

DOCUMENT RESUME

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Report to Sen. Harrison A. Williams, Jr., Chairman, Senate Committee on Human Resources; by Elmer B. Staats, Comptroller General.

Issue Area: Program and Budget Information for Congressional Use (3400).

Contact: Program Analysis Div.

Budget Function: Education, Manpower, and Social Services: Elementary, Secondary, and Vocational Education (501); Education, Manpower, and Social Services: Research and General Education Aids (503).

Organization Concerned: Department of Health, Education, and Welfare; Office of Management and Budget; Office of Education.

Congressional Relevance: Senate Committee on Human Resources. Sen. Harrison A. Williams, Jr.

Authority: Congressional Budget Act of 1974, title VIII (P.L. 93-344). Elementary and Secondary Education Act of 1965, as amended (P.L. 89-10; P.L. 93-380; P.L. 90-747; P.L. 85-864; P.L. 90-247; P.L. 81-874; P.L. 91-230; 20 U.S.C. 236).

A review to determine the Senate Committee on Human Resources' needs for oversight information on selected elementary and secondary education programs focused on the information currently provided to the committee, information available from the Federal educational community, information available from State educational agencies, and information available from local educational agencies. Information collected during 1976 and 1977 covered a wide range of descriptive information, financial data, and performance indexes.

Findings/Conclusions: More uniformity is needed in education programs and budgetary presentations. There are several varying lists and structures for programs authorized by the Elementary and Secondary Education Act. Each list or structure serves a purpose that influences its form, but several appear to be justified only because of different information requirements of various users. Information users should attempt to move toward uniformity of list or structure; where this is not possible, easily usable cross-references should be developed and made available. Also, there needs to be more uniformity in the terms and their definitions used in reports to the Congress on education programs. Four alternative approaches to providing the committee with oversight information are: (1) comprehensive data packages supplied to the committee; (2) selected data reported to the committee and the remainder retained to be available upon request; (3) selected data obtained by the Education Division and reported to the committee; or (4) maintain existing

reporting systems. Recommendations: The Secretary of Health, Education, and Welfare should coordinate with the Office of Management and Budget and interested congressional committees to develop: a basic program/activity list and cross-references between other program identification description, fiscal data, student eligibility and participation, assessment of needs, and program evaluation information for future reports to the committee. (RRS)

66601

REPORT BY THE

Comptroller General

OF THE UNITED STATES

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Better Information Needed For Oversight And Evaluation Of Selected Elementary And Secondary Education Programs

The Senate Human Resources Committee asked GAO to analyze information it receives for the oversight of selected education programs.

The information, provided by HEW, needs to be better organized and defined more specifically, and its terminology needs to be more uniform.

Additional information may be needed by the Committee for these programs.



PAD-78-35
MAY 30, 1978



COMPTROLLER GENERAL OF THE UNITED STATES
WASHINGTON, D.C. 20548

B-164031(1)

The Honorable Harrison A. Williams, Jr.
Chairman, Committee on Human Resources
United States Senate

Dear Mr. Chairman:

We are reporting on the information needed for oversight and evaluation of selected elementary and secondary education programs. This report is one of the products we have developed in response to your November 12, 1975, letter and subsequent informal guidance. We have worked closely with your office and education officials throughout this project. We also reviewed policies, regulations, procedures, and reports affecting the availability of information about the selected elementary and secondary education programs. Most of this work was done at Department of Health, Education, and Welfare (HEW) headquarters and at State and local educational agencies in California, Illinois, New Mexico, and New York.

We have discussed the report informally with cognizant Office of Education officials. They generally concurred with our findings, noting particularly the tradeoff between having information for decisionmaking and restraining the reporting burden. They commented that existing reports to the Congress could be modified to include some of the additional information cited in the report. Additionally, some technical comments were offered. We have incorporated the Office of Education's comments where appropriate.

In our work at HEW, we determined what information was available to fill the Committee's needs. We noted some gaps in availability. A survey was conducted on a sample of State and local educational agencies to determine the availability of information at those levels needed to fill these gaps.

We found that information which could contribute to congressional decisionmaking was available. Education program information is presented to the Congress under many different or slightly different program names and groupings (program/activity lists or structures). As one of the important

aspects of providing oversight information, the report discusses the need for more uniformity in terminology and compatibility in program/activity lists. In appendix I, we present a program/activity list that we believe would better meet your Committee's needs. We are recommending that unnecessary variations be eliminated and standard terminology be used. We want to continue to work with the committees and agencies to develop a basic program/activity list and cross references to other necessary information.

The Secretary of Health, Education, and Welfare should cooperate with us in developing a basic program/activity list for programs in the Committee's jurisdiction. The list should be developed in coordination with the Office of Management and Budget and the interested congressional committees. It should contain cross references to other program/activity lists and structures. The Secretary should also coordinate with the appropriate congressional committees and Federal agencies on changes or additions to terms and definitions which respond to the requirements of the legislation.

Based upon your Committee's decision concerning the information it needs, the Secretary of Health, Education, and Welfare should cooperate with us and coordinate with the other interested congressional committees and the cognizant Federal agencies to develop the specific types of program identification description, fiscal data, student eligibility and participation, assessment of needs, and program evaluation information for future reports to your Committee.

Discussed in detail are four alternative approaches to providing the Committee oversight information:

Option 1: Comprehensive data packages supplied to the Committee - The Education Division would submit all raw data in formats which would allow analyses of the data. This would be a significant addition to the base of information the Committee has available for decision-making. As the Education Division would have to collect information presently maintained by State and local educational agencies, the reporting effort required would also be significant.

- Option 2: Selected data reported to the Committee and the remainder retained at the Education Division to be available upon request - The Committee would receive regularly a limited amount of information. This information probably would be insufficient--by itself--for a complete analysis of the program. The remaining information would be maintained by the Education Division. Thus, the costs of standardization and collection would not be reduced.
- Option 3: Selected data obtained by the Education Division and reported to the Committee - The Education Division would collect and report a limited amount of crucial information. Standardization and collection costs would not be as high but the Committee would not be able to receive additional data without outside assistance or special data collection.
- Option 4: Maintain existing reporting systems - The Committee would receive no additional information, and no standardization of the present data would occur. Without significant additional cost, the Committee and staff of the Education Division could recast the currently available information to better meet the Committee's needs.

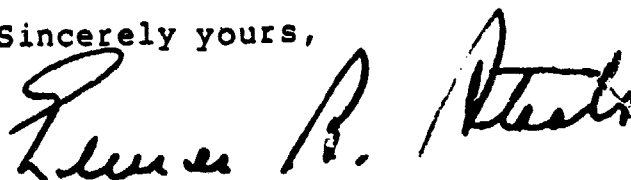
These options satisfy, to varying degrees, your Committee's need for selected elementary and secondary education program information. Although we did not address HEW's needs for management information, we believe that much of the information discussed in appendix I would be helpful to HEW and other education officials. Legislative language useable for the various options will be provided separately to your office. The draft legislation will identify for each of Titles I, IV (parts B and C), and VII, the information which would be required.

Our review was made pursuant to your request and under the provisions of Title VIII of the Congressional Budget Act of 1974 (Public Law 93-344).

This report contains recommendations to the Secretary of Health, Education, and Welfare. As arranged with your office,

unless you publicly announce its contents earlier, we plan no further distribution of this report until 30 days from the date of the report. At that time, we will send copies to the Secretary of Health, Education, and Welfare; the Director, Office of Management and Budget; the Assistant Secretary for Education; and the Commissioner of Education.

Sincerely yours,

A handwritten signature in black ink, appearing to read "James B. Stewart". The signature is written in a cursive style with a large, prominent initial "S" at the end.

Comptroller General
of the United States

BETTER INFORMATION NEEDED
FOR OVERSIGHT AND EVALUATION OF SELECTED
ELEMENTARY AND SECONDARY
EDUCATION PROGRAMS

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ABBREVIATIONS

ESEA	Elementary and Secondary Education Act
GAO	General Accounting Office
HEW	Department of Health, Education, and Welfare
LAPIS	Legislative Authorization Program and Fudgetary Information System
LEA	local educational agency
NCES	National Center for Education Statistics
OE	Office of Education
OMB	Office of Management and Budget
SEA	State educational agency

BETTER INFORMATION NEEDED FOR OVERSIGHT AND EVALUATION OF
SELECTED ELEMENTARY AND SECONDARY EDUCATION PROGRAMS

BACKGROUND

Title VIII of the Congressional Budget Act of 1974 requires that the General Accounting Office (GAO) assist the committees of the Congress in specifying and developing their requirements for information. On November 12, 1975, the Chairman of the Senate Labor and Public Welfare Committee (now the Senate Committee on Human Resources) requested that GAO provide assistance in assessing, specifying, and developing the Committee's overall information requirements for (1) oversight of the Federal programs under its jurisdiction and (2) full participation in the new congressional budget process. We were requested to consider all phases of the new budget process, which includes the Committee's requirement to:

- Report to the Senate Committee on the Budget by March 15 its views and estimates of the funding needed for the legislation under the Committee's jurisdiction.
- Report its proposed legislation authorizing new budget authority by May 15.

In response to the Committee's request, we conducted a review with the following objectives: (1) describe the information needed by the Committee to carry out its budgetary responsibilities and perform effective oversight, (2) determine how much of this information was available, and (3) determine what additional information could be provided.

In June 1976 we agreed with your office that for the oversight portion of the request, we would develop a case study in one major area--elementary and secondary education.

