with the highest professional standards.

We hope that you will find this introductory book of assistance in becoming more familiar with the SBA and its activities.

¹ PEORP has the following components: (1) The FRS Investment Plan, an optional 401(a) defined contribution plan that employees choose in lieu of membership in the FRS Pension Plan (a traditional defined benefit plan); (2) Processing about 75,000 enrollments annually into the two FRS retirement plans; and (3) The MyFRS Financial Guidance Program, providing about 700,000 employees retirement planning support.



Organizational Chart



Primary Responsibilities

The State Board of Administration (the "SBA" or the "Board") is an agency of Florida state government that provides a variety of investment services to various governmental entities. These include managing the assets of the Florida Retirement System (FRS) Pension Plan (i.e., defined benefit plan) and Investment Plan (i.e., defined contribution plan), the Lawton Chiles Endowment Fund, the Local Government Surplus Funds Trust Fund (also known as the "Local Government Investment Pool" or "LGIP"), the Hurricane Catastrophe Fund, the Lottery Fund and a variety of smaller funds. As of December 31, 2008, the SBA managed 36 different funds, some established as direct requirements of Florida law and others pursuant to client-initiated trust agreements.

The SBA currently invests in eight asset classes: Domestic Equities, Foreign Equities (both developed and emerging markets), Fixed Income, High Yield, Private Equity, Strategic Investments, Real Estate and Cash.

The next page lists the December 31, 2008 market value of each SBA-managed fund. SBA's flagship management responsibility is to invest and safeguard assets of the FRS Pension Plan Trust Fund, one of the world's largest and financially healthiest public pension funds. The charts on pages 7 and 8 detail the SBA's long-term track record investing the FRS Pension Plan.

The SBA has performed well relative to its investment objective, benchmarks/market indices and peers, in terms of both returns and cost. Notwithstanding the difficult post-2000 and 2007-08 market environments, the SBA has been able to significantly add value over and above the actuarial investment return requirement, helping to create one of the largest surpluses for state pension systems in the U.S. A recent study found that only 10% of U.S. public pension plans have a surplus.

Finally, the SBA has important responsibilities that do not directly involve asset management, including:

- Providing retirement planning support to about 700,000 active members of the Florida Retirement System through the *MyFRS Financial Guidance Program* (created under the 2000 PEORP legislation)
- Administering the Hurricane Catastrophe Fund (CAT Fund) and its associated programs
- Serving as an investment consultant to retirement programs administered by other state agencies, including the State of Florida Deferred Compensation Program and State University System Optional Retirement Program
- Managing the corporate affairs of the Inland Protection Financing Corporation and the Florida Water Pollution Control Financing Corporation
- Administering all debt service funds for bonds issued pursuant to the State Bond Act as well as serving as trustee and escrow agent for bonds issued by the Division of Bond Finance
- Providing administrative support for the Division of Bond Finance and the Florida Prepaid College Board Programs

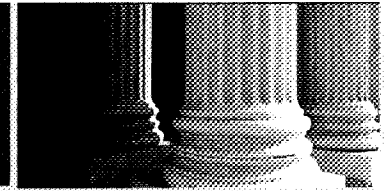
A Board of Trustees governs the SBA. Comprised of Governor Charlie Crist, as Chairman; Chief Financial Officer Alex Sink, as Treasurer; and Attorney General Bill McCollum, as Secretary. The Trustees have ultimate authority and oversight for the SBA's overall strategy. All three of the Trustees are elected statewide to their respective positions as Governor, Chief Financial Officer, and Attorney General.

The Trustees delegate authority to the Executive Director, who serves at the discretion of the Trustees and is responsible for managing and directing all administrative, personnel, budgeting, investment policy and investment functions. The Executive Director manages 191 professional and administrative support staff.

The Trustees appoints six members to serve on the Investment Advisory Council. The Investment Advisory Council provides independent oversight of the SBA's funds and major investment responsibilities. The Council meets on an ongoing basis to discuss general investment policies and broad topics related to the general economic outlook. The Trustees also appoint members to serve on the Participant LGIP Advisory Council.

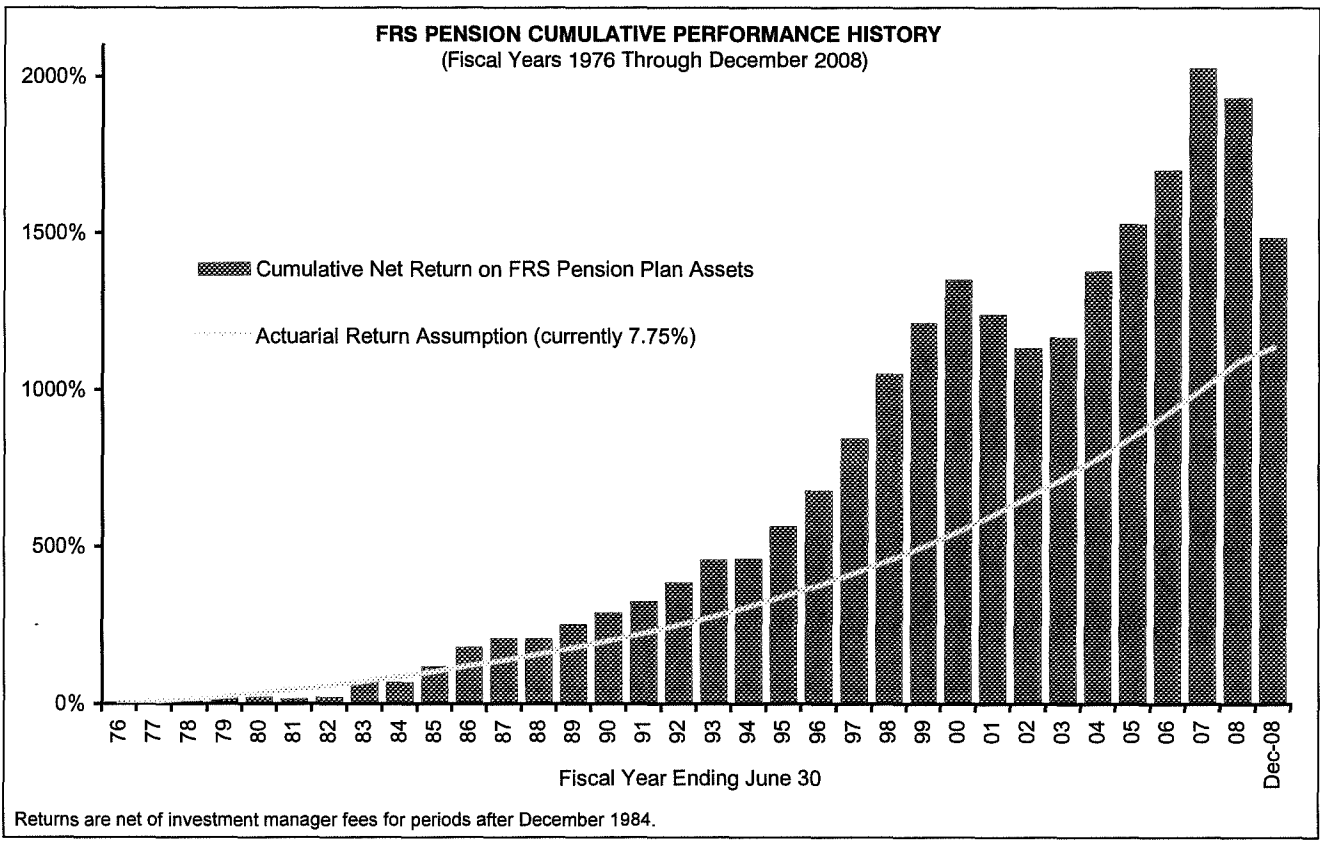
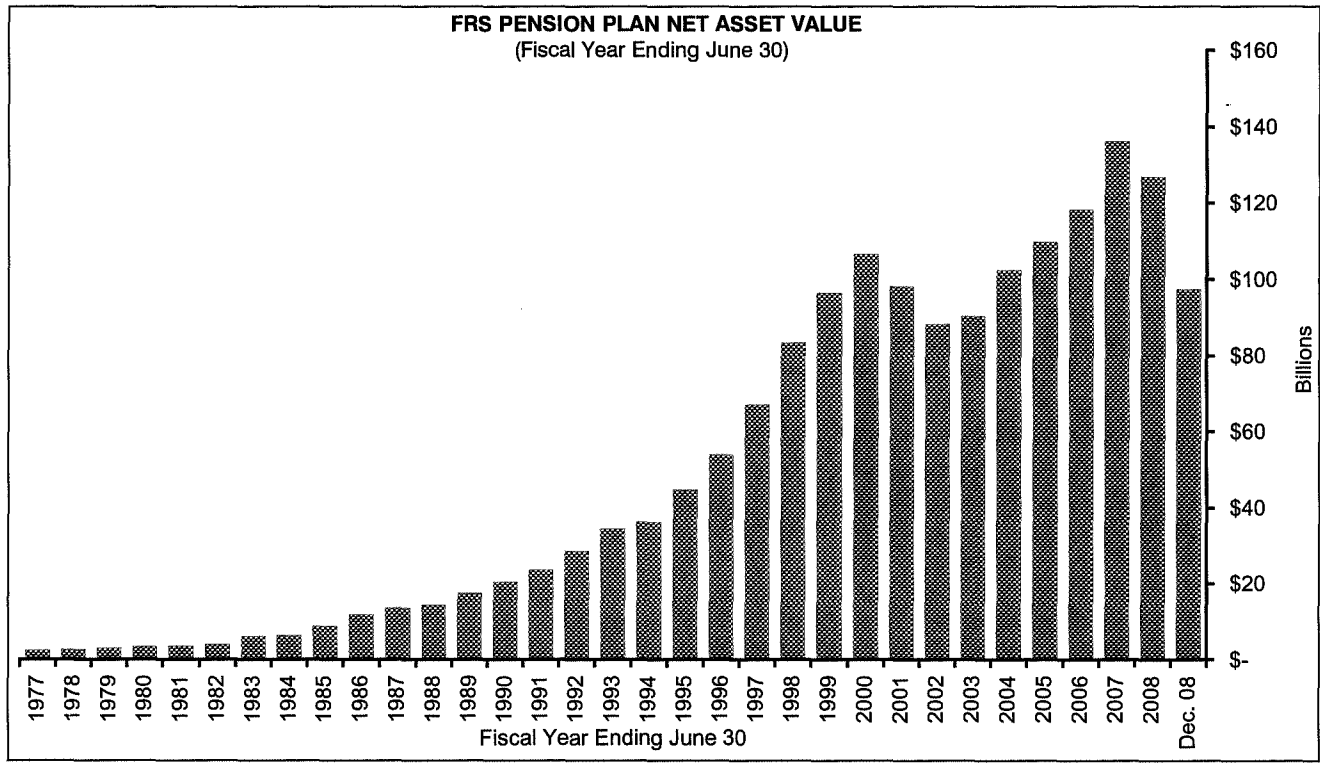
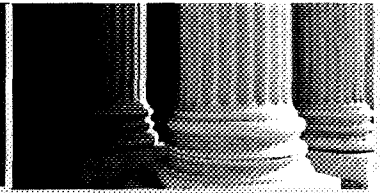
SBA Assets Under Management

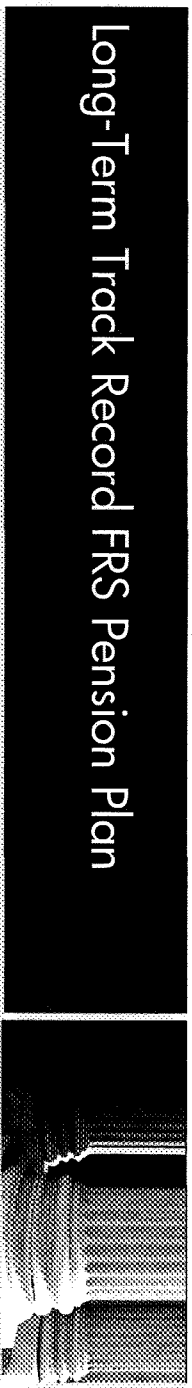
Managed Funds as of December 31, 2008



FLORIDA RETIREMENT SYSTEM (IN THOUSANDS)	December 31, 2008 MARKET VALUE	September 30, 2008 MARKET VALUE
FRS DB ASSET CLASSES		
DOMESTIC EQUITIES	\$32,869,425	\$41,171,858
FOREIGN EQUITIES	\$17,181,877	\$7,865
FIXED INCOME	\$27,039,716	\$31,145,104
HIGH YIELD	\$2,245,746	\$2,645,501
REAL ESTATE	\$9,202,830	\$9,857,904
PRIVATE EQUITY	\$4,335,806	\$4,361,842
STRATEGIC INVESTMENTS	\$3,382,753	\$4,865,477
CASH	\$1,113,772	\$1,042,016
TOTAL FRS DB	\$97,355,052	\$114,510,047
TOTAL FRS DC	\$3,736,126	\$4,162,806
LAWTON CHILES ENDOWMENT (IN THOUSANDS)		
ASSET CLASSES		
DOMESTIC EQUITIES	\$788,884	\$1,040,511
FOREIGN EQUITIES	\$148,820	\$202,013
FIXED INCOME	\$290,361	\$327,426
REAL ESTATE	\$49,896	\$83,278
TIPS	\$171,258	\$201,457
CASH	\$22,839	\$13,771
TOTAL	\$1,472,058	\$1,868,455
OTHER FUNDS (IN THOUSANDS)		
DEBT SERVICE NONESCROW	\$568,355	\$513,783
DEBT SERVICE ESCROW	\$1,199,903	\$1,204,502
GAS TAX	\$1,450	\$1,451
RETIREE HEALTH INSURANCE SUBSIDY	\$238,337	\$232,359
POLICE AND FIREFIGHTERS	\$119,190	\$82,752
FLORIDA ENDOWMENT FOR VOCATIONAL REHAB.	\$2,028	\$2,118
LOCAL GOVERNMENT INVESTMENT POOL	\$5,686,326	\$6,244,851
FUND B SURPLUS FUNDS TRUST FUND	\$391,206	\$501,813
DEPARTMENT OF THE LOTTERY	\$1,159,354	\$1,131,979
SBA ADMINISTRATIVE EXPENSE	\$46,511	\$45,322
PEORP ADMINISTRATIVE TRUST FUND	\$31,822	\$31,397
FLORIDA HURRICANE CATASTROPHE	\$3,046,465	\$2,247,741
FLORIDA HURRICANE CATASTROPHE FINANCING CORP.	\$6,096,773	\$7,239,075
FLORIDA PREPAID COLLEGE PROGRAM ¹	\$190,818	\$239,334
BOND PROCEEDS	\$1,200	\$3,136
ARBITRAGE COMPLIANCE	\$2,213	\$2,233
REVENUE BOND FEE	\$1,688	\$1,858
INLAND PROTECTION FINANCING CORPORATION	\$1	\$1
BLIND SERVICES	\$2,021	\$2,264
MCKNIGHT EDUCATION FUND	\$1,507	\$2,110
SCRIPPS	\$130,056	\$141,578
FSU RESEARCH FOUNDATION	\$68,986	\$74,899
ICB PROGRAM	\$36,693	\$32,591
BURNHAM INSTITUTE	\$120,231	\$118,891
TORREY PINES INSTITUTE	\$18,262	\$21,919
PINELLAS SUN COAST TRANSIT AUTHORITY	\$6,654	\$6,359
SRI INTERNATIONAL	\$8,686	\$8,723
UNIVERSITY OF MIAMI	\$38,193	\$60,404
MAX PLANCK	\$66,535	\$84,668
OREGON HEALTH AND SCIENCE	\$46,873	\$45,495
CHARLES STARK DRAPER LABORATORY	\$8,057	\$0
PAYING BANK RECALLS	\$0	\$0
TOTALS	\$19,336,394	\$20,325,612
ALL FUNDS	\$121,899,631	\$140,866,919

Long-Term Track Record FRS Pension Plan

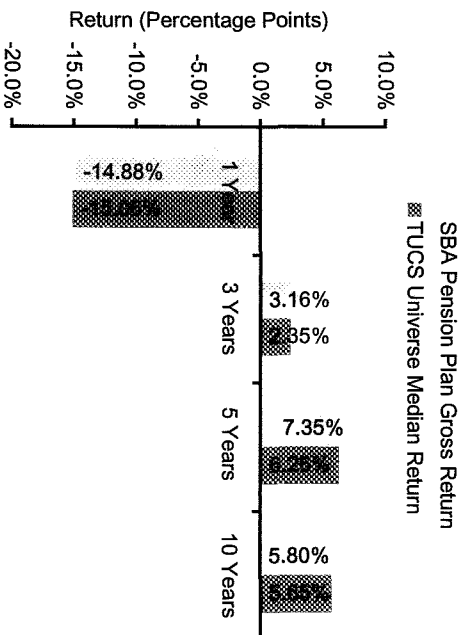




Long-Term Track Record FRS Pension Plan

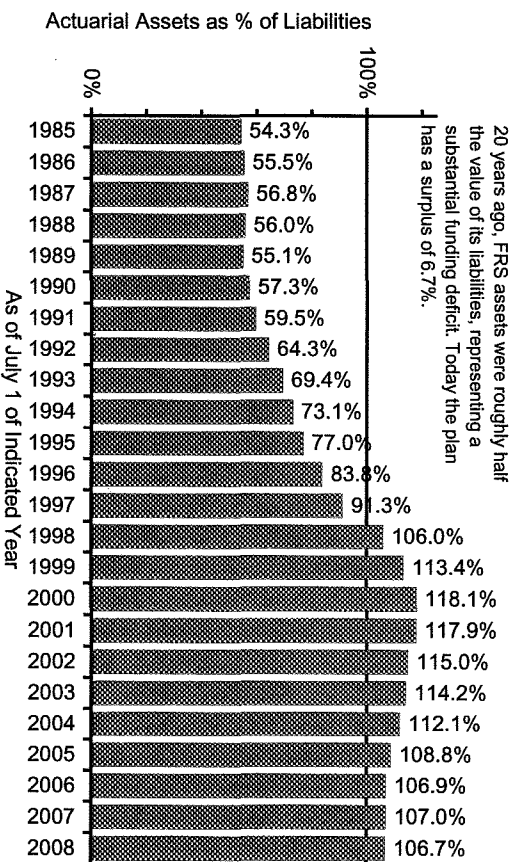
PENSION PLAN PERFORMANCE COMPARISON TO TUCS UNIVERSE

TUCS Defined Benefit Plans (Corporate and Public)
Through September 30, 2008

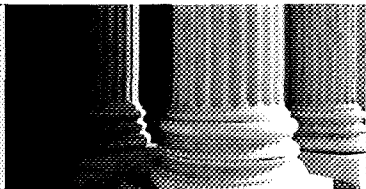


WILSHIRE'S TRUST UNIVERSE COMPARISON SERVICE ("TUCS") is a cooperative effort between Wilshire Associates and custodial organizations. Custodians submit asset positions and performance data to be pooled into universes of managed tax-exempt portfolios. According to Wilshire, TUCS is the most widely accepted benchmark for the performance of institutional assets, with assets in excess of \$2.1 trillion across 288 plan sponsors.

