



Terry Dozier @ ed.gov

09/12/97 05:07:00 PM

Record Type: Record

To: Michael Cohen, William R. Kincaid

cc:

Subject: The National Commission on Teaching and America's Future

Bill-

I wanted to follow up on our conversation about the possibility of Presidential involvement in the National Commission's anniversary meeting in November. Governor Hunt will be here and they plan to have a big splash marking the anniversary of the Commission's creation and highlighting progress made since the Commission's report, *What Matters Most: Teaching and America's Future*, was released last September.

You asked if there would be anything the President could "announce." I spoke with the Commission this week and there are a number of things they are planning on announcing at the National Press Club on Thursday, November 20.

1) Linda Darling-Hammond is working on an updated report that looks at what's happening across the country since the Commission's report was released. It will include not only the work being done in their 12 partner states, but also federal action, and other state and local policies and programs that are addressing the quality of our teaching force.

2) Each of the partner states will release their own status of teaching reports. The partners are North Carolina, Georgia, Illinois, Indiana, Kansas, Kentucky, Maine, Maryland, Missouri, Montana, Ohio, and Oklahoma.

3) On the local level, they will announce the launching of an urban initiative. They have received a grant from the Ford Foundation to do something like the policy inventory for states, for urban school districts.

So, they plan to announce something at the national, state, and local levels.

Of course, they would be thrilled to have the President or Vice President participate in some way. I told them that I did not think either one of them ever participated at a press conference at the National Press Club.

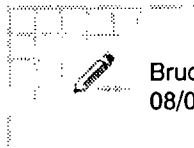
There will be a luncheon that follows the press conference and then the Department, CPRE, and the Commission will co-sponsor a conference

on issues surrounding the quality of our teaching force. I believe that is scheduled to be held at the Mayflower.

I told them I would get back to them about potential interest on the part of the White House. I explained to them that the President would not be interested in participating in something that has been announced "after the fact."

Let me know what you think the likelihood is that this is interesting enough for WH participation. The President did issue a directive last year to the Department after the Commission's report was released. He ordered us to identify promising practices and federal resources that are available to states and local communities to address teacher quality. He also asked the Department to report to the nation our progress. We are currently working on a biennial report card on teacher quality that will be released in 1998.

Terry



Bruce N. Reed
08/08/97 09:21:57 AM

Record Type: Record

To: Elena Kagan/OPD/EOP, William R. Kincaid/OPD/EOP, Christa Robinson/OPD/EOP

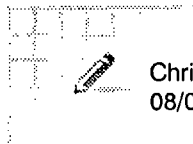
cc:

Subject: calif charter schools

At yesterday's scheduling mtg, the President said he wanted to put as much focus on education as he could in September, while America's thinking about it. He suggested that we consider having him do a charter school event in the Bay Area while he's out there to take Chelsea to Stanford. Bill, can you and Schnur look into the possibilities, and see if this is possible? If it is, we should save that charter schools \$ to announce there.

His other idea was to squeeze something into the Arkansas trip. Any ideas?

Rahm and Erskine are counting on us being ready to announce an amicus brief in N.C. for the Sept 8th event...



Christa Robinson
08/06/97 08:29:57 PM

Record Type: Record

To: William R. Kincaid/OPD/EOP, Michael Cohen/OPD/EOP, Bruce N. Reed/OPD/EOP, Elena Kagan/OPD/EOP

cc:

Subject: Education Events

The only education event currently scheduled is a back to school event on Sept. 8th. It is the first day POTUS is back from vacation, and it is a great opportunity for significant news coverage. While we should put as many good announcements as possible into an education package for this event, please keep in the back of your mind the possibility of another date in September being held for an education message. Since we lost the higher ed event on Aug. 15, I think folks will want to make up for it in Sept. -- most likely when POTUS takes Chelsea to college Sept. 18th in San Francisco. I talked to Ann briefly about this and we should propose an event if we want to secure this opportunity.

San Francisco is onPodesta raised the concern that there will likely be another date in September where we

SCHEDULING REQUEST

REQUEST: Participation in a Back-To-School event to highlight the administration's education reform themes and accomplishments and to announce the awarding of new grants for the development of more charter schools. The President could announce \$40 million in grants for new charter schools -- a reform effort the administration strongly supports. He could also highlight administration support for standards, fixing failing schools, public school choice and the continued need to push forward with school reform efforts.

PURPOSE: (1) To highlight the administration's message on school reform at the start of the new school year; (2) To announce the awarding of \$40 million in grants from the U.S. Department of Education to states and school districts to support the development of charter schools.

BACKGROUND: As we go back to school, there is **genuine cause for hope about the future of American public education** in particular. We have turned a corner: the record thus far gives us reason for continued efforts toward reform.

- **Vastly increased public interest** in education
- **Movement toward standards** and away from social promotion (urban districts sign-ons unthinkable 15 years ago)
- **Demonstrated improvement** in mathematics (4th grade TIMMS)
- **Growing innovation and public school choice** (1 charter when President took office; 500 in operation now)
- We're **integrating technology correctly**
- Successful **school-to-work strategies**.
- Growing **professionalism within the teaching** profession.

There is still work to be done: low-performing schools, low results on some indicators. This bad news often overwhelms the national debate, and can lead to a kind of reform fatigue -- even among those who care about education reform

This is a particularly critical moment *not* to give up. Many of the real gains in education reform will come from the next stages: implementing state standards, measuring results with national tests and recruiting talented new teachers to replace the large block of retiring baby boom teachers.

DATE&TIME: **September 8, 1997.** Students are going back to school in early September. This is an opportunity to focus national attention on education

reform and, in particular, highlight the administration's charter schools program. The President could host a roundtable discussion with local education reform leaders at the school level, such as:

- *Principals/developers from innovative charter schools
- *Parent group leader from school with highly-developed parental involvement program
- *Urban/rural superintendent agreeing to take national tests (San Francisco just signed-on)
- *Students from a previously failing school that has turned around.

After hearing from these local reformers, the President could make remarks on the need for continued education reform efforts and announce the \$40 million in grants for charter schools.

DURATION: One hour

LOCATION: White House.

MAIN POINT:

As we go back to school, there is **genuine cause for hope about the future of American public education** in particular. We have turned a corner: the record thus far gives us reason for continued efforts toward reform.

THE GOOD NEWS:

- Vastly **increased public interest** in education: survey data demonstrates change in public attitudes; increased business/community involvement.
- **Movement toward standards** and away from social promotion (urban districts sign-ons unthinkable 15 years ago)
- Demonstrated **improvement in mathematics** (4th grade TIMMS scores)
- **Growing innovation and public school choice**: has inspired creation of good programs, increased parental participation
- We're **integrating technology correctly** (the old mistake was to buy computers and then fail to do adequate teacher training, so computers were unused or used ineffectively). Better training and professional development, technology partnerships etc.
- Successful **school-to-work strategies**. Especially in this global economy where low skill jobs don't earn a living wage, we are giving students marketable skills in high school to prepare them for careers.
- **Growing professionalism within the teaching profession** (union focus on school reform, recent NEA support for peer review) -- teacher organizations filling a role for their members much like other professional associations -- the ABA and AMA, for instance.

THERE IS STILL WORK TO BE DONE:

- Performance still lags on some indicators e.g. 8th grade TIMMS
- Urban and rural poor schools
- Need to focus on recruiting and retaining talented teachers
- Schools still have to focus on "peripheral" issues that affect their ability to educate: drug use, teen pregnancy, violence etc.