During the initial work, we obtained, compiled, and analyzed the readily available information on four selected programs authorized by the Elementary and Secondary Education Act (ESEA) of 1965, as amended (20 U.S.C. 236 et seq.). The ESEA programs reviewed were:

1. Title I - Financial Assistance to Local Educational Agencies for the Education of Children of Low-Income Families
2. Title IV - Part B - Libraries and Learning Resources (Consolidated from the National Defense Education Act Title III, ESEA II - School Library Resources, ESEA Title II - Guidance, Counseling, and Testing)
3. Title IV - Part C - Educational Innovation and Support (Consolidated from ESEA Title III - Supplementary Educational Centers and Services, ESEA Title V - Strengthening State and Local Educational Agencies, ESEA Sec. 807 Dropout Prevention, and ESEA Sec. 808 - Demonstration)
4. Title VII - Bilingual Education

ESEA was used as a case study because:

- The legislation is scheduled for reauthorization in 1978, and the data gathered for the case study can be used in the reauthorization process.
- The programs authorized by the legislation provide a broad range of information collection problems since they are diverse in intent, are administered through a decentralized education system, and are not easily measured in terms of success or benefit.

In June 1976 staff members from the full Committee and the Subcommittee on Education, Arts and the Humanities met with GAO staff, budget officials from the Department of Health, Education, and Welfare (HEW), and Office of Education (OE) representatives. At the meeting, we requested that OE provide assistance in gathering information for us to use in developing a prototype program information system for education programs.

SCOPE OF REVIEW

Our review to determine the Committee's needs for oversight information on selected elementary and secondary education programs focused on the information (1) currently provided to the Committee, (2) available from the Federal

educational community--HEW, (3) available from State educational agencies, and (4) available from local educational agencies. We worked with OE program and budget personnel in collecting information available in the Federal sector. The information collected during 1976 and 1977 covered a wide range of descriptive information, financial data, and performance indicies.

We presented our initial assessment of the Committee's needs to the Committee in an information requirements document (Discussion of Information Needs, Senate Committee on Labor and Public Welfare, OPA 76-57, Dec. 18, 1975) as a basis for discussion. That document addressed the Committee's need for better access to program information on a regular basis. The information that we said was needed included program description, objectives, performance indices, program recipients, and budget execution data. We stated further that information on the status and performance of all ongoing programs within the Committee's jurisdiction was needed to carry out the oversight function. With guidance from the Committee concerning its needs and the problems it saw in the current reporting, we proceeded to test the availability of recurring information needed for Committee oversight.

The Committee requested that we assist in specifying, developing, and defining its overall information requirements, including proposed formats for presenting the information (report formats). We were asked to work with departments and agencies in implementing any necessary reporting systems. Emphasis was to be placed on information that would facilitate continuing Committee oversight of execution, performance, and status of programs under the Committee's jurisdiction. The goal was for the Committee to be provided appropriate fiscal, budgetary, and program-related information on a recurring basis (quarterly, semi-annually, etc.) from the departments and agencies administering the programs.

For the information available at the Federal level, an evaluation was made of (1) its usefulness to the Committee and (2) the feasibility and desirability of providing the information to the Committee. The analysis concentrated on supplying information that might be useful in measuring accomplishments against legislative objectives.

We analyzed the information available and determined which oversight information requirements could (1) be easily

filled, (2) be filled with some additional effort, and (3) not be presently met.

After assessment of the availability of information and information sources at the Federal level, we briefed the Committee staff. We indicated that the information existing in the Federal sector could be more useful if packaged in a different manner, and that there were gaps in the performance, budget, financial, and program information currently available within the Education Division. We believe that the problems with performance information are the most serious.

There was no cohesive presentation of this information available to the Committee. If properly displayed and packaged for the Committee, we believe this information could be of valuable additional assistance to the Committee in carrying out its oversight and budgetary functions. The displays and packaging of this information would need to link the budgetary, evaluation, and performance information with congressional and agency decisionmaking processes.

In 1977 and 1978 we conducted an exploratory search of education information that was in most cases available at the State and local educational agencies in response to Federal, State, and local ESEA implementing regulations. The regulations require that some information be collected and maintained by local and State educational agencies, but do not require that all this information be reported to the Education Division. Some State educational agencies collected additional information because they (1) believed that the regulations were vague and (2) wanted to ensure that they were fulfilling all requirements. States also collected information for their own monitoring and administrative purposes that was not required by the Education Division.

We visited four States--California, Illinois, New Mexico, and New York--which satisfied considerations of regional differences, variations in size of student enrollment, and the extent of data automation. The States we covered have approximately 23 percent of the national student enrollment. After working with State educational agency (SEA) officials, we visited nine local educational agencies (LEAs) in these four States. The LEA selection provided a mixture of large and small student enrollments in both urban and rural areas. The SEAs and LEAs we visited were:

--New York State Education Department:

Rochester City School District
Saratoga Springs Enlarged City School District
Jefferson/Louis Counties Board of Cooperative
Educational Services (BOCES)
Sackets Harbor Central School District

--Illinois State Education Department:

Quincy Public School District
Vandalia Public School District

--New Mexico State Education Department:

Moriarty Municipal School District
Sante Fe Public School District

--California State Education Department:

Sacramento City Unified School District

We did not address the implementation issues of timing, consistency, presentation, and level of detail needed for each specific data element. In developing the information needed by the Committee, we realize that these issues will be important in increasing the information useable for oversight, and they will have to be explored further.

Effective conduct of oversight by congressional committees requires information. We believe that all of the data elements discussed below could contribute to improved congressional oversight. Because of the uncertainty concerning the effectiveness of compensatory education, we believe it is especially important for the Committee to receive detailed information on the federally funded elementary and secondary education programs. To improve upon current policies, it is important to know the effects of the current policies.

Where detailed information is not necessary, having the detail available would allow the flexibility of satisfying needs of other users.

"* * * the apparently harmless aggregation [of data] may restrict any further utilization of the basic data (now buried in the aggregate) so that the actual effort and expense involved may be high in light of the limited usefulness of the product. * * *" 1/

We have not done an analysis of the cost of obtaining the data elements described below. According to the education report by the Commission on Federal Paperwork (Apr. 29, 1977), reliable cost data on providing education information has not yet been developed. Given that some of the costs of providing education information are intangible, it is very difficult to state definitively--in terms of benefits and costs--what amount of data should be collected. Increased information collection increases the costs for State and local educational agencies. The benefits, however, accrue primarily to the information users at the Federal level. Neither costs nor benefits can be reliably assessed.

MORE UNIFORMITY NEEDED IN THE EDUCATION PROGRAM AND BUDGETARY PRESENTATIONS

We were given the responsibility for developing standard terminology, definitions, classifications, and codes under Title VIII of the Congressional Budget Act of 1974. Sec. 801. of the act states that

"* * * Such standard terms, definitions, classifications, and codes shall be used by all Federal agencies in supplying to the Congress fiscal, budgetary, and program-related data and information."

A key ingredient in this process is the full cooperation and support of the Committees and agencies. We believe an important first step toward improving the oversight process will be taken through bringing the various program/activity lists used by legislative and executive organizations into closer agreement.

During our review, we noted that education information users have developed several program/activity lists used within larger structures that satisfy their differing needs.

1/"Setting Statistical Priorities," National Academy of Sciences, 1976, p. 28.

But cross references 1/--comparisons of program/activity lists that indicate the relationships between these lists and show their similarities and differences (see table II, p. 13)--are lacking. To further complicate the situation, the various user groups use differing technical terminologies. Sometimes, the same term has a different meaning to different users. To enable users of these varying lists and structures to communicate with each other via shared definitions, attention needs to be focused on developing greater uniformity in education lists and the terminology used.

More uniformity and compatability
needed in program/activity lists

In performing our analysis of the availability of information needed by the Congress, we developed a comprehensive program/activity list. We composed our list after reviewing the lists most commonly used, the OE organizational structure, the legislation, and the OE accounting system. The program/activity list demonstrates a programmatic presentation tied as closely as possible to the authorizing legislation and the OE accounting system.

A simplified list, such as the one we developed, needs to be adopted and maintained for use by the various participants in the congressional decisionmaking process. Our program/activity list for ESEA is shown below.

TABLE I

GAO-DEVELOPED PROGRAM/ACTIVITY LIST FOR THE
ELEMENTARY AND SECONDARY EDUCATION ACT
TITLES I, IV (PARTS B AND C), AND VII

EDUCATIONALLY DEPRIVED CHILDREN:

- Grants to Local Educational Agencies
- State Administration (percent of Title I grants)
- Incentive Grants
- State Program:
 - Handicapped in State Schools
 - Migratory Children
 - Neglected and Delinquent Children
- Studies and Evaluations:
 - Study on Updating Count of Children
 - Study on Compensatory Educator
 - Study on Measure of Poverty
 - Participation Study
 - Program Evaluation
- National Advisory Council

1/ Cross references are also commonly called crosswalks.

LIBRARIES, GUIDANCE AND COUNSELING**Libraries and Learning Resources, Consolidated:**

- State Administration
- Equipment and Minor Remodeling
 - *[State Administration]
 - *[Loans to Non-Profit Schools]
- School Library Resources
 - *[Administration of the State Plan]
- Guidance, Counseling, Testing
 - *[State Activities]

OTHER ELEMENTARY AND SECONDARY EDUCATION**Innovation and Support:**

- Strengthening State and Local Educational Agencies
- Supplementary Educational Centers and Services
- Dropout Prevention
- Nutrition and Health
 - *[Comprehensive Planning and Evaluation]
- State Administration

Bilingual Education:

- Basic Program (Grants to Local Education Agencies for Classroom Demonstration)
- Training:
 - Inservice Training
 - Professional Development
 - Resource Centers
 - Fellowships
- Materials Development
- Advisory Council
- National Information Clearing House
- Research and Studies
- Assistance to State Education Agencies
- Commissioner's Report on Bilingual Education

*Activated only if funds are distributed under the old categorical plan.

To demonstrate cross references, we will show the relationships between our program/activity list and the other major program/activity lists currently used for presenting information to the Congress.

In the summer and fall of 1977, the Senate Committee on Human Resources developed its own program/activity list from the authorizing legislation for which it was responsible.

