

Interview with Sheila Simon

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Pogue: Philip Pogue

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Pogue: It’s August 10, 2012, and we’re in the Illinois State Capitol. My name is Philip Pogue, and we’re going to be discussing the topic of school reorganization. We have with us today Lieutenant Governor Sheila Simon, who’ll be talking to us about the Classrooms First Commission. Thank you very much for participating.

Simon: Thanks for inviting me to participate, and thanks for your focus on this issue. I’m glad you’re doing it.

Pogue: To begin with, could you review your personal background, family, education and work experience?

Simon: Personal background, [I] grew up in southern Illinois, moved out to near Washington, D.C when I was in high school, when my dad [Illinois State Senator, Paul Simon]—who was a public official for all of my life—was elected to Congress. I should backup and say that my parents both served in the Illinois State House [of Representatives], which I think had a big impact on me and my brother, that there was always an expectation that we’d be involved in politics and public service in one way or another.



*Sheila Simon,
Lieutenant Governor 2011-2015*

I went to Wittenberg University in Springfield, Ohio, a little, tiny liberal arts school [and] Georgetown University Law Center for my law degree, out in Washington, D.C.

Work experience, [I] started off working at Land of Lincoln Legal Assistance in Carbondale, Illinois and was in private practice briefly, then an assistant state's attorney in Jackson County, and then moved to teaching at the law school. I was teaching at the law school for about ten or twelve years before joining the ticket and running for lieutenant governor.

Let's see, other family of note, my husband, Perry is a community college teacher. We have two daughters, Reilly, who is twenty-two and will be a senior at the U of I [University of Illinois] in Urbana-Champaign this fall, [in] just a couple of weeks, and our daughter Brennan, who will be eighteen next week, will be starting up at DePaul in a couple of weeks, as well.

Pogue: What attracted you to run for state-wide office?

Simon: (laughs) I like the smile on your face when you ask that question, Phil. I suppose I have always been interested in public service and saw a need when the Democratic Party lost its candidate for lieutenant governor in the last election and needed a replacement. [It was] kind of like at the PTA meeting, where you raise your hand and you say, "I'll do that." I raised my hand and called the governor and said I would be happy to be his running mate. The Democratic Party picked me, so here I am.

Pogue: One of your duties is working with education issues for the governor. What are some of the committees that you serve on?

Simon: Just yesterday we had a meeting that I chair, the Joint Education Leadership Committee of the P-20 Council, which is preschool through graduate school. The Joint Education Leadership Committee brings together some of the top administrators, along that preschool through graduate school spectrum, along with leaders from economic development and a range of areas that have a big impact on education. So, that's an important vehicle to get things done, keep things connected from across the school system, rather than just having separate units of school systems.

I recently chaired the Classrooms First Commission, participated in the process of coming to Senate Bill 7, which was a big reform for the State of Illinois—really led very well by Senator Kimberly Lightford—that got people to say, "Okay, I've got my angle on things, and the other side has their angle on things, but what we have in common is a desire for the schools to be successful. Let's see what we can do to move towards that." [It] really made some big change for the State of Illinois that I think, as it is put into effect, we will appreciate. Those are some of the things that I've been working on.

Some [work], a little bit less formal, I've toured all the community colleges in the state, which has been a great education for me. So, those are some of the things I've been working on.

Pogue: Had you been involved with any school reorganization issues prior to serving on the Classrooms First Commission?

Simon: I think, outside of discussing in my hometown of Carbondale, how the schools are set up, and why and how some of those issues have an impact on the community, no, I have not been involved directly in school reorganization.

Pogue: Carbondale is a unit-type district?

Simon: Carbondale has one high school for a community beyond Carbondale. [It] has a grade-school district for folks in the city of Carbondale, and then three other school districts that feed into the high school. So there are some challenges that are presented by that.

Pogue: How did you get named to be the chair of the Classrooms First Commission?

Simon: [laughs] I asked for it. Maybe not the smartest political judgment that one could make, but I knew that this would be an important conversation, particularly for downstate folks, and the way that the people from Chicago say "downstate," meaning everything outside of Chicago. But being from southern Illinois, I know the importance of schools to communities and really wanted to make sure that I could steer this conversation in a positive way.

