



## Printable Edition

**Note:** This resource includes all articles from the April 2010 Rural Policy Matters newsletter, except for RPM Premium Exclusives, which is available to members of the [Rural School Innovation Network](#).

### Facts and Figures About Which States Have the Most Rural Students Qualifying for Reduced-Price School Meals

**Question:** In which nine states do more than 50% of rural students qualify for free or reduced-price school meals?

**Answer:** New Mexico (81.3% of students qualify), Louisiana (68.4%), Mississippi (63.8%), Arkansas (59.1%), Oklahoma (58.7%), South Carolina (57.3%), Kentucky (55.0%), West Virginia (52.6%), and Alabama (50.6%). The average percentage of rural students qualifying for free and reduced-priced school meals in the U.S. is 40.6%.

### Children's Defense Fund Calls for Overhaul of Title I Funding

The Children's Defense Fund, a leading child advocacy organization led by the venerable Marian Wright Edelman, has written Democratic and Republican leaders of the U.S. House Education and Labor Committee calling for broad reforms of the Elementary and Secondary Education Act (a.k.a. No Child Left Behind). First on its list of needed changes is the Title I formula.

"Because the current formula (a complex combination of four formulas) favors large districts irrespective of their child poverty rate," Edelman wrote, "children who live in areas of concentrated poverty in mid-sized cities and in rural districts lose out. The inequities are blatant — between and within states."

Edelman concluded that "By ensuring that many of the neediest children receive the *least* amount of Title I educational support, the formula denies many children in areas of concentrated poverty a way out of poverty and fuels the cradle-to-prison pipeline."

The letter also called for strengthening the Rural Education Achievement Program, and stronger efforts to help the most vulnerable children, especially by supporting early childhood education with Title I funds, replacing "zero tolerance" policies with more positive discipline programs, and providing better educational services for children in juvenile justice facilities and foster homes.

The Children's Defense Fund is a co-sponsor of the Formula Fairness Campaign.

Do you know an organization that should be a co-sponsor of the Formula Fairness Campaign? Direct the leadership to [www.formulafairness.com](http://www.formulafairness.com) or to our Facebook page where they can sign on, or just tell them to write [marty.strange@comcast.net](mailto:marty.strange@comcast.net).

### Formula Fairness Campaign Update

#### New Report Chock Full of Info

The Rural Trust has published a report submitted to U.S. House and Senate education committees by Policy Director Marty Strange outlining how the use of a weighting system to inflate the count of disadvantaged students eligible for Title I funding systematically discriminates against high-poverty small school districts, both rural and urban.

This is the first comprehensive explanation of the abuses of the “number weighting” system, and it is chock full of data from the well-respected, non-partisan Congressional Research Service.

You can download a free copy of the report at [www.formulafairness.com](http://www.formulafairness.com).

While you’re on the website, sign the petition to Congress and the Obama Administration protesting this bias and sign up for “updates” and “action alerts” that let you know what you can do to help end it. Share this information with friends.

### **National Association of Black School Educators Endorses Formula Fairness Campaign**

The NABSE has issued a strong statement endorsing the Formula Fairness Campaign. You can read the statement [here](#).

The NABSE is an organization of African-American professional educators founded in 1971. With more than 100 affiliate groups in the U.S., Canada, and the Bahamas, the NABSE is a strong voice for African American Education.

[Check out the Formula Fairness Campaign Facebook page](#), become a fan, and tell all your friends about it, too.

## **Two Analyses of Mississippi Achievement Data Produce Significant Findings for Policymakers**

- **Smaller school districts reduce the impact of poverty on student achievement**
- **So-called higher achieving districts do no better than low-achieving districts at closing achievement gaps for Mississippi’s low-income, African American, or disabled students**