This list was used in obtaining information for the Committee's March 15, 1978, "Views and Estimates" report to the Senate Committee on the Budget, as required by the Congressional Budget Act of 1974.

With GAO's assistance, information contained in the list was collected from all the Federal agencies that implemented programs authorized by the Senate Human Resources Committee's legislation. By this means, it was intended that the Committee have access to the available budget data on the programs for which it was responsible.

This program/activity list is currently maintained by us in the Legislative Authorization Program and Budgetary Information System (LAPIS). This system is used to assist the authorizing committees in preparing their views and estimates on the budget. The structure ties budgetary and program information to authorizing legislation. The Committee's information in LAPIS is transferred from GAO, via automated tape, to the Senate Computer Service. The Computer Service plans to maintain a system that would allow the Senate Human Resources Committee to track and tie congressional budgetary decisions to Committee recommendations. Tables II, IIa, IIb, and IIc (see pp. 13 to 16) show this program/activity list for ESEA and its relationship to our list.

A different, less detailed list is used by the House Education and Labor Committee. It is maintained for Committee Members on the House Information System's computer where the Committee's staff budget specialist tracks legislative actions on its funding recommendations. Table III (see p. 17) reflects that list for ESEA Titles I, IV (parts B and C), and VII and its relationship to the GAO-developed list.

Another less detailed list is used by the House Appropriations Subcommittee on Labor, Health, Education, and Welfare in its appropriations bills. Table IV (see p. 18) reflects that list for ESEA programs as it is currently being used in the 1978 appropriations bill and its relationship to the GAO-developed list.

The Office of Management and Budget (OMB) classifies education information several different ways, i.e., through the appropriation accounts, the Catalog of Federal Domestic Assistance, and the budget function classifications.

The appropriation accounts are used in creating the President's January budget request and subsequent revisions. Table V (see p. 19) reflects the applicable program by

TABLE II

SENATE HUMAN RESOURCES PROGRAM/ACTIVITY LIST AND ITS RELATIONSHIP
TO THE GAO-DEVELOPED PROGRAM/ACTIVITY LIST FOR ELEMENTARY AND
SECONDARY EDUCATION ACT TITLE I

SENATE HUMAN RESOURCES COMMITTEE
PROGRAM/ACTIVITY LIST

GAO-DEVELOPED PROGRAM/ACTIVITY LIST

ELEMENTARY AND SECONDARY EDUCATION:

Grants to local educational agencies for educational needs of children from families below the poverty level or living in institutions for neglected or delinquent children. Includes grants to Guam, American Samoa, the Virgin Islands, the Trust Territories of the Pacific, Puerto Rico, and American Indians, Public Law 89-10.

Participation of educationally deprived children enrolled in private schools, Public Law 93-380, Title I, (by-pass provision)

Use of other Federal agencies; Transfer and availability of appropriations, Public Law 81-874.

Special incentive grants for a state "effort index" exceeding the national "effort index." PL 90-747, Title I, Sec. 108(a)(5).

Grants to States for programs for handicapped child, Public Law 93-380.

Grants to State educational agencies for programs for migratory children, Public Law 93-380.

Grants to State educational organizations for educational needs of neglected or delinquent children which are the unmet responsibility of a local educational agency, Public Law 89-10, and grants to State agencies for neglected or delinquent children, Public Law 93-380.

Educational studies and surveys - survey and study for updating number of children counted, PL 93-380, sec. 822.

Educational studies and surveys: Study of purposes and effectiveness of compensatory education programs, PL 93-380, sec. 821.

Educational studies and surveys - study of the measure of poverty used under Title I of the ESEA of 1965, PL 93-380, sec. 823.

Evaluation of programs for education of disadvantaged children, Public Law 89-10.

National Advisory Council on the Education of Disadvantaged Children, Public Law 89-10.

EDUCATIONALLY DEPRIVED CHILDREN:

Grants to Local Educational Agencies

State Administration (percent of Title I grants)

Incentive Grants

State Programs

Handicapped in State Schools

Migratory Children

Neglected and Delinquent Children
Studies and Evaluations

Study on Updating Count of Children

Study on Compensatory Education

Study on Measure of Poverty

Participation Study

Program Evaluation

National Advisory Council

TABLE IIa

SENATE HUMAN RESOURCES PROGRAM/ACTIVITY LIST AND ITS RELATIONSHIP
TO THE GAO-DEVELOPED PROGRAM/ACTIVITY LIST FOR ELEMENTARY AND
SECONDARY EDUCATION ACT TITLE IV PART B

SENATE HUMAN RESOURCES COMMITTEE
PROGRAM/ACTIVITY LIST

GAO-DEVELOPED PROGRAM/ACTIVITY LIST

LIBRARY RESOURCES:

Elementary and Secondary School Libraries and Learning Resources,
Public Law 93-380:

Grants to States for the acquisition of instructional equipment,
Public Law 93-380 and Grants to local education agencies for
strengthening instruction in science, math, modern foreign lan-
guages, and other critical subjects, Public Law 85-864.

Loans to private non-profit schools for strengthening instruction
in science, math, modern foreign languages, and other critical sub-
jects, Public Law 85-864.

Acquisition of school library resources, textbooks, and other
printed and published instructional material and grants for instruc-
tional materials for elementary and secondary schools, Public Law
93-380 and Elementary and Secondary School Library Resources,
Textbooks, and Instructional Resources, Public Law 89-10.

Grants for testing and counseling students in elementary and
secondary schools to advise them on their aptitudes and oppor-
tunities, and to encourage them to finish their secondary school
education, Public Law 93-360 and Supplementary Education
Centers and Service: Guidance, Counseling, and Testing, Public
Law 89-10.

LIBRARIES, GUIDANCE AND COUNSELING:

Libraries and Learning Resources, Consolidated

State Administration

Equipment and Minor Remodeling

* [State Administration]

* [Loans to Non-profit Schools]

School Library Resources

* [Administration of the State Plan]

Guidance, Counseling, Testing

* [State Activities]

* Activated only if funds are distributed under the old categorical plan.

TABLE 11b

SENATE HUMAN RESOURCES PROGRAM/ACTIVITY LIST AND ITS RELATIONSHIP
TO THE GAO-DEVELOPED PROGRAM/ACTIVITY LIST FOR ELEMENTARY AND
SECONDARY EDUCATION ACT TITLE IV PART C

SENATE HUMAN RESOURCES COMMITTEE
PROGRAM/ACTIVITY LIST

GAO-DEVELOPED PROGRAM/ACTIVITY LIST

ELEMENTARY AND SECONDARY EDUCATION:

Advisory councils on Quality in Education, Public Law 91-230, Title I, Sec. 143(a)(4)(D); National Advisory Council on Quality in Education, Public Law 91-230.

State Advisory Councils on Quality in Education, Public Law 91-230.

Grants to strengthen State departments of education, Public Law 89-10.

Grants to strengthen local educational agencies, Public Law 89-230.

National Advisory Council on Supplementary Centers and Services, Public Law 90-247.

Supplementary Educational Centers and Services: Guidance, Counseling, and Testing, Public Law 89-10; Provision of vitally needed educational services not available in sufficient quantity or quality, Public Law 89-10.

Development of exemplary model educational programs, Public Law 89-10.

Dropout Prevention Projects, Public Law 90-247.

Grants for Demonstration Projects to Improve School Nutrition and Health Services for children from low-income families, Public Law 91-230.

Research and demonstration projects relating to academic or vocational education of antisocial, aggressive, or delinquent persons, Public Law 91-230.

Grants for comprehensive planning and evaluation to achieve high quality education for all, Public Law 91-230.

OTHER ELEMENTARY AND SECONDARY EDUCATION:

Innovation and Support

Strengthening State and Local Education Agencies

Supplementary Educational Centers and Services

Dropout Prevention

Nutrition and Health

Comprehensive Planning and Evaluation

State Administration

*Activated only if funds are distributed under the old categorical plan.