FRS PENSION PLAN FUNDED STATUS



Legal & Operational Framework



The SBA's specialized responsibilities and fiduciary duties create a need for operational flexibility that has been recognized by the courts and the Florida Legislature.

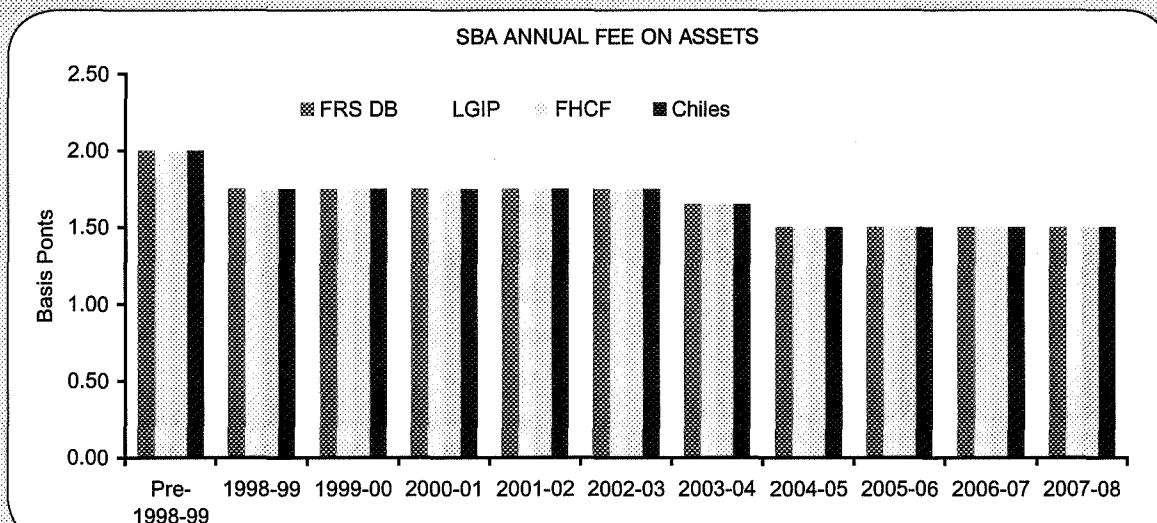
- The Trustees annually authorize operating and capital expenditures as appropriate for the SBA to continue to provide exceptional investment management and administrative services
- With a focus on a measurable bottom line, staff endeavors to maximize the return on investments while prudently managing risk, controlling costs, and performing our duties ethically and in accordance with the highest professional standards
- Service and commodity procurements occur under well articulated competitive procedures

Staff has conservatively managed budgets and fee revenue, while recognizing that we must have sufficient resources to successfully accomplish our mission. For example:

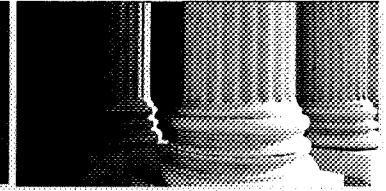
- The SBA has performed its mission with minimal budget and staffing increases. The charts on page 10 illustrate the long-term budget and staffing trends for the SBA
- The SBA's core operating budget is based on the fees we charge our clients, which for most investment management clients is currently 1.5 basis points on funds under management. In other words, we charge less than 2/100 of 1% for our administrative overhead
- The SBA has continuously faced the challenge of recruiting and retaining seasoned investment professionals. To help meet these challenges, effective July 1, 2005, the Trustees approved a modest Incentive Compensation Plan for investment professionals and effective July 1, 2008, a targeted recruitment and retention program

FOCUS ON... Client Fees

The SBA has saved investment clients approximately \$15 million in fees through a combination of fee reductions and no fee periods approved by the Trustees since FY 2000-2001.

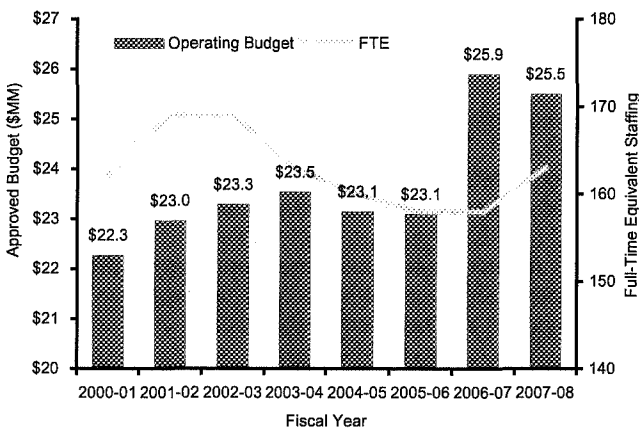


Prudent Management of Budget

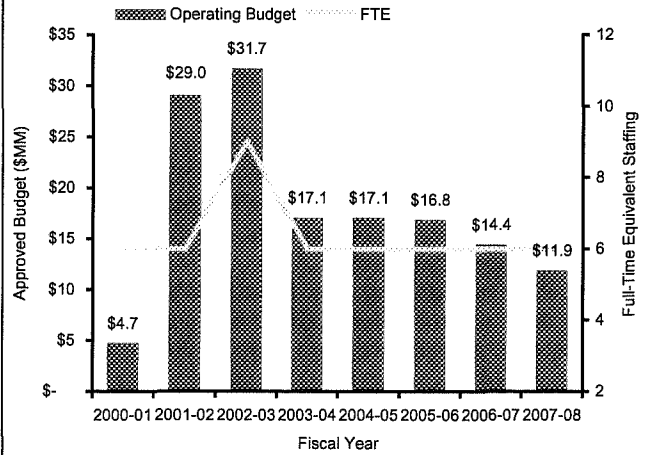


Staff has conservatively managed budgets, while recognizing that we must have sufficient resources to successfully accomplish our mission.

SBA Core Operating Budget and Full-Time Equivalent Staffing (Excludes CAT Fund, PEORP, Bond Finance and Prepaid Budgets)

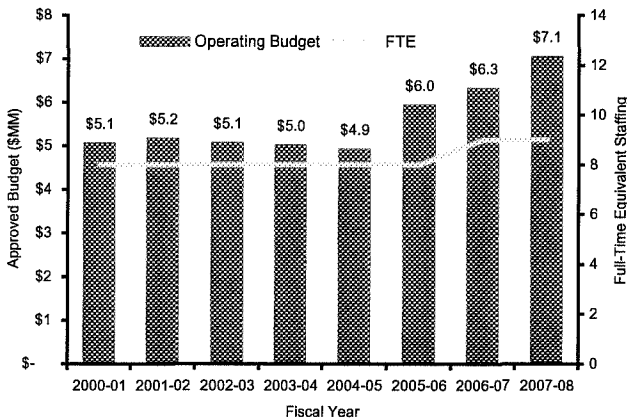


SBA PEORP Operating Budget and Full-Time Equivalent Staffing

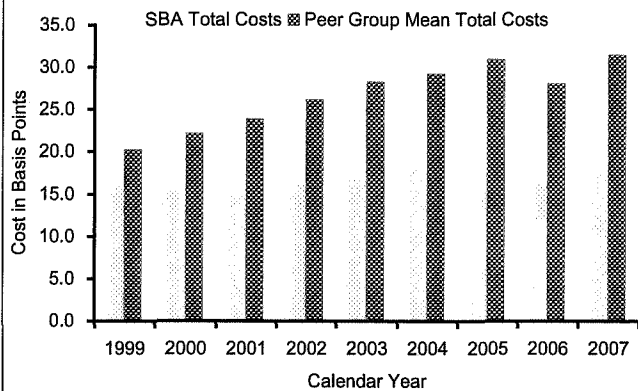


*Year on year decreases reflect use of Forfeiture Account, per Florida Statute and IRS private letter ruling. The Public Employee Optional Retirement Program (PEORP) includes administering the FRS Investment Plan, FRS enrollments, and the MyFRS Financial Guidance Program.

SBA CAT Fund Operating Budget and Full-Time Equivalent Staffing

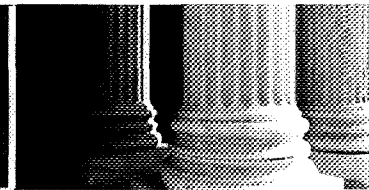


**Pension Plan Cost Comparison to CEM Peer Group
CEM Peers = Largest Reporting U.S. Corporate and Public Plans**



Cost Effectiveness Measurement ("CEM") maintains a global database of detailed cost information provided by public and corporate pension plans. The SBA's 2007 CEM Peer Group included 17 U.S. plan sponsors with assets under management of \$2.3 Trillion.

Governance & Accountability



The Trustees provide strong leadership, set high standards and hold the Executive Director and staff fully accountable. First, and foremost, the Board has statutory responsibility to invest assets and discharge its duties in accordance with the limitations on investments as outlined in Section 215.47, Florida Statutes, and in compliance with the fiduciary standards of care contained in sections 121.4501(15), 215.44(2)(a) and 215.47(10), Florida Statutes.

As fiduciaries, the SBA is obliged to make investment decisions that are solely in the interest of participants and their beneficiaries (or other clients as applicable) and:

- For the exclusive purpose of providing benefits to participants and their beneficiaries (the SBA is prohibited from pursuing political or social agendas in its investment decisions)
- With the care, skill, prudence, and diligence under the circumstances then prevailing that a prudent person acting in a like capacity and familiar with such matters would use in the conduct of an enterprise of a like character and with like aims (investment decisions are made from the perspective of subject-matter experts, not merely as well-intentioned persons acting in good faith)
- By diversifying the investments of the plan(s)

FOCUS ON... Corporate Governance

The SBA plays an active role in supporting sound governance of corporations, both domestic and foreign. Through proxy voting and other actions, the SBA is working to encourage companies to adhere to high ethical standards and industry best practices. The SBA votes on approximately 3,600 Corporate Proxies annually, participates as a member of the International Corporate Governance Network (ICGN), and Council of Institutional Investors (CII), participates in securities litigation and actively pursues Corporate Governance reforms.

The SBA's objectives for strengthening corporate governance at public companies include establishing independent boards, performance-based executive compensation, accurate accounting and auditing practices, and transparent board procedures. Without question, we believe that fostering better corporate governance enhances shareholder value and ultimately supports our long-term investment objectives.

The Board establishes broad policy guidelines, principally through formally adopted Investment Policy Statements or similar documents. It delegates to the Executive Director administrative and investment authority, within the statutory limitations and rules, to manage the investment of assets on a day-to-day basis.

To ensure accountability, and consistent with the importance of its mission, the SBA is subject to oversight by a variety of bodies and operates under an array of internal policies and guidelines.

A six-member Investment Advisory Council (IAC) is appointed by the Board and confirmed by the Florida Senate. The IAC meets quarterly for the purpose of reviewing investment performance, economic conditions, and investment policy and strategy. Investment Policy Statements are reviewed by the IAC prior to submission to the Trustees.

The 2008 legislature established a requirement for six-member Participant Local Government Advisory Council (PLGAC), appointed by the Board and subject to confirmation by the Senate. The purpose of the PLGAC is to review the administration of the LGIP and make recommendations regarding such administration to the trustees.

The Trustees appoint a three-member Audit Committee to serve as an independent and objective party to monitor SBA's processes for financial reporting, internal controls, risk assessment, compliance and review and appraise the audit efforts of SBA's independent auditors and Office of Internal Audit

The SBA is subject to audit by two external legislative entities: the Auditor General and the Office of Program Policy Analysis and Government Accountability (OPPAGA). The former executes financial audits and the latter conducts performance reviews. In addition, the SBA may engage with outside audit firms as needed.

The Board directs the Executive Director to coordinate the preparation of quarterly reports of the investment performance of the FRS using investment returns calculated by an independent third party. The Executive Director also provides a variety of formal periodic reports to the Board including:

- An annual investment report of the SBA and the FRS
- Monthly and quarterly detailed reports on performance and investment actions taken
- Special investment reports pursuant to Section 215.47(6), Florida Statutes

Protecting *entrusted* ASSETS

Protecting Beneficiaries

As defined in Webster's Dictionary, fiduciary means "held or holding in trust for another." The SBA's relationship with the beneficiaries of the 36 different funds that we manage is built on a foundation of trust, performance and integrity.

Investment Protection Principles

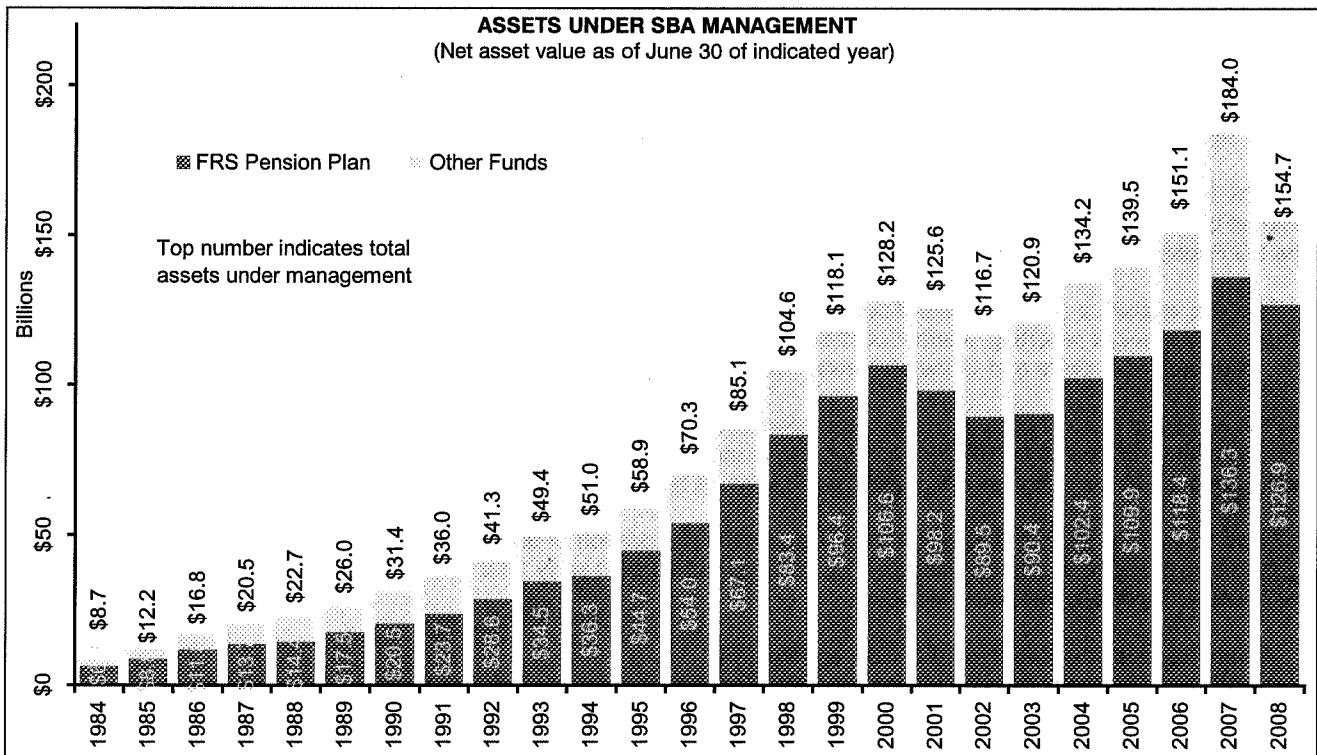
The SBA's Investment Protection Principles (IPP) are founded upon the simple premise of ensuring the soundness and integrity of the investment and trust management services we provide. The broker-dealers we retain are subject to a stringent set of standards regarding analyst compensation and compensation reporting.

