



AEFA

Winter 2010



American Education Finance Association Newsletter

— 2010 AEFA Conference in Richmond, March 18-20—

Education Finance and Policy in a Time of Fiscal Constraints and Federal Action

Final Conference Program, Membership Renewal and Conference Registration on line at www.aefa.cc

You can still register for one of two outstanding [pre-conference workshops](#):

- (1) How can NCES Data be Accessed and Used for Research?
- (2) The Future of School Finance Litigation: A Discussion of Educational Accountability in the Face of Economic Challenges and Technological Change

[Speakers](#) at the conference feature **Andrew J. Rotherham**, co-founder of Education Sector, and the Eduwonk blog, and **Marshall S. Smith**, Senior Counselor to the U. S. Secretary of Education. A symposium on "How Governors Make Budget Decisions and Their Implications for Education" features **Randall Bauer** (Iowa), **Richard D. Brown** (Virginia), **John Cape** (New York State) and **Daniel Timberlake** (Virginia).



— [CANDIDATE PROFILES AND PHOTOS](#) —

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President's Message

Marty Orland is the Director of Evaluation and Policy Research at WestEd. He assumed the presidency of AEFA following the March, 2009 meeting in Nashville

Dear AEFA Colleagues:

If you live in the Washington, D.C. area like me and are still literally knee deep in snow, it is difficult to imagine that the AEFA meeting -- always a harbinger of spring -- is just around the corner. However, this is in fact the case and before we know it, we will be in Richmond for our 35th annual AEFA conference.

(continued on next page)

Please submit your contribution to the *AEFA Newsletter* by May 15, 2010 to hnelson@aft.org. The newsletter is sent to members of AEFA and helps the Board of Directors conduct the business of the organization. The newsletter also provides opportunities to share information on a wide range of school finance organizations, publications and activities. Most recent info at <http://www.aefa.cc>.

(President's Message continued)

Program Chair Susanna Loeb along with her program committee colleagues; Dominic Brewer, Rajashri Chakrabarti, Sean Corcoran, Julie Berry Cullen Lawrence Getzler, Doug Harris, Donna Muncey and John Yinger - have done an exceptional job in planning the program. The timeliness of this year's theme -- ***Education Finance and Policy in a Time of Fiscal Constraints and Federal Action*** -- should be evident to all given the severe impact of the Great Recession on state and local education revenues as well as the unprecedented level of federal education support under the American Recovery and Reinvestment Act.

The program will feature two plenary sessions on the topic, providing first a state and then federal perspective on the current fiscal/policy context for education. Other noteworthy aspects of this year's program include more practice-based sessions featuring, for example, local administrators involved with the implementation of the Teacher Incentive Fund and Charter Management Organization officials. Also, for the third consecutive year, the poster session is expanded and will for the first time include a cadre of expert discussants.

AEFA's board members all have day jobs and volunteer their valuable time on behalf of our organization. As my term comes to a close, I want to thank the board and, in particular, our board chairs for their personal support and unwavering dedication to AEFA.

I also have taken the liberty of calling upon former board members and ex-presidents to become involved again in important AEFA affairs. I am grateful that they too have, without exception, heeded the call and hope that the involvement of former AEFA officers in serving significant organizational needs will become a regular occurrence.

Finally, I want to thank AEFA's Executive Director Craig Wood and his assistant Carlee Poston Escue for keeping AEFA on a forward trajectory and tolerating my personal predilections. As conference attendees, next month we will witness the product of much of Craig and Carlee's handiwork, which, we are confident, will result in a worthwhile and rewarding experience for all.

Looking forward to seeing you in Richmond!

**- Marty Orland
President**

Workshop Registration, Membership Renewal and Conference Registration is available on line at www.aefa.cc. If you have logged in previously and changed your user name and password, you will use that to log in. If you have not logged in before, your user name is the email address that AEFA has for you and your password is AEFA. Renewal and registration is easy using your credit card



Richmond, Virginia, February 7, 2010

Future Conference

2011 in Seattle, Washington

Grand Hyatt Seattle
March 24-26, 2011

2012 in Boston, Massachusetts

Hyatt Regency Hotel
March 15-17, 2012

2013 in New Orleans, Louisiana

Hotel Intercontinental
March 14-16, 2013

EDUCATION FINANCE AND POLICY IN A TIME OF FISCAL CONSTRAINTS AND FEDERAL ACTION

PROGRAM HIGHLIGHTS

2010 Annual Conference

Richmond, Virginia

March 18-20, 2010

FIRST GENERAL SESSION

**Insights from State Budget Officers: How
Governors Make Budget Decisions and Their
Implications for Education**



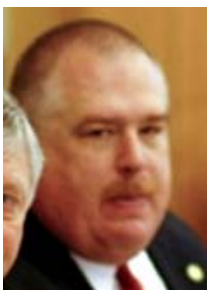
Randall Bauer, The PFM Group,
former Budget Director for the State
of Iowa