TABLE IIc

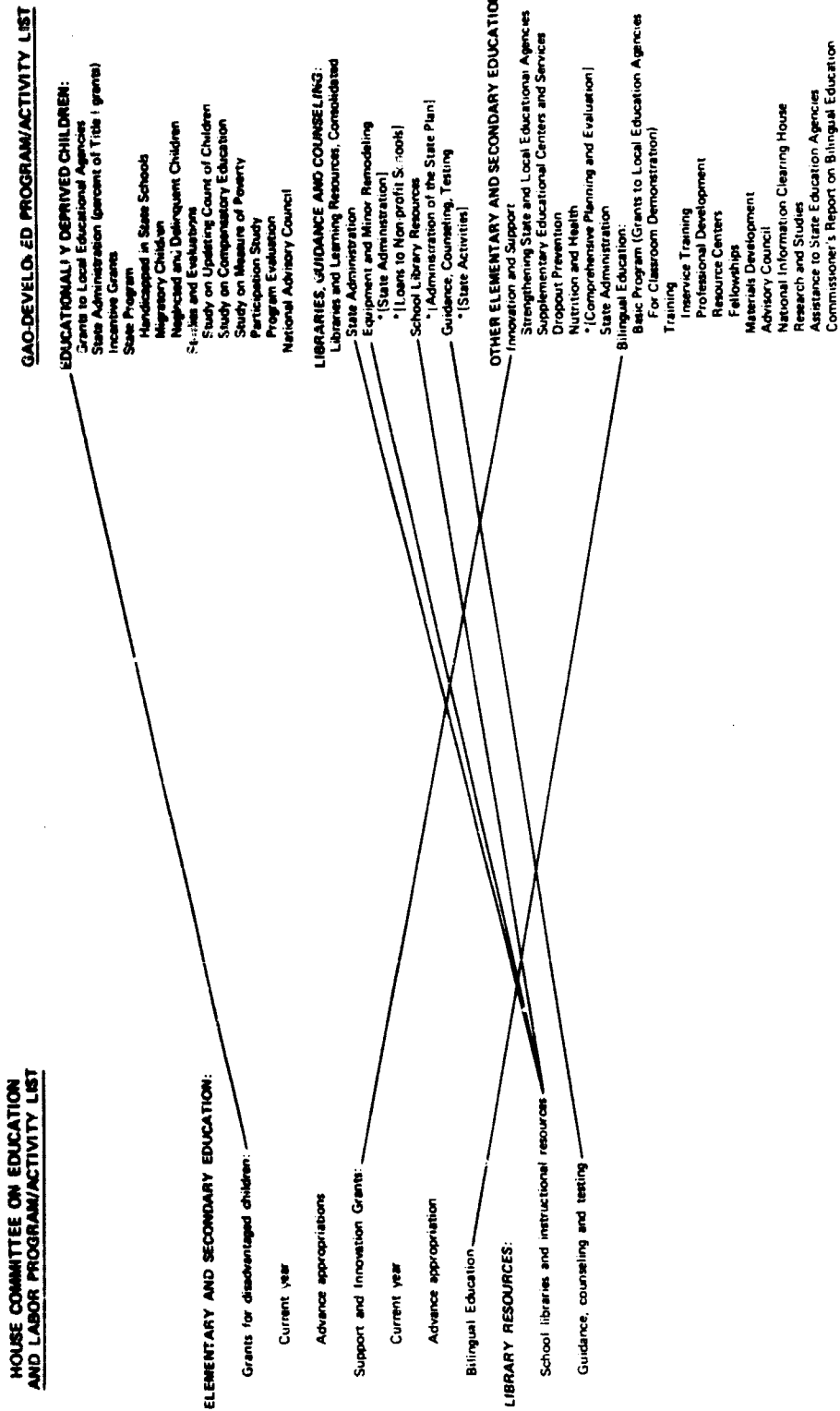
SENATE HUMAN RESOURCES PROGRAM/ACTIVITY LIST AND ITS RELATIONSHIP TO THE GAO-DEVELOPED PROGRAM/ACTIVITY LIST FOR ELEMENTARY AND SECONDARY EDUCATION ACT TITLE VII

<u>SENATE HUMAN RESOURCES COMMITTEE PROGRAM/ACTIVITY LIST</u>	<u>GAO-DEVELOPED PROGRAM/ACTIVITY LIST</u>
ELEMENTARY AND SECONDARY EDUCATION:	
Office of Bilingual Education: salaries and direct operating expenses, Public Law 93-380.	Bilingual Education:
Grants for Bilingual Education Programs, Public Law 93-380: Grants for establishment, operating, and improvement of bilingual education programs, Public Law 93-380.	Basic Program (Grants to Local Education Agencies For Classroom Demonstration) Training
Grants for auxiliary, and supplementary community, and educational activities, Public Law 93-380.	Inservice Training Professional Development
Training for persons participating in conducting bilingual education programs, Public Law 93-380.	Resource Centers Fellowships
Grants for technical assistance regarding bilingual education programs, Public Law 93-380.	Materials Development Advisory Council
National Advisory Council on Bilingual Education, Public Law 93-380.	National Information Clearing House Research and Studies
Research and Demonstration Projects in Bilingual Education, Public Law 93-380: Studies to determine basic educational needs, Public Law 93-380, Sec. 105(a)(1).	Assistance to State Education Agencies
Develop and disseminate instructional materials, Public Law 93-380.	Commissioner's Report on Bilingual Education
National Clearinghouse of information for bilingual education, Public Law 90-247.	

TABLE III

HOUSE COMMITTEE ON EDUCATION AND LABOR PROGRAM/ACTIVITY LIST AND ITS RELATIONSHIP TO THE GAO-DEVELOPED PROGRAM/ACTIVITY LIST FOR

ELEMENTARY AND SECONDARY EDUCATION ACTIVITIES I, IV, PARTS B AND C, AND VII



* Activated only if funds are distributed under the old categorical plan.

TABLE IV
 APPROPRIATIONS BILL STRUCTURE PROGRAM/ACTIVITY LIST FOR 1978
 AND ITS RELATIONSHIPS TO THE GAO-DEVELOPED PROGRAM/ACTIVITY
 LIST FOR THE ELEMENTARY AND SECONDARY EDUCATION ACT

<u>APPROPRIATIONS BILL PROGRAM/ACTIVITY LIST</u>	<u>GAO-DEVELOPED PROGRAM/ACTIVITY LIST</u>
<p>ELEMENTARY AND SECONDARY EDUCATION:</p> <p>Title I, part A (Grants to Local Educational Agencies)</p> <p>Title I, part B (Special Incentive Grants)</p> <p>Title IV, part C (Educational Innovation and Support)</p> <p>Title VII (Bilingual Education)</p> <p>LIBRARY RESOURCES:</p> <p>Title IV, part B (Libraries and Learning Resources)</p>	<p>EDUCATIONALLY DEPRIVED CHILDREN</p> <p>Grants to Local Educational Agencies</p> <p>State Administration (Department of Title I grants)</p> <p>Incentive Grants</p> <p>State Program</p> <p>Handicapped in State Schools</p> <p>Migratory Children</p> <p>Neglected and Delinquent Children</p> <p>Studies and Evaluations</p> <p>Study on Updating Count of Children</p> <p>Study on Measure of Poverty Participation Study</p> <p>Program Evaluation</p> <p>National Advisory Council</p> <p>LIBRARIES, GUIDANCE AND COUNSELING:</p> <p>Libraries and Learning Resources, Consolidated</p> <p>State Administration</p> <p>Equipment and Minor Remodeling</p> <p>*(State Administration)</p> <p>*(Loans to Non-profit Schools)</p> <p>School Library Resources</p> <p>*(Administration of the State Plan)</p> <p>Guidance, Counseling, Testing</p> <p>*(State Activities)</p> <p>OTHER ELEMENTARY AND SECONDARY EDUCATION:</p> <p>Innovation and Support</p> <p>Strengthening State and Local Educational Agencies</p> <p>Supplementary Educational Centers and Services</p> <p>Dropout Prevention</p> <p>Nutrition and Health</p> <p>*(Comprehensive Planning and Evaluation)</p> <p>State Administration</p> <p>Bilingual Education:</p> <p>Basic Program (Grants to Local Education Agencies For Classroom Demonstration)</p> <p>Training</p> <p>Inservice Training</p> <p>Professional Development</p> <p>Resource Centers</p> <p>Fellowships</p> <p>Materials Development</p> <p>Advisory Council</p> <p>National Information Clearing House</p> <p>Research and Studies</p> <p>Assistance to State Education Agencies</p> <p>Commissioner's Report on Bilingual Education</p>

* Activated only if funds are distributed under the old categorical plan.

TABLE V
 OMB APPROPRIATION ACCOUNTS STRUCTURE LIST AND ITS RELATIONSHIP TO THE
 GAO-DEVELOPED PROGRAM/ACTIVITY LIST FOR ELEMENTARY AND
 SECONDARY EDUCATION ACT TITLES I, IV, PARTS B AND C, AND VII

OMB APPROPRIATION ACCOUNTS STRUCTURE LIST	GAO-DEVELOPED PROGRAM/ACTIVITY LIST
ELEMENTARY AND SECONDARY EDUCATION:	EDUCATIONALLY DEPRIVED CHILDREN:
Grants for disadvantaged	Grants to Local Educational Agencies
Support and innovation grants	State Administration (percent of Title I grants)
Bilingual education	Incentive Grants
LIBRARY RESOURCES:	State Program
School libraries and instructional resources	Handicapped in State Schools
Guidance and counseling	Migrant Children
	Neglected and Delinquent Children
	Studies and Evaluations
	Study on Updating Court of Children
	Study on Compensatory Education
	Study on Measure of Poverty
	Participation Study
	Program Evaluation
	National Advisory Council
	LIBRARIES, GUIDANCE AND COUNSELING:
	Libraries and Learning Resources, Consolidated
	State Administration
	Equipment and Minor Remodeling
	* [State Administration]
	* [Loans to Non-profit Schools]
	School Library Resources
	* [Administration of the State Plan]
	Guidance, Counseling, Testing
	* [State Activities]
	OTHER ELEMENTARY AND SECONDARY EDUCATION:
	Innovation and Support
	Strengthening State and Local Educational Agencies
	Supplementary Educational Centers and Services
	Dropout Prevention
	Nutrition and Health
	[Comprehensive Planning and Evaluation]
	State Administration
	Bilingual Education:
	Basic Program (Grants to Local Educational Agencies)
	For Classroom Demonstration
	Training
	Inservice Training
	Professional Development
	Resource Centers
	Fellowships
	Materials Development
	Advisory Council
	National Information Clearing House
	Research and Studies
	Assistance to State Education Agencies
	Commissioner's Report on Bilingual Education

* Activated only if funds are disbursed under the old operational plan.

activities in the appropriation accounts as they relate to ESEA programs and their relationship to our list.

OMB also is responsible for publishing the Catalog of Federal Domestic Assistance, which provides information on all domestic programs providing assistance to State and local governments. The ESEA programs listed in the Catalog and their relationship to the GAO-developed list are shown in table VI. (See p. 21.)

Budget functional categories have been used since 1948 to classify each Federal program according to the major purpose to be served. Section 601(i) of the Congressional Budget Act of 1974 requires that budget and program information for all Federal activities be presented in terms of national needs, agency missions, and basic programs beginning with the fiscal year 1979 budget. To meet these requirements, OMB has refined the fiscal year 1979 functions and subfunctions to better reflect national needs and agency missions.

The majority of Federal educational assistance, including ESEA programs, is classified under Functional code 500 (National Need: Education, Training, Employment, and Social Services), as shown in table VII. (See p. 22.) The ESEA programs are included in the schedule under elementary and secondary education.