THE CASE FOR CONTINUED REFORM ... ACCELERATED AND INCREASED:

- This bad news often overwhelms the national debate, and can lead to a kind of reform fatigue -- even among those who care about education reform, especially those on the front lines. "We've been at this for so long, and so many trends are negative, *lets give up*"

- Ultimately, that's exactly what vouchers are: giving up on public education ... a few students may be served better by them, but in the long run our larger society suffers
- BUT, for all the reasons articulated above, the evidence just does not support the conclusion that this task is beyond us. Since a Nation At Risk we've reached a national consensus that we *should* reform education. My message is that *we can*.
- And this is a particularly critical moment *not* to give up. Many of the real gains in education reform will come from the next stages: implementing state standards, measuring results with national tests, replacing large block of baby boom teachers, etc
- Genuine education reform implies fundamental change in so many areas, from replacing the highly talented, low-cost labor pool we lost when women gained the opportunity to take jobs besides teaching and nursing, to changing the expectations of students and parents, to meeting tough external standards. Reforming American school may even take more patient, expensive, long-term efforts than defeating communism did. But we did that because our survival depended on it. It also depends on this.



UNITED STATES DEPARTMENT OF EDUCATION

OFFICE OF THE SECRETARY

FAX TRANSMITTAL

TO: Bill KmcaidORGANIZATION: DPC

PHONE NUMBER: _____

FAX NUMBER: _____

FROM: Kevin Sullivan

PHONE NUMBER: _____

FAX NUMBER: ~~202 401 3000~~

MESSAGE: check in with Perry
or Susan Frost
if you have any
suggestions. din on
Vancouver

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600 INDEPENDENCE AVE., S.W. WASHINGTON, D.C. 20202

Our mission is to ensure equal access to education and to promote educational excellence throughout the Nation.

(Draft #3 --Friday 6pm)

A PARENTS GUIDE TO THE 1997 TAX CUTS

How to help your children get a good education

The 1997 balanced budget agreement and tax cut includes many new benefits for parents who have children in school or who are already saving to send their children to college. This guide highlights some of the significant features of the tax cut including the \$500 child tax credit and the largest investment in higher education since the passage of the G.I. Bill in 1945.

These tax cuts essentially make the first two years of college universally available to all Americans and they will give many more working Americans the financial means to go back to school if they want to choose a new career. When fully phased in, 12.9 million students are expected to benefit -- 5.8 million under the HOPE Scholarship, and 7.1 million claiming the Lifetime Learning Credit.

- **A \$500 child tax credit for every child in America:**

This tax credit which will be phased in at \$400 will benefit approximately 27 million families with 45 million children under the age of 17 in 1998. Families will be able to deduct \$400 per child when they file their 1998 income tax form and \$500 thereafter. This child tax credit begins to phase out for couples with incomes above \$110,000.

- **A \$1,500 scholarship for every student who is starting college**

The Hope Scholarship makes the first two years of college universally available. Students will receive a scholarship of 100% on the first \$1,000 of tuition and fees and 50% on the second \$1,000. This tax credit will be available for college expenses paid beginning January 1, 1998. A high school senior going into his or her freshman year of college in September of 1998, for example, will be able to receive the \$1,500 scholarship.

A married couple with a \$60,000 income, with two incomes and two children in college, one at a community college with a tuition of \$2,000 and the other a sophomore at a private college with \$11,000 tuition, would have a tax benefit of \$3,000.

This credit is phased out for joint filers between \$80,000 and \$100,000 of income, and for single filers between \$40,000 and \$50,000. The credit can be claimed in two taxable years for college freshman and sophomores who are enrolled on at least a half-time basis for any portion of the year.

- **Learning for a Lifetime: a tax credit worth \$1,000 to \$2,000.**

This tax provision is targeted for college juniors, seniors, graduate students, mid-career changers and other adults who want to go back to school. A family will receive a 20% tax credit for first \$5,000 of tuition and fees through 2002, and for the first \$10,000 thereafter. The credit is available for net tuition and fees (less grant aid) to pay for post-secondary enrollment after June 30, 1998. The credit is available on a per-taxpayer (family) basis, and is phased out at the same income levels as the HOPE scholarship.

Graduate student: a single graduate student with an income of \$15,000 and tuition bill of \$15,000 would receive a \$1,000 tax benefit by using the lifetime learning credit.

Mid-career change: after 20 years in business a successful mid-level manager decides to change careers and decides to attend a graduate teacher training program at a public university which charges \$3,500 for tuition. The mid-career manager makes \$70,000. The mid-career manager receives a tax benefit of \$700 because of the lifetime learning credit.

- **Why it makes sense for parents and grandparents to create an Education IRA**

Taxpayers may withdraw funds from an IRA, without penalty, for the higher education expenses of the taxpayer, a spouse, a child, and even a grandchild. For each child under age 18, families may deposit \$500 per year into an Education IRA. Earnings will accumulate tax-free and no taxes will be due upon withdrawal for net post-secondary expenses for tuition, fees, books, equipment, and room and board.

The Education IRA is phased out for families with incomes between \$150,000 and \$160,000, and for single filers between \$95,000 and \$110,000. There are a few restrictions. A taxpayer, for example, who uses the tax-free distributions from an Education IRA may not, in the same year, benefit from the HOPE Scholarship or Lifetime Learning Credit.

- **Expanded benefits for pre-paid tuition plans**

Pre-paid tuition plans also get help. State-sponsored pre-paid tuition plans -- the earnings from which are not taxed until the time of withdrawal -- now include room and board expenses for students who attend on at least a half-time basis. Withdrawals are eligible for the HOPE Scholarship and Lifetime Learning tax credits.

- **Paying back Student Loans at Less Cost**

For many college graduates one of their first financial obligation is to pay off their student loan, on average about \$13,500. This provision will essentially allow a borrower to get one "free" monthly payment by allowing students to take a tax deduction for interest paid in the first 60 months of repayment on student loans or training expenses.

A college senior graduates from college and finds a job paying \$25,000 a year. The student has a total student debt of \$12,500. The new job holder because of his or her income is in the 15% federal income tax bracket. The monthly payment for this student loan is \$153. The total payments for the year is \$1,836 and over half of the total payment is interest -- \$1,000 -- which can be deducted. The students tax benefit is \$150 (the interest deduction multiplied by the 15% tax rate). In subsequent years the interest portion of the total student debt declines but using this tax provision still remains a money saver.

The maximum deduction is \$1,000 in 1998, \$1,500 in 1999, \$2,000 in 2000, and \$2,500 in 2001 and beyond. It is available to joint filers with income between \$60,000 and \$75,000, and to single filers with incomes between \$40,000 and \$55,000 (indexed after 2002). The deduction is also available for loans made before August of 1997 when the tax cuts became law but only to the extent that the loan is within the first 60 months of repayment.

- **Going to School while you work**

This provision will enable many Americans to pursue their goals of lifelong learning while working to pay their bills. The tax bill extends Section 127 of the tax code for undergraduates for three years (for courses beginning prior to June 1, 2000). This provision allows workers to exclude \$5,250 of employer-provided education benefits from their taxable income.

- **Community Service Loan Forgiveness**

Excludes from taxable income loan amounts forgiven for borrowers who take community-service jobs that address unmet needs. Community service loan forgiveness programs run by government agencies are already exempt but this provision would extend that to nonprofit tax-exempt charitable or educational institutions.

The 1997 tax cuts also provides health insurance for 5 million children and includes a provision to encourage computer donations to schools. In addition, President Clinton's "call to action" to improve American education expands Headstart, sets the goal of making sure every child can read well by the end of the 3rd, gets computers into the classroom, and increases the maximum Pell grant for college to \$3,000. All of these benefits and tax cuts have one broad goal -- to give parents the support they need to give their children a first class education and hope for the future.