Eliminating Conflicts of Interest

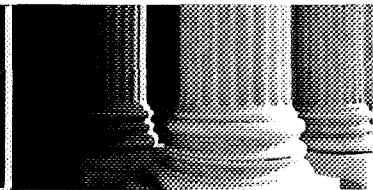
Also under the IPP, the investment management firms we retain must follow guidelines with respect to:

- > Client relationship disclosure and confidentiality
- > Compensation methods disclosure
- > Commission reporting
- > Relationships with affiliate companies
- > Integrity and quality of accounting and financial data
- > Corporate governance policy review

SBA staff is subject to a stringent Personal Investment Activities Policy.



Local Government Investment Pool



OVERVIEW

The Local Government Investment Pool (LGIP), more formally called the Local Government Surplus Funds Trust Fund, was created by the Florida Legislature effective October 1, 1977 (Chapter 218, Part IV, Florida Statutes). The purpose of the LGIP, as expressed in Florida law (section 218.401, Florida Statutes) is "to promote, through state assistance, the maximization of net interest earnings on invested surplus funds of local units of government, based on the principals of investor protection, mandated transparency, and proper governance, with the goal of reducing the need for imposing additional taxes." The SBA has operated the LGIP since January 1982.

The SBA is charged with the powers and duties to administer and invest the LGIP, in accordance with the statutory fiduciary standards of care as defined in Section 215.47(9), Florida Statutes. The SBA has contracted with Federated Investment Counseling to provide investment advisory services for the LGIP.

During 2007, new guidelines were adopted for the LGIP, allowing it to secure an AAAM rating from Standard & Poor's, the highest rating possible for a governmental money market fund. Consistent with this change, the fund's benchmark was changed from the iMoneyNet First Tier Institutional Money Market Index to the Standard & Poor's U.S. AAA & AA Rated GIP All 30 Day Gross Yield Index. The SBA contracted with Federated on March 3, 2008 to invest the LGIP.

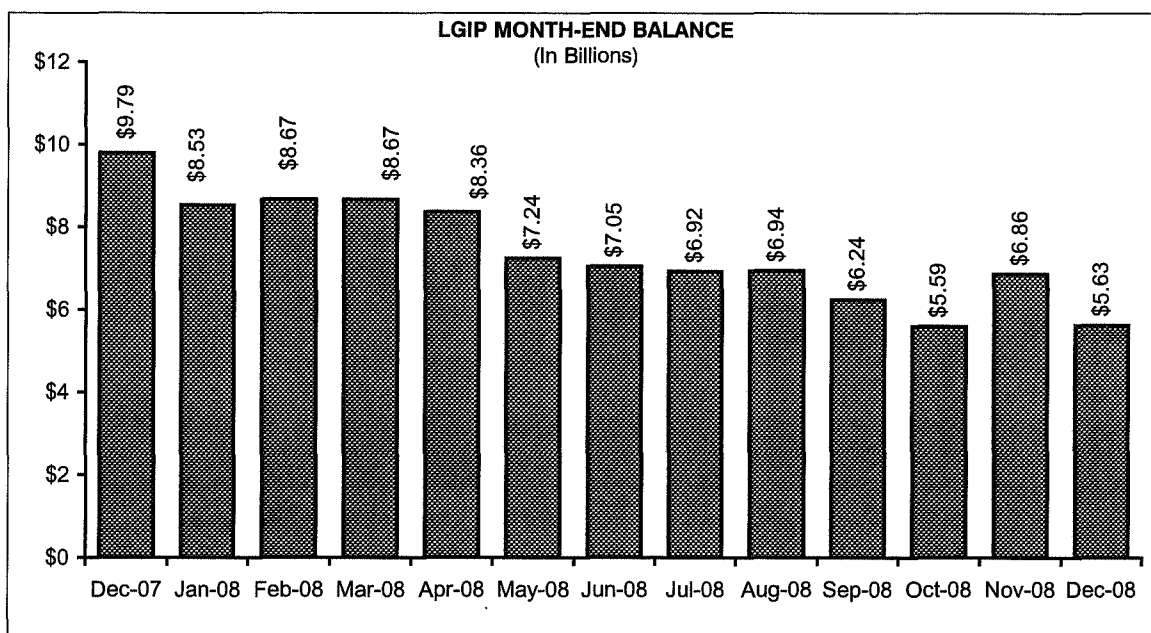
The LGIP is governed by Chapters 215 and 218, Florida Statutes, and Chapter 19-7 of the Florida Administrative Code.

OBJECTIVES AND GUIDELINES

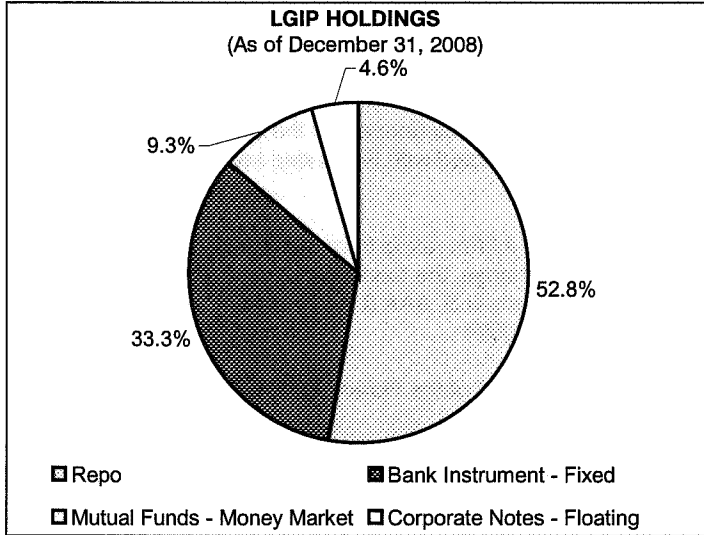
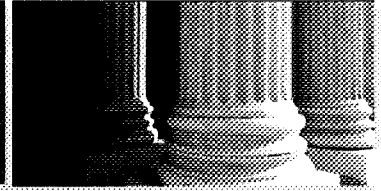
The primary investment objectives for the LGIP, in priority order, are safety, liquidity, and competitive returns with minimization of risks. Investment performance of the LGIP will be evaluated on a monthly basis against the Standard & Poor's U.S. AAA & AA Rated GIP All 30 Day Gross Yield Index.

The LGIP's assets will be invested in short-term, high-quality fixed income securities.

Liquidity is available on a daily basis through online account access.



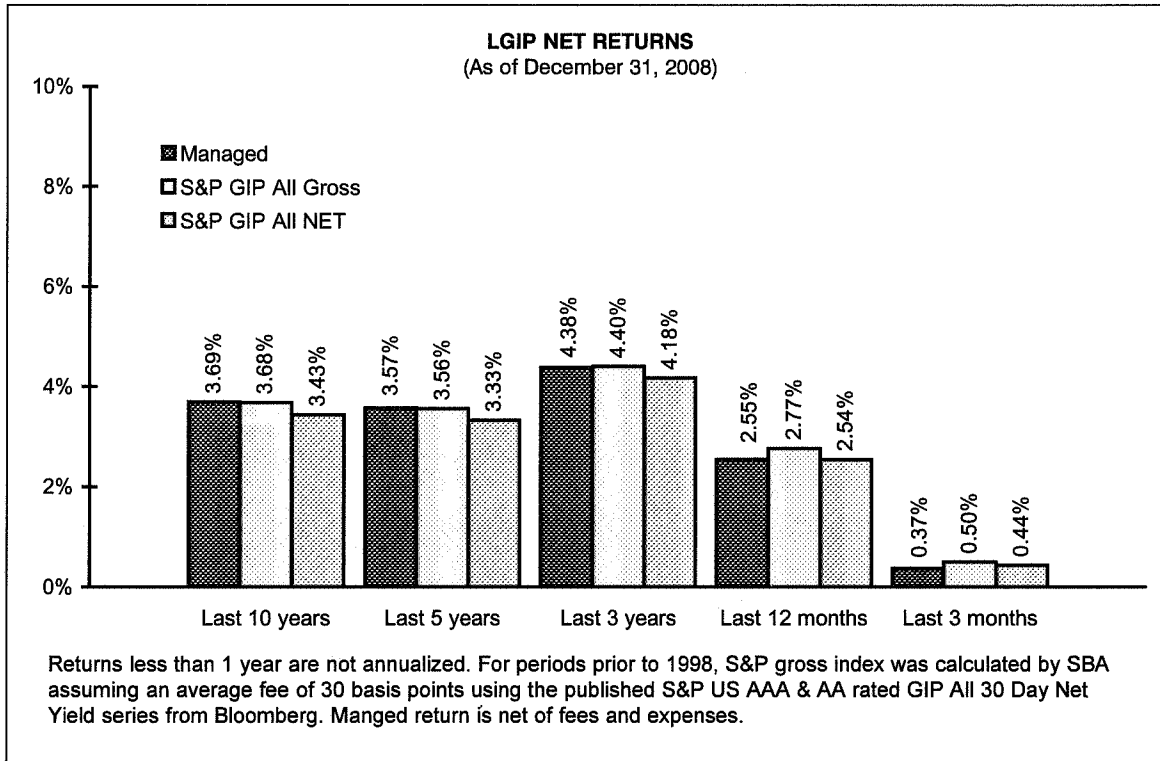
Local Government Investment Pool



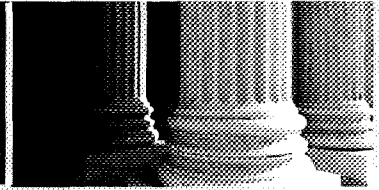
HISTORY OF THE LGIP LIQUIDITY CEILING
December 5, 2007 through December 23, 2008

Initially Imposed		The greater of:
	12/05/07	15% or \$2.0m
	01/18/08	37% or \$4.0m
	05/15/08	50% or \$8.0m
	05/29/08	50% or \$12.0m
	09/25/08	65% or \$12.0m
	12/12/08	74% or \$12.0m
Fully Removed	12/23/08	100% n/a

*Applied to 12/5/07 opening balances



Fund B Surplus Funds Trust Fund



OVERVIEW

Fund B was created by the Florida Legislature effective June 1, 2008 (Section 218.421, Florida Statutes). The SBA is charged with the powers and duties to administer and invest Fund B. The SBA has contracted with Federated Investment Counseling to provide investment advisory services to Fund B.

Fund B is governed by Chapters 215 and 218, Florida Statutes, and Chapter 19-7 of the Florida Administrative Code.

OBJECTIVES AND GUIDELINES

Fund B's primary objective is to maximize the present value of distributions from Fund B.

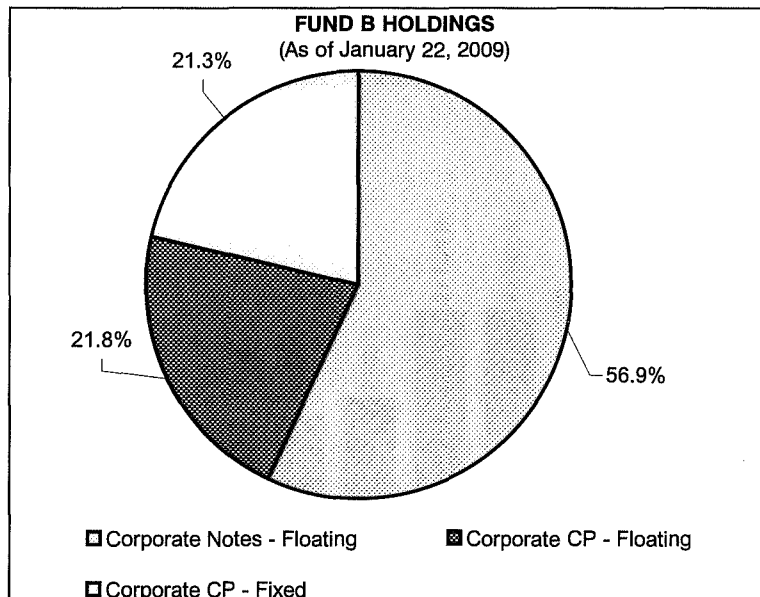
Fund B principally consists of Segregated Securities, which are securities originally purchased for the LGIP that (1) defaulted in the payment of principal and interest; (2) were extended; (3) were restructured or otherwise subject to workout; (4) experienced elevated market illiquidity; or (5) did not meet the criteria of the nationally recognized statistical rating organization ("NRSRO") that provides the LGIP's AAAM rating.

Participants cannot make additional deposits into, or any withdrawals from, Fund B.

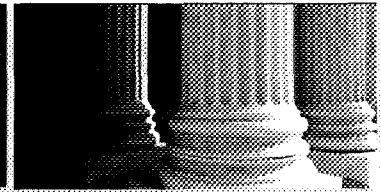
FUND B DETAILED HOLDINGS
(As of January 22, 2009)

Security Name	Type	Par	Amort Cost	Mkt Value
Axon Financial Funding LLC	VARIABLE RATE COMMERCIAL PAPER	\$162,707,392	\$162,704,769	\$80,764,526
Dreyfus Government Cash Management Fund OVNMF	OVERNIGHT MUTUAL FUND	\$67,243	\$67,243	\$67,243
Florida East Funding LLC	VARIABLE RATE TERM NOTE	\$135,896,406	\$135,896,406	\$89,837,863
Florida West Funding LLC	VARIABLE RATE TERM NOTE	\$288,361,267	\$288,361,267	\$165,901,570
Issuer Entity LLC (Ottimo)	VARIABLE RATE COMMERCIAL PAPER	\$158,424,928	\$158,424,928	\$46,698,239
		\$745,457,235	\$745,454,613	\$383,269,442

FUND B HOLDINGS
(As of January 22, 2009)

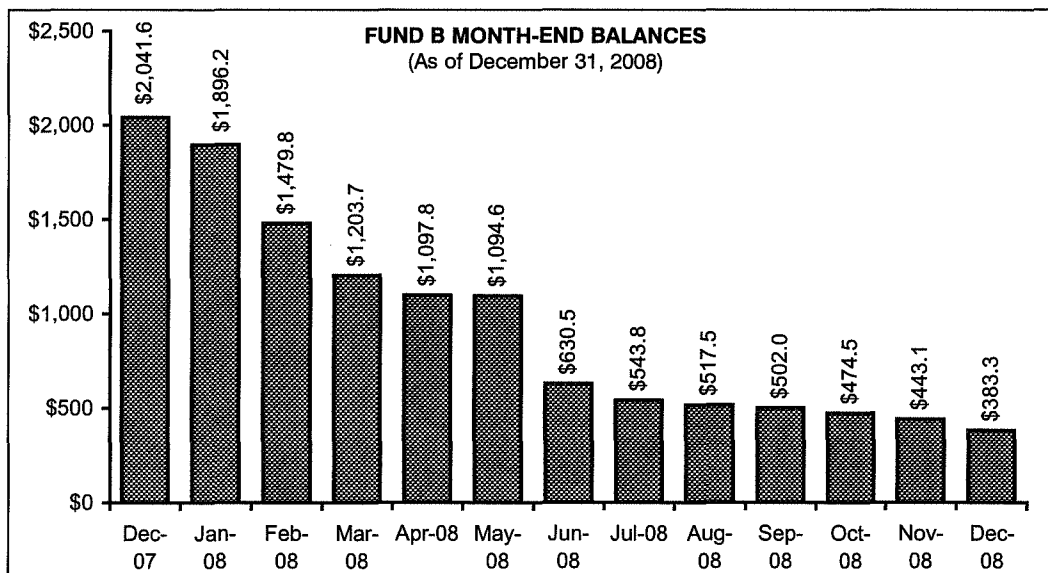


Fund B Surplus Funds Trust Fund

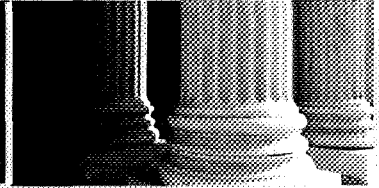


FUND B DISTRIBUTIONS, INCOME & FEES (As of January 09, 2009)