Richard D. Brown, Virginia
Secretary of Finance, President of
the National Association of State
Budget Officers, former Director of
the Virginia Department of Planning
and Budget



John Cape, The PFM Group,
Rockefeller Institute of Government,
former Director of the Budget for
New York State



Daniel Timberlake, Director of the
Virginia Department of Planning and
Budget, former head of the Virginia
Department of Education's Finance
Division

SECOND GENERAL SESSION

**The Federal Role in Education Policy: Goals,
Approaches, Promises, and Limitations**



Andrew J. Rotherham, co-founder and publisher of
Education Sector, Eduwonk.com blog creator and writer



Marshall S. Smith, Senior Counselor to the Secretary,
Director, International Affairs, U.S. Department of
Education

PRE-CONFERENCE WORKSHOPS

WORKSHOP 1

How can NCES Data be Accessed and Used for Research?

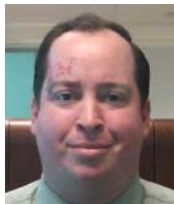
Live Interactive on-line training session

- Interactive training on NCES web-based data tools: Build-a-Table Tool, Public School & District locators, Public Schools District Finance Peer Search, Public Schools District Longitudinal Data Tool
- Overview of Common Core of Data (CCD) Fiscal Surveys: CCD Local Education Agency finance Survey (F-33); National Public Education Financial Survey (NPFES); Teacher Compensation Survey and non fiscal surveys
- Overview of the Schools and Staffing Survey (SASS)

Education Finance data provide powerful information for decision making, policy making, and research within and across education systems. The Common Core of Data (CCD) is the primary database on public elementary and secondary education in the United States



Frank Johnson



Mark Dixon



Stephen Cornman

The workshop offers interactive training on the NCES Build-a-Table, a tool that allows the data user to create user-specific tables of CCD public school data by selecting data elements, years, districts, and schools, among other parameters. The NCES Build-a-Table tool permits the user to create custom tables with over 500 variables at the state, district, or school level.

One focus of the workshop will be on navigating the CCD Local Education Agency Finance Survey, commonly called the F-33. Fiscal records at the school level can be matched to CCD School Universe (nonfiscal) survey, enabling data users to match information about students, staff, and institution characteristics with finance data. Training on how to match the files will be conducted. The workshop also will focus on the CCD National Public Education Financial Survey (NPEFS), which is an annual collection of state level finance.

The workshop will review the NCES Teacher Compensation Survey (TCS), an administrative records survey that collects total compensation, teacher status, and demographic data about individual teachers from multiple states.

This session is live and interactive. The participants should bring their laptops to access data from the NCES website and perform practice exercises.

Presenters: **Stephen Q. Cornman** and **Frank Johnson**, from the U.S. Department of Education, National Center for Education Statistics (NCES).

Eunice Ave, and **Mark A. Dixon** from the US Census Bureau

WORKSHOP 2

The Future of School Finance Litigation: A Discussion of Educational Accountability in the Face of Economic Challenges and Technological Change



William Owings



Ann McColl



James Guthrie



Anthony Rolle

The ultimate goal of educational finance litigation is to improve the quantity and quality of educational opportunities provided to all children. But, in a climate of increased legal and political accountability, coupled with fiscal restraint, the unanswered question remains: How? More specifically, how are litigation decisions transformed into educational programs and policy that improve student learning? This AEFA workshop is designed to explore past and current strategies used in education finance litigation; desired adequacy, equity, and efficiency possibilities; and, preferred roles that accountability policies, economic climate, and technology change have on future litigation efforts.

R. Anthony Rolle, K-12 Educational Administration Program, Texas A&M University College of Education and Human Development

Richard Salmon, Department of Educational Leadership & Policy Studies, School of Education, Virginia Tech.

William Owings, Department of Educational Leadership and Counseling, Darden College of Education, Old Dominion University

Ann McColl, General Counsel, North Carolina Association of School Administrators; and, McColl Law Firm

James Guthrie, Director of Education Policy Studies at George W. Bush Institute, Southern Methodist University



STATE OF THE STATES AND PROVINCES – You Can Help

At this year’s conference, Catherine Sielke, University of Georgia, and Lawrence Getzler, Virginia Department of Planning and Budget will chair the popular State of the States and Provinces. Participants will be able to move easily from table to table and learn the latest legislative news from the states and Canadian provinces.