Sincerely,

Richard W. Riley
U.S. Secretary of Education

For more detailed information on how your children and grandchildren can prepare for college please call: 1-800-USA-LEARN to obtain a new booklet entitled *Getting Ready for College Early*.

For more specific information on student financial aid, call the Federal Student Financial Information Center toll free at 1-800-4FED-AID. You can also obtain the guide for federal financial aid entitled *The Student Guide* by writing the Federal Student Information Center at P.O. Box 84, Washington, D.C. 20044.



UNITED STATES DEPARTMENT OF EDUCATION
OFFICE OF THE SECRETARY

FAX TRANSMITTAL

TO: Bill Kincaid / Mike Cohen.

ORGANIZATION: DPC.

PHONE NUMBER: _____

FAX NUMBER: _____

FROM: Kevin Sullivan

PHONE NUMBER: _____

FAX NUMBER: ~~202 401-3000~~

MESSAGE: FYI

2 pages

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CORE ELEMENTS OF NEW AMERICAN CONSENSUS ON EDUCATION.

In the decade since Ted Bell issued the landmark report entitled, "A Nation at Risk" America's educators have gone back to the drawing board to rebuild and improve American education. Now, a decade later a new consensus has emerged about what is needed to prepare our young people for the coming times. The core elements of this consensus include.

- **Ending the tyranny of low expectations with an absolute commitment to high standards and higher expectations for all of our young people.**
- **A new emphasis on early childhood development (brain research)**
- **A strong emphasis on mastering the basics once and for all including reading well by the end of the third grade.**
- **A commitment to a "core" curriculum (tougher courses like algebra)**
- **A new willingness to demand accountability including closing down failing schools and reconstituting them if necessary in addition to a "peer review" process for teachers.**
- **the need for a strong system of assessment**
- **Better prepared teachers (Title V/Higher Ed.Act). \$350 million/ five years.**
- **Making sure the benefits of technology gets to all of our students. (E-rate=90% discounts for poor schools; 60% average discount)**
- **more family and community involvement (community schools)**
- **Recognition that you have to have some college education to get ahead and growing recognition of the importance of life-long learning.**

This is a pragmatic, mainstream, consensus; yet -- at the same time - it recognizes that we are in the Information Age. I think we all recognize that public education is not as monolithic as some critics suggest. I visit 50 to 60 schools a year and there is a lot of creativity going on at the local level.

There are other issues that are rapidly gaining support including greater public school choice, the development of charter schools and the need for strong after-school programs. Other issues like vouchers and equity in school financing remain deeply contentious and we need to take a good hard look at what we are doing to help young people in are urban communities.

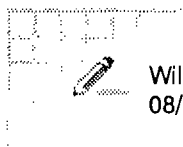
But in the main I believe that American education has developed a "road map" for the future. As a result, we are starting to see the first, solid evidence that this consensus is producing positive results. The latest TIMSS data from 4th grade math and science test based in a survey of 26 nations suggests that American schools are doing a better than expected job in teaching the basics. America placed above the international average in both math and science and we are particularly strong in science -- second only to Korea in the world.

We also know from a 1991 literacy study of 31 nations that our 4th grades were second in the world just behind Finland even though we have a large number of young people who are still struggling to become good readers.

Now, we have a very long way to go to improve standards. This most recent TIMSS report is follow-up to a report last November on 8th grade math and science which suggested that while we are doing a good job in maintaining our ability to teach science, we are falling down on the job when it comes to math, where we have slipped below the international average.

These two TIMSS reports suggest that standards are having a positive impact in the early grades but that we need to pay much more attention to the later grades and what is going on in our nation's middle schools. We will release a third TIMSS report next year for 12th graders. I do not expect that this report will be as good as the last one that we released in June for 4th grades. It takes a long time to make standards stick and many of the 8th graders and 12th graders simply haven't had been exposed to the tougher standards.

But what is clear as we start the 1997 school year is that a new American consensus has developed about how to improve American education.



William R. Kincaid
08/05/97 09:23:34 PM

Record Type: Record

To: Elena Kagan/OPD/EOP

cc:

Subject: Re: Request for VP event/announcement ideas for September

Elena--

Here are some ideas; please let me know if you are going to pass any of these along; as you will see, some of these I would rather have the POTUS do.

The Education Department and the National Institute for Literacy have both expressed interest in having the POTUS release some data on adult literacy rates (by state and congressional district) on National Literacy Day, which is Sept. 8. The Department has submitted a scheduling request for an event that would tie those data in to family literacy provisions in America Reads. Carolyn Staley at the National Institute for Literacy would like to try to use this to develop an additional component of America Reads that is explicitly focused on adult (rather than child literacy). I don't foresee that happening, but the data could still make either a decent POTUS radio address (on the Saturday just prior to Sept. 8, the last at Martha's vineyard) or for a VP event on Sept. 8. I don't really see this as "the" POTUS event for back to school week because it isn't K-12 focused enough, and the overall data on adult literacy has already been released, although not by subdivision.

In addition, at least a couple of the things I e-mailed you and Bruce about last night might be appropriate if the POTUS doesn't do them, especially the grants announcements:

1. Announce \$40 million in **new charter schools grants** (Jon Schnur with OVP is very involved with charters so this would be easy for VP to do; however, I think it's really important for the President to do a charter event soon if we are going to get state legislatures going on this again, and for this event the news piece is easy).
2. Possibly announce **technology literacy grants** (still need to check on timing of this)
3. Release **math strategy** (addresses falloff in TIMSS scores after 4th grade) (but personally I would prefer for the POTUS to do this, in part because it has been developed in response to a POTUS directive and that has been the general expectation for the working group; moreover, this doesn't have to go out the week of Sept. 8; we have a lot of flexibility on when to release this)

FAX TRANSMISSION
U.S. DEPARTMENT OF EDUCATION

600 INDEPENDENCE AVENUE SW, RM. 6133
WASHINGTON, DC 20202
202-401-3414
FAX: 202-401-0598

To: MIKE COHEN & BILL KINCAID Date:

Fax #: 456-7028

Pages: , including this cover sheet.

From: Terry K. Peterson/Lidice Rivas

Subject: FYI. THESE WERE SUBMITTED TO DAVID
BEAUBAIRE WHILE KRIS BAUDERSTON IS OUT OF
TOWN. WHAT DO YOU THINK WE SHOULD DO?
DO YOU HAVE ANY SUGGESTIONS? ADVICE?

THANK YOU,

LIDICE

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DATE OF REQUEST:

REQUEST: The First Lady to visit the teacher preparation program at Norfolk State University in Hampton Roads, Virginia to highlight the President's proposals to improve teacher preparation and recruit teachers for high-poverty communities.

PURPOSE: This visit to a minority-serving institution providing high-quality teacher preparation would celebrate a successful teacher education model, dramatize the President's commitment to increase diversity among teachers and administrators, and offer an opportunity to talk about the role the nation's teachers must play in improving education, expanding economic opportunity in poor communities, and bringing Americans together across racial lines.

BACKGROUND: On July 17, 1997, the President announced a proposal for Title V of the Higher Education Act which will provide \$350 million in competitively awarded grants over the next five years for targeted programs to improve the recruitment, preparation, and retention of diverse teachers for high-poverty communities. This two-pronged proposal is an extension of the President's commitment to have a talented, dedicated, and well-prepared teacher in every classroom. Under the lighthouse component of the proposal, 10-15 institutions of higher education with exemplary teacher preparation programs and their PreK-12 partners will collaborate with 8-15 institutions seeking to improve. The recruitment portion of the proposal will provide scholarships and support services for teachers, particularly minorities, who commit to serving three years in high-poverty urban and rural schools. The selection criteria for grantees will emphasize the President's education priorities, including preparing teachers to teach to high standards and to integrate technology into the curriculum.