CREATION OF FUND B	\$2,134,760,076.90
DISTRIBUTIONS	
Transfer to LGIP 1/17/08	-\$50,000,000.00
Transfer to LGIP 2/8/08	-\$518,000,000.00
Transfer to LGIP 3/17/08	-\$210,550,000.00
Transfer to LGIP 4/18/08	-\$106,000,000.00
Transfer to LGIP 6/18/08	-\$291,500,000.00
Transfer to LGIP 6/25/08	-\$150,500,000.00
Transfer to LGIP 7/3/08	-\$34,700,000.00
Transfer to LGIP 8/6/08	-\$10,400,000.00
Transfer to LGIP 9/5/08	-\$9,300,000.00
Transfer to LGIP 10/6/08	-\$11,750,000.00
Transfer to LGIP 11/6/08	-\$8,700,000.00
Transfer to LGIP 12/4/08	-\$20,500,000.00
Transfer to LGIP 1/8/09	-\$7,900,000.00
Total Distributions	-\$1,429,800,000.00
INCOME	
Income on Overnight Investments	\$491,346.18
Income on Distressed Securities	<u>\$41,977,178.81</u>
Total Income	\$42,468,524.99
FEES	
Custody Fees	-\$1,399.99
Management Fees	-\$1,968,251.54
Administrative Fees	<u>-\$12,700.16</u>
Total Fees	-\$1,982,351.69
Balance (Cost) at 01/22/09	<u>\$745,457,235</u>

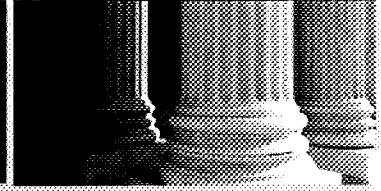


LGIP & Fund B School Board Balances (01/06/09)



School Board Name	LGIP Balance	Fund B Balance
ALACHUA COUNTY SCHOOL BOARD	\$83,888,067	\$830,825
BAKER COUNTY SCHOOL BOARD	\$1,751,594	\$262,377
BAY COUNTY SCHOOL BOARD	\$3,161,789	\$3,500,271
BRADFORD COUNTY SCHOOL BOARD	\$1	\$115,516
BREVARD COUNTY SCHOOL BOARD	\$10	\$0
CALHOUN COUNTY SCHOOL BOARD	\$6,429,235	\$229,067
CHARLOTTE COUNTY SCHOOL BOARD	\$93,490,823	\$2,124,886
CITRUS COUNTY SCHOOL BOARD	\$22,901,297	\$789,053
CLAY COUNTY SCHOOL BOARD	\$91,289,123	\$2,668,395
COLLIER COUNTY SCHOOL BOARD	\$43,527,065	\$10,280,149
COLUMBIA COUNTY SCHOOL BOARD	\$0	\$382,603
DESOTO COUNTY SCHOOL BOARD	\$1,168,715	\$462,530
DIXIE COUNTY SCHOOL BOARD	\$712	\$290
DUVAL COUNTY SCHOOL BOARD	\$430	\$0
FLAGLER COUNTY SCHOOL BOARD	\$486,462	\$113,624
FLORIDA VIRTUAL SCHOOL	\$7,382,670	\$402,945
FRANKLIN COUNTY SCHOOL BOARD	\$2,138,209	\$749,861
GADSDEN COUNTY SCHOOL BOARD	\$3,125,144	\$136,485
GILCHRIST COUNTY SCHOOL BOARD	\$3,538,278	\$5,173
GLADES COUNTY SCHOOL BOARD	\$3	\$11,767
GULF COUNTY SCHOOL BOARD	\$3,436,485	\$19,703
HAMILTON COUNTY SCHOOL BOARD	\$2,809	\$1,137
HARDEE COUNTY SCHOOL BOARD	\$1,002	\$207,404
HENDRY COUNTY SCHOOL BOARD	\$202,763	\$304,474
HERNANDO CNTY SCHOOL BOARD	\$20,230,517	\$6,518,875
HIGHLANDS COUNTY SCHOOL BOARD	\$7,674	\$215,773
HILLSBOROUGH COUNTY SCHOOL BOARD	\$678,133,846	\$31,392,416
HOLMES COUNTY SCHOOL BOARD	\$10,014	\$224,594
INDIAN RIVER COUNTY SCHOOL BD.	\$114,476,251	\$6,122,595
JACKSON COUNTY SCHOOL BOARD	\$6,018,980	\$243,398
Subtotal	\$1,186,799,969	\$68,316,184

School Board Name	LGIP Balance	Fund B Balance
JEFFERSON COUNTY SCHOOL BOARD	\$42,336	\$172,828
LAFAYETTE COUNTY SCHOOL BOARD	\$108,949	\$43,864
LAKE COUNTY SCHOOL BOARD	\$14,559	\$8,085
LEE COUNTY SCHOOL BOARD	\$107,746,980	\$16,916,172
LEON COUNTY SCHOOL BOARD	\$10,545,721	\$3,811,214
LEVY COUNTY SCHOOL BOARD	\$184,737	\$75,144
LIBERTY COUNTY SCHOOL BOARD	\$2,762,614	\$110,646
MADISON COUNTY SCHOOL BOARD	\$3,726,318	\$154,451
MANATEE COUNTY SCHOOL BOARD	\$749	\$2,011,770
MARION COUNTY SCHOOL BOARD	\$28,312,883	\$5,551,687
MARTIN COUNTY SCHOOL BOARD	\$18,675,385	\$3,590,193
MCINTOSH AREA SCHOOL	\$696	\$13,576
MONROE COUNTY SCHOOL BOARD	\$195,604	\$1,174,372
NASSAU COUNTY SCHOOL BOARD	\$5,519,045	\$1,371,703
OKALOOSA COUNTY SCHOOL BOARD	\$53,802,535	\$5,092,521
OKEECHOBEE COUNTY SCHOOL BOARD	\$3,476,362	\$462,024
ORANGE COUNTY SCHOOL BOARD	\$1,532	\$0
OSCEOLA COUNTY SCHOOL BOARD	\$53,352,980	\$2,491,186
PALM BEACH COUNTY SCHOOL BOARD	\$247,092	\$112,557
PASCO COUNTY SCHOOL BOARD	\$107,201	\$13,255,338
PINELLAS COUNTY SCHOOL BOARD	\$16,485,406	\$2,344,598
POLK COUNTY SCHOOL BOARD	\$83,992,470	\$7,714,584
PUTNAM COUNTY SCHOOL BOARD	\$3,920,158	\$1,664,784
SANTA ROSA SCHOOL BOARD	\$18,352,158	\$386,775
SARASOTA COUNTY SCHOOL BOARD	\$114,167,064	\$8,276,584
SEMINOLE COUNTY SCHOOL BOARD	\$0	\$55
ST. LUCIE SCHOOL BOARD	\$1,600,071	\$457,607
SUMTER COUNTY SCHOOL BOARD	\$1,009,237	\$461,624
TAYLOR COUNTY SCHOOL BOARD	\$10,136	\$147,512
UNION COUNTY SCHOOL BOARD	\$15,812	\$84,226
UNIVERSITY OF SOUTH FL PATEL CHARTER SCH	\$7,277	\$19,113
VOLUSIA COUNTY SCHOOL BOARD	\$7,846,971	\$84,362
WAKULLA COUNTY SCHOOL BOARD	\$4,875,212	\$230,120
WALTON COUNTY SCHOOL BOARD	\$1,339,069	\$602,287
WASHINGTON COUNTY SCHOOL BOARD	\$8,490,594	\$477,591
Subtotal	\$550,935,915	\$79,371,150
Totals	\$1,737,735,884	\$147,687,334



The trusteeship and investment management of public funds demands the highest degree of confidence from beneficiaries of the funds and the public in general. Employees of the SBA hold a public trust that obligates them to honesty and integrity in fulfilling the responsibilities to which they are appointed. Paramount in that trust is the principle that public employment may not be used for personal gain or private advantage. The citizens of the State of Florida expect SBA employees to perform their public responsibilities in accordance with the highest ethical and moral standards and to conduct the business of the SBA in a manner that advances the public's interest.

- Employees shall act with honor and integrity in all professional relationships and shall be honest and objective in all SBA business transactions and negotiations
- Employees shall maintain a duty of loyalty to our beneficiaries and act in the best interests and for the exclusive benefit of our clients and beneficiaries
- Employees shall avoid personal, social, employment or business relationships that reflect adversely on the individual's objectivity, create conflicts of interest or interfere with the proper performance of official duties and shall have an affirmative duty to disclose and cure conflicts of interest
- Employees shall not use the prestige or influence of their position or SBA resources to obtain personal, financial or political gain or private advantage for themselves, their family or an organization with which they are associated
- Employees shall not seek or accept gifts, money, preferential treatment or property that would influence, or appear to influence, official duties
- Employees shall exercise prudence and integrity in the management of funds in their custody and in all financial transactions
- Employees shall use care and discretion in the handling of confidential information and shall not disclose or use confidential information for personal gain or private advantage
- Employees shall be familiar with and comply with SBA policies and local, state and federal laws that affect the SBA and its employees and shall not knowingly be a party to, or condone, any illegal or improper activity
- Employees shall not falsify or fail to record proper entries on any books or records of the SBA, or knowingly sign or permit the issuance of any statement or report which contains any misstatement or which omits any material fact
- Employees shall abide by approved practices and recommended standards set forth by professional associations and standard setting organizations

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Funding For School Construction

Presentation to the
Florida House of Representatives
Pre-K – 12 Appropriations Committee

February 10, 2009

Funding Sources For K-12 School Construction

Local School District Sources:

- Ad Valorem Taxes (“2 Mill Money”)
- Local Option Sales Taxes (“Half Penny Sales Tax”)
- Impact Fees
- General Obligation Bonds (“GO Bonds”)
- Certificates of Participation (“COPs”)

State Sources:

- Public Education Capital Outlay (“PECO”)
- Capital Outlay (“CO&DS”)
- Lottery Revenue Bonds (“Lottery Bonds”)

Local Funding Sources of Capital Outlay: K-12

Ad Valorem Taxes (2 Mill Money)

- Up to 2 Mills of 10 Mill Total Can Be Levied by School Districts Without Election
- 2 Mills Reduced to 1.75 Mills Last Year
- May Be Used for Any Capital Expenditure, Lease-Purchase, and Repayment of Short-term Loans

Local Option Sales Tax

- Two Options for Sales Taxes
 - School Districts Authorized to Participate in Local Government Infrastructure Sales Taxes Beginning in 1990; Rates of Either 0.5% or 1%
 - School Capital Outlay Surtax Rate Up to 0.5% Authorized in 1995
- Both Sales Tax Options Require Voter Approval
- Only for Capital Projects, but May Be Used on “Pay As You Go” Basis or to Pay Debt Service

Local Funding Sources (continued)

Impact Fees

- Impact Fees For Schools Generally Authorized by Local Ordinance
- Landmark Case Addressing Impact Fees For Schools Decided in 1991
- Becoming Increasingly Important Source of Funding for School Capital Outlay

General Obligation Bonds (GO Bonds)

- Requires Voter Approval
- Payable From Additional Ad Valorem Tax Levy

Certificates of Participation (COPs)

- Lease-purchase of Facilities Authorized by Law in 1987
- No Voter Approval Required
- Financing Vehicle Became Commonplace in Early 1990s After Validated by State Supreme Court
- Up to $\frac{3}{4}$ of 2 Mill Capital Outlay Levy (Now 1.75 Mills) Can Be Used to Pay Debt Service on COPs

State Funding Sources

Public Education Capital Outlay (PECO)

- Funds Construction for K - University System
- State General Obligation Bonds Additionally Secured by Pledge of Gross Receipts Taxes
- Authorized by Florida Constitution
- Five-Year Average Allocation

K-12	31.5%	\$378.3 Million
Community Colleges	29.4%	\$353.6 Million
Universities	39.1%	\$469.7 Million

Capital Outlay (CO&DS)

- Funds Construction for K – 12 and Community Colleges
- State General Obligation Bonds Additionally Secured by Pledge of a Portion of Motor Vehicle License Tag Revenues
- Authorized by Florida Constitution
- Local School Districts and Community Colleges Receive Funding Based on Formula (Base Plus Growth)

State Funding Sources (continued)

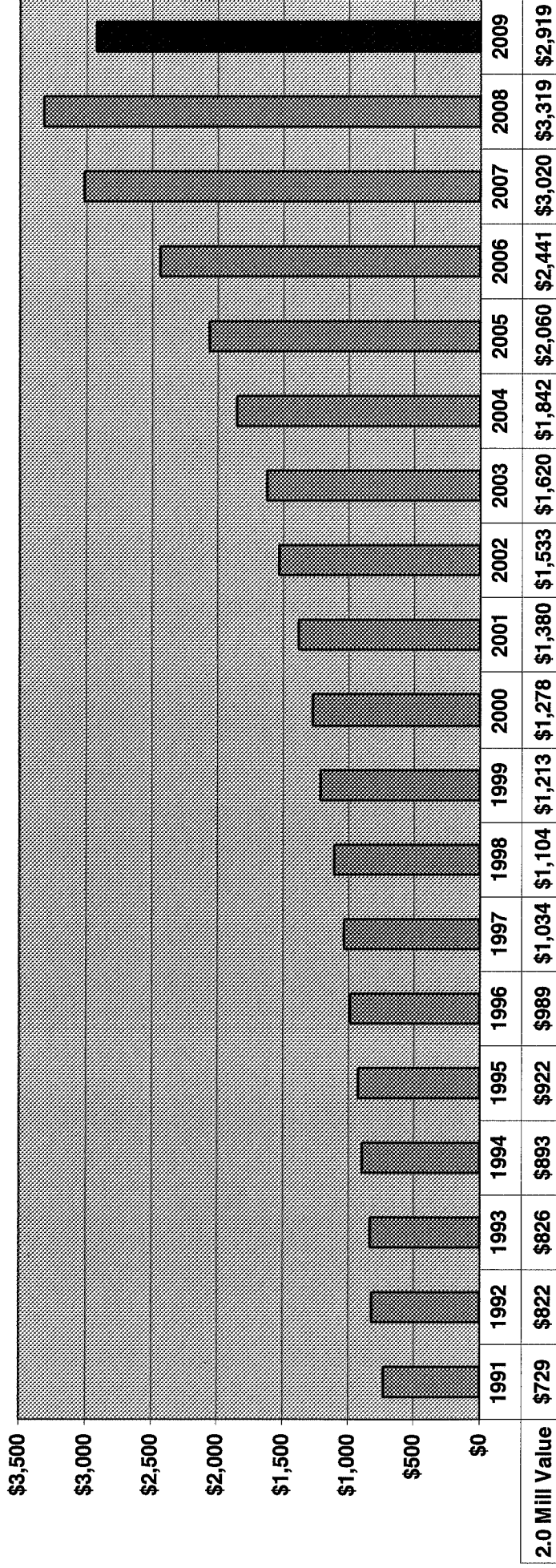
Lottery Revenue Bonds

- Funds Construction for K – 12
- Revenue Bonds Secured by a Pledge of Lottery Revenues
- School Districts Receive Funding Based on Statutory Formula Similar to Capital Outlay
- Authorized by Florida Law in 1997 Special Session

Historical Revenues From 2.0 Mill Levy

Historical 2.0 Mill Collections

Fiscal Years 1991 through 2008 and Projection for Fiscal Year 2009
(in Millions of Dollars)



- Total 2 Mill Money Since 1991 For Capital Outlay: \$27.0 Billion
- Total 2 Mill Money For Last 5 Years: \$10.8 Billion
- 2 Mill Money Doubled Over Last 5 Years, Increasing From \$1.6 Billion in Fiscal Year 2003 to \$3.3 Billion in Fiscal Year 2008

Sales Taxes & Impact Fees For School Construction

Sales Taxes For School Construction

- 27 School Districts Have Passed Sales Tax Referendums for School Construction
- \$2.7 Billion in Sales Taxes for Schools Have Been Collected in Last 5 Years
- \$560 Million in Sales Tax Collection for Schools During 2007-08

Impact Fees

- 31 School Districts Receive Funding From Local Impact Fees for School Construction
- \$1.5 Billion in Impact Fees Received by School Districts Over Last 5 Years
- \$180 Million in Impact Fees Received by School Districts During Fiscal Year 2007-08