ALERT! State Representatives Needed

AEFA invites you to participate in our 2010 State of the States and Provinces either to represent a state/province or just to learn about state and province-specific education finance and policy developments from knowledgeable representatives. State of the States and Provinces will not conflict with other sessions. In the first half of the session state/province representatives will be grouped at tables by region. Each representative will speak very briefly (just a few minutes) and as informally or formally as desired about the developments in his/her state/province. In the second half all representatives will be free to move to any table and chat with any other representative or audience member.

Currently 30 states and provinces do not have representatives. Please contact Cathy Sielke (csielke@uga.edu, 706-542-9767) or Larry Getzler (lawrence.getzler@dpb.virginia.gov, 804-786-8360)

Help Update State of the States Document

You can also help update the State of the States document posted on the AEFA Web Site. Link to last year’s State of the States.

<http://aeфа.cc/media/uploads/2009StateoftheStates.pdf>

This document consists of a series of one or two page bullet lists on recent state, district, or province level developments in education finance and policy. The developments are primarily legislative, judicial or regulatory. Each bullet includes bolded text to indicate the area of action.

States and Provinces Needing Representatives		
Alaska	New Hampshire	Utah
Arkansas	New Jersey	West Virginia
Delaware	New Mexico	Wyoming
Hawaii	North Dakota	Alberta
Idaho	Oregon	British
Kansas	Pennsylvania	Columbia
Louisiana	Rhode Island	Manitoba
Massachusetts	South Dakota	New Brunswick
Mississippi	Tennessee	Quebec
Montana	Texas	Saskatchewan

These bullet lists are not intended to be complete explanations of education finance and policy developments in each respective state, district, or province. Authors were restricted to one or two pages each. Additional details on state, district, or provincial developments can be obtained from representatives at the State of the States and Provinces Session of the 2010 American Education Finance Association Annual Conference. Author contact information also is included on each page.

We have bullet lists of recent education finance and policy developments for twenty-two U.S. states, the District of Columbia, and the Canadian province of Ontario. We welcome information on other states and Canadian provinces. If you wish to be an author/representative for a currently unrepresented state or province for next year’s edition, please contact Larry Getzler at Lawrence.Getzler@dpb.state.va.gov - (804) 786-8360 or Cathy Sielke at csielke@uga.edu - (706) 542-9767.



Maintain your current mailing and email address by updating your profile on www.aefa.cc or send changes to:

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Gainesville, FL 32611-7049
(352)392-2391 ext. 266



AEFA Officers: Martin Orland; President; Susanna Loeb, President-Elect; Amy Ellen Schwartz, Immediate Past President. **Board of Directors: Terms Expire at Adjournment of the 2010 Conference:** Joyce Levenson, Rajashri Chakrabarti, Michael Rebell, Julie Cullen, and Lori Taylor. **Terms Expire at Adjournment of the 2011 Conference:** Lawrence Getzler, Julia Koppich, Sean Corcoran, John Yinger, Janet Hansen. **Terms Expire at Adjournment of the 2012 Conference:** Elizabeth Dhuey, Donna Muncey, Douglas Harris, Gloria Rodriguez, and Dominic Brewer. **Designees of Sustaining Members:** Joyce Levenson, United Federation of Teachers, Edward J. Hurley, National Education Association; Jewell C. Gould, American Federation of Teachers; and Ronald Skinner, Association of School Business Officials International. **Institutional Members:** American Institutes for Research, New Jersey Department of Education, , University of Albany, State University of New York, Wisconsin Center for Postsecondary Education (WISCAPE) at the University of Wisconsin-Madison and Quantitative Methods in the Social Sciences. **Newsletter Editor:** F. Howard Nelson: hnelson@aft.org. **Education Finance and Policy Executive Editors:** Thomas Downes and Dan Goldhaber. **Executive Director:** R. Craig Wood. **Assistant Executive Editor:** Carlee Poston Escue. **Executive Director Emeritus:** Ed Steinbrecher, George R. Babigian. **Website:** <http://www.aefa.cc/>.

Nominees for the AEFA President Elect and Board Membership

Candidate for President-Elect



Carolyn Herrington
Florida State University

Dr. Herrington is Professor and Director of the Educational Policy Center at Learning Systems Institute at Florida State University. She has most recently served as Dean, University of Missouri College of Education. Her research focuses on the politics and financing of educational reform. She has authored over 50 publications and her work has appeared in the *Journal of Education Finance*, *Educational Policy*, the *Journal of Education Policy*, *Peabody Journal of Education*, *American Journal of Education*, *Educational Considerations* and the *Educational Administration Quarterly* among others. She has served on the AEFA Board of Directors and on the editorial boards of the *Education Finance and Policy* and *Journal of Education Finance*. Her work has been funded by the Carnegie Cooperation, BellSouth, Wallace Dewitt and the Institute of Educational Sciences. Her current work is investigating the impact and funding of the *Differentiated Accountability* programs under NCLB; intergovernmental equity and adequacy challenges in school financing; and design and funding of comprehensive educational and social services in low-income, urban neighborhoods.