Pogue: The commission came up with twenty-three recommendations, regarding reorganizations. What are some of the major ones that have been presented to the [Illinois] General Assembly and the governor [Pat Quinn]?

Simon: We've presented all the ideas in the form of a report. As we move along, we'll be presenting them to the General Assembly and the governor in the form of legislation, starting with the next session. So we don't have anything passed yet.

Some of the recommendations are also administrative, so don't require legislative action. I think, if we could break it down into categories, the two big categories are promoting voluntary consolidation, and also making it easier to get to what we've categorized as virtual consolidation.

So, in terms of voluntary consolidation, where the districts want to, where they see that this is in their interest, how can we make sure that, where folks want it to happen, that it does? One of the barriers, for example, is, are they contiguous? We've found one school district that wanted to consolidate with a nearby, but not touching, school district. The statute didn't allow that. They had to get special legislation to do that. We want to make that more of

an option for districts that are very close by to each other, but not necessarily touching.

Other good ideas that came from... Really most of the good ideas came from listening around the state, doing our research and being open minded about where we might go with this process. Another thing we found is that, particularly where consolidation can only take place in a new building—because none of the school districts have a big enough building for the high schoolers—that we would like to set up a law that allows districts to consolidate, to vote to do that, but not have that consolidation become effective until the new building is built. Because there is such a delay in building school buildings, I think that will help a great deal.

In terms of virtual consolidation, what we are working on is making it easier for districts to share with each other. Even though they're not consolidating, even though they're keeping all of their local control, how can they share buying textbooks? How can they share buying health insurance for employees? How can they share, if they want to, for example, a superintendant? There are some districts in Illinois that have one superintendent for two districts. And it's working pretty well for them. I want to make sure that other districts, who think that this might work for them, have an easier way to go to get there.

We're going to build a reservoir of model contracts, so that if a school district thinks about this idea, someone doesn't say, "Oh gosh, no one's ever done that before. It'll cost an arm and a leg in terms of attorneys' fees to get this worked out." We want to give them a head start in saying, "Okay, we know it can work. Will it work for us? Let's see about that."

Pogue: Now your report indicated and broke down these recommendations in short-term, medium-term and long-term, in terms of getting some of those done. Going through some of the short-term ones, I see that you had such issues as tying efficiency and shared services in with the financial watch list. What was that all about?

Simon: One of the things that we want to make sure we can do is—and there are several overlapping ideas here—we want to make sure that school districts that have some of the indicators that consolidation might be a good idea, that we can get to those in advance. So one of the recommendations is, school districts that are having financial problems and are in counties with declining populations, we're going to ask them to do a study on whether consolidation would be in their best interests, a little bit of prodding there.

Some of the other recommendations, dealing with efficiency, one of them is modeled off a program in the state of Ohio that took advantage of all the information that school districts report to the state and turned it back around to the districts, so that a district can say, "I wonder how much other

school districts are spending on their transportation contracts. Let me pick a district that's my size and population and see what they're spending. If they're getting it cheaper, then that's a person to call and say, 'Hey, how did you manage this? What have you figured out that I need to figure out?'" So, some of the efficiency measures are really sharing information, so districts can take advantage of ideas, of information that the board of education already has in its possession.

Pogue: Also on the short-term list, you had, as an administrative recommendation, establish the P-20 Learning Pathways.

Simon: Yeah. This is something that we're mooching off of some good ideas that are already taking place. The Department of Commerce and Economic Opportunity, along with the State Board of Education, as a response to the very first call for proposals of the Race to the Top Program, put together an idea of how can we link businesses and industries, link the employers, to the students, starting in high school. [How can we] provide a little bit more information about what goes on in certain STEM- [science, technology, engineering and mathematics] related careers, so that students can get inspiration to pursue these lines of study?

Fortunately, along the way, in the third round of Race to the Top, we actually got some funding for it. So that is an initiative that you can expect to hear more about in September and October. I think [it] will be a real bonus for the state. It's an area where employers saw an opportunity to have their needs met better.