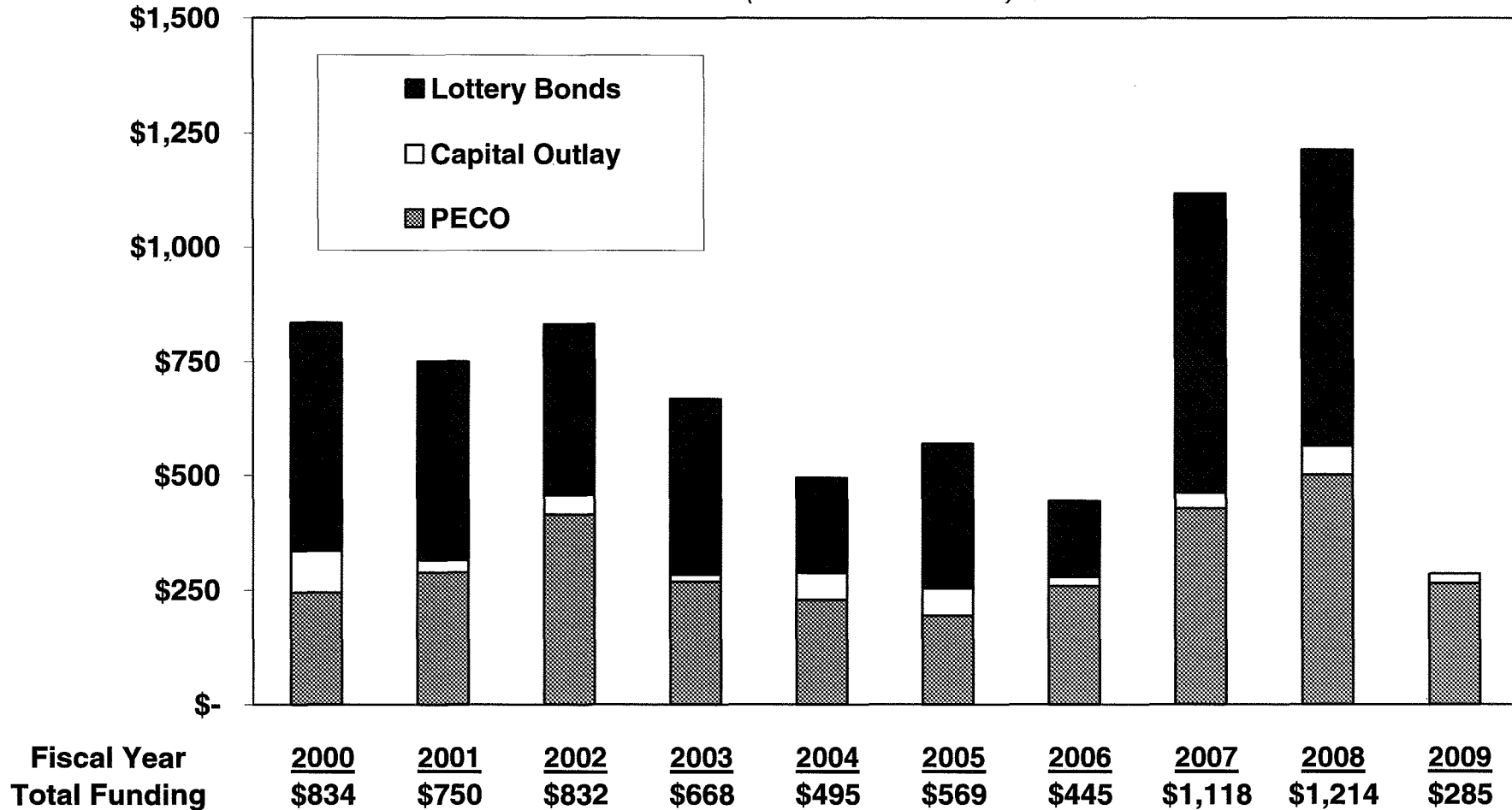
Long-Term Obligations

Certificates of Participation (COPs)

- COPs Developed As Financing Vehicle in 1991
- Debt Service Requirements on COPs Paid From 2 Mill Money
- \$8.0 Billion Estimated COPs Issuance Over the Last Five Years

Historical State Funding for School Construction

Education Funding
PECO, Capital Outlay and Lottery Bonds Programs
(In Millions of Dollars)



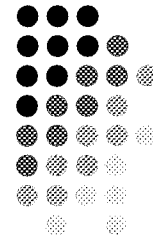
- Total State Funding All Sources Last 10 Years: \$7.2 Billion
- Total State Funding All Sources Last 5 Years: \$3.6 Billion

2/10/09

SBE- Assessment & Evaluation Budget

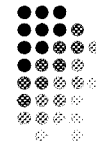
FY 09 Base Budget Presentation

Dr. Eric Smith
Dr. Cornelia Orr

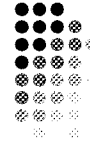


SBE – Assessment Budget

- Two Major Components
 - K-12 Assessment Program
 - FCAT (22 tests)
 - Other K-12 Assessments
 - Post Secondary Assessments
 - CLAST – College Level Academic Skills Test
 - Educator Certification Examinations – FTCE and FELE (Alternate Certification Expansion)



K-12 Assessment Budget – More than FCAT



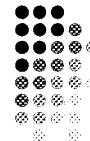
PreK-12 Program Areas	Statutory Requirements
FCAT	Sections 1008.22, 1003.438, 1003.41, F.S. and NCLB-Title I
Alternate Assessment for Students With Disabilities)	Section 1003.438, F.S. and NCLB-IDEA
English Language Proficiency Assessment (CELLA)	Section 1008.25, F.S. and NCLB-Title III
Kindergarten Readiness Assessment (FLKRS)	Section 1002.69, F.S.
DJJ Educational Programs Assessment	Section 1003.438, F.S.
Corporate Tax Credit Scholarship Analysis	Section 220.187, F.S.
PSAT/Plan	Section 1007.35, F.S.
Map Clearinghouse	Sections 1012.225 and 1012.225(1), F.S.

February 10, 2009

Assessment FY09 Base Budget

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K-12 Assessment Program Fund Sources



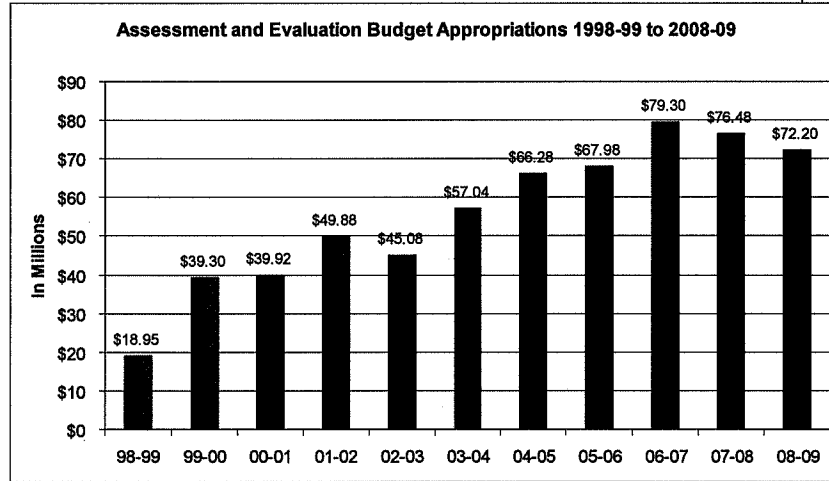
Program AREA	General Revenue Funds	Trust Funds
FCAT	53%	47%
Alternate Assessment for Students With Disabilities		100%
English Language Proficiency Assessment (CELLA)		100%
Kindergarten Readiness Assessment (FLKRS)	100%	
DJJ Educational Programs Assessment	100%	
Corporate Tax Credit Scholarship Analysis	100%	
PSAT/Plan	100%	
Map Clearinghouse	100%	

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Assessment Budget Growth



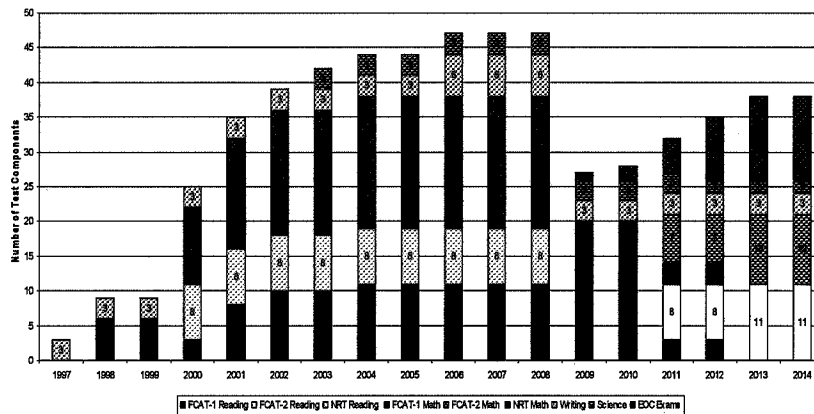
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FCAT Testing Growth

Next Generation FCAT & EOC Exams - Proposed Changes



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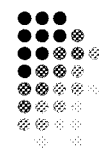
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Ongoing Management Challenges

- Overlapping testing cycles each 12 months (administer current, develop next, review previous)
- Revising contracts to align with new policy directions and appropriations
- Develop new procurements as needed
- Design good tests – What kinds of tests promote the best teaching and learning?
- Test administration – accurate printing and directions for all students
- Test scoring – accurate results for every child
- Reporting results – information for all audiences
- Post test reviews – Continue oversight



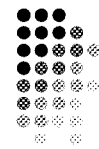
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K-12 Assessment Requirements

K-12 Assess. Programs	NCLB Required Programs	Florida Required Programs	Included in NCLB AYP (School Grades)
FCAT – Reading	Grades 3-8, and 10	9 th , grad. & retesting	Yes, all (SG-all)
FCAT – Mathematics	Grades 3-8, and 10	9 th , grad. & retesting	Yes, all (SG-all)
FCAT – Science	Grades 5, 8, 11		No (SG-all)
FCAT – Writing		Grades 4, 8, 10	Yes, all essay only (SG-all, essay only)
NRT-Reading		Grades 3-10	No
NRT-Mathematics		Grades 3-10	No
CELLA	All grades		No
Alternate Assessment for SWD	All grades	All grades	Yes (SG-No)
PSAT/PLAN		Grade 10	No
DJJ		All grades	No
Kindergarten Readiness		K only	No



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Assessment FY09 Base Budget

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House of Representatives
PK-12 Appropriations Committee
Education Technology Budget

Department of Education
John Newman
February 10, 2009



Technology Budget

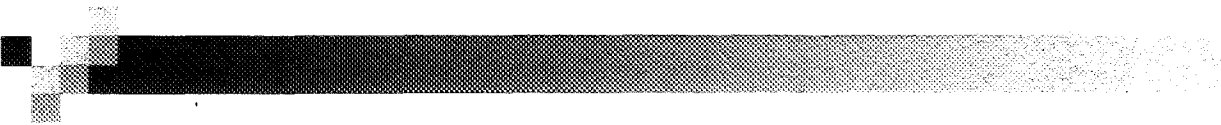
- Line 57 – FETPIP/Workforce Development Management Information Systems
- Line 75 - Student Financial Assistance Management
- Line 78 - Centralized Technology Resources
- Line 79 - Education Data Warehouse
- Line 80 - Regional Data Centers – State University System
- Line 81 - Education Technology and Information Services



Line 57 - \$162,712

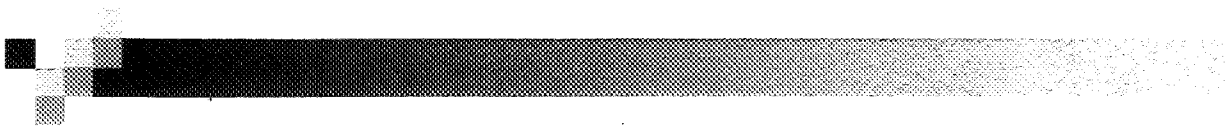
Florida Education and Training Placement Information Program /
Workforce Development Management Information Systems

- Integrated interagency data collection and reporting system, administered through the Florida Department of Education
- Relies administrative data resources of state and federal agencies.
- Designed & developed to follow-up all participants and students from Florida's education and training programs at all levels
- Helps to answer the question: What happens to students after they graduate from or otherwise leave programs



Line 75 – \$484,993
Student Financial Assistance Management

- **State Student Financial Aid Database System**
 - Hosted at the Southwood Shared Resource Center
 - Web based application system
 - Online internal system
 - Bright Futures Transcript Entry and Evaluation
 - Management and statistical reports



Line 78 – \$650,000
Centralized Technology Resources


- Cost recovered through the Working Capital Trust Fund
- Used to support Education Data Center
- Expenses
 - Software licenses
 - Hardware and software maintenance contracts



Line 79 - \$759,889


Education Data Warehouse

- Longitudinally Integrates “source data” from PK-12, Workforce, Adult Education, Community Colleges, Universities student and staff data bases.
- Additionally integrates financial aid, facilities, and finance data sources.
- Includes demographic, course-level enrollment, attendance, statewide assessment results, and awards for students.
- Includes demographic, payroll, and facilities information for all staff; certification, course data, preparation information for instructional staff.
- Links to follow-up information and external agency data.



Line 80 – \$2,731,685
Regional Data Centers – State University System

- Northwest Regional Data Center
 - Federal Family Education Loan Program System
 - Bright Future Eligibility System
 - K-12 Staff and Student Database System
 - FASTER Electronic Transcript System
 - ACT/SAT Test Scores Repository



Line 81 – \$7,373,119

Education Technology and Information Services

- **Cost recovered through the Working Capital Trust Fund**
- **Supports**
 - **Education Data Center - \$2,791,884**
 - **Application Support - \$3,778,809**
 - **Technology, Planning and Management - \$802,426**



Education Data Center

- Telephony and data communications
- Server support
- Desktop support
- End user services
- Computer operations



Application Support

- School support applications
- Internal applications
- Scholarship and grant system
- Federal Family Education Loan Program System Supports
- Web site development including sophisticated Web-based application
- Database administration



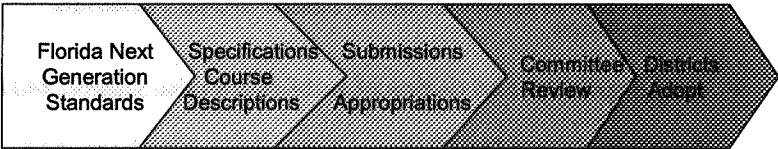
Technology, Planning and Management

- OTIS personnel administration
- Preparation of annual budget reports for the governor and the legislature
- Working Capital Trust Fund administration
- Project Management Office – assist DOE program areas with project management
- Assist department personnel with all technology purchases



**Florida's Instructional Materials Adoption Process
Development Process**

Instructional Materials Adoption



It Starts With The Law

Florida's adoption process is statute driven.

 **Chapter 1006 – Support for Learning**

 **Part 1, F. – Instructional Materials
for K-12 Public Education
1006.28 – 1006.43**

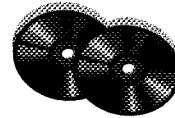
The Law: Chapter 1006

- **Duties of school board, superintendent, and school principal**
- **Affidavit and duties of State Instructional Materials Committees**
- **Requirements and duties of publishers who submit bids**
- **Prohibited Acts (publishers, committee members, and school boards)**
- **Powers and duties of Commissioner**
- **Use of IM allocation**

Definition Of Instructional Materials

"items having intellectual content that by design serve as a major tool for assisting in instruction...."

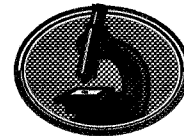
"...bound or unbound, hard or soft cover, kit, consumables, manipulatives, learning laboratories, electronic media, computer courseware or software...."



Section 1006.29(4), F.S.

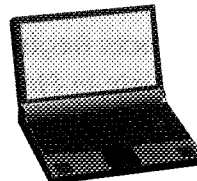
Hardware Not Included!

"...does not include electronic or computer hardware...nor does it include equipment or supplies."



Section 1006.29(4), F.S.

Ø Not even if bundled with software!
Ø Not even if offered free with purchase!



Instructional Materials Timeline

- **Adoption Cycle by Subject Area** **6 years**
- **Specifications Document** **1 to 2 years out**
- **Call for Bids** **January**
- **Formation of State Instructional
Materials Committee** **January – May**
- **Intents to Bid** **February**
- **Receipt of Bids** **May**
- **Committee Training** **June**
- **Shipment of Sample Materials** **June**

Instructional Materials Timeline

- **Individual Evaluations** **July – Sept/Oct**
- **Formal Adoption Meetings** **Sept/Oct/Nov**
- **Recommendations to
Commissioner** **December**
- **Update to State Catalog** **April**
- **New Instructional Materials
Contracts Begin** **April**
- **Materials in Florida Classrooms** **August**

One to Two Years Prior to Adoption Year -- Specifications

- **Published one to two years prior to adoption year**
- **Include:**
 - **Florida's Vision**
 - **List of Courses in Call**
 - **General Description for Publishers' Submissions**
 - **Research Base and Major Priorities for Instructional Materials**
 - **Criteria for Evaluations**
 - **Course Descriptions with Next Generation Sunshine State Standards**
 - **Requirements for Braille Textbook Production**

Prior to Adoption Year -- October

- **Commissioner issues call for nominations for State Instructional Materials Committees**

Year of Adoption -- January

- **Official Announcement is e-mailed to publishers and posted to Instructional Materials website**
- **Bid information for publishers is posted to Instructional Materials website**

Year of Adoption -- February

- **Instructional Materials office holds annual Publishers' Workshop**
- **Publishers submit "Intents to Bid"**

Year of Adoption -- May

Publishers submit:

- **Bids**
- **Correlations to course descriptions**
- **Publisher's Questionnaire**
- **Warranties**
- **Affidavits**
- **Bid Deposit**

Florida Department of Education forms State Instructional Materials Committees (SIMC) based on call and number of submissions received from publishers.