Norfolk State University, the nation's fifth largest historically Black university, has an enrollment of 8,500 students. Each year Norfolk State sends roughly 350 graduates into the region's public schools. The University prepares students for initial licensing through B.A., M.A., and post-baccalaureate programs. Close partnerships with area PreK-12 schools and school districts are central to the University's success. One of the most innovative programs at the University is the Pathways to Teaching Program which is funded by the DeWitt Wallace/Reader's Digest Fund and has been implemented in collaboration with Old Dominion University and the Norfolk Public Schools. The Pathways program focuses on recruiting teachers aides, substitute teachers, and other paraprofessionals -- particularly minorities and males -- to become well-prepared, fully-certified teachers in the Norfolk Public Schools. This program served as a model in the development of the President's proposal for recruiting new teachers for high-poverty communities.

PREVIOUS PARTICIPATION: None. This is a special event to promote the President's proposals to improve teacher preparation and would be part of the "America Goes Back to School" program of the Department of Education.

DATE AND TIME: September 8, 9, 10, 11, or 12, 1997 (tentative)

DURATION: 2 hours

LOCATION: Norfolk State University, Hampton Roads, Virginia

PARTICIPANTS:

- Approximately 350 student teachers
- Recent graduates of the program working in high-poverty local schools
- Norfolk State University faculty and administrators
- Teachers and administrators from partner PreK-12 school districts and schools
- Parents of children attending the partner schools
- Representatives of the Virginia Department of Education
- Local State legislators and Congressional representatives
- Department of Education Senior Officers and Teacher Development Task Force Members

OUTLINE OF EVENTS:

10:00 AM-	First Lady and Dr. Dozier to visit a Norfolk public school
11:00 AM	participating in the Pathways to Teaching Program. The First Lady would visit the classrooms of current paraprofessionals enrolled in the program and recent graduates now fully certified. The First Lady would also meet briefly for an informal discussion with these Pathways participants, their instructors from Norfolk State, and their administrators.
11:30 AM-	Address to New Students: University President Harrison
12:00 PM	Wilson and Dean of Education Elaine Witty will welcome and give brief opening remarks. Special Adviser to Secretary Riley Terry Dozier will introduce the First Lady. First Lady will address the student teachers.

REMARKS REQUIRED: Address to students. (Approximately 15 minutes in length)

ATTENDANCE REQUESTED: Mrs. Clinton

MEDIA COVERAGE: Open/Education Press

RECOMMENDED BY: Richard W. Riley, Secretary of Education

CONTACT: Leslie Thornton, Chief of Staff
Telephone: 401-3000; Fax 401-0596

SCHEDULE PROPOSAL**TODAY'S DATE: 6/23/97**

___ ACCEPT**___ REGRET****___ PENDING**

TO:

Stephanie Streett
Deputy Assistant to the President
Director of Scheduling

FROM:

Kris Balderston
Cabinet Affairs

REQUEST:

The President to speak to parents, teachers, adult literacy learners, and representatives of business, civic, religious, family- and youth-serving and literacy organizations about the State of American Literacy

PURPOSE:

- 1). To announce the results of the National Adult Literacy Survey (NALS) which provides state-by-state data broken down by Congressional district indicating levels of literacy;
- 2). To urge support for the President's America Reads Challenge initiative to ensure that every child reads well and independently by the end of third grade as a means to prevent low literacy levels in adults;
- 3). To challenge Congress to make good on its agreement to fund a child literacy initiative in the 1998 balanced budget agreement reflective of the President's goal to create a literate society;
- 4). To challenge the states to support the creation of literacy coalitions in individual communities that will address family literacy, and encourage adults to access the tax credit for lifelong learning opportunities available under the balanced budget agreement;
- 5). Release a publication outlining the opportunities available through the lifelong learning tax credit;
- 6). Release a publication of best practices for forming community coalitions featuring existing America Reads Read*Write*Now! communities.

▶ BACKGROUND:

Literacy is increasingly seen as indispensable to the social and economic health of the United States.

The Goals 2000: Educate America legislation recognizes the importance of adult literacy as one of eight national education goals. Goal six states that "every adult will be literate and have the skills to compete in the global economy and participate in American democracy." The National Education Goals Panel has adopted a specific set of adult literacy proficiency measures as the yardstick by which to judge progress toward meeting the adult literacy and lifelong learning goal. These measures were used to assess the literacy capabilities of the nations adults age 16 and older.

The President's America Reads Challenge to ensure that every child read well and independently by the end of third grade was initially proposed for mandatory funding in the balanced budget sent forward to Congress. A "child literacy initiative consistent with the President's America Reads Challenge proposal" was moved to discretionary funding by the Congress and was included in the initial budget agreement to be funded at the President's requested level of \$260 million for fiscal 1998. In the final budget agreement, funding has been moved forward to fiscal 1999 with the possibility of all funds being appropriated for IDEA programs if authorizing legislation is not written by April 30, 1998.

The President's 20 percent Tuition Tax Credit for lifelong learning promotes the acquisition and improvement of basic literacy skills within the context of additional job training and career enhancement programs. The President has championed the need for all Americans to continually improve their skills throughout their working lives and stood fast against the Congress' attempts to reduce these opportunities through their budget proposal.

PREVIOUS PARTICIPATION:

DATE AND TIME:

September 10, 1997, or whatever fits the President's schedule

BRIEFING TIME:

DURATION:

LOCATION:

PARTICIPANTS:

Richard W. Riley, Secretary of Education
Donna Shalala, Secretary of Health and Human Services
Alexis Herman, Secretary of Labor
Members of Congress
Select Governors
Corporation Executives
Members of the President's Coalition for the America
Reads Challenge
Michael Keaton, Actor and co-Chair, America Goes Back
To School initiative
Paul Simon, former Senator from Illinois
Tara Holland, Miss America
Exemplary reading teachers
Adult literacy students
Parents and children involved in family literacy programs

OUTLINE OF EVENTS:

A tent will be set up on the lawn with tables skirting the perimeter at which participating literacy organizations will set up booths, displaying program information and providing children and adults in attendance opportunities to participate in literacy activities. Music will be provided to create a celebratory atmosphere.

Crowd will be welcomed by Secretary Riley who will speak briefly on the importance of creating a literate society. He will introduce Secretary Shalala who will speak briefly about the importance of literacy and welfare reform. She will introduce Secretary Herman who will speak briefly about the importance of having a qualified and literate society to ensure economic security in 21st century. She will introduce former Senator Simon.

Senator Simon will present results of the National Adult Literacy Assessment report. He will present state reports to two current Senate and House members, indicating that other members' reports will be delivered to their Congressional offices. He will then introduce Miss America, Tara Holland.

Ms. Holland will speak briefly about what she has learned about literacy having chosen it as the focus of her reign. She will then introduce an adult learner who will give a brief testimony about how life has changed since becoming literate.

Secretary Riley will then introduce the President.

President Clinton will speak about the importance of creating a literate society; he will encourage adults to take advantage of lifelong learning opportunities now available to them because of his diligence to provide a major education tax cut for continued learning; he will include the need for ongoing support for adults to become literate so they will be ensured success under the new welfare reform law; and he will address how the Administration's initiatives support early literacy for all Americans through the America Reads Challenge, America Goes Back to School and Hope Scholarships, and how support of these programs can work to prevent the need for adult literacy programs in the future.

He will then introduce two new publications, one that explains how adults can take advantage of the 20 percent lifelong learning tax credit and the other that provides best practice examples of how communities can create coalitions that reflect their communities' needs.