Because each Federal program is classified according to the major purpose served, many education-related programs which directly support another national need or mission are displayed in other areas. Table VIII (see p. 23), Federal Education Outlays Supporting Other Major Missions, 1979, shows the education-related programs (by agency) which are classified under other national needs or missions.

Two more program/activity lists are used by HEW for education information commonly submitted to the Congress. One list, shown in table IX (see p. 24) for ESEA programs, is used in the budget justifications which are submitted to the Congress with the President's budget. The relationship of that list to the GAO-developed list is shown in table IX. The other list consists of the Education Division's all-purpose tables that are compiled by the Office of Planning, Budgeting, and Evaluation. That list and its relationship to the GAO-developed list is shown in table X. (See p. 25.)

TABLE VI

OMB CATALOG OF FEDERAL DOMESTIC ASSISTANCE PROGRAM LIST AND ITS
 RELATIONSHIP TO THE GAO-DEVELOPED PROGRAM/ACTIVITY LIST FOR
 ELEMENTARY AND SECONDARY EDUCATION ACT TITLES I, IV, PARTS B AND C, AND VII

GAO-DEVELOPED PROGRAM/ACTIVITY LIST

EDUCATIONALLY DEPRIVED CHILDREN:

- Grants to Local Educational Agencies
- State Administration (percent of Title I grants)
- Incentive Grants
- State Program
- Handicapped in State Schools
- Migratory Children
- Neglected and Delinquent Children
- Studies and Evaluations
- Study on Updating Count of Children
- Study on Compensatory Education
- Study on Measure of Poverty
- Participation Study
- Program Evaluation
- National Advisory Council

LIBRARIES, GUIDANCE AND COUNSELING:

- Libraries and Learning Resources, Consolidated
- State Administration
- Equipment and Minor Remodeling
- * [State Administration]
- * [Leans to Non profit Schools]
- School Library Resources
- * [Administration of the State Plan]
- Guidance, Counseling, Testing
- * [State Activities]

OTHER ELEMENTARY AND SECONDARY EDUCATION:

- Innovation and Support
- Strengthening State and Local Educational Agencies
- Supplementary Educational Centers and Services
- Dropout Prevention
- Nutrition and Health
- * [Comprehensive Planning and Evaluation]
- State Administration
- Bilingual Education:
- Basic Program (Grants to Local Education Agencies
- For Classroom Demonstration)
- Training
- Inservice Training
- Professional Development
- Resource Centers
- Fellowships
- Materials Development
- Advisory Council
- National Information Clearing House
- Research and Studies
- Assistance to State Education Agencies
- Commissioner's Report on Bilingual Education

Program
Number

- 13 403 Bilingual Education
- 13 427 Educationally Deprived Children - Handicapped
- 13 428 Educationally Deprived Children - Local Educational Agencies
- 13 429 Educationally Deprived Children - Migrants
- 13 430 Educationally Deprived Children - State Administration
- 13 431 Educationally Deprived Children in State Administered Institutions Serving Neglected or Delinquent Children
- 13 570 Libraries and Learning Resources
- 13 571 Educational Innovation and Support

* Activated only if funds are distributed under the old categorical plan.

TABLE VII

NATIONAL NEED: EDUCATION, TRAINING, EMPLOYMENT, AND SOCIAL SERVICES

[Functional code 500: in millions of dollars]

Major missions and programs	Recom- mended budget authority for 1979	Outlays			
		1977 actual	1978 estimate	1979 estimate	'80 a. wife
Education:					
Elementary, secondary, and vocational education:					
Aid to education agencies:					
Elementary and secondary education...	3,395	2,352	2,574	3,003	3,265
Proposed legislation.....	400	-----	-----	28	285
Impact aid.....	856	765	810	838	850
Proposed legislation.....	676	-----	-----	-58	-88
Education for the handicapped.....	972	249	367	562	850
Occupational, vocational and adult education.....	726	693	740	803	740
Other.....	683	530	595	642	674
Child development.....	735	469	587	664	735
Subtotal, elementary, secondary, and vocational education.....	8,443	5,078	5,673	6,484	7,312
Higher education:					
Student aid and institutional support.....	4,414	2,953	3,627	4,107	4,378
Special institutions.....	175	152	162	182	188
Subtotal, higher education.....	4,588	3,104	3,789	4,289	4,566
Research and general education aids:					
Special projects and training.....	105	43	75	92	100
Proposed legislation.....	11	-----	-----	2	9
Educational research:					
National Institute of Education.....	100	64	80	90	102
Other.....	40	19	24	32	37
Cultural activities.....	560	409	521	501	592
Proposed legislation.....	-----	-----	-----	-----	-6
Other.....	524	392	478	530	519
Subtotal, research and general education aids.....	1,339	927	1,177	1,247	1,353
Subtotal, education.....	14,370	9,109	10,639	12,020	13,231

SOURCE: The Budget of the United States Government, FY 1979, pages 164-165.

TABLE VIII

FEDERAL EDUCATION OUTLAYS SUPPORTING OTHER MAJOR MISSIONS, 1979
 (In millions of dollars)

Functional code	Agency	Elementary and secondary education	Higher education	Adult and continuing education	Total
604/352	Agriculture.....	2,820	10	260	3,090
702	Veterans Administration.....	66	2,009	266	2,341
601	Health, Education, and Welfare: Social Security Administration.....	390	1,504	150	2,044
051	Defense.....	376	721	257	1,354
151	International Development Assistance.....	3	-----	126	129
251	National Science Foundation.....	14	55	5	74
750	Justice.....	2	43	17	62
150	International Communications Agency.....	6	-----	47	53
450	Housing and Urban Development.....	-----	-----	54	54
452	Appalachian Regional Commission.....	38	4	3	45
400	Transportation.....	-----	-----	48	48
---	Other.....	14	23	60	97
	Total.....	3,729	4,360	1,293	9,381

SOURCE: The Budget of the United States Government, FY 1979, page 170.

TABLE IX
OE BUDGET JUSTIFICATIONS PROGRAM/ACTIVITY LIST AND ITS RELATIONSHIP
TO THE GAO-DEVELOPED PROGRAM/ACTIVITY LIST FOR ELEMENTARY AND SECONDARY
EDUCATION ACT TITLES I, IV, PARTS B AND C, AND VII

OE BUDGET JUSTIFICATIONS PROGRAM/ACTIVITY LIST	GAO-DEVELOPED PROGRAM/ACTIVITY LIST
Grants for disadvantaged (ESEA II)	EDUCATIONALLY DEPRIVED CHILDREN:
Grants to local education agencies	Grants to Local Educational Agencies
Grants to State agencies	State Administration (percent of Title I grants)
Children of migratory workers	Incentive Grants
Neglected or delinquent children	State Program
Handicapped children	Handicapped in State Schools
State administration	Migratory Children
Studies and evaluation	Neglected and Delinquent Children
Incentive grants (Part B)	Studies and Evaluations
Evaluation (Part C)	Study on Updating Count of Children
Studies (General Education Provisions Act, Sec. 417(a)(21))	Study on Compensatory Education
School libraries and instructional resources	Study on Measure of Poverty
(Elementary and Secondary Education Act, Title IV, Part B)	Participation Study
Support and innovation grants (ESEA Title IV, Part C)	Program Evaluation
Innovative projects for supplementary centers and services	National Advisory Council
Projects for handicapped children	LIBRARIES, GUIDANCE AND COUNSELING:
Dropout prevention projects	Libraries and Learning Resources, Consolidated
Nutrition and health demonstration projects	State Administration
Projects for strengthening leadership resources of LEAs	Equipment and Minor Remodeling
Strengthening SEA leadership resources (55% of the amount used for direct support services to LEAs)	* [State Administration]
Administration of the program	* [Loans to Non-profit Schools]
Bilingual education (ESEA VII)	* [School Library Resources]
Grants to school districts Part A Sec. 721	* [Administration of the State Plan]
LEA inservice training Part A, Sec. 721(a)(3)	Guidance, Counseling, Testing
Other Part A Sec. 721(b)(4) Sec. 723(a)(A)	* [State Activities]
Support services	OTHER ELEMENTARY AND SECONDARY EDUCATION:
Materials development Part A Sec. 721(a)(4)	Innovation and Support
Grants to State Education Agencies Part A Sec. 721(b)(3)	Strengthening State and Local Educational Agencies
Advisory council Part B, Sec. 732	Supplementary Educational Centers and Services
Information Clearinghouse Part C, Sec. 742(c)(3)	Dropout Prevention
Research and studies Part C, Sec. 741, 742	Nutrition and Health
	* [(Comprehensive Planning and Evaluation)]
	State Administration
	Bilingual Education:
	Basic Program (Grants to Local Education Agencies
	For Classroom Demonstration)
	Training
	Inservice Training
	Professional Development
	Resource Centers
	Fellowships
	Materials Development
	Advisory Council
	National Information Clearing House
	Research and Studies
	Assistance to State Education Agencies
	Commissioner's Report on Bilingual Education

*Activated only if funds are distributed under the old categorical plan.