State Committee Membership

Minimum of 10 Members:

- 5 teachers actively engaged in teaching and certified in the area being considered for adoption**
- 2 supervisors of teachers**
- 1 school board member**
- 2 lay citizens not professionally connected with education**

Section 1006.29, F.S.

State Instructional Materials Committees

- **Are appointed by Commissioner no later than April 15 of adoption year**
- **Must reflect the broad racial, ethnic, socioeconomic, and cultural diversity of state, including a balanced representation from the state's geographic regions**
- **Are appointed for 18 months**
- **Before transacting any business, must sign an affidavit**
- **Must complete a training program prior to beginning the review of materials**

Year of Adoption -- June

- **State Instructional Materials Committees are trained. Non-FEFP Instructional Materials Management dollars pays for this training.**
- **State Instructional Materials Committees receive materials from publishers.**

Year of Adoption -- June – November

- **Individual committee members review and evaluate publishers' submissions from June to Fall meeting.**
- **SIMC meetings are held in September, October, and November. Non-FEFP Instructional Materials Management dollars pay for all the expenses of these committee meetings, including the committee members' travel.**

Year of Adoption -- December

- **Commissioner approves recommended materials for adoption**
- **SIMC Report is compiled, approved by Commissioner, and posted to website**
- **Newly adopted materials are added to online catalog**

Following Adoption Year

- **Contracts with publishers are prepared, signed by publishers, Governor, and Secretary of State**
- **Materials must be in depository of publisher's choice.**
- **"Each district school superintendent shall notify the department by April 1 of each year the state-adopted instructional materials that will be requisitioned for use in his or her school district." Section 1006.28, F.S. Districts report planned purchases to FIMWeb. FIMWeb is an electronic reporting site paid for with Non-FEFP Instructional Materials Management dollars.**

Following Adoption Year

- **Annually by July 1 and prior to the release of instruction materials funds, each district school superintendent shall certify...that the district school board has approved a comprehensive staff development plan that supports fidelity of implementation of instructional materials programs....shall include...that training was provided and that materials are being implemented as designed.**

Section 1011.76, F. S.

Purchasing Adopted Materials

- **Each district must purchase current instructional materials to provide each student with materials in core courses (mathematics, language arts, science, social studies, reading, and literature).**
- **Such purchase must be made within the first two years of the adoption.**

Instructional Materials Funding

- **IM Dollars are funded categorically**
- **50% must be spent on state adopted instructional materials**
- **50% are “flex” dollars – must be spent on instructional materials**
- **Can vary by district**

Section 1006.40, F.S.

Florida Association of District Instructional Materials Administrators Cost Analysis

- **Uses projected student population from Department of Education**
- **Uses real cost of instructional materials**
- **Identifies a typical curriculum for a student at each grade level**
- **Determines actual materials being used around the state**
- **Identifies what districts are actually planning to purchase**

Florida Association of District Instructional Materials Administrators Cost Analysis

- Includes dual enrollment materials
- Is based on one book per child in the core subject areas
- Includes cost for growth and maintenance
 - Growth is the amount needed by each district to purchase a full set of materials for each new student
 - Maintenance is the amount needed to purchase materials for returning students

How frequently has their estimate been appropriated?

<u>Year</u>	<u>Cost Analysis</u>	<u>Appropriation</u>
2000	168,936,442	174,891,807
2001	166,134,233	173,891,807
2002	195,338,584	195,338,584
2003	208,839,157	208,839,157
2004	218,113,605	208,839,176
2005	216,304,200	215,304,200
2006	228,899,489	228,899,489
2007	252,178,457	247,573,588
2008	267,674,282	252,844,498
2009	314,930,678	241,333,326

**FADIMA Cost Analysis
2009/2010**

**Kindergarten
Cost Data**

Subject	Item	Publisher	Code	Ratio	Price	Noncon	Yrs	Consum	Growth
Health	Learning System	Macmillan	00-265-0	1 to 125	309.00	0.49	5		2,472
Reading	Kit	Macmillan	03-540-0	1 to 18	2,595.00	28.83	5		144,167
	Phonics Practice	Sadler	06-730-0	1 to 1	8.97			8.97	8,970
Mathematics	Text	Harcourt	06-026-0	1 to 1	19.98			19.98	19.98
	Kit		06-023-0	1 to 18	793.08	8.89	5		44,437.8
Science	Kit	Harcourt	03-165-0	1 to 18	430.00	5.97	4		23,888.8
	Equipment Kit		09-165-1	1 to 18	718.73	9.95	4		39,818.3
Social Studies	Kit	Houghton	09-400-0	1 to 18	375.00	3.47	6		20,833.3
Music/Art	Big Book	Scott		1 to 125	452.90	0.72	5		3,623.2
	CD Pkg.	Scott		1 to 125	509.00	0.81	5		4,072
Totals						\$59.13		\$28.95	\$312,262

Annual Nonconsumable	+	Annual Consumable	=	Maintenance	** Growth
\$ 59.13		\$ 28.95		\$ 88.08	\$ 312.26

** Based on actual prices, not rounded figures that may be reflected in Annual Nonconsumable and Consumable columns.

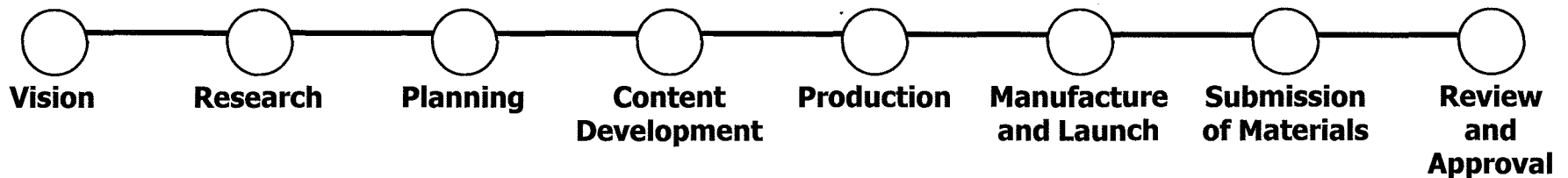
A 1:1 ratio is used for a textbook, workbook or other material that is used by one student.
A 1:18 ratio at grades K-3 is used for materials that serve the complete classroom.
A 1:125 ratio is used at the elementary level for materials that serve an entire school.

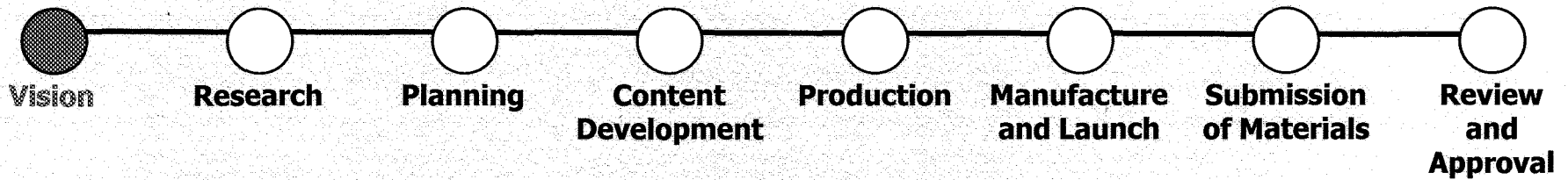
Florida's Adoption Process

- Ensures alignment to Florida's Next Generation Sunshine State Standards
- Promotes integrity and objectivity for all publishers
- Allows state to maintain cost control
- Contracts for adequate availability of materials for Florida's school districts



Process and Timeline for Developing *Florida Literature*

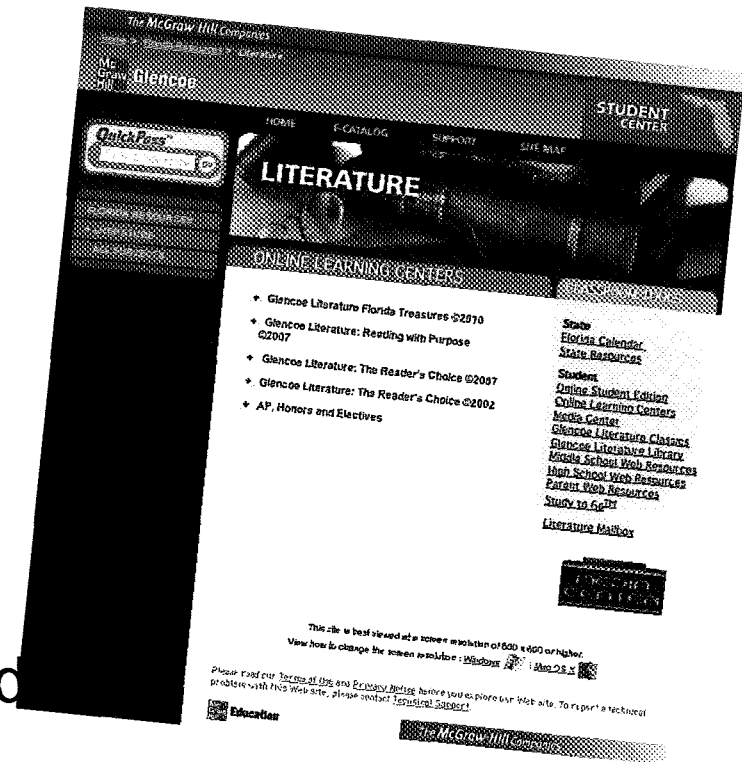


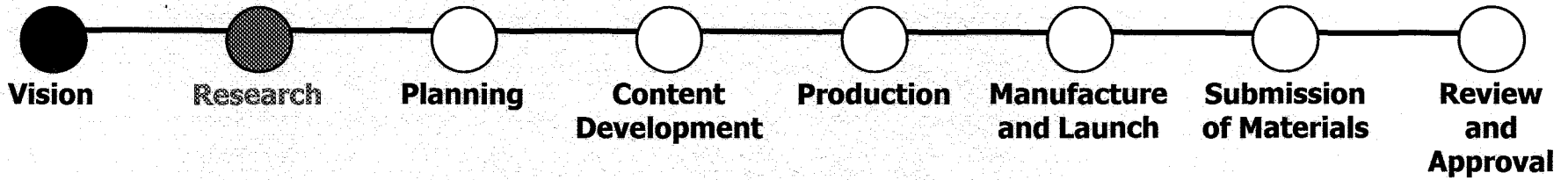


Vision

36 Months before Adoption

- Plan integrated print and technology literature program for the 21st century
- Research best practices for literature, reading, and writing and communication instruction, including digital delivery





Research

33 Months before Adoption

- Analyze State Assessment results
- Survey teachers to determine needs and preferences
- Prepare and plan for teacher/supervisor discussion groups
- Identify teachers for Florida Advisory Board
- Identify Florida Consultants

Countdown to the FCAT—Week 6

Reading
Read the following selection and answer the questions.

from "The Lure of the Swamp" by John Cultrone

When I was in the ninth grade, I wrote a term paper on the Florida Everglades. It was my first real research paper. I learned to use the *Reader's Guide to Periodical Literature* and came up with an article on the Glades from a *National Geographic* published in the late 1950s. It was an expansive article, a parson's like the watery land it spoke of, full of swampy photographs dripping with the greens, blues, and yellows of another time.

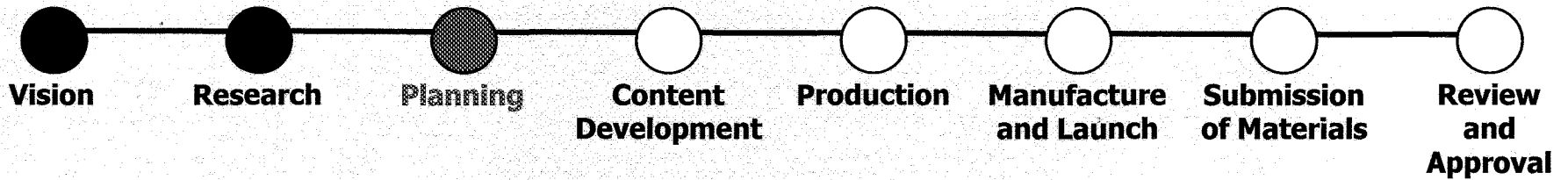
For weeks I kept returning to the library just to look at that article. It was the lurking wildness that I loved about my home state, all that swampliness waiting beneath the concrete. It sparked my curiosity. And when I asked my folks to take me to the Glades, they took me to the boardwalks of Corkscrew Swamp.

For a coastal boy accustomed only to sand and pelicans, it was an adventure into the unknown. I saw things up close that I'd only seen in books: cypress knees, swamp lilies, the amazing abundance of bromeliads perched high in the trees, thriving *off* air and water. Here was the saw grass I had read about, and the awkward arhangas drying its wings in the sun, just like in the photographs. The arhangas is a fishing bird that, oddly enough, cannot fly with wet wings. It sits there patiently at the water's edge, black wings outstretched, a bit like a phoenix but somehow not nearly as majestic. Herons and egrets with pointed bills stalked on stilts across lettuce lakes—fresh water covered entirely by crimped green leaves. They stepped so gingerly across them as to never force a ripple, while eyes watched from beneath the surface—round eyes that barely blinked and you couldn't be sure if they were attached to fish or frog or gator or who knows what.

And there were gators: three or four of the mean, ferocious variety that pass the hours lazily warming themselves atop a sunny log or a floating bank of peat. And in the stillness of the place, there was the grand railroad-station chatter of the roosting wood storks that began as a mere buzzing early on and grew steadily louder till we thought we might be running headlong into a swarm of bees. But no, it was wood storks, more than we could count, big clumsy birds perched high in the trees, talking madly to each other and doing what noosing wood storks do.

But mostly, there was something about the cypress, something I couldn't quite grasp. Something about the quality of sunlight as it filtered through these ancient trees. Like coming in from outside into a room of gray-headed grandfathers, most of them tall, some of them soaking their feet, knees propped up, each one silent yet brimming with tales of days gone by, tales only they know, tales in their own native tongue, tales leaning close to vanishing.

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Planning

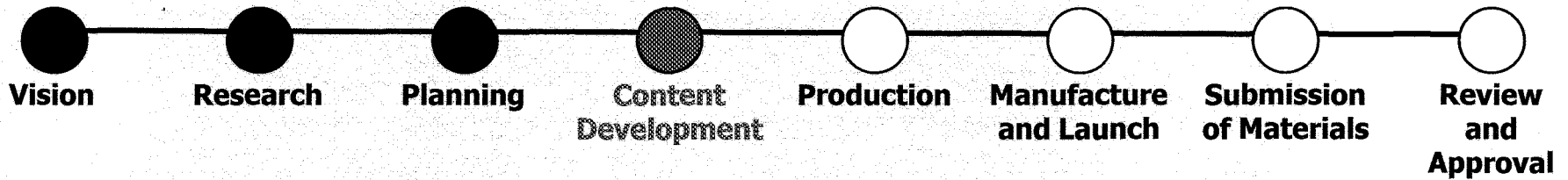
30 Months before Adoption

- Meet with Florida Advisory Board and Consultants
- Develop Scope and Sequence
- Create lesson prototypes for print and digital versions

Book Overview	
How to Use <i>Clarcoe Literature</i>	ix
Clear Safety	xiii
UNIT ONE	
The Short Story	
Part 1: Matters of Life and Death	1
Part 2: Rewards and Sacrifices	7
Part 3: Dreams and Reality	95
	183
UNIT TWO	
Nonfiction	
Part 1: Looking into Lives	259
Part 2: On the Move	265
Part 3: Finding Common Ground	325
	375
UNIT THREE	
Poetry	
Part 1: Nature Inspires	441
Part 2: Life Lessons	447
Part 3: The Strength of Family	503
	561
UNIT FOUR	
Drama	
Part 1: The Power of Love	613
Part 2: Awkward Encounters	619
	735

Stopping into the Americas Division James Cortada Acrylic on Canvas, 243.8 x 240.9 cm, Private collection.