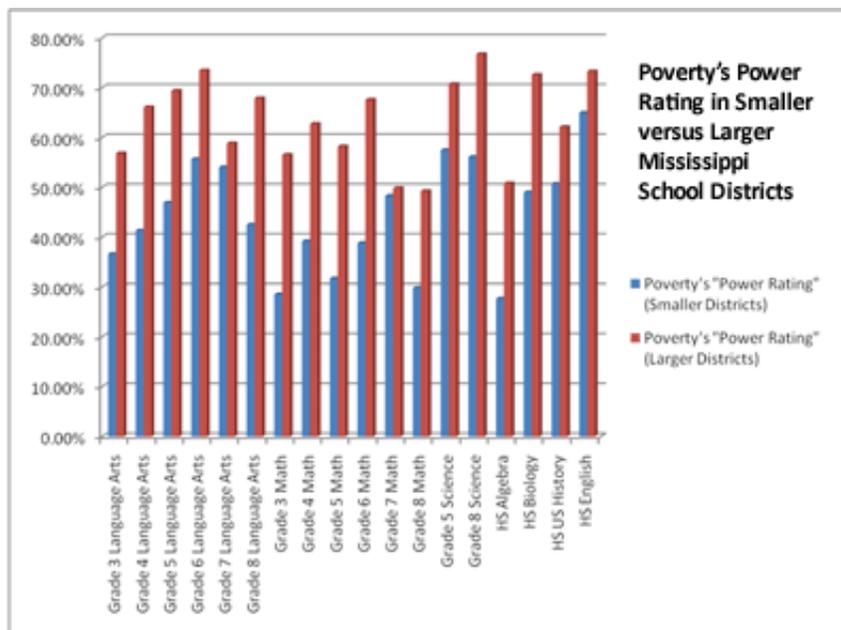
The state of Mississippi is considering closing many of its school districts (see [RPM, January 2010](#)). Criteria for closure are likely to include some combination of factors including enrollment and district performance ratings. The Rural Trust, on behalf of Southern Echo, has analyzed student test data gathered as part of the state’s accountability system to explore the relationships between achievement, poverty, and other factors. The results are relevant to public policy choices in many other states as well as in Mississippi.

### **Achievement, Poverty, and District Size**

Low-income students who attend school in one of Mississippi’s smaller school districts are less likely to fall behind their more affluent peers, on average, than low-income students in larger districts. In other words, the state’s smaller districts reduce the impact of poverty on student achievement. That’s important information in one of the nation’s poorest states because poverty is more threatening to academic achievement than any other factor.

Rural Trust researcher Jerry Johnson, Ph.D., analyzed school data collected through the Mississippi Department of Education to determine the interaction of poverty, school district size, and student achievement. He found that poverty explains 78.5% of the variance in performance outcomes (using the state’s Quality of Distribution Index, or *QDI*) in larger districts compared to 62.4% of test score variance in smaller districts. That’s a substantial difference on an important achievement outcome.

In fact, poverty had less influence in smaller districts than in larger districts on all 18 assessments required by the state. These assessments include Language Arts and Math tests for students in grades three through eight and high school tests in algebra, biology, US history, and English.



**Figure 1.** Poverty's Power Rating in Smaller versus Larger Mississippi School Districts (based on the state's 2008–09 Quality Distribute Index) (click on graph for larger image).

A large and consistent body of research suggests that the influence of school and district size on student performance is indirect. Enrollment size does not directly impact performance one way or the other. Instead, size disrupts the relationship between academic achievement and other characteristics, including poverty.

Studies conducted in more than 15 states have found similar results: smaller district size is associated with weakening the negative influence of poverty while larger district size is associated with increasing the negative influence of poverty.

The Mississippi analysis divided the state's 149 regular school districts in half according to size. Half the districts (the smaller districts) have enrollments under 2,272 students; the other half (the larger districts) enroll 2,272 students or more.

The study found that, in Mississippi, larger districts tend to have higher student test scores. But that does not mean that larger districts improve achievement. Rather, the analysis found that larger districts have lower percentages of students living in poverty.

### **Achievement, Student Learning Challenges, and District Ratings**

In a separate analysis, Johnson and researcher Shane Shope, explored the question of whether achievement gaps linked to race, poverty, or disability exist in the state's new district accountability assessment categories.

The system assigns districts to one of six performance categories based on student test scores: Failing, At Risk of Failing, Academic Watch, Successful, High Performing, and Star.

The analysis utilized the Mississippi Curriculum Test 2 for grades three through eight in Language Arts and Math. To determine whether achievement gaps existed in each of the six categories, the analysis made comparisons between (1) White and African American students, (2) Economically Disadvantaged and Non-Economically Disadvantaged students, and (3) Disabled and Non-Disabled students.