REMARKS REQUIRED: 10-15 minutes of brief remarks

MEDIA COVERAGE: Open Press

FIRST LADY'S ATTENDANCE No

VICE PRESIDENT'S ATTENDANCE: No

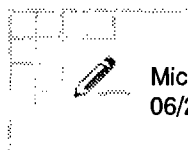
RECOMMENDED BY: Richard W. Riley, Secretary of Education
Donna Shalala, Secretary of Health and Human Services
Alexis Herman, Secretary of Labor

CONTACT: Leslie Thornton, Chief of Staff
U. S. Department of Education

ORIGIN OF PROPOSAL: Office of Public Liaison
White House Social Office

Cabinet Affairs

SOURCE OF PAYMENT:



Michael Cohen
06/25/97 04:05:00 PM

Record Type: Record

To: Bruce N. Reed/OPD/EOP
cc: Elena Kagan/OPD/EOP, William R. Kincaid/OPD/EOP, Christa Robinson/OPD/EOP
Subject: Re: event ideas

Here are my nominations for education events in July and August. A number of these were mentioned in the testing memo to POTUS (which went to him on June 17 -- I reconfirmed this with staff secretary)

1. State sign-up event in mid-July: As we discussed, I'm working on putting this together. If we can get enough states, we could do this at the NGA meeting.

2. City sign-up event in mid-late July: I'm also trying to get this together. Should know early next week if we can get enough cities on board to do something.

3. Principals meeting in late July: We could announce the Interagency Math Strategy the President directed ED and NSF to develop.

4. Transmittal of the Higher Ed Act reauthorization proposal: If we can get ED to complete its work and send the whole package up at once, we could do a transmittal event. Much of the proposed legislation will retain the basic structure of student financial aid, with some wrinkles to make it easier for students and parents to understand, and increase accountability for institutions that administer aid programs, while reducing regulatory burden on most of those who do this job without problem.

More newsworthy potential components of HEA proposal include: (1) a proposal to increase the size of Pell grants for kids with high academic performance in high school [details of this are not yet developed, though Riley briefly mentioned this in his testimony to the House committee last week]; (2) some version of the teacher incentive/teacher preparation proposal we discussed before the service summit; or (3) some version of Chakkah-Fattah.

[late note: Terry Dozier says the plan is still to transmit separate components of HEA, and the teacher preparation component is the most advanced, with a transmittal anticipated by late July.]

5. Failing School Initiative: We could certainly have something ready by early August. As a stand-alone initiative, I assume it would either redirect existing/proposed resources (e.g., charter schools/community schools) or include a modest amount of new funds, such that we would stand a chance of getting OMB sign-off outside the normal budget process.

6. Gun Free Schools: Sometime this summer ED will be releasing final numbers for the gun free schools act (Gore released preliminary numbers). I'm checking on when they anticipate doing this.

7. NCSL: I still think it would be a good idea for POTUS to speak to the NCSL meeting. He could push testing and charter schools. I'm trying to find a good charter schools announcement, but won't know what we can in fact do until Jon Shnur gets back. If we've got something good on charters, we should do a

charter event even if we don't do NCSL.

I'll continue to think about NAACP possibilities, and Leslie Thornton has asked people in ED to send me additional ideas, which I will feed into the mix as they come.



UNITED STATES DEPARTMENT OF EDUCATION

OFFICE OF THE SECRETARY

FAX TRANSMITTAL

TO: Mike Cohen / Bill KincaidORGANIZATION: WH

PHONE NUMBER: _____

FAX NUMBER: 456 - 7028FROM: Jill Krimer

PHONE NUMBER: _____

FAX NUMBER: ~~202 401 3000~~

MESSAGE: Mike & Bill, I started working for
Terry Peterson last Wednesday.
Just wanted to let you
know that this was sent
late Friday. Call me if you
have any questions about it
especially while Terry is out
this week.

CONFIDENTIALITY NOTICE

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UNITED STATES DEPARTMENT OF EDUCATION

OFFICE OF THE SECRETARY

August 1, 1997

MEMORANDUM

TO: Thurgood Marshall, Jr.

FROM: Leslie T. Thornton
Chief of Staff

SUBJECT: Request for the President to Announce the Availability of a "Preparing Your Child for College Early" Handbook and to Join in Releasing Data on the Strong Correlation Between Financial Resources and College Attendance

Attached is a scheduling request for the President to introduce preliminary findings from a Department of Education report that shows the more students and parents know about financial resources and financial aid for college, the more likely students are to apply to and attend college. The President will also be able to make a handbook available for the first time to families which will provide them information about how to help their children prepare for college appropriately. This event also provides an opportunity to highlight Administration support for federal aid to students, including Pell Grants, Work-Study assistance, and tax cuts for education.

I appreciate your review of this request and thank you for your assistance. If you have any questions, please contact me at 401-3001.

Attachment

Scheduling Proposal

Date _____

_____**ACCEPT**_____**REGRET**_____**PENDING****TO:**

Stephanie Streett
Deputy Assistant to the President and
Director of Scheduling and Advance

Jennifer Palmieri
Deputy Assistant to the President and
Director of Scheduling and Advance

FROM:

Thurgood Marshall, Jr.

REQUEST:

Participation in an event to highlight data from a study to be released in October that shows the more students and parents know about financial resources and financial aid for college, the more likely students are to apply to and attend college. The President could announce the availability of a new, free guidebook for parents entitled, "Preparing Your Child for College Early." He could also highlight Administration support for federal aid to students, including Pell Grants, Work-Study assistance, and tax cuts for education.

PURPOSE:

(1) To release new data from the U.S. Department of Education that shows the strong relationship between financial resources, information about financial aid, and the likelihood of students going to college. This data is important because if families and students don't think they can afford college, students will not sign up for the courses that prepare them for college early enough; (2) To announce the availability of a new, free guidebook for parents of middle and junior high school students to help them plan their course work and finances to go to college. **The new publication is the first tangible piece of information to go into homes across the country which addresses proper preparation for college;** (3) To highlight Administration support for federal aid to students, including Pell Grants, Work-Study assistance, and tax cuts for education.

BACKGROUND:

In the 21st century, all students will need to attend at least two years of college to meet the new demands of the job market. Parental views on financial aid and their ability to afford a college education are likely to have a large impact on students' expectations about their education, the courses they select in high school, and their postsecondary education attendance. Having financial aid available and a basic knowledge of financial aid programs is one way to change parents' views of their ability to finance a college education for their child and encourage their child to

enroll in middle and high school college-prep courses. This problem is even more acute for families of moderate means and low-income families.

An analysis of 8th grade parent attitudes and their child's subsequent college enrollment surveyed in the National Educational Longitudinal Study (NELS) shows that (preliminary data from the study; is still being verified prior to formal release):

- o High performing middle to low-income students are 4 times more likely to not attend college than high performing students from higher income homes.
- o Middle performing students from families with moderate to low-incomes are half as likely to go to college as are middle performing students from higher-income households.
- o Middle-income students who are offered financial aid are more likely to attend college than those who are not.
- o A significant number of the parents of the very top performing 8th grade students in America do not believe there is sufficient availability of information on financial aid.

At first glance, it may appear that students and parents can learn about financial aid from many different resources. However, many do not. As a result:

- o Students who talk or read about financial aid, or have parents who do so, are more likely to attend college. While 80 percent of 8th graders whose parents speak to someone about financial aid attend college, only 54 percent of students whose parents do not speak to someone about financial aid attend college.

DATE & TIME: August 15, 1997. Students are going back to school in late August and early September. This time period is the last opportunity for parents and students to consider signing up for courses in middle, junior, and high schools that will prepare them to go through the college track. Additionally, the President's recent balanced budget agreement reached in July will have a major impact on families and students either in or preparing to go to college and getting that information widely distributed to families could result in higher college attendance.