We have too-large of a disconnect between employers and the jobs that they want to have filled and employees and the jobs that they'd like to have. Often the employees don't have the skills to meet the jobs that are available. Right now in Illinois, our rough guess is we have around 140,000 of those unfilled jobs. So employers are very interested in making sure that the educational system meets the market a little bit more accurately.

Pogue: As you go to long-term recommendations, one of them dealt with reorganizing the incentives program. What seemed to be the concern there?

Simon: Well, I think our concern there is that the incentive program is a good one, but maybe not as accurate as it can be. It sets up a rough guide to what the costs of consolidation will be. For some districts, that meets the cost of consolidation. For some districts, the actual cost of consolidation is going to be higher than that set amount, per teacher.

I think, if we can find a way to be more accurate, in terms of incentives, we might save some money in some circumstances. We might spend a little bit more money in others, but use the same money more effectively to generate more cost savings for districts.

Pogue: Another one that is listed there was a two-year state budget.

Simon: (laughs) How do you like that idea? This seems shocking to folks who work with the state budget and know the budgeting process, here in the capitol. It seems like common sense to everyone else. When you start off a new job, when you take out a loan to buy a new car or look into student loans for how you can afford to go to college, you look at the long term. You say, "What can I do? What can I support over a longer period of time?" Then you can make plans.

School districts are in the position of having to make a plan for one year and guesswork beyond that. If we can have a two-year budget, that gives school districts a little bit more of a guarantee of here's what you get in this year; here's what you get in the next year, I think we're going to see a better connection.

I'd like to eliminate the situation that's so common in schools where, at the end of the school year, a whole set of teachers get their notices that they're not welcome back, until we figure out whether we've got enough money in the budget. I think we'd do a better job of keeping some outstanding teachers working in Illinois schools, if we had that.

Pogue: Now, you indicated that you'll be working with members of the General Assembly at the next session?

Simon: Um-hmm.

Pogue: How will that go?

Simon: I think it'll go very well. I think we've had, on this commission, a good bipartisan interest. Education is really fun to work on, because it's not a Democratic issue or a Republican issue. Everyone talks the same language. Everyone has the same incentive, because everyone looks at the future for your kids and your nephews and nieces. It's a set of issues where I think it's easier to build a bipartisan consensus.

We had four legislators on the commission, and they are among the leaders on the legislation in the House and Senate, so I think we've got an excellent head start on achieving some of these goals.

Pogue: As far as the State Board of Education, some of those fall under administrative. How will that be handled?

Simon: Well, we're working with the State Board of Education on how to implement some of these ideas. They were very active participants in the commission process itself. So, we're not sitting off in an isolated room and saying, "We recommend that you do this." The Board of Education has been very active and has helped us shape some of these ideas.

I think it's easy, if you don't have any financial restrictions on what you're thinking about. But everything that we've done in this commission has been under the assumption that resources are limited, if not shrinking. So we've been very watchful about how these things, if they need to be paid for, can be paid for. I think one of the most challenging areas in working with the administrative end of things is how can we implement some of these ideas that do have some small cost attached?

Pogue: The commission held a number of hearings, public hearings, around the state. You had four in the fall; you had four in the spring, after the draft resolutions were approved. You had on-line surveys that allowed people to provide information. What kind of powerful testimony did you hear?

Simon: [laughs] We heard a lot of very powerful testimony, a lot of strong, passionate feelings, particularly at the public hearings. The first round, I would start off each one of these hearings with a message about how I'm from southern Illinois; I understand the importance of schools to communities; I also understand that there's not such a thing as one-size-fits-all solution, that we have to be more attentive to differences between one area and another.

Even having said all that, most of the commentaries started off with, "Don't force us to consolidate; we value our local control." Then they'd go on and say, "Here's what **we** do." In that second part of their testimony was where we found some great ideas that we decided were very much worth sharing with other school districts. People would say, "Don't make us consolidate, because we've figured it out already. We share an advanced biology teacher and other subjects with our neighboring school district by the Internet or by having the teachers drive back and forth." So, we found some good ideas in that way by really reaching out, listening.