The resulting calculations provide a measure of the size of the achievement gap in each of the three student categories for each of the six district performance categories.

**Results.** Data for language arts results for 3rd, 4th, and 5th graders found that "Failing" districts actually exhibit less of an achievement gap between White and African-American students than "Star" districts. Similar patterns held at 6th, 7th, and 8th grade level and for math results at 3rd, 4th, 5th, 6th 7th, and 8th grades. The data suggest that "lower" rated districts may actually do a better job of serving students from historically underserved groups than higher rated districts.

Data for low-income and disabled students showed no significant patterns linking achievement gap and districts with different ratings. The overall conclusion of the analysis is that no districts have been entirely

successful at closing achievement gaps in Mississippi schools, even those touted as being the state's best.

The results are important for a variety of reasons. High performance rankings in Mississippi's districts tend to describe the demographics of the students and do not reveal how well those districts are educating students with learning challenges. Although no districts are successful in meeting the needs of historically underserved student groups, low-performing districts are doing a better job than higher-performance districts in several circumstances. Closing "low-performing" districts and sending students to "higher performing" districts will not likely improve educational outcomes for those students.

## **Conclusion**

Together these two studies suggest that Mississippi should find more effective ways to improve achievement and close achievement gaps than closing districts. Consolidation will not move students into new districts that are more effective than their current districts at teaching students with learning challenges.

In a state where so many children and young people struggle with the challenges of deep and widespread poverty, closing districts will only add to the hardships students face. Further, eliminating districts will limit the opportunities local residents have to participate in the governance of their schools. And, eliminating schools almost always leads in short order to the closing of schools. And that's yet another level of hardship for poor rural students and their families. Other research has not found financial savings associated with district consolidation.

Further, Mississippi's school ranking system does not provide an accurate guide to how well districts are educating the most at-risk students. Indeed, many "failing" and "at risk of failing" districts are in that position primarily because they serve student populations with higher proportions of students of color, or who are low-wealth, or who have a disability.

## **Save Alabama's Small Schools Hosts Statewide Meeting**

The rural education advocacy group, Save Alabama's Small Schools (SASS), held its first annual conference earlier this month.

The group initially formed in 2003 to support the state's small rural public schools and to advocate for state and local policies and programs that ensure the best educational opportunities for rural students. In 2009, SASS incorporated as a non-profit organization.

Since then SASS has held annual lobby days at the state legislature, gathered and shared information on the effects of school size on student outcomes such as graduation rates and achievement, collaborated with other organizations on quality education initiatives, and worked at the community level to preserve small schools and protect them from consolidation. In 2008, SASS hosted the Rural Education Working Group's national meeting.

The April event marks the group's first statewide conference.

"This was a great opportunity to get our message out to more communities and to build relationships and support," said Samuel Brewer, SASS President.

More than 60 people attended the conference held on April 13th at Tuskegee University.

Larry Lee, Director of the Center for Rural Alabama, gave a keynote address emphasizing the importance of building supportive environments within schools to enable children to grow and thrive. Mayors Johnny Ford of Tuskegee and James Robbins of Midway welcomed participants and asserted their support for small public schools.

*SASS is a grassroots non-profit organization committed to saving, improving, and advocating for small rural schools in Alabama.*

## **Rural SchoolFunding News**

## **Connecticut High Court Rules in School Finance Case**

Last month, Connecticut's Supreme Court ruled that students have the right to more than just a "free"

education. Ruling in *Connecticut Coalition for Justice in Education Funding (CCJEF) v. Rell*, the Court wrote: "We conclude that [the state constitution] entitles Connecticut public school students to an education suitable to give them the opportunity to be responsible citizens able to participate fully in democratic institutions, such as jury service and voting."

The decision reversed a lower court's ruling that the state constitution does not guarantee a minimum quality standard.

The Connecticut education clause states: "There shall always be free public elementary and secondary schools in the state."