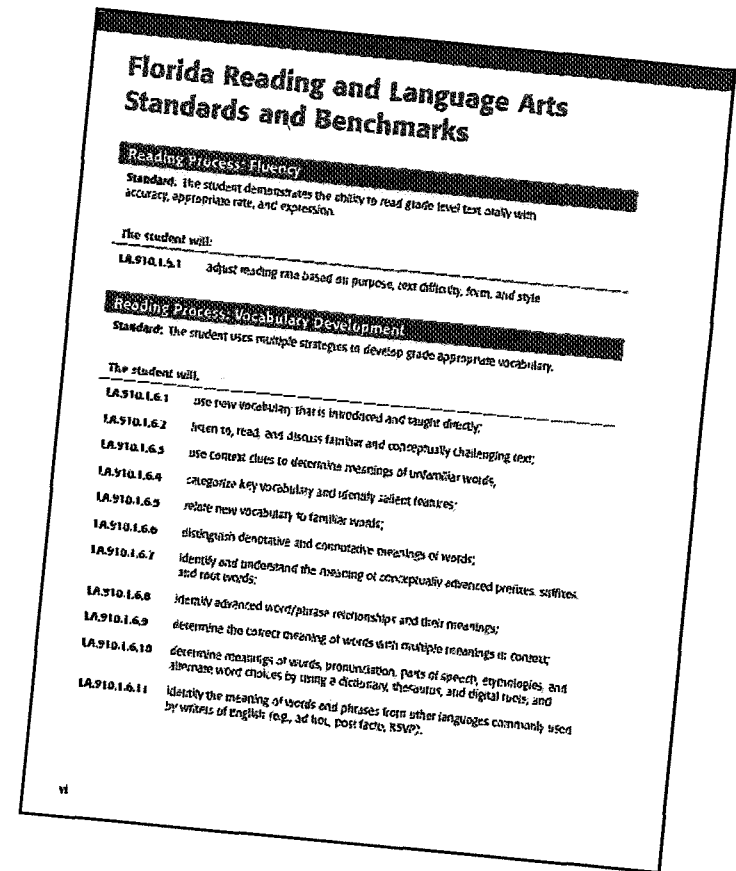
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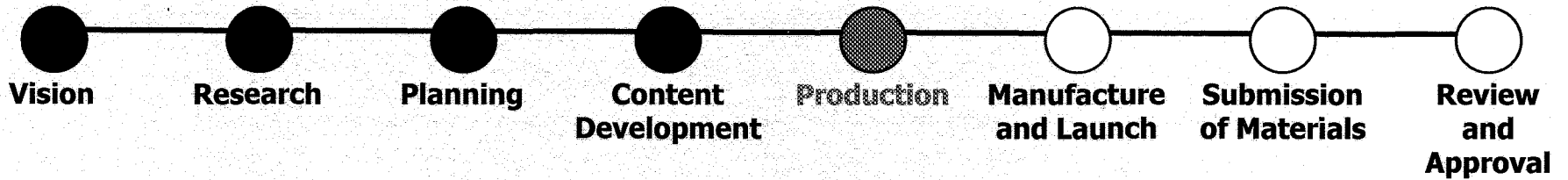


Content Development

23 Months before Adoption

- Outline and develop manuscript
- Design Digital Components
- Send manuscript to Consultants and Florida Teacher Advisory Board for review
- Review manuscript for alignment with Sunshine State Standards

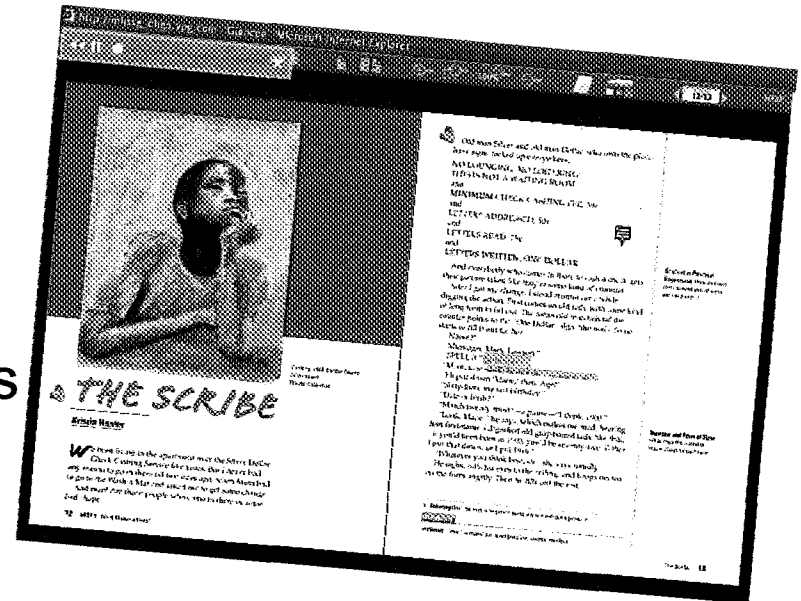


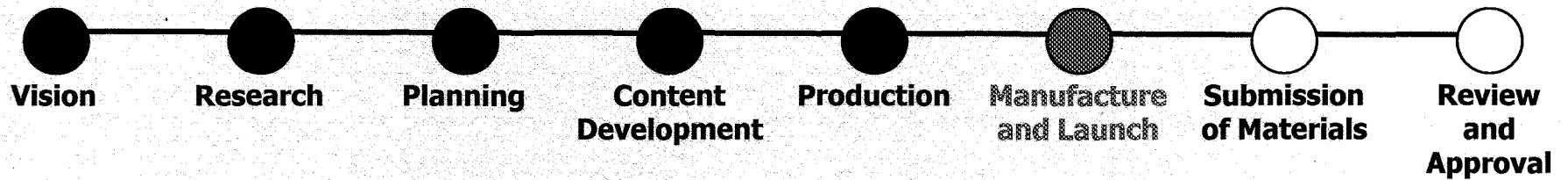


Production

16 Months before Adoption

- Layout pages and screens
- Acquire art, photos, and permissions
- Verify accuracy and quality of all lessons
- Confirm Next Generation Sunshine State Standards references
- Prepare final files for online and print versions

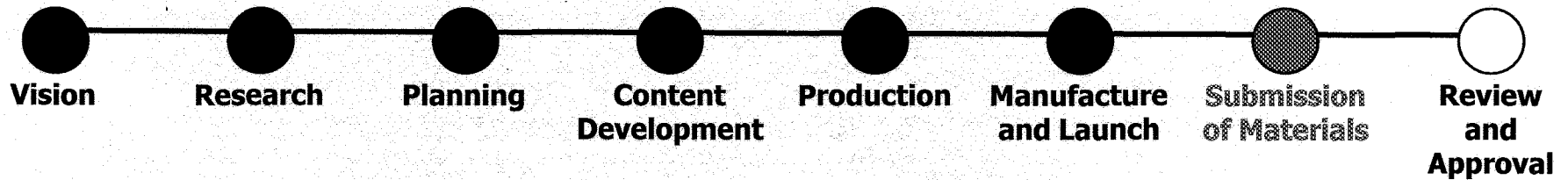




Manufacture and Launch

9 Months before Adoption

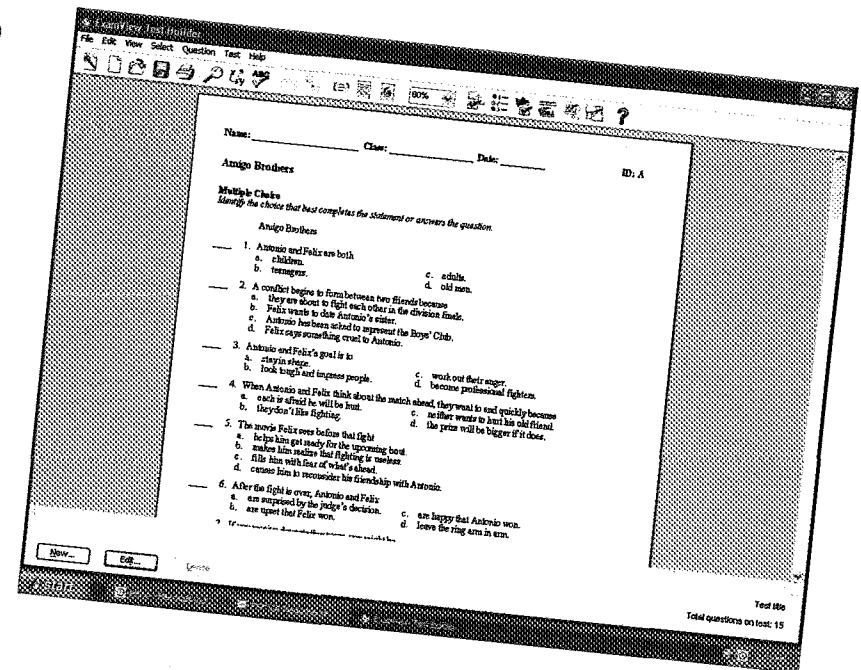
- Print Materials (Student Edition, Teacher Edition, ancillary materials)
 - Check printer proofs
 - Print and bind
- Online Content (online materials including student version, assessment, activities, and professional development)
 - Review all content and functionality
 - Post to Online Learning Center
- CDs and DVDs
 - Check gold master discs
 - Duplicate discs and assemble packages

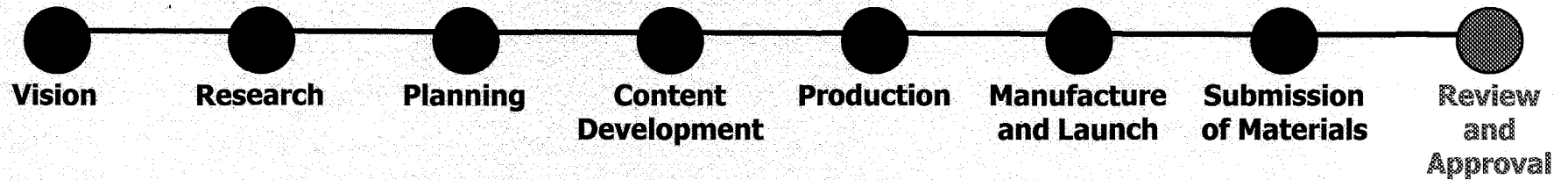


Submission of Materials

6 Months before Adoption


- Deliver print materials, online content, CD's & DVDs, according to adoption submission requirements
- Sample materials to the state board, individual committee members, regional centers, and local school districts







Review and Approval

- Deliberations by State Instructional Materials Committee
- Deliberations and adoption by the Commissioner of Education





K-12 Resource Sharing

- **Library Media services – countercyclical**
 - More demand for collections and services during economic downturn
- **Impacts:**
 - Over 3,000 schools in 67 districts 
 - 2,580,996 students
 - Teachers, library media specialists, administrators, and parents




K-12 Resource Sharing

- **Equitable access to:**
 - Over 2 million titles in school library media centers
 - Over 31,000 curriculum-related Internet sites
 - Savings to schools – \$898,400 based on comparable services
 - Nearly 2,000 streaming video files
 - Curriculum portals for students, teachers, library media specialists, parents and administrators 




K-12 Resource Sharing

- **Value:**
 - Receives over 1 million searches per year
 - Based on average for last 3 years
 - Facilitates 62,225 interlibrary loans (2007-2008 school year)
 - Savings to schools \$1,307,394.80 based on average cost of book (\$21.10 – *School Library Journal*)
 - Provides E-Store resources (July 2007-present)
 - Supplies over 200,000 pieces of SUNLINK instructional literature using budgeted printing costs
 - Offers preservice and inservice - face-to-face & online
 - Maintains *Age of Collection* statistics for every school




K-12 Resource Sharing 2009-2010 Proposed Improvements

- **Value:**
 - Provides State Standards Subscription (\$499/school) <http://www.follettsoftware.com/page/standards/>
 - Service for matching state standards to Florida school library resources
 - Title Peek (\$249/school) <http://www.follettsoftware.com/page/titlepeek/>
 - Service for title search information
 - Web Path Express (double) (\$499/school) http://www.follettsoftware.com/page/webpath_express/
 - Service for educational reliable Internet sites in catalog
 - Total value to Florida public schools: \$ 3,700,000.00




K-12 Resource Sharing

- **Return on Investment (2009-2010) = 800%**
 - Value of interlibrary loans = 1.3 million
 - MARC record data base = 1.1 million
 - Curriculum-related Internet sites = 1.65 million
 - State standards correlation service = 1.65 million
 - Title Peek service = 825,000
 - Total = 6.5 million




K-12 Resource Sharing

- **Budget (Phase XXI) 2008-2009 – Revised**
 - \$800,111 – (6% reduction) = \$752,105
 - Mastering union database + web maintenance = \$315,000*
 - Salaries and Fringes – \$318,010 - \$8,511 = \$309,500
 - Expenses – \$79,000 - \$4,500 = \$74,500
 - Rent, utilities, printing (e-store products for schools), supplies, etc.
 - Honorariums deleted.
 - Travel – \$25,000 - \$17,500 = \$7,500
 - 7 Task Force members x 1 meeting @ \$500 = \$3,500
 - Conferences – 2 employees x 2 conferences @ \$958 = \$3,832
 - Training – \$25,000 - \$17,000 = \$8,000
 - Training – 1 employee x 38 sessions @ \$208 = \$4,160
 - Indirect costs (5%) – \$38,101 - \$496 = \$37,605
 - Totals in Italics are based on proposed budget reduction.

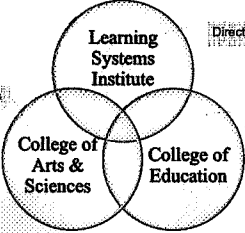


**Florida Center for Research
in Science, Technology,
Engineering, and Mathematics**

A Multi-disciplinary Center at Florida State University





Created by the 2006 Florida Legislature (Ch 1004.86 F.S.)
"The purpose of the center is increasing student achievement in
mathematics and science, with an emphasis on K-12 education."



Director, Dr. Laura Lang
Dean, Dr. Joseph Trivita
Dean, Dr. Marcy Driscoll

Center Director, Dr. Harry Kroto
A co-recipient of the 1996 Nobel Prize in Chemistry and
a Francis Eppes Professor in the Department of
Chemistry & Biochemistry, Dr. Kroto is an ardent
advocate for K-12 science education worldwide.

FCR-STEM Mission

The mission of FCR-STEM is to help the State of Florida improve K-12 teaching and learning in science, mathematics and technology and prepare students for higher education and science, technology, engineering, and mathematics careers in the 21st Century.

Through impacts on classroom practice, FCR-STEM strives to:

- Improve student achievement in STEM
- Narrow student achievement gaps in STEM
- Increase student pursuit of STEM courses and careers

Research Focus

FCR-STEM is committed to conducting rigorous investigations designed to address questions that will help policymakers and educators make evidence-based decisions and wisely invest public resources.

Examples of Research conducted through FCRSTEM:

Do middle school students learn more in integrated STEM classes or traditional classes?
Dr. Laura Lang, Learning Systems Institute

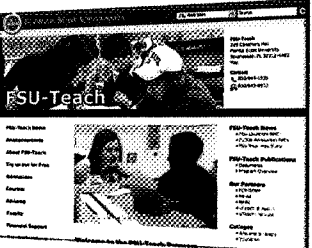
Does individualizing science instruction, based on reading skills, improve 2nd grade students' performance in science and/or reading?
Dr. Carol Connor, Florida Center for Reading Research & Dr. Diana Rice, College of Education, FSU

Does inquiry-based instruction improve 4th and 5th grade students' understanding of science more than traditional textbook-driven approaches?
Dr. Ellen Granger, Office of Science Teaching Activities & Dr. Sherry Southerland, College of Education, FSU

What are the cognitive characteristics and problem-solving skills of students in Advanced-Placement science courses who perform at the highest levels on AP exams vs. those at the lowest levels?
Dr. Paul Ward & Dr. David Eccles, Center for Expert Performance Research, FSU

Does professional development for principals that improves their math and science content knowledge and pedagogical content knowledge improve math and science teaching and learning in their schools?
Dr. Laura Lang, Learning Systems Institute

FSU-Teach



Purpose: increase numbers of math and science teachers with strong content knowledge and applicable classroom experiences by attracting and supporting math and science majors into the teaching profession.

College of Education and College of Arts & Sciences
Grant required matching funds provided by FCR-STEM



Florida Center for Research in Science, Technology, Engineering and Mathematics

Research and Technical Assistance in Support of STEM Education in Florida's K-12 Public Schools

About FCR-STEM

Authority: Florida Statutes, Section 1004.86, Florida Center for Mathematics and Science Education Research (2006).

Mission: Increase Florida K-12 student achievement in mathematics and science through research and technical assistance on policies and practices related to mathematics and science learning, instruction, and assessment.

Award: Florida Department of Education issued RFP in Sept 2006. February 21, 2007 Gov. Charlie Crist announced the competitive award to Florida State University - Florida Center for Research in Science, Technology, Engineering and Mathematics (FCR-STEM). The grant award letter was received in April 2007. The Center is housed within FSU's **Learning Systems Institute** (www.lsi.fsu.edu), which has an international reputation for bridging the gap between research and practice in reading, education and training.

Base Funding (non-recurring): 2006-07 - \$2 million; 2007-08 - \$2 million; 2008-09 - \$1.34 million

Time in operation to date: 16 months (April 2007 to August 2008).

Return on Investment: 3.68. For every dollar in base funding awarded to FCR-STEM since July 1, 2007 (\$3.34M total), the center secured \$3.68 in additional federal, private and state funding for research, professional development, a model pre-service preparation program for math/science teachers, and special projects.

Success rate on external funding applications: 49%. Dollar amount of proposals funded to date (\$12.2M, excluding base funding) divided by total dollar amount of proposals funded and not funded. Most funded projects are multi-year. Pending are 6 additional NSF and USDOE proposals totaling \$8.7M.



*Florida Center for Research in Science, Technology, Engineering and Mathematics (FCR-STEM)
Florida State University • C4600 University Center • Tallahassee, FL 32306, USA
Phone: 850.644.2570 • Fax: 850.644.4952 • URL: www.FCRSTEM.org*

FCR-STEM Leadership

Executive Committee

Joseph Travis, Ph.D., Dean of the College of Arts and Sciences, is the Center's Principal Investigator. Dr. Travis is a Robert O. Lawton Distinguished Professor at Florida State University and a Fellow of the American Association for the Advancement of Science. Dean Travis became a faculty member in the Biological Science Department in 1980, serving as Chair from 1991-1997. He was named Director of the School of Computational Science and Information Technology in 2000.