DURATION: One hour or less

LOCATION: We are looking for a preexisting education-related event scheduled for August 15 in the DC, Virginia, Maryland, or West Virginia areas.

Montgomery County is one possibility because of its strong parent involvement program funded through a Goals 2000 grant (the Family Work Project) and is beginning a parent involvement program in four middle schools.

Teaching

* → Solving the 8th grade drop-off — get a handle on
National Conference on Teaching Middle School Math — this fall.

Teacher professional development:

* * National Board Certification concept — Announce that National Board will develop
next certification in middle school math

[— Demo project with unions on what would count for ongoing professional development
-- leverage money already spent

→ * — Competition on middle school math teacher prep course design and materials--
maybe connect up with lighthouse institutions

[Math specialists at the school level to leverage Title I, etc.]

→ Disruptive
Launching a 50-state study of teacher licensing requirements

Curriculum and Instruction

* → Release TIMSS Toolkit *Apprentical toolkit to compare . . .*

→ New math site on the web

Getting Students, Families and Communities Excited about Studying First-Class Math

* * National Partnership

Use Mars pathfinder replica 312 million miles

1st problem

Gouldin

Telementary Conference — Announce

Much closer cooperation among federal agencies to ensure that federal investments in K-12 math and science education focus on helping students attain challenging standards.

* New mathematics site on the web - Heighten / clarify / instill unit

Fall Conference on middle school mathematics

Conduct a 50-state study of teacher licensure requirements to make sure we are expecting high academic skills and preparation of our teachers who will be preparing the next generation

Release of TIMSS toolkit - Done yet? Good timing by 7/21 - GPO orders by August

Formation of math partnership

Math problems

Teacher preparation approaches and materials -- can we announce a competition?

Technology / instruction review

Invest / allocate Congress ED / NST

617-489-7374 / Muredale
703-593-4048
703-318-0964

Wurtzel / Goroff

OFFICE OF SCIENCE AND TECHNOLOGY POLICY

Science Division

Executive Office of the President

436 Old Executive Office Building

Washington, DC 20502

202-456-6130

202-456-6027 (FAX)

FAX TRANSMITTAL SHEET

TO:	Mike Cohen	456-7028
	Bill Kincaid	456-7028
PHONE NUMBER:	Judy Wurtzel	401-3095
FAX NUMBER:	Judy Sunley	703-306-0109

FROM:

NUMBER OF PAGES (INCLUDING COVER SHEET): 5

ADDITIONAL MESSAGE:

Comments welcome!
Let's meet soon?

Danny

OSTP Draft 7/23/97

The MathAmerica Project:

Status Report and Operational Plan

Academy Meeting

On July 15, the National Academy of Sciences hosted a meeting to discuss a particular mathematics outreach idea. Present were: Bruce Alberts, Marshall Smith, Judy Sunley, William Kincaid, Daniel Goroff, Judy Wurtzel, Rodger Bybee, Joan Ferrini-Mundy, Patrice Legro, Ed Esty, and Joy Belin.

The goal of the project is to create consensus among professional teachers, volunteers, students, and parents about what constitutes high quality eighth grade mathematics. That we currently lack such a consensus was one of the critical findings of TIMSS, the Third International Mathematics and Science Study. TIMSS results released this year indicate that U.S. middle school mathematics is significantly less focused and less advanced than in other nations. The proposed national test of mathematics for eighth graders also addresses this problem. Indeed, that project and this one should be mutually reinforcing. For example, public outreach should help establish what kinds of mathematics students need to know for the test.

A preliminary description of this media-based project was distributed in advance (see *America Counts: Partnerships for High Standards in Mathematics*). Although the project is referred to there as "America Counts," both the analogy to "America Reads" and the reference to counting are overly restrictive. This document uses Daryl Chubin's provisional name "MathAmerica" as a provisional label. MathAmerica plans call for the weekly publication of compelling mathematical exercises, prominently introduced, showcasing volunteer efforts, and indicating how to follow up.

Points raised by the Academy at the meeting included: the importance of White House leadership in providing "caché"; the relationship of this initiative to the DoED/NSF Working Group; the roles different agencies expect to play; the ability of the exercises to represent what will appear on the national test; the importance of enlisting professional public relations expertise; and, of course, questions about time and money.

Other points discussed at the meeting concerned: equity issues in access to the exercises and to help with them; the importance of guidebooks and coordination with schools; the potential for capacity building; the possible inclusion of reform critics in the process; and, perhaps most important, the encouraging reception given this idea by business leaders, media experts, community groups, mathematicians, educators, etc.

The Academy appears eager to participate, and would even like to try convening a group to begin work as soon as this August. The rough estimate discussed at the meeting was

OSTP Draft 7/23/97

that it would cost MSEB between \$500,000 and \$750,000 to produce a year's worth of weekly exercises and related materials. This would largely cover staff time and meetings, but not, the Academy stressed, the public relations aspects. MSEB has excellent contacts with a wide range of mathematical stakeholders, and could involve individual business or government representatives (though perhaps not from the sponsoring agencies) along with educators in these meetings. This may or may not also involve their institutions as sponsors and participants in the public outreach activities.

In any case, recruiting sponsors and participants for the public outreach activities is a serious task. There is more to MathAmerica, after all, than developing materials that showcase curriculum. Who will do what when is one of the important planning issues that remain. As one media expert said about the idea, "It could be great, but there are lots more moving parts than you might think."

Functions

One way to organize the operational planning of MathAmerica is by function, such as production, distribution, service, partnering, and management. Some considerations and options for discussion about each follow:

Production. Devising exercises, introductory text, and guidebooks seems to be what MSEB is most interested and qualified to accomplish. Their drafts would presumably then be presented to potential celebrity spokespersons and sponsoring organizations. There may be quite a bit of negotiation before each column is finally ready for distribution. It is not clear whether MSEB sees this as part of their task.

Distribution. The weekly advertorials run by Al Shanker are a model for how the columns might be printed in a recognizable form simultaneously in a number of publications. *USA Today*, *Parade*, and the like are good prospects, but putting the details in place calls for professional assistance. The web and other media are also important vehicles, not only for the columns, but also for supplementary exercises and extensions, hints, solutions, and contacts.

Service. Part of each column should indicate how to contact both the "sponsor of the week" about their activities and the MathAmerica Project itself. Services must be ready to provide to those teachers, students, parents, or volunteers whose interest in mathematical problem-solving is piqued by the campaign. This means setting up 800 numbers, websites, and other helpful response mechanisms. For example, organizations engaged in volunteer mathematical tutoring may register local contact information with MathAmerica. Column sponsors should do so throughout the year and not just on their week. There could also be telementoring and other resources available.

Partnering. Recruiting sponsors is a task that will require many participants. White House involvement should be valuable in attracting and coordinating attention. Natural candidates include NASA, IBM, Price-Waterhouse, and the 240 high-tech corporations pledged to support world-class standards at the state level. Criteria and priorities for what kinds of volunteer activities MathAmerica would especially like to showcase could be very helpful. So would a small number of options for becoming a sponsor such as commitments for funding, follow-up, volunteer efforts and their registration, the use of the national test for employment screening, or other possibilities. In addition to sponsors, there is also much partnering and coordination to be done with other groups, such as professional societies.