Fifteen families and the CCJEF sued Governor Jodi Rell in 2005, saying that the state's funding system denies students in poor municipalities a suitable and equal education. The plaintiffs were represented by volunteers at the Yale Law School Education Adequacy Clinic. The arguments before the state Supreme Court took place almost two years ago.

In the ruling, the majority of judges identified four components that must be in place to meet the constitutional standard of adequacy: minimally adequate facilities; minimally adequate learning instruments; minimally adequate teaching of reasonably up-to-date curriculum; and sufficient, adequately trained teachers.

The decision also addressed another issue in the case: justiciability, or whether an issue is one that the courts have a role in deciding. As part of its decision, the lower court had held that the courts could not address the constitutionality of the state's school funding system.

The case has been remanded to the lower court for trial. The Supreme Court's opinion sets the "rational basis" standard of review for the remanded case, which states that the lower court should give the state's actions a significant amount of leniency. Some analysts believe that weakens the decision.

Connecticut education advocates say the school funding formula may work, but that it has never been fully funded. Currently, localities are responsible for over 50% of the cost of schools. The formula was developed after an earlier equity lawsuit in the state, *Horton v. Meskill* (1977), which established a right to an education in the state.

*Read more:*

Local coverage of the case, including a copy of the court's decision:

- [www.nhregister.com/articles/2010/03/23/news/a1-educationsuit\\_0323.txt](http://www.nhregister.com/articles/2010/03/23/news/a1-educationsuit_0323.txt)

More local coverage:

- [www.ctpost.com/news/article/Court-sanctions-challenge-to-state-school-equity-417419.php](http://www.ctpost.com/news/article/Court-sanctions-challenge-to-state-school-equity-417419.php)
- [www.courant.com/news/education/hc-school-funding-lawsuit-0323.artmar23,0,3475898.story](http://www.courant.com/news/education/hc-school-funding-lawsuit-0323.artmar23,0,3475898.story)
- [www.ctlawtribune.com/getarticle.aspx?ID=36644](http://www.ctlawtribune.com/getarticle.aspx?ID=36644)

This article addresses the additional funding that may be needed to meet the adequacy requirements set in the decision:

- [www.courant.com/news/education/hc-education-funding-0413.artapr13,0,6091660.story](http://www.courant.com/news/education/hc-education-funding-0413.artapr13,0,6091660.story)

The home page of the Connecticut Coalition for Justice in Education Funding, the group plaintiff organizations:

- <http://ccjef.org/>

## Illinois' Economy Spurs Actions on Education Funding

*Editor's note: Links are free and current at time of posting, but may require registration or expire over time.*

A new school funding lawsuit in Illinois claims discrimination against taxpayers based upon where they live. The suit claims that because property values in the state vary so widely, homeowners in property-poor communities are forced to pay higher rates. This is the first lawsuit in Illinois brought by taxpayers claiming equal protection violations.

The lawsuit defines property-poor districts as those in the bottom one-third of property values. Illinois annually sets a "foundation level" for per-pupil financial support, provides a portion of that foundation amount, and requires local districts to impose property taxes to reach a certain level. Plaintiffs in the suit argue that taxpayers in property-poor districts must tax themselves at much higher rates to collect the required funding, and that, despite those efforts, per-pupil spending is lower than in property-rich districts.

Currently, there is one other school finance lawsuit pending in the state. That suit was brought by the Chicago Urban League and claims that the school funding system is racially discriminatory.

Earlier school funding lawsuits in the state resulted in rulings that court action on school finance issues is inappropriate intervention in public policy matters. And, one of the decisions from the 1990's also held that any funding disparities among local districts are rationally related to maintaining the principle of local control of schools. The current suit argues that additional state mandates have now made local control irrelevant.

The economic crisis has also prompted renewed calls for district consolidation, which Illinois refers to as "school district reorganization." Governor Pat Quinn has spoken in favor of consolidation, and some lawmakers plan to introduce legislation encouraging consolidation. Illinois already has a number of financial incentives for consolidation, and a Chicago *Tribune* analysis of school district mergers found that most districts that have consolidated in the last ten years spent more after consolidation than before.