TABLE X
 OE ALL-PURPOSE TABLE PROGRAM/ACTIVITY LIST AND ITS RELAT¹ SHIP
 TO THE GAO-DEVELOPED PROGRAM/ACTIVITY LIST FOR ELEMENTARY AND SECONDARY
 EDUCATION ACT TITLES I, IV, PARTS B AND C, AND VII

<u>OE ALL-PURPOSE TABLE PROGRAM/ACTIVITY LIST</u>	<u>GAO-DEVELOPED PROGRAM/ACTIVITY LIST</u>
ELEMENTARY AND SECONDARY EDUCATION:	EDUCATIONALLY DEPRIVED CHILDREN:
Grants for disadvantaged	Grants to Local Educational Agencies
Grants to local educational agencies	State Administration (percent of Title I grants)
State agency programs	Incentive Grants
State administration	State Program
Evaluation and studies	Handicapped in State Schools
	Migratory Children
	Neglected and Delinquent Children
	Studies and Evaluations
	Study on Updating Count of Children
	Study on Compensatory Education
	Study on Measure of Poverty
	Participation Study
	Program Evaluation
	National Advisory Council
	LIBRARIES, GUIDANCE AND COUNSELING:
Support and innovation grants	Libraries and Learning Resources, Consolidated
	State Administration
	Equipment and Minor Remodeling
	*(State Administration)
	*(Loans to Non-profit Schools)
	School: Library Resources
	*(Administration of the State Plan)
	Guidance, Counseling, Testing
	*(State Activities)
	OTHER ELEMENTARY AND SECONDARY EDUCATION:
Bilingual education:	Innovation and Support
Grants to school districts (LEAs)	Strengthening State and Local Educational Agencies
Training grants:	Supplementary Educational Centers and Services
(1) LEA inservice training	Dropout Prevention
(2) Other	Nutrition and Health
Support services:	*(Comprehensive Planning and Evaluation)
Materials development	State Administration
Grants to State agencies	Bilingual Education
Advisory council	Basic Program (Grants to Local Education Agencies For Classroom Demonstration)
Information clearinghouse	Training
Research and studies	Inservice Training
	Professional Development
	Resource Centers
	Fellowships
	Materials Development
	Advisory Council
	National Information Clearing House
	Research and Studies
	Assistance to State Education Agencies
	Commissioner's Report on Bilingual Education
LIBRARY RESOURCES:	
School libraries and instructional resources	
Guidance and counseling	

* Activated only if funds are distributed under the old categorical plan.

More uniformity in terminology
would simplify cross references
and improve information usage

Attempting to construct cross references among these different program/activity lists and structures can be frustrating because the relationship of one to another is not always readily apparent. Similar terms used differently in the education community may not have the same meaning and thus may not be comparable, causing considerable confusion among the users. Relating the more complex and detailed lists and structures to similarly detailed or simpler ones can be difficult.

Budgetary concepts can be particularly difficult for people not familiar with the terminology. For example, tracking total outlays is important to the Congress since it sets limits on Federal spending. The Senate Human Resources Committee's staff is interested in obtaining budget and program data, such as outlays, at a lower level of detail than shown in The Budget of the U.S. Government. However, OE officials informed us that outlays are not tracked below their appropriation account level.

In the absence of outlay data at the program level, OE's accrued cost data must be used. OE collects cost data in terms of its Common Accounting Numbers System, which approximately corresponds to OE's programs or activities. The use of the data on a monthly and quarterly basis is greatly restricted due to inconsistent treatment of accruals during the year. (Accrual basis of accounting is a method of accounting in which revenues are recognized in the period earned and costs are recognized in the period incurred regardless of when payment is received or made.) 1/

However, outlays and accrued cost data are not the same, and the subtleties in differences between them would have to be understood by congressional decisionmakers, who have little time to spare for technical details if they are to make full use of the information. We are attempting to assist in the standardization of budget terms by periodically publishing and updating a glossary which defines budgetary and economic terms. 1/ However, the consistent application of these standard definitions requires the full cooperation of the executive branch and the education community.

1/"Terms Used In The Budgetary Process" by the Comptroller General of the United States (PAD-77-9, July 1977).

Groups in any field define terminology in ways which serve their purposes and needs. Within the field of education itself, conflicting approaches and purposes result in inconsistent use of terms and definitions. This causes considerable confusion for those outside the field who are not familiar with the terminology of a particular environment.

In an effort to enhance a meaningful exchange of information terms, the National Center for Education Statistics (NCES) has been publishing handbooks dealing with data collection, standard definitions, and terminology since 1953. In 1976 the Administrator of NCES was assigned the responsibility for developing a common set of definitions and terms after consultation with the head of each bureau or agency directly responsible for the administration of an applicable program. 1/

Conclusions

By comparing the previous tables, it is apparent that there are several varying lists and structures used for programs authorized by ESEA. Each serves a purpose that influences its form. More than one appears to be justified because of differing information requirements of the various users. What is needed is a method that relates them and identifies, in detail, programs with similar objectives authorized by statutes other than ESEA.

The number of lists and structures being used appears to be growing. This contributes to communications problems. We would like to see this trend reversed. As stated previously, we believe that several program/activity lists and structures may be necessary to satisfy different reporting needs. However, we believe that there should be further efforts by the various information users to move toward uniformity where possible. Where this is not possible, easily usable cross references should be developed and made available. Developing more uniformity among program/activity lists and simultaneously meeting the needs of the various education information users will be a difficult and complex task. It will require a dedicated effort.

In addition, there needs to be more uniformity in the terms and their definitions used in reports to the Congress on education programs. Congressional decisions are made more difficult because information obtained about a program from more than one source is inconsistent or otherwise challenges comparison. Unnecessary variations need to be

1/20 U.S.C. 1221 e-1.

eliminated. We recognize that where specific needs of a group cannot be served by a standard term, variations should remain. To minimize potential problems accentuated by variations, easy-to-understand definitions and explanations need to be made available to the information users.

Recommendations to the Secretary of
Health, Education, and Welfare

The Secretary of Health, Education, and Welfare, should cooperate with us, and coordinate with OMB and the interested congressional committees, to develop a basic program/activity list and cross references between other necessary lists and structures.

Terms to be used in reporting to the Congress on the execution of education legislation should be integrated into NCES' handbooks. As soon as possible, after passage of new education legislation, the Secretary of Health, Education, and Welfare should coordinate with the appropriate congressional committees and cognizant Federal agencies on changes or additions to terms and definitions, which respond to the requirements of the legislation, in NCES' handbooks.

OPTIONS FOR IMPROVING OVERSIGHT INFORMATION

In our review, we identified the information that could be useful for congressional oversight and which is generally available for ESEA programs at the Federal level and at the State and local educational agencies we visited. In most cases, we found that the information described below is currently available or could be generated. This information includes descriptive, evaluation, and financial data. Presently, the Education Division reports some of the information to the Committee. The remainder would have to be collected from the Education Division or the State or local educational agencies.

Although the Committee currently receives a high volume of information, Committee and Subcommittee staff to whom we spoke said that much of the information they received was inappropriate for their needs. They said much of the information was not clear, or the information was aggregated and thus did not show separate information for the component parts. In addition, some of their information needs for performing oversight of the programs were not met at all. For example, the Committee does not receive, on a regular basis, test score data for gaging national program needs.

We believe that all of the data elements discussed below (see pp. 31 to 34) could contribute to improved congressional decisionmaking. The more comprehensive the system and the data elements included in it, the higher the cost of the system. Among other things, the additional data provided by State and local educational agencies would have to be transmitted to the Education Division and then to the Committee. Timing, consistency, and aggregation problems would have to be resolved. In light of the substantial concern about the Federal reporting burden, the Committee may need to fully assure information providers that the data will be appropriately used. If the Committee decides that some or all of this information should be collected and reported, there would need to be additional verification that the information is available at most or all State and local educational agencies, nationwide.

Alternative levels of information

To allow the Congress 1/ flexibility in considering the trade-off between having the information and the cost of

1/Although this report is directed to the Senate Human Resources Committee, other committees would probably find this information useful.

providing it, we propose four options for information collection. These options satisfy, to varying degrees, your Committee's need for selected elementary and secondary education information. Although, we did not address HEW's needs for management information, we believe that much of this information would be helpful to HEW and other education officials. These options reflect varying levels of information packages along a continuum ranging from the most comprehensive to the least:

- Option 1: Comprehensive data packages supplied to the Committee.
- Option 2: Selected data reported to the Committee and the remainder retained at the Education Division to be available upon request.
- Option 3: Selected data obtained by the Education Division and reported to the Committee.
- Option 4: Maintain existing reporting systems.

Although it might appear that individual data elements within each option could be added and subtracted in a variety of combinations, the interrelationships between the data elements are important in reviewing the programs. The data elements would be less useful (perhaps even misleading) if these interrelationships were disturbed. For example, pupil enrollment is one measure of the coverage of a program, but the need for the program is revealed more precisely when contrasted with a measure of eligibility, such as the number of children below a specific percentile as measured by standardized test scores. Using enrollment figures without eligibility figures, or eligibility figures without enrollment figures, would show an incomplete and thus inaccurate picture of the need for the program. Even if both of these figures are available, the Committee may need to obtain additional data to get an understanding of notable differences among States and local educational agencies.

Toward this end, the information in the following five categories may be useful to the Committee but would naturally have to be weighed against the cost and burden of data collection and analysis. Unless specifically indicated, the

data elements below are generally available at the educational agencies included in our review. These categories and the information to be provided are:

1. Program identification description:

- Brief description of the program.
- Citation of authorizing legislation and its termination date.
- Description of funding procedures, type of grant, basis of awards.
- Appropriation account number.
- Catalog of Federal Domestic Assistance number.
- Program manager's name and telephone number.
- Information on related Federal and State programs: name, authorizing legislation and its termination date, brief description, administering agency.
- Information on required reports: name, legislative citation requiring report, frequency of submission, and report manager's name and telephone number.
- Information on Federal regulations: citation, date published, brief description, status of proposed regulations.

2. Fiscal data:

- Expenditures by title by object of expenditure (e.g., salaries).
- Average Federal expenditure per pupil under each title (amount and percent of total per pupil expenditure).
- Federal expenditures by title.
- State expenditures by title.

- Local expenditures by title.
- Expenditures on other Federal, State, and local programs with a similar target group (by State). 1/
- Federal budgetary actions: authorization, total budget authority, new budget authority, apportionments/reapportionments, allotments, deferrals, reprogrammings, date and description of recisions, total obligations, obligations from current budget authority, obligations from prior year budget authority, outlays from new budget authority, total outlays, receipts, and reimbursements.