We started off the first commission, and I asked everyone to focus on goals of efficient use of tax dollars, opportunity for students, and to do our work with an open mind. Everyone on the commission had a particular point of view. That's why they were there, to represent a constituency, a perspective. But they really did that amazingly well. I think we all learned along the way.

I think a lot of us came in with some assumptions about, "Here's how I think things should go." But when we did the research, reached out to people, both in person and online, we found out we came up with a much better, I think, end product than we would have if we'd just sat down around a table and said, "What do we come up with? Let's assume that we've got all the knowledge right here in the room."

Pogue: Were there any differences in the testimony in the various geographic regions of the state?

Simon: You know, the answer to that is, there's some different challenges, but the bottom-line message about the importance of local control in schools was uniform, top to bottom. (laughs) Suburban schools, downstate, southern, rural schools, everyone said, "We value local control."

As a person involved in state government, I often see people who are apathetic or upset with state government, to the point where they don't participate at all. I think that's a real disadvantage for our state system, that we have so many people who are not participants. If we've got a system of government, where people are participating and really active about it and really value that, I want to make sure we get the best of that. I don't want to pull the plug on that.

Pogue: Now, the study took place at a time when Illinois was not in a good economic condition. In 1985, there was an effort to reorganize schools. It was met with a lot of opposition, but that was part of the Educational Reform Act, with a lot of legislation, from pre-kindergarten to alternative schools, tech prep with the community colleges, the learning goals, the evaluation changes for principals and teachers. There were roughly about 115, 120 initiatives.

You were handling this when you had issues of PTELL [Property Tax Extension Limitation Law] in many of the counties. You had the talk on pension cost shifting, the issue of transportation being a local responsibility and major cutbacks. State aid had been declining as a percentage, as well as actual dollars. You had unpaid bills that the state was wrestling with, pension costs and Medicaid costs. So you had almost the exact opposite of 1985. How did that impact the discussion?

Simon: (laughs) When you string all those things together in that question, it sounds absolutely awful (laughs). But I'll tell you the silver lining in that perfect storm cloud. It's that the financial pinch causes folks to re-examine how they've been doing things, in a way that they wouldn't re-examine them in times where all the budgets are full and all the payments are on time, and there are no challenges.

I don't know that I would ask for these circumstances, but I think, given that we have these circumstances, it makes sense to take advantage of that willingness to look at different ways to do things. I think that we're going to come away with some better systems, some smarter ways to use those limited resources because of it. I found that people have been receptive to thinking a little bit differently, and that's a fun thing to work with.

Pogue: Now the commission members were appointed by various segments of the education community, based on the law that was passed under House Bill 1216. Other staff members were included with some of the subgroups that were formed, and I believe there were four of them formed. How were those staff members selected?

Simon: Well, we have a fantastic staff member who I think you've already interviewed, Dr. Lynne Haeffele, who just has an outstanding background in education. [She] really connected us with the research. But beyond that, she was the architect of the process that we used to get our information, to assess the information and make a preliminary report, and then to take it back out again, to put on some finishing touches.

The process has been an outstanding one, in that we heard from everyone, and we focused enough on our goals that everyone agreed to in the very beginning, those goals of spending our tax dollars wisely and making sure that opportunity is available in every school, that in the end, we wound up with a report that everyone on the commission agreed with. There was not a dissenting vote.

I give great credit to Lynne and two other young staffers here, Justin Stofferahn, who works with me on many different things, and Crystal [Olsen]. Justin and Crystal also took responsibility for one of the commissions, and both of them did a fantastic job. They were also helpful in organizing the public hearings, where we had a lot of people, and we had to limit their time, so that we could hear from everyone. A couple of the hearings, we had to stay beyond the time we had scheduled, because there were so many people there who wanted to have input. Justin and Crystal helped to manage that very effectively.

Pogue: And you had quite an active home page that described everything that was going on. Who was involved with that?