*Read more:*

Local coverage of the school finance lawsuit:

- [www.chicagotribune.com/news/education/ct-met-school-funding-lawsuit-20100323.0,7151629.story](http://www.chicagotribune.com/news/education/ct-met-school-funding-lawsuit-20100323.0,7151629.story)

Editorial on the school funding inequities, including a link to the plaintiffs' complaint:

- [www.suntimes.com/news/commentary/2119044,CST-EDT-edit24a.article](http://www.suntimes.com/news/commentary/2119044,CST-EDT-edit24a.article)

Coverage of consolidation efforts:

- [http://articles.chicagotribune.com/2010-03-25/news/ct-met-school-consolidations-20100325\\_1\\_small-districts-smaller-districts-school-districts](http://articles.chicagotribune.com/2010-03-25/news/ct-met-school-consolidations-20100325_1_small-districts-smaller-districts-school-districts)

Illinois State Board of Education District Reorganization policies:

- [www.isbe.net/sfms/html/reorg\\_school.htm](http://www.isbe.net/sfms/html/reorg_school.htm)

Summary of current consolidation efforts in other states, including Maine, Vermont, and Mississippi, featuring comments by The Rural Trust's Marty Strange:

- [www.stateline.org/live/details/story?contentId=470554](http://www.stateline.org/live/details/story?contentId=470554)

## **Alaska Judge Demands Action for Rural Schools**

*Editor's note: Links are free and current at time of posting, but may require registration or expire over time.*

The Alaska high court has ruled that the state is still not complying with a previous order to develop and implement improvement plans for chronically underperforming rural schools. On March 31, Judge Sharon Gleason gave the State Department of Education and Early Childhood two months to produce a "proper effort" and said she may appoint a special master if the state does not come up with a suitable plan.

Last year, Gleason ruled that the state should be doing more to assist these districts, including implementing pre-kindergarten programs. That ruling clarified four requirements for the state: 1) a constitutionally adequate set of standards;; 2) adequate assessments to determine whether schools are meeting those standards;; 3) adequate funding so schools would be able to meet those standards;; and 4) adequate oversight and accountability. It is this last requirement that has not been met.

The lawsuit was first filed in 2004.

The state had identified five districts that are chronically failing. The state claims that in those districts curriculum is not aligned with standards, students do not have sufficient individual remediation plans, teacher retention had not be addressed, and the districts do not have sufficient remediation plans.

The small rural districts say that they need and welcome the additional help. Many of the remote boroughs only have one or two teachers and students who do not speak English as their first language.

Lawyers for both sides in the case have met to discuss a settlement.

*Read more:*

Local coverage of the Gleason's ruling:

- [www.adn.com/2010/04/06/1215031/judge-threatens-to-appoint-master.html#ixzz0kQV15hgC](http://www.adn.com/2010/04/06/1215031/judge-threatens-to-appoint-master.html#ixzz0kQV15hgC)
- [http://juneauempire.com/stories/040810/reg\\_603528565.shtml](http://juneauempire.com/stories/040810/reg_603528565.shtml)

## ***RSFN Special Series:*** **Financing Rural Schools: Characteristics of Strong Rural School Finance Systems**

### **School Finance Principles, Generally**

What does a good school finance system look like?

A good system for funding schools should meet the following basic criteria:

- It provides a secure, stable and fair sources of revenue;
- The relationship between property wealth and resources for students is minimal;
- It takes into account needs of students with unique challenges;
- It equips all schools to optimally serve their students, staff, and communities

In addition, the Rural Trust sets forth specific principles related to the unique contexts of rural schools. These include the following:

- Rural people have the right to educate their children in good schools close to home, in a place and context with which students are familiar;
- All children should be educated well for life within the community as well as beyond it;
- Rural communities possess the civic and professional skills to run good community schools that meet local as well as state standards of excellence;
- Rural communities need the fiscal resources to build and maintain schools, provide highly qualified teachers, and support a strong curriculum.

### **What is a School Finance System?**

A school finance system is the set of mechanisms through which schools are funded. Every state's school finance system is different, and the details of how funds are distributed to schools are found in states' laws and regulations. Typically those rules are referred to as the formula. Usually, only a few people in the state know exactly how the formula works. Nevertheless, the formulas are a matter of public record and community advocates can learn them. The total amount allocated by the state for public education is found in the state's annual budget.