3. Student eligibility and participation:

- Pupil enrollment in programs developed under each title by type of institution.
- Pupil participation (duplicated count) by type of program developed by LEAs, under each title (e.g., reading).
- The number of educationally deprived children and the skill level by the amount below the national average (fiftieth percentile) of the achievement distribution according to the norm-referenced model: 1/
 - Pupils being served under each title.
 1. In the bottom quarter.
 2. In the bottom third.
 3. In the bottom half.

1/Although not currently available in the educational agencies in our review, this could be generated.

--Pupils not being served.

1. In the bottom quarter.
2. In the bottom third.
3. In the bottom half.

--Pupil participation in other Federal, State, and local programs with a similar target group (by State). 1/

--Pupil participation (unduplicated count) by title (by State).

--Average length of time enrolled in programs developed by LEAs under each title (by State).

4. Assessment of needs:

--Student achievement (by State) measured by standardized test score statistics.

--The number of LEAs using each type of needs assessment procedure and a description of the approved procedures (by State).

5. Program evaluation information:

--Number of audits of programs under each title conducted by a local audit agency, the SEA or HEW, a description of any exceptions, and the disposition (by State).

--Evaluations conducted by SEAs: 1/

Information on evaluation studies: methodology, findings, and recommendations.

Number of on-site visits in addition to studies.

--Information on evaluation studies conducted by LEAs: methodology, findings, and recommendations. 1/

1/Although not all currently available in the educational agencies in our review, this/these could be generated.

--Procedures for evaluations conducted at the Federal level: evaluation authorization, description of requirement, date of mandated reporting, classification or type of program, description of evaluation techniques/methodology, primary program objectives, secondary program objectives, and short-term program objectives.

--Evaluations conducted at the Federal level: name, program authorization legislation, description of objectives and methodology, performer, cost, starting and completion dates, uses of the evaluation, recommendations for program changes, changes made as a result of the evaluation recommendations, and name and telephone number of person responsible for evaluations.

Using the criteria of interrelated data elements and the results of our review, we present four options:

Option 1: Comprehensive data packages supplied to the Committee

Under this option, the Education Division would collect and submit all of the data cited above directly to the Committee. The Committee would then have access to raw data elements in formats which would allow analyses of the data. To assure that this information would be provided in the most useful form and at the time needed, the data required could be specified in law. In the following sections, we describe each area and why the data elements would be necessary for comprehensive data packages.

Program identification description

A clear understanding of the nature of the program is important to any oversight review. Specific descriptions are important in developing a clear understanding of the program. These descriptions would be especially important if the activity lists are not standardized. (See p. 27.) The data elements included in this area would describe the program and the program procedures.

The relevant Federal regulations would provide many of the details of program administration. The citations to the appropriate sections of the regulations would facilitate use of the regulations for oversight purposes.

Descriptions of reports required by legislation are maintained by us as part of a larger effort required by section 801 of the Congressional Budget Act of 1974 to monitor recurring reporting requirements to the Congress. We would continue to provide these descriptions to the Committee.

Identification of related programs could facilitate a review of statutes with similar objectives. For example, the Headstart program (authorized by the Economic Opportunity Act of 1964, as amended) has similar objectives to those of the programs authorized by ESEA Title I. Information on these programs could include brief descriptions and references to additional information.

Fiscal data

Most fiscal data maintained by the Education Division consists of budgetary transactions at the Federal level. Other financial data could be obtained from State financial reports provided to the Education Division. ^{1/} With the receipt of fiscal data from the Education Division and the State reports, the Committee could more closely monitor the implementation of the program as it is reflected in budgetary actions.

Data including the expenditures by object of expenditure for each title could help the Committee in monitoring the programs developed under ESEA. Given the joint funding from Federal, State, and local sources, the amount of funds from each source could give the Committee greater insight into the impact of Federal education dollars. Through analysis of Federal budgetary transactions, the Committee could learn the rate at which funds are being spent on the program.

^{1/}The Financial Status Report (HEW 601T) currently reports some of the information (e.g., total outlays by program), but it would have to be modified to receive other financial information (e.g., expenditures by title by object of expenditure).

Student eligibility and participation

Data concerning student eligibility and participation would enable the Committee to monitor (1) the total number of students eligible for assistance, (2) the number of students actually participating in ESEA programs, and (3) the amount each of these groups are below the national average. In some cases when Federal programs fail to serve all eligible students, States have established similar programs with State funds. Data on participants in these State programs could highlight imbalances in the distribution of program funding between States.

The Committee could also learn the limits of the current Federal programs as described by (1) the number of eligible pupils who are not served either by a Federal program or similar State program and (2) the extent to which these pupils are educationally behind their peers.

Assessment of needs

Under criteria established by OE, LEAs develop their own methods for (1) demonstrating their need to participate in Federal programs and (2) selecting program participants. LEAs use various needs assessment procedures to select participants: testing, teacher evaluation, parental requests, and combinations of these factors.

Currently, there are no standardized procedures which LEAs use to determine either the need for the program or the students who are eligible. The Education Division does not generally have information on the procedures used to select eligible students.

Information regarding the needs assessment procedures could inform the Committee of the priorities being determined and addressed. We also believe that information on the need for Federal programs in combination with information on eligibility criteria for participants could identify problems such as inappropriate emphasis on certain criteria that the Committee might want to correct. The Committee could also evaluate the appropriateness of the needs assessment procedures (e.g., the scheduling of testing).

As part of needs assessment information, standardized achievement test scores could also be collected on a regular

basis. The Committee would receive information on the test results, which may be useful in program planning. We recognize that standardized testing does have limitations. As discussed in a recent GAO report, ^{1/} these test scores have been criticized for being (1) biased against minority groups and (2) unable to provide an absolute measure of how well a child could read. These are important concerns, and research is needed on ways to improve the ability of standardized tests to measure achievements. However, information on student performance as measured by standardized tests appears to be the primary measure of achievement that could be made available to decisionmakers at the Federal level. OE officials informed us that they would not advise the use of test scores for purposes other than needs assessment outside the context of a predetermined study design.

Program evaluation information

OE develops, monitors, and reports evaluations of Federal education programs. OE also reports information on State-conducted evaluations of these programs. The "Annual Evaluation Report on Programs Administered by the U.S. Office of Education" could be an important element of this option. Under this option, the Committee would also receive the methodology, findings, and recommendations of evaluations conducted at Federal, State, and local levels. This is important information, and could assist Committee oversight by providing information on the achievements of the programs among States and among programs. The Annual Evaluation report could be of additional use if modified to include all the evaluation information included in this option.

OE officials pointed out that the report "Uses of State Administered Federal Education Funds" has laid the base for the provision of increased information to the Committee. The Committee could also have available information on the audits performed for program monitoring and summaries of actions taken to respond to the findings.

OE has developed evaluation models for Title I which use either standardized achievement tests or tests for which norms are not available. These models establish procedures for State and local educational agencies to use in evaluating Title I programs. These models are designed

^{1/}"Problems and Needed Improvements in Evaluating Office of Education Programs" (HRD-76-165, Sept. 8, 1977).

to assist State and local educational agencies in performing evaluations. The results of evaluations which follow these models could provide evaluation information comparable to other Title I programs. The use of these models could be an important part of providing comparable evaluation information to the Committee. Program oversight could be enhanced if OE officials expanded the use of these models to include other Federal education programs. We believe it is also important to report to the Committee the methodology, findings, and recommendations of the annual State evaluation and LEA-sponsored evaluations using these models.

The Committee could also have available program evaluation procedures for evaluations conducted at the national level. Data elements for this area include a description of the requirement and the methodology to be used. This information would allow oversight of evaluation procedures being used and a check on the required evaluations.

Summary

All of the data described above could make a significant contribution to the base of information the Committee needs to exercise its oversight responsibility. This assumes that necessary changes can be made to assure that the data provided will be timely, consistent, and in a form appropriate for Committee analysis and evaluation. However, the effort involved in developing and providing this information is also significant. We believe most of the information is generally available and could be reported to the Committee. The collection of additional raw data would be required only where it does not now exist. In most cases, OE would be required only to collect information presently maintained by State and local educational agencies.

Program identification description data is maintained at the Federal level. The initial collection of this data may require some investment of resources. Once established, however, maintenance should not be difficult as this information will change only if the legislation or method of implementation changes significantly. Before the Committee can fully utilize the information, a common program/activity list (see pp. 10 and 11) would have to be accepted by the relevant committees, the Education Division, and OMB. Thus, with respect to program identification description data, State and

local educational agencies would probably not have to submit any additional information as a result of changes in the program/activity list. However, these changes could ultimately affect the level of detail of reporting. If, for example, the program/activity list under each title were to reflect the types of programs, then State and local educational agencies would have to report financial data by type of program.

The fiscal data on Federal budgetary actions that we believe could be useful to the Committee would not require any additional information collection; the Education Division could provide these figures to the Committee. Some changes would have to be made in the fiscal data reported from the States, but these changes would probably not add significantly to the States' reporting burden. Although new items would be requested, several of the items currently requested on the standard form (Financial Status Report 601T) could be eliminated as they are not used to a great extent by OE program managers. Changes in the program/activity list could affect reporting from Federal, State, and local levels.

Some information on student participation is currently collected by the Education Division. To fully understand the coverage of the program, State and local educational agencies would have to report more detail on participants and eligible non-participants. Changes in the program/activity list could affect this data as well.

Data is not available on (1) the number of pupils eligible for ESEA programs, (2) the extent that these pupils are below a specified percentile of the achievement distribution according to the norm-referenced model, or (3) how many are not served by any compensatory program. This additional information is important in measuring eligibility in the program, but would have to be collected and reported by LEAs.

The Committee could receive needs assessment information measured by standardized test scores. Needs assessment criteria also could be reported by local educational agencies. As this information or related information is not presently reported to the Federal level, requiring this information would be a new requirement rather than an expansion of similar information already collected. Awareness of the criteria

at the Federal level could lead to a desire for standardization of the criteria. Presently, LEAs have the discretion to use any needs assessment they consider appropriate as long as the procedures used in development are consistent with ESEA regulations. If LEAs are required to adopt more uniform criteria and report these procedures for review and analysis by the Committee, standardization could permit the further step of aggregating the data at the Federal level. However, the disadvantage of standardization for the sake of Federal-level aggregation is that it would reduce local discretion by forcing LEAs to choose among a limited number of procedures.