Management. It was not clear at the meeting which agencies might contribute how much to start-up funds. The Federal government is unlikely to provide all the dollars necessary for MathAmerica in any case. This will necessitate careful juggling of resources. Scheduling is an issue, too. It makes sense, for example, to lead up to the first administration of the national test in the spring of 1999. In that case, a potential kick-off event would be the National Council of Teachers of Mathematics Conference scheduled for April 1998 in Washington, D.C. How much should be ready before an announcement takes place? Perhaps biweekly exercises are more practical, with student answers and extensions distributed during alternate weeks? In view of the time and money issues, establishing MathAmerica as a 501(c)(3) nonprofit organization may be an option well worth further exploration.

Another Consultation

Bruce Alberts asked if the EOP would look into the public relations aspect of the project because the Academy would not even though, as one of their representatives later put it, "the important work here is one third mathematics and two thirds PR." With these considerations in mind, Daryl Chubin and Daniel Goroff met on July 21 to discuss mechanics with Ruth Chacon, who led much of the work on TIMSS for the Widmeyer-Baker Group. Points raised by this communications expert include:

- There should be just one 800 number and one website for MathAmerica with hot links to individual sponsors in a "comarketing" arrangement;
- While Federal blessings, funding, and participation would all be helpful, MathAmerica would work better if it were not organized as a Federal effort;
- Besides print and digital distribution, we should also consider radio, television, milk cartons, cereal boxes, and bill inserts;
- We should expect to have to pay for some but not all media space, but corporate sponsors should not be difficult to secure.

One role she identified for a firm like Widmeyer-Baker is "message development," i.e., creating the vocabulary, prospectus, workplan and concept for such a project.

Suggested Organization and Timeline

Sorting out the potential and preferred roles of various institutions is difficult without some structure. Suppose instead that we consider only three types of participants: a single 501(c)(3) to manage the project; a few contractors like the Academy or Widmeyer-Baker to perform specific production or distribution tasks; and then everyone else is just a potential sponsor – including NSF, the Department of Education, NASA, IBM, Hewlett-Packard, NCTM, AAAS, etc.

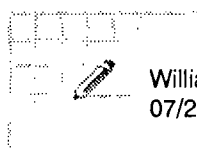
Partnering could take place as follows. The 501(c)(3) acts as an editorial board, clearinghouse, and management team. It draws up criteria for accepting column sponsors and referees submissions. Factors might include: monetary or in-kind contributions to the project as a whole; a record worth showcasing of educational efforts meeting certain standards; institutional capacity for service in response to its own column and those of others; visible commitments to numeracy in general and the eighth grade test in particular; ideas for good public and follow-up exercises; etc. Once a few founding partners are established, any other organization that would like to become a sponsor would have to satisfy the quality control criteria in order to obtain a place in line.

This suggests a three stage strategy.

Stage I (now through September 1997): Set up a 501(c)(3) staffed by two or three strong individuals backed by a few founding partner organizations that contribute resources and caché. Complete the "message development," sponsorship criteria, and enough examples of column material to serve as a road map for the rest of the project. This Stage culminates in an event where the formation of MathAmerica is announced along with other initiatives in conjunction with the release of the Working Group Report.

Stage II (September 1997 through April 1998): Recruit, tune, and approve enough sponsors to cover a year. Create and test that much material, checking with MSEB and the test developers that the results represent a balanced diet according to the NAEP frameworks, the NCTM standards, etc. Line up media placements. This Stage culminates in a kick-off event before thousands of teachers at the NCTM meeting in Washington.

Stage III (April 1998 through April 1999): Publish and distribute material weekly. Field and direct inquiries. Work with teachers, clubs, and volunteers. This Stage culminates with the administration of the first administration of the voluntary National Mathematics Test.



William R. Kincaid
07/22/97 03:50:56 PM

Record Type: Record

To: Pauline_Abernathy @ ed.gov @ inet
cc:
Subject: Higher ed reauth announcements

Pauline--

Following up on our phone conversation today, I think what would be most helpful is a simple list of the top policy changes contemplated in ED's HEA reauth proposal that could potentially serve -- alone or packaged -- as newsworthy policy announcements that we could build events around, with a very brief one or two sentence description of each of the policy changes. It might make sense to differentiate between those changes that are basically agreed to versus those that have not been fully settled either internally at ED or between ED, OMB and the White House. I think an informal e-mail to Bob, Mike, and me would do--what's likely to happen is that Bob and I will talk with Mike about it and then Mike will pitch stuff with Bruce and Elena either verbally or in his own e-mail.

If you want to put more effort into it and describe what the events themselves might look like, that's ok, but I really think the more urgent need (within the next 24 hours) is just the basic information that I have described. Unless we get some of the possible policy announcements into people's thinking soon, there is a strong likelihood that the President's limited time before he leaves for vacation in August, and between his vacation and leaving to take Chelsea to school in early September, will get filled up with other stuff, in which case (it seems to me) the Department will have to go ahead and transmit and there will be little "announcement" news left for the POTUS.

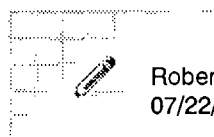
The most obvious way to announce these items, it seems, would be in a transmittal event, but there could be other ways as well.

Below are the things that Bob mentioned.

Sorry to add this to your burdens, but I would hate to lose a good opportunity if there are legitimate hooks. Thanks.

-- Bill

----- Forwarded by William R. Kincaid/OPD/EOP on 07/22/97 03:27 PM



Robert M. Shireman
07/22/97 11:15:12 AM

Record Type: Record

To: Michael Cohen/OPD/EOP
cc: William R. Kincaid/OPD/EOP
Subject: Higher ed reauth announcements

That could include an initiative on early intervention (whether or not related to Chaka Fattah), a "Super-Pell" focused on achievement, a simple "student aid package" for all, cutting loan fees, and/or other proposals.

THE WHITE HOUSE
WASHINGTON

Mike —

Here's what I got
from ED on Policy
proposals in the
H&A reauthorization.

Skipped items are ones
for which I could

imagine packaging
for events.

- Bill

Reauthorization Proposals Under Consideration

The following HEA proposals are in various stages of clearance in the Department and OMB. While we have basic agreement internally and with OMB, NEC and the DPC, with the exception of the items in the budget, the details of these proposals have not been approved.

The proposals set forth in this document are categorized by the principles underlying our HEA reauthorization package.

Access: Opportunity with Responsibility

- In future budgets, we hope to propose substantial annual increases in the maximum Pell Grant award, so long as they can be paid for within a balanced budget;
- * We hope to eliminate student loan origination fees entirely, if possible. The President's 1998 budget already proposed substantial reductions in these fees that student borrowers must pay;
- ** Identify and publicize the amount of Federal aid that postsecondary students are eligible to receive and the typical costs of postsecondary education;
- ** Modify the treatment of assets in the calculation of expected family contribution (EFC) to encourage saving and investment for college;
- Graduate Programs (Title IX): Consolidate Javits, Harris, and Graduate Assistance in Areas of National Need (GAANN) into one comprehensive program that retains the important features of all three programs and is focused on national academic needs;
- * Ensure quality in distance learning programs and provide equivalent student aid opportunities for all learners, whether they be campus-based learners or distance learners;
 - Require accrediting agencies to develop and enforce educational outcome standards for distance learning programs to ensure accountability;
 - Modify some provisions that limit institutional eligibility for Title IV aid based on percentages of students and programs in distance learning;
 - Compute the non-tuition cost of attendance for students in distance learning programs under the same methodology as all off-campus students;

Support Effective Education: High Standards, High Achievement

- ** Create a SuperPell program to supplement the Pell Grant for students in their sophomore year to encourage persistence of students making satisfactory academic progress;