School finance systems age quickly because the facts and circumstances they include as factors change in their relative importance or cost. A formula that has been in place for 15 years is considered old. Even so, many states have not overhauled their basic formulas in decades.

State legislatures do tend to make incremental changes to their formulas. These small changes can throw important aspects of the formula out of balance and dramatically reduce how much funding a district receives.

It is important to acknowledge that school finance is political in nature. 'Horsetrading' among legislators is not uncommon, and programs or interests with powerful advocates are often funded, even as pressing needs of less powerful constituencies go unaddressed. The political nature of school finance also makes overhauling the system difficult. Proposed systemic changes are usually analyzed in terms of impact on specific districts, and 'winners' and 'losers' quickly declared.

### **The Current Rural School Funding Landscape**

The economic crisis impacts rural schools and communities more harshly than other districts for several reasons. First, in flush economic times, many rural districts lack the local property tax base to generate sufficient revenue for schools, even when tax *rates* are much higher than state averages. Therefore, when state funding is cut, many local rural districts do not have the means to make up the shortfall. Second, the

state policy climate is often indifferent or even hostile to rural schools and districts. For example, many states do not address the extra costs of student transportation common to most rural districts, nor do they address the challenges of staffing rural schools. Many states actively encourage school or district consolidation and use funding as one means to force the issue. Economic crises at the state level tend to intensify the negative policy context for rural schools. Third, rural schools are diverse and have a variety of circumstances and needs. Cuts to funding rarely account for the many different ways rural districts will be affected. Finally, rural people are a demographic and political minority in nearly every state making it harder to get the attention and interest of policymakers for rural issues.

Overall policy trends in school finance also tend to disfavor rural schools. For example, increasing centralization and control of funding streams at the state level generally decreases both local autonomy and local accountability. School finance system characteristics are closely tied to how much control the state has over schools and districts. For these reasons, it is important for rural school advocates to be active in school finance activities in their communities, in the policymaking arena, and, at times, in the courts.

## **Guidelines for Rural School Funding Reform**

Many of the guidelines featured in this special RSFN series are based on work that is already underway in rural places among partners and friends of Rural Trust. We are glad to facilitate connections between groups that are working to distribute funding in ways that provide the most support to the poorest rural schools.

### ***Characteristic 1: A Strong Foundation Formula***

One place to start an analysis of your state's funding system is to determine whether the largest source of money for districts comes from a *foundation formula*. A foundation formula calculates the basic amount of funding needed to educate a student in a general education (rather than a special education) program. A strong formula should account for all of the major elements necessary to educate a typical student in a typical district to state standards: teachers, curriculum materials and equipment, supplies, facilities, administration and other support personnel, transportation, maintenance, and other core education needs.

A foundation program determines how much "base" funding is needed per student, although it does not necessarily determine how that money is spent by the district. Other aspects of the state's finance formula determine how much of the foundation is covered by the state and how much by the district.

A few states use a teacher or personnel allocation (often called a "teacher unit") method to determine foundation funding. In this case funding is based on district enrollment but funding calculations are tied to the number of teachers, administrators, and other personnel "earned" by the district.

A foundation formula is important to rural schools because it establishes a base amount needed to educate a student. In most states, a foundation formula implies a state obligation to help districts meet the foundation amount regardless of local property wealth. Most states adjust the distribution of state funding in relation to the relative wealth of the district as determined by taxpayer indices and local property values. In other words, low-wealth property-poor districts get a higher proportion of foundation funding from the state than do high-wealth property-rich districts. As currently implemented, these measures rarely ensure funding equity for rural districts, but they do help.

Foundation formulas usually recognize that it does not cost the same to educate every child. For example, it costs more to educate a high school student than an elementary school student and more to educate children living in poverty than in affluence.

These types of cost differences are recognized in good foundation formulas and are often accounted for by giving extra "weight" to various student characteristics. For example, each poor or at-risk student or each English Language Learner might get extra weight in the formula based on how much more it costs to achieve the same educational outcome for these students as it would for students without those needs. It is important that weights are accurate measures of cost, a topic that will be discussed in a future article in this series.