Lawrence G. Abele, Ph.D., Provost and Executive Vice President for Academic Affairs, is a Co-Principal Investigator. Dr. Abele served as Dean of the College of Arts and Sciences from 1991 to 1994 and as Chairperson of the Department of Biological Science from 1983-91. Dr. Abele is a Fellow of the American Association for the Advancement of Science and has served on advisory committees for the National Science Foundation, the Smithsonian Institution and other governmental agencies.

Marcy Driscoll, Ph.D., Dean of the FSU College of Education, is a Co-Principal Investigator. Dr. Driscoll is the Leslie J. Briggs Professor of Educational Research, and a professor in the Instructional Systems and Educational Psychology programs at Florida State University. She served as Chair of the Department of Educational Psychology and Learning Systems from 1996 – 2003 and as Associate Dean of the College of Education from 2003-2005.

Laura Hassler Lang, Ph.D., Director of the Learning Systems Institute, is a Co-Principal Investigator. Dr. Lang is an Associate Professor of Educational Leadership and Policy Studies and the director of the multi-disciplinary **Learning Systems Institute** at Florida State University. With Dr. Joseph Torgesen and other research faculty, Dr. Lang established the Florida Center for Reading Research (FCRR), where she recently directed a large-scale reading research study at the high school level. In 1996, she was recognized by Education Commissioner Frank Brogan as one of Florida's Outstanding Middle School Principals.

Harold Kroto, Ph.D. – Director of FCR-STEM

Dr. Kroto is a co-recipient of the 1996 Nobel Prize in Chemistry, a Francis Eppes Professor in the FSU Department of Chemistry and Biochemistry, and an ardent advocate for K-12 science education worldwide. He is a co-founder of the Vega Science Trust established to promote science education and science careers among young people. In 2001, he won the Royal Society's prestigious Michael Faraday Award, given annually to a scientist who has done the most to further public communication of science, engineering or technology in the United Kingdom

Kris Ellington, Ed.S. – Associate Director of FCR-STEM

Ms. Ellington, Associate in Research, coordinates the work of FCR-STEM faculty and staff. Previously, she was Bureau Chief of K-12 Student Assessment for the Florida Department of Education and also served as Director of the FCAT Test Development Center. From 1991 to 2000, Ms. Ellington was the K-12 Mathematics Coordinator for Leon County Schools in Tallahassee.

FCR-STEM Research Activity

Principal PROMiSE Research Project: *Lead Investigator, Laura Lang*, is conducting an experiment with 400 elementary school principals to determine their effectiveness in leading implementation of Florida's new math and science standards. Expected long-term outcomes are improved leadership, teacher practice and student achievement in math and science and a research-based professional development for principals that can be adopted by the state and school districts.

Professional Development Approaches for Reform-based Curricula. *Lead Investigators, Ellen Granger & Sherry Southerland*, are testing the effectiveness of the Great Explorations in Math and Science (GEMS) curriculum, embodying a reform-based approach to science teaching, and professional development in improving elementary teachers' reform-minded instruction and students' science learning in 130 elementary school classrooms over two years. Preliminary analysis of the data from the first year indicates that students in the 30 classrooms using the GEMS curriculum scored significantly higher on content knowledge and positive attitude toward science than students in the classrooms employing traditional instruction.

Individualized K-3 Science Instruction. *Lead Investigator, Carol Connor*, is developing and testing a grade 2 curriculum differentiating instruction based on students' vocabulary and background knowledge. This research will help teachers individualize science instruction and organize science instructional activities to ensure increased reading and science performance.

Examining Superior Performance in AP Courses. *Lead Investigator, Paul Ward*, is studying higher-order thinking and cognitive mechanisms that differentiate high and low-performing students in Advanced Placement Science courses. By working backwards from objectively measured superior performance to how that superiority was achieved, this research will help improve learning, performance, and instruction.

Integrated Math, Science and Technology (IMAST) in the Middle Grades. *Lead Investigator, Laura Lang*, is researching the effectiveness of an interdisciplinary approach to teaching math, science, and technology in middle school. Although there is strong philosophical support for integrating math and science, more research is needed on its effectiveness in improving students' understanding and attitudes.

Teacher Preparation

FSU-Teach. Leads: Joseph Travis and Marcy Driscoll. The FSU Colleges of Arts & Sciences and Education are collaborating on the development and testing of a pre-service teacher preparation program modeled after the successful UTeach program at UT-Austin. Designed to substantially increase the number of secondary mathematics and science teachers in Florida with strong content and content-specific pedagogy, FSU-Teach seeks to more than double the number of math and science teacher graduates per year at FSU (from about 30 to at least 70) and ultimately provide a model for secondary science and mathematics teacher preparation in the State University System. Enrollment in its first course this fall indicates that its enrollment goals may be readily achievable.

FCR-STEM Technical Assistance

Development of Next Generation Mathematics and Science Standards. Participation and expert review by 13 FSU College of Arts & Sciences faculty.

PK-3 Math Formative Assessment Project. *Lead: Kris Ellington.* Development of mathematics assessments that teachers can use to monitor student progress and individualize instruction.

GeoGebra. *Lead: Markus Hohenwarter.* Free and multi-platform dynamic mathematics software for schools that joins geometry, algebra, and calculus.

Next Generation Sunshine Standards Database, Course Code Directory (CCD), Course Descriptions, and Curriculum Planning Tools for Grades K-12. *Leads: Rabieh Razzouk & Markus Hohenwarter.* Online portal and tools built on the Next Generation Standards for Florida's educators.

Math/Science Next Generation Standards Workshops. *Leads: Danielle Sherdan & Marty Beech.* Provided for 900 district/school personnel from 62 school districts.

PROMiSE Professional Development on Next Generation Standards. *Leads: Laura Lang & Christi Moss.* To be provided for 700 secondary principals/assistant principals and elementary principals in over 55 school districts.

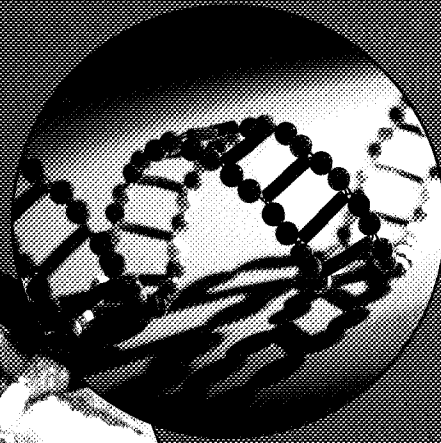
Female-Minority Initiative. *Lead: Laura Lang.* A study and proposal to increase participation and success of females and minorities in STEM education and careers.

Global Educational Outreach for Science, Engineering & Technology (GEOSET). *Lead: Harry Kroto.* Short Internet modules to support instruction on mathematics and science concepts.



FLORIDA STATE UNIVERSITY

Florida
Center for
Research in

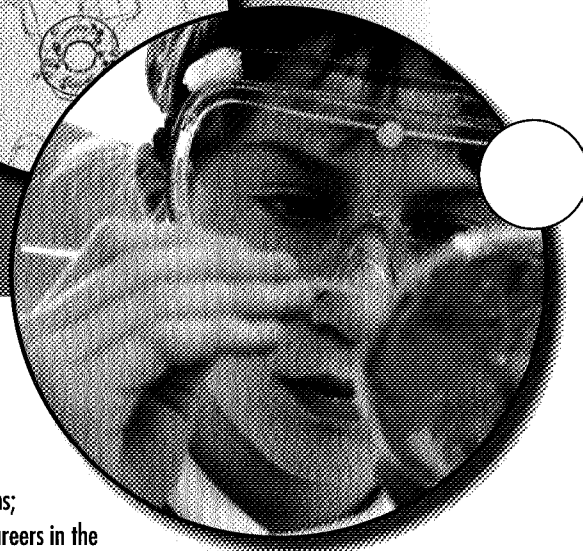
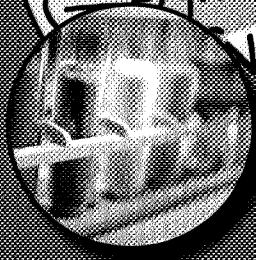
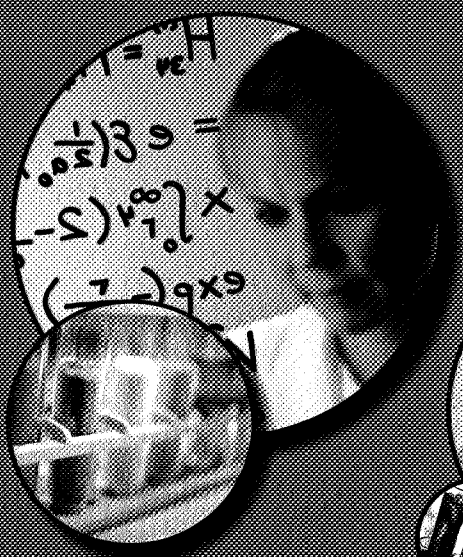


Science
Technology
Engineering
and Mathematics

FCR STEM

"No one would think of getting to the Moon or of wiping out a disease without research. Likewise, one cannot expect reform efforts in education to have significant effects without research-based knowledge to guide them."

Scientific Research in Education (2002) • Committee on Scientific Principles for Education Research • National Research Council



Mission

- 1 To contribute to the scientific body of knowledge regarding how students learn science and mathematics, and how this learning is assessed;
- 2 To improve teaching and learning in Florida's STEM classrooms;
- 3 To increase students' preparation for higher education and careers in the 21st Century.

Specifically, the center engages in research, technical assistance and dissemination activities designed to improve classroom instruction and, in turn,

- raise K-12 student interest and achievement in science, technology, engineering, and mathematics.
- narrow achievement gaps in mathematics and science among gender, racial/ethnic and other demographic groups.
- increase student pursuit of STEM postsecondary education and careers.

About FCR-STEM

Statutory Authority

Florida's center for mathematics and science education research was established in state statute (Section 1004.86) in 2006 during the last legislative session of Governor Jeb Bush's administration.

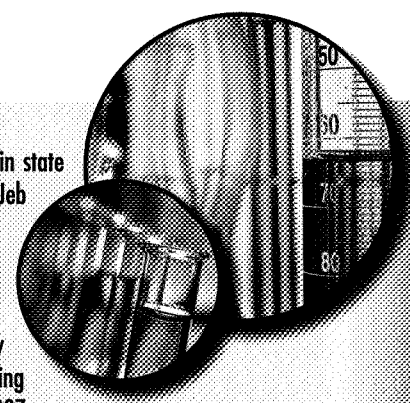
On February 21, 2007, Governor Charlie Crist announced the competitive award of the new center to Florida State University, specifically the Florida Center for Research in Science, Technology, Engineering and Mathematics (FCR-STEM). Jointly administered by the FSU College of Arts & Sciences, College of Education, and Learning Systems Institute in the Office of the Provost, the center began operation in April 2007.

Funding

Since April 2007, the Florida Legislature has provided non-recurring base funding for the center's project start-up and core operation: 2006-07 - \$2 million; 2007-08 - \$2 million; 2008-09 - \$1.34 million. In 2009-2010, FCR-STEM is seeking recurring funds to continue its work and hire permanent faculty.

Return on investment

FCR-STEM has yielded a high rate of return on the state's investment. For every dollar in base funding awarded to FCR-STEM from July 1, 2007 to August 31, 2008 (\$3.34M total), the center secured \$3.68 in additional federal, private and state funding for research, professional development, a model pre-service preparation program for mathematics/science teachers, and special projects. Most funded projects are multi-year.



FCR-STEM Leadership

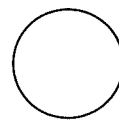
Executive Committee

- Dean of the College of Arts & Sciences, Joseph Travis, Ph.D., Chairman
- Provost and Vice President of Academic Affairs, Larry Abele, Ph.D.
- Dean of the College of Education, Marcy Driscoll, Ph.D.
- Director of the Learning Systems Institute, Laura Hassler Lang, Ph.D.

Center Director

- Nobel Laureate Harold Kroto, Ph.D.
Francis Eppes Professor, Chemistry and Biochemistry

Research



With a focus on the classroom, FCR-STEM is committed to conducting rigorous research that will:

1. increase understanding about how children learn mathematics and science, and
2. produce evidence about "what works" to improve K-12 student performance in science and mathematics.

Conducted in Florida, the center's research projects are designed to address questions that will help policymakers and educators make evidence-based decisions and wisely invest public resources. To date, six multi-year projects are underway.

- What is effective science and mathematics instruction? How does it vary at different grade levels and for different groups of students?
- What content knowledge and instructional skills are most critical for teachers of mathematics and science? How can they best acquire and improve these skills?
- What policies, curricula and programs maximize student achievement, persistence, and career choice in mathematics and science? How do results vary for demographically different groups of Florida students?
- What classroom assessments are most appropriate for Florida's students at various grade levels? How can teachers use these assessments to guide their instruction?
- How can technology, such as web-based teacher planning tools, support teachers' instruction and, in turn, increase student engagement and learning in mathematics and science?
- How can principals and school districts support effective mathematics and science instruction that is aligned with the Next Generation Standards?

The mission of FCR-STEM is to help the State of Florida

Technical Assistance

A major role of FCR-STEM is to provide technical assistance and support to school districts and schools in the development and implementation of mathematics and science instruction. The center has been fulfilling this role in the following ways.

Florida's Next Generation Sunshine State Standards in Mathematics and Science

- Participation in writing and review of the standards
- Development of course descriptions and benchmark ratings to guide content and rigor of instruction.
- Provision of regional one-day workshops for school districts introducing the new standards and their implications for instruction.
- Development of web-based tools to promote statewide use of the new standards.

Intensive Professional Development

- Provided for principals, to build their understanding of the Next Generation mathematics and science standards and capacity to support teachers use of these standards (700 principals statewide over 3 years).*
- Provided for mathematics and science teachers (K-12), to enhance instruction aligned with the Next Generation Standards*
- Provided for secondary mathematics and science teachers, to enhance learning of subject matter content related to science and mathematics (220 teachers in 9 districts over one year).

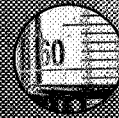
*as part of the Florida PROMiSE partnership



Assessment

- Development of an assessment system that will help teachers monitor student progress and individualize instruction in mathematics and science.
- Initiated a multi-year effort in 2008-09 with development of a preliminary plan for a PreK-3 mathematics assessment for Florida.

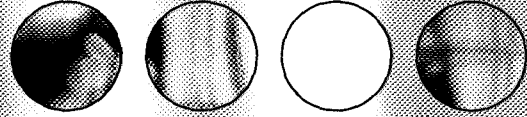
to improve K-12 teaching & learning in science, technology, engineering



Teacher Preparation

With matching funds from FCR-STEM, the FSU College of Arts & Sciences and College of Education successfully competed for a grant (2008-2012) to develop and test a pre-service teacher preparation program modeled after the UTeach program at the University of Texas-Austin. FSU-Teach is designed to

- substantially increase the content knowledge and content-specific pedagogy of secondary mathematics and science teachers in Florida
- more than double the number of mathematics and science teacher graduates per year at FSU, and
- ultimately provide a model for secondary science and mathematics teacher preparation in the State University System.



Special Initiatives

- **Global Educational Outreach for Science, Engineering and Technology (GEOSET):** Development of Internet modules that will help Florida's K-12 educators teach essential mathematics and science concepts and increase student interest in STEM careers.
- **GeoGebra:** Continuing design of a free, award-winning, interactive mathematics software designed to support the teaching of geometry, algebra, and calculus to students in grades 6-12.
- **Female-Minority Initiative:** A proposed plan to increase the participation and success of females and minorities in K-20 STEM education and STEM fields in Florida.

...eering and mathematics and prepare students for high

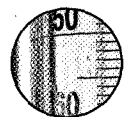
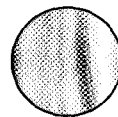
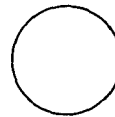
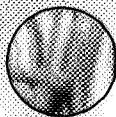
Center Expertise

Over 35 multidisciplinary faculty – from Arts & Sciences, Education, and the Learning Systems Institute – direct, manage and advise on the center's projects. Collectively, they offer expertise in the following fields:

- **Biology**
- **Chemistry**
- **Cognitive Psychology**
- **Computer Science**
- **Early Childhood Education**
- **Educational Evaluation and Research**
- **Educational Leadership**
- **Exceptional Student Education**
- **History of Science**
- **Instructional Systems Design**
- **Mathematics**
- **Mathematics Education**
- **Meteorology**
- **Oceanography**
- **Physics**
- **Science Education**



er education and STEM careers in the 21st Century.



**Florida Center for Research in
Science, Technology, Engineering and Mathematics (FCR-STEM)**

Florida State University



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