Simon: Again, Justin and Crystal were the masterminds of making that all electronically available. I'm way too old to know how to do that. (laughs)

Pogue: Before you went through the hearings, I think you were looking at all the research and information from other states, and you came up with some findings. One of them would be the cost of school reorganization. I think, in the document that was released, you talked about it being as high as \$3 billion. How would the cost be developed, and would it be so costly to merge all of these districts?

Simon: Yeah, that was one of the questions. I have to say, that was a surprising answer to us. We looked at one of the most simple ideas of consolidation, and that's... Illinois is a state that's unusual in some ways, in that school districts can be kindergarten through twelve, or they can be elementary school and high school as separate districts. So we looked at, what if we, just in one fell swoop, said, "We're going to mandate that all of those separate districts become one." There's some logic behind that.

We asked the State Board of Education to calculate, given our current incentive system and given the number of schools that are split up that way,

how much it would cost? That's where we came up with that really daunting \$3 billion figure.

As if we didn't have enough reason already to say, "Let's look at where consolidation is going to be beneficial, and not just assume it's going to be a benefit and force it on people." That \$3 billion number was a wake-up call for all of us, that we were dealing with something very large.

We could have, of course, recommended a package that would do away with those incentives entirely. Then we would be in a position of forcing consolidation and not paying for it, so forcing some short-term costs on districts that are already in a financial pinch. That was a shocking figure.

Pogue: Were there any other major things that you learned during this year-long process?

Simon: I think one of the things I learned—again, thanks to Lynne and some of the research that she did—was... I think when people talk about school consolidation, it's sort of an umbrella term that says, "I think, if schools consolidate, we'll be spending our dollars more efficiently, and we'll have more opportunity for students, particularly students going to small schools." That's why I broke down the goals of the commission to focus on those two things, because I don't think consolidation always gets there.

One of the things we found early on, in some research, was that, while there's an idea of schools that are too small to do the job—and that's why many schools look at consolidation—there's also, on the other end of the scale, the idea that there's a certain size that might be too big, that if you increase the size of the school district beyond a certain point, then you actually start limiting the benefits of consolidated administration. You actually have to start hiring more administrators. I think we tried to keep in mind that there's both a too small and a too big, which is not always a part of the conversation. So that was a good education for us all.

Pogue: Over the next ten years, what do you expect to be taking place, regarding school reorganization? Your commission body came up with ideas that would help with voluntary reorganization, and you're talking about virtual consolidation. And we've talked a little bit about the difficult financial straits schools are in, as well as the State of Illinois. Where do you foresee us going with this?

Simon: Yeah, I hope that improving the ability of school districts to consolidate voluntarily—to ease that path when school districts want to do that—will lead to a little bit more consolidation, where it's merited.

I also have the feeling that, as schools can more easily cooperate with each other, as school districts can more easily cooperate with each other, that we might find more arrangements that look something in between separate

school districts and a consolidated school district. In fact, we met several times along the way with folks who were interested in forming a cooperative school district that enjoys the benefits of local control, particularly for their primary grades, and a combined force for high school. I think we'll see more of that that is responsive to the needs of students.

I also think we might find that, as schools and school districts work together a little bit more, some of the old sports rivalries that stand in the way of cooperation sometimes, might be less of a factor, as we see that the academic benefit from some of that cooperation, whether it's consolidation or not, is a real benefit to students.

Pogue: As we close, how do you feel about the work that was done by the commission?

Simon: I feel outstanding about it. You shouldn't be proud, but I'm proud (laughs) of this work. A really good bunch of people, who really took to heart the mission of what we wanted to do and the reason why we wanted to do it. One of our commission members at the last meeting noted that we had taken what was sort of a political hot potato and moved it into a level-headed policy discussion. I'm particularly pleased by that, and I think that will help us get some results out of this.

Pogue: Thank you very much for taking some time to talk to us about the work of the Classrooms First Commission. It was a year-long experience, meeting lots of people, all over the state of Illinois, and I want to thank you for that effort.

Simon: Thank you for focusing attention on it. I appreciate your good questions, and I appreciate anyone who, for any reason, is listening to this oral history, and [I] would offer my help any way I can to help improve education in the state of Illinois.

(end of transcript)