- * Limit the length of time students may qualify for Pell Grants;
- Continue support for the Fund for the Improvement of Postsecondary Education (FIPSE) and stress the dissemination of the projects it funds to encourage their replication;
- Create separate parts of Title III for Hispanic-Serving Institutions and Tribally-Controlled Community Colleges so as to underscore the importance of these institutions. Encourage these institutions' use of technology in academic and administrative operations;
- Develop a new teacher preparation program whereby colleges that have demonstrated excellence in this area would partner with other postsecondary institutions that are committed to improving their own teacher preparation programs;
- Create improved teacher recruitment programs to include paraprofessionals, mid-career people, and those willing to work in underserved areas;
- Identify and spread best practices in teacher education for high-poverty urban and rural areas;

Improve Outreach to Potential Students and Linkages to Employment and Elementary and Secondary Education

- * Reward postsecondary institutions that serve large numbers of Pell Grant recipients who persist and complete an educational program;
- * Redefine the Talent Search program as a mentoring and academic support program for disadvantaged middle school students;

Improve Management and Simplify Program Delivery

- Create a statutory and regulatory framework for tailored, performance-based standards to strike the proper balance between ongoing accountability efforts and imposing burdens on schools;
- Provide equal benefits for students in Direct Lending and FFEL;
- Expand the Direct Loan repayment options to FFEL borrowers (also in FY 1998 budget);
- Improve the terms of FFEL consolidation loans (also in FY 1998 budget submission);
- Prohibit lenders from offering different benefits to selected borrowers (also in budget);
- Clarify the roles of the Department and guaranty agencies whereby the Department would pay 100 percent of lender default claims and recall Federal funds unnecessarily held in reserve by the agencies. Guaranty agencies would administer guarantees paid by the

Federal government under performance-based agreements and would be compensated by the Department for functions they perform (also in FY 1998 budget submission);

- Examine the best way to modernize certain aspects of the student aid delivery system, including the consideration of models proposed by the postsecondary education community (such as a Mutual Benefit Corporation or a Performance-Based Organization within a Federal agency), building on ideas developed through Project EASI;
- Student Aid Delivery: Consider using multi-year promissory notes for both loan programs to reduce administrative burden for schools, lenders, and the Department.

FAX TRANSMISSION

U.S. DEPARTMENT OF EDUCATION

600 INDEPENDENCE AVENUE SW, RM. 6133

WASHINGTON, DC 20202

202-401-3414

FAX: 202-401-0596

To: Bill Kneaid

Date: 7/25

Fax #:

Pages: 4, including this cover sheet.

From: Terry K. Peterson/Lidice Rivas

Subject:

Please see attached proposal for possible event of the President announcing "Getting Ready for College Early."

The attached is a very rough-draft and still in preliminary stages, but we will polish as needed.

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DRAFT
7/25/97

PROPOSED EVENT WITH POTUS
AUGUST 15, 1997
FAMILY INVOLVEMENT IN GRADES K-8

Purpose: (1) To release new data (preliminary) from the U.S. Department of Education that shows the strong relationship between financial resources, information about financial aid, and the likelihood of students going to college. These data are important because if families and students don't think they can afford college, students will not sign up for the courses that prepare them for college early enough; (2) To announce the availability of a new, free guidebook for parents of middle and junior high school students to help them plan their course work and finances to go to college; (3) *POSSIBLE--MAY NOT BE READY:* To announce the transmittal of a new legislative proposal for Talent Search, a TRIO program focused on identifying qualified youths with potential for college, to encourage them to complete secondary school and enroll in college, and provide them with information on financial aid.

Why is this a good time for the announcement? (1) Students are going back to school in late August and early September. This time period is the last opportunity for parents and students to consider signing up for courses in middle, junior, and high schools that will prepare them to go through the college track. (2) In addition, Congress is considering major tax cuts that will be critical to the families of middle and high school students as they plan for paying for college.

Why is financial aid and family knowledge of financial aid important in the middle school grades? In the 21st century, all students will need to attend at least 2 years of college to meet the new demands of the job market. Parental views on financial aid and their ability to afford a college education are likely to have a large impact on students' expectations about their education, the courses they select in high school, and their postsecondary education attendance. Having available financial aid and a basic knowledge of financial aid programs is one way to change parents' views of their ability to finance a college education for their child and encourage their child to enroll in middle and high school college-prep courses. This problem is even more acute for families of moderate means and low-income families. An analysis of 8th grade parent attitudes and their child's subsequent college enrollment (to be released) surveyed in the National Educational Longitudinal Study (NELS) shows that:

- **High performing middle to low income students are four times more likely to not attend college than high performing students from higher means homes.** About 20 percent of high performing middle and low means students do not attend college as compared to only 5 percent of high performing students from homes with more affluent means.

- **Middle performing students from families with moderate to low-income means are half as likely to go to college as are middle performing students from higher income households.** About 40 percent of moderate- and low-income students do not attend postsecondary education as compared to 19 percent of students from higher income homes.
- **Middle income students who are offered financial aid are more likely to attend college than those who are not.** For this group, individuals who receive financial aid are 216 percent more likely to attend college than those who are not.
- **A significant number of the parents of the very top performing 8th grade students in America do not believe there is sufficient availability of information on financial aid.** Between one-fifth and one-quarter of 8th grade parents of top performers say they have been unable to get much information about financial aid.

At first glance, it may appear that students and parents can learn about financial aid from many different resources. However, many don't. As a result:

- **Students who talk or read about financial aid, or have parents who do so, are more likely to attend college.** While 80 percent of 8th grade students whose parents speak to someone about financial aid attend college, only 54 percent of students whose parents do not speak to someone about financial aid attend college. (This is probably because individuals who seek out financial aid information are more interested in college-going.)

Actions. (1) Having a certainty of opportunity for middle and high school students who work hard to afford college is very important. The President's HOPE Scholarship and tax credit for college and life-long learning coupled with a large increase in Pell grants are essential for Congress to pass. (2) Evidence exists on the importance of financial aid knowledge and available information on college attendance. This suggests that information on the financial aid process should be made available to students and their parents as early as possible in the educational system. In response, the President should release the new U.S. Department of Education publication, *Getting Ready for College Early*, targeted at the parents of middle and junior high school. This publication showcases the availability of financial aid, how to plan for paying for college, and the course sequence necessary to get into college. Quantities of this important guidebook for parents would be available by calling 1-800-USA-LEARN. (3) I am announcing today important revisions to Talent Search (need to check out).

Location: We are presently looking for a pre-existing education-related event scheduled for August 15th in the DC, Virginia, Maryland, or West Virginia area, but none has been found yet.

Montgomery County. Another possibility is to put together an event with Montgomery County that has a strong parent involvement program funded through a Goals 2000 grant (The Family Work Project) and is beginning a parent involvement program in 4 middle schools based on the catchment area of elementary schools with which they are currently working. Factors in its favor include:

- **Family Involvement Materials .** Using U.S. Department of Education parent involvement materials, Montgomery County is developing a parent involvement guide for middle school parents that could be announced at the event. Furthermore, State Education Agency staff expressed interest in co-publishing the *Getting Ready for College* publication and adding a section on how parents should interpret the Montgomery County 8th grade Criterion Referenced Test and its implications for course taking.
- **Algebra and Geometry Requirements.** Montgomery County has a math requirement that all students must take algebra and geometry. They also have a standard of algebra in 9th grade that was begun in 1993. Twenty-seven percent of 8th graders took algebra last year. Eight-six percent of students attend college. They are working with the community college system to put into place a K-14 system.
- **Raising Math Standards.** Montgomery County is also raising the standards for math in the 3rd, 4th, and 5th grades based on data they gathered that 8th grade math scores were far below their current standard (same pattern as TIMSS). They found that the early grades math was not academically rigorous enough even though students performed well on the 4th grade math test. The building blocks for later grades were not in place for success in the later grades.