The state and the local district share the cost of the foundation amount. The local share of that cost is usually based on a uniform tax rate, and often a local minimum tax rate is required. In some states, a local tax cap is imposed.

A characteristic of a strong rural school finance system is that the foundation or equalization portion of the formula is the largest source of money for districts. The foundation amount should include the biggest costs for districts so that rural districts can benefit from adjustments for differences in local wealth.

The calculation of the foundation amount is also an important advocacy opportunity. Too often, state legislatures first decide an amount of money to be spent on education, and then allocate it among districts

— with some not getting what they need. The base student cost in a state should reflect what the actual costs of educating students are, not what amount of money is available in a given year.

### A Note About Categorical Funding

Another funding mechanism closely related to the foundation formula is *categorical* funding. Categoricals are specific amounts of money for particular children, special programs, or special purposes. They are usually smaller pots of money for restricted purposes, typically distributed without regard to a district's property wealth or per-pupil spending.

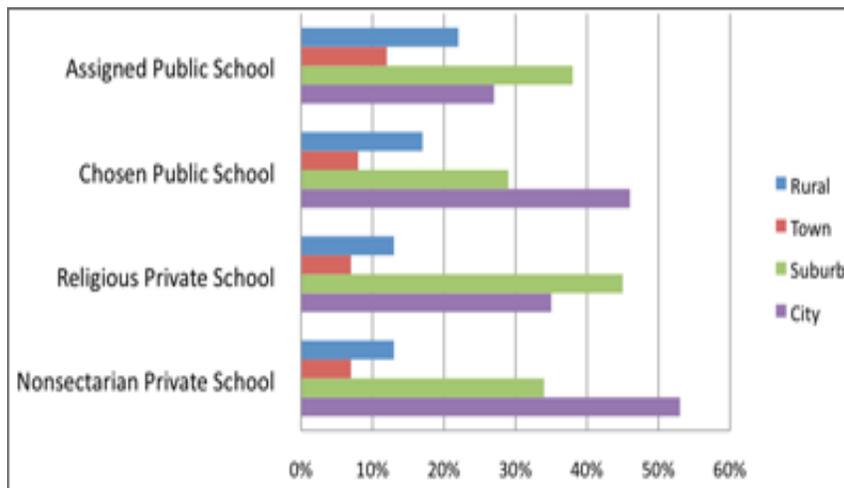
Although rural schools need school finance systems that recognize specific needs, categorical funding is not always the most efficient or sufficient method for meeting those needs.

Categorical funding generally requires compliance activities on the part of districts; it often is used for programs with a "one-size-fits-all" approach; it frequently results in the labeling of children and incentivizes retaining children in programs that earn more funding for the district; and categorical funding often lacks transparency at the local level. One of the primary reasons for increases in categorical restricted funding — usually to the detriment of foundation funding — is the desire of legislators to control how funds are spent.

Categorical funding does, however, allow legislatures to target additional funds to special student populations, against the general trend of higher funding for wealthier schools. In addition, innovative new programs can also more easily be funded categorically.

## Graph

### Percent Distribution of Students Within Public and Private School Types



(click graph for larger image)

Source: U.S. Department of Education, National Center for Education Statistics:  
<http://nces.ed.gov/pubs2010/2010004.pdf>

## RPM Premium Exclusives

### Stopping Bullying: Effective Approaches

This resource is for Rural School Innovation Network members only. [Click here](#) for information on joining.

High-profile cases of school bullying have made their way into the media recently. What have we learned about what reduces child and adolescent bullying and why does it matter? A new paper looks at the research...

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Comments, questions, and contributions for Rural Policy Matters should be sent to:

**Policy Program**

Marty Strange, Director  
41 Graham Street | Bethel, VT 05032  
Phone: (802) 728-5899 | Fax: (802) 728-2011  
E-mail: [policy.program@ruraledu.org](mailto:policy.program@ruraledu.org)

Robin Lambert, Editor  
E-mail: [editor@ruraledu.org](mailto:editor@ruraledu.org)

**National Office**

1530 Wilson Blvd., Suite 240 | Arlington, VA 22209  
Phone: (703) 243-1487 | FAX: (703) 243-6035  
E-mail: [info@ruraledu.org](mailto:info@ruraledu.org)

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