To provide the Committee with improved program evaluation information, the State and local educational agencies would have to significantly increase the amount and types of information reported. Much of the essential performance information would have to be standardized to allow for comparability between and within programs. This standardization would further reduce local discretion as the LEAs would be forced to evaluate according to standardized procedures which might not be as appropriate as methodologies designed specifically for the individual LEA.

The increased reporting necessary to provide the Committee with comprehensive information for oversight purposes is significant. State and local educational agencies would have to provide more information on student eligibility and participation, assessment of needs, and program evaluation. Standardization of procedures and program/activity lists would at least initially increase the effort required to furnish the information.

Option 2: Selected data reported to the Committee and the remainder retained at the Education Division to be available upon request

Recognizing resource constraints and the difficulty of providing a large amount of information in a short period of time, it may not be feasible for the Committee to receive all of the information described in Option 1. All of this information would still be useful, and both the Committee and the Education Division would benefit by having it available. However, the Committee may choose to receive regularly only the data which is critical to its own decision-making process.

Under this option, the following information would be reported to the Committee:

1. Brief description of the program.
2. Total outlays.
3. Outlays from new budget authority.
4. Total budget authority.
5. Expenditures by title by object of expenditure (e.g., salaries).
6. Pupil participation (unduplicated count) by title (by State).
7. The number of educationally deprived children as measured by the amount below the national average (fiftieth percentile) of the achievement distribution according to the norm-referenced model. 1/
8. Student achievement (by State) measured by standardized test score statistics.
9. Summaries of evaluations conducted by State and local educational agencies.
10. Summaries of Federal-level evaluations.

In this way, the Committee would receive only selected information, and the amount of reporting to the Committee would be reduced. At the same time, the comprehensive list of information described in Option 1 would be easily available to the Committee through ad hoc queries of the Education Division. However, the procedures necessary to standardize and report all of the information would still be necessary.

The priority information in each of the five areas of data--program identification description, fiscal data, student participation, assessment of need, and program evaluation information--is described below.

1/ Although not currently available in the educational agencies in our review, this could be generated.

Program identification description

The Committee would receive very little information in this area, i.e., only the name and a description of the program. The remainder of the information could be maintained by the Education Division. We do not consider most of this information a priority because it is generated at the Federal level, and thus is commonly known or easily available from other sources, such as the Catalog of Federal Domestic Assistance or The Budget of the U.S. Government--Appendix. Once the program/activity list is established (see pp. 10 and 11), the name of the program can quickly lead to the additional information that is needed.

Fiscal data

The information provided to the Committee on Federal-level budgetary actions could be limited for the same reasons as above. The Committee could still monitor the rate at which funds are being spent over time for each program. This would require reporting 1/ (1) outlays from new budget authority, and (2) total budget authority. Total outlays would also be reported to allow the Committee to monitor outlays against the ceilings set by the Congress.

We believe the Committee should receive an analysis of the expenditures by title by object of expenditure. This is only a part of the description of the way State and local educational agencies use Federal education funds. However, the Committee could use this analysis as a mechanism to indicate where further information, requested from the Education Division, would assist in oversight.

Student eligibility and participation

Measures of eligibility and participation are crucial to programs that are attempting to assist the disadvantaged. It is imperative, therefore, that the Committee receive some of this information. We believe that the Education

1/This information is currently available only on an annual basis.

Division should report to the Committee information on both eligibility and participation by State, but that data on the extent to which these pupils are educationally behind their peers not be included. Again, this information could be regarded as just one part of a set of measures and could be used to indicate where further data analysis is needed.

Assessment of need

The Committee would not need to regularly receive information on the methods LEAs use to select programs and program participants. If acceptable methods were standardized, the methods chosen would not vary much over time. The Education Division could maintain this data for its own use and that of the Committee. The Committee could also receive needs assessment information measured by standardized test scores.

Program evaluation information

The most important information in this area is that which attempts to measure the results of the Federal programs. The Committee could receive summaries of evaluations conducted at the Federal, State, and local levels. Although the results of any evaluation may be qualified, given the methodology of the study, this information is not crucial to the Committee for oversight. Under this option, if the Committee wishes to review the evaluation results in detail, the Education Division could provide the relevant information on any study results reported.

Summary

Given the resource constraints under which the Committee conducts its oversight function, we believe the data described above is critical in developing a base for decisionmaking. The Committee would not receive the information needed for a complete analysis of the programs. However, the remaining information could be available from the Education Division.

The cost of standardizing the data, collecting it from State and local governments, and maintaining it at the Education Division would not be reduced, as all of the information recommended under Option 1 would be maintained by the Education Division under this option.

Option 3: Selected data obtained by the
Education Division and reported to
the Committee

Having addressed the information collection and data standardization requirements present in the first two options, we will now present a more restricted option. We consider the information presented in the previous options to be optimal for congressional oversight and decisionmaking. If the Committee decides that the procedures necessary to obtain all of the information are too much of a burden, then only the selected data which the Committee would have received under Option 2 (see p. 41) should be collected by the Education Division and reported to the Committee. This would give the Committee an indication of the progress of the programs. The Committee could not do a detailed analysis of the programs with this information; the Committee would have to rely on other sources. The Education Division would not be required to maintain any information beyond what is reported to the Committee and maintained for program management. The Committee would have available only the following information.

Program identification description

OE could report the name and a brief description of the program to the Committee. The majority of the information in this category is generally available at the Federal level and could be easily obtained. However, some of the information would be hard to obtain unless the program/activity list is standardized. This would initially require some effort, but the maintenance commitment should be smaller than the initial investment.

Fiscal data

The Committee could receive the appropriate information ^{1/} to calculate the rate at which funds are being spent over time for each program: (1) outlays from new budget authority and (2) total budget authority. Total outlays could also be reported to allow the Committee to monitor outlays against the ceilings set by the Congress. Other data on Federal-level budgetary actions could still be obtained from the Education Division, as the information is maintained there.

^{1/}This information is currently available only on an annual basis.

The only information from State and local educational agencies reported to the Education Division and the Committee would be the expenditures by title by object of expenditure. The Committee would receive the same information as under Option 2, but would only be able to obtain additional Federal level information from the Education Division. The Committee would have to rely on other sources of information to further develop this analysis.

Student eligibility and participation

The Committee could receive information on the number of eligible students and the number of students participating by State. This data would indicate if there are significant gaps between those eligible and those participating. These figures would not show the amount the pupils are below the national average. The detailed information necessary for this analysis would not be collected under this option.

Assessment of need

The Committee would not receive any information on the methods used by State and local educational agencies to select programs and program participants. The needs assessment information would not be standardized. Although standardization would not be necessary to ease data collection, some additional control on criteria used for needs assessment might lessen the need for close congressional oversight of this aspect of the program.

State and local educational agencies could report information on needs assessment measured by standardized test scores.

Program evaluation information

The Committee could receive summaries of evaluations conducted at Federal, State, and local levels. This is the most critical information, and it would assist Committee oversight by providing information on the achievements of the programs among States and among programs. The Committee could receive additional information on Federal evaluations if it so desired. It should be noted that the Committee probably would not have available any information on the

methodology used to conduct the State and local studies. Validation of the evaluation results would have to be conducted independently of the data provided under this option.

Summary

The Committee could significantly reduce the effort required by the State and local educational agencies and still receive the information crucial to the decisionmaking process. Basically, only summary information would be reported. The information reported under this option would not provide comprehensive data. If the State and local educational agencies are not required to report the supporting information, the Committee would not be able to conduct any additional data analyses without either obtaining outside assistance or undertaking special data collection efforts from the State and local educational agencies.

Option 4: Maintain existing reporting systems

The Committee may choose to maintain the present arrangement of information collection. If the Committee wants effective oversight information for its own use, this would be the least desirable option. Some of the information now collected is useful, but some of it is not. More importantly, our attempts to collect the information from the Education Division in a predetermined format showed that there are significant gaps in the information available at the Federal level. The lack of standardization in the program/activity lists and in the terminology prevent even the available data from being as useful as it might be because the information is not comparable.

If no changes are made in the information collected, some marginal improvements could be made to assist the Committee. Staff of the Education Division and the relevant committees could review all of the reports and other information transmitted to the Committee to determine the most appropriate and useful information for the Committee's use. In this way, the amount of unnecessary information could be reduced, and the important information would be highlighted and provided in greater detail.

Implementation alternatives

To obtain any desired information not presently received, the Committee would have to request the information from the Education Division. The Committee could amend

the authorizing legislation to require either that specific data elements be made available or that general categories of information be provided. With regard to the latter alternative, specific data elements to be provided under each general category could be further specified in Committee reports. If there is a clear legislative mandate, the Education Division can collect and report the information more quickly and accurately.

Should the Committee decide not to specify its information requirements in legislation, it could request the Education Division to provide as much information as is now available in formats acceptable to the Committee. The Committee would then receive the key data currently maintained by the Education Division. This would highlight the information gaps that need to be addressed in the future. The Committee could then work with the Education Division and OMB to determine (1) how best to obtain this additional information and (2) what changes in program administration--such as standardization--would be necessary to enable the additional information to be generated.

Recommendation to the Secretary of Health,
Education, and Welfare

Based upon the Committee's decision concerning the information it needs, the Secretary of Health, Education, and Welfare should cooperate with us and coordinate with the interested congressional committees and the cognizant Federal agencies to develop the specific types of program identification description, fiscal data, student eligibility and participation, assessment of needs, and program evaluation information for future reports to the Committee. Issues to be considered in developing this information include timing, level of detail, and report formats.