-- Presidential Nomination Process --

According to the AEFA bylaws, the Board is permitted to nominate only one candidate to stand for this election as president-elect. The Board made this change several years ago in order to avoid the inevitable result that, each year, the AEFA membership was asked to reject one of the most esteemed leaders of our profession and organization. AEFA's Bylaws, however, allow other candidates to be nominated by petition:

Nomination by Petition

- a. Additional persons who are active members of the Association can be nominated by petition signed by twenty-five (25) active members of the Association. Such a petition shall be filed with the Secretary-Treasurer by 10:00 a.m. on the first full day of the Annual Conference.
- b. Any active member may nominate an individual by emailing the name of the nominee and the position for which they are nominating the person, to the Secretary-Treasurer at least two weeks prior to the date of the election. Any person so nominating another individual must provide the Secretary-Treasurer with the names and current email addresses of a minimum of twenty-five (25) active members supporting the nomination, and also must provide confirmation that the person nominated agrees to serve in the position.

**Candidates for Federal Government Affiliate
(One Position)**



Stephen Q. Cornman
U.S. Department of Education
Institute for Education Sciences, NCES

Stephen is a former Assistant Research Professor at Georgetown University. He is a Public Policy Specialist with ten years of government experience as Chief of Policy for the largest county in New Jersey, Deputy Director of Essex County, New Jersey Improvement Authority and Policy/Budget Assistant to former Borough President Fernando Ferrer in New York City. As the former Chief of Policy and Planning for Essex County, he designed a community based welfare-to-work system that reduced the welfare rolls from 32,000 to 16,000 people. Cornman has professional degrees in public affairs and law, and is an active member of the District of Columbia Bar. He is a Columbia University MPA, a Thomas Jefferson School of Law J.D., and a candidate for a Ph.D. at Columbia University. Stephen is committed to publicizing the existence of and expanding accessibility to school finance data through training by the Department of Education and other federal agencies.

Emily Pas Isenberg
U.S. Census Bureau
Longitudinal Employer-Household Dynamics Program (LEHD)

As a research economist, Emily creates and analyzes longitudinal earnings and employment histories of most workers in 48 states. The data are based on unemployment insurance records, and these data are, among other things, the largest database of teacher work histories in the United States. Emily also directs research projects on behalf of other federal agencies that make use of LEHD data as well as other data, like data on TANF participation. Emily's research interests include teacher labor markets, educational equity, and higher education. In 2008, she was a co-recipient of AEFA's Jean Flanigan Outstanding Dissertation Award, and she is a former Spencer Foundation Dissertation Fellow. Emily is published in *Public Finance Review*. She received her B.A. from Williams College and her Ph.D. in Economics from the Maxwell School of Syracuse University.



Teacher Organization Affiliate (One Position)

Eric Elliott
Pennsylvania State Education Association (PSEA)

Eric specializes in conducting research into issues of school funding for PSEA, the state affiliate in Pennsylvania for the National Education Association. Eric has an M.A. in Economics from the University of Texas at Austin (1982), and a Ph.D. in Public Policy Analysis from the University of North Carolina at Chapel Hill (1999). Eric has been with PSEA since September 1995. As part of his job, he has provided bargaining support to PSEA's members by analyzing the finances of many school districts in every part of the state. Eric also has done research on school funding equity in Pennsylvania, including assisting the Pennsylvania Association of Rural and Small Schools in its equity lawsuit. He is actively involved with different groups proposing changes in school funding and property tax reform, and has estimated the effects of the major proposals offered to date. In 2006, Eric was appointed by Governor Ed Rendell to serve on Pennsylvania's Task Force on School Cost Reduction.



Paul Aaker
Colorado Education Association

Paul spent 32 years on the staff of the Colorado Education Association. During that period, he was on the governmental relations staff and spent 22 years as the Director of Research. Aaker specialized in school finance legislation, school district expenditures and employee compensation

Candidates for Member at Large (Three Positions)



Susan Dynarski
University of Michigan

Susan Dynarski is an Associate Professor of Education and Public Policy. She is a Faculty Research Associate at the National Bureau of Economic Research and has been a Visiting Fellow at the Federal Reserve Bank of Boston and Princeton University. She is an editor of *The Journal of Labor Economics* and on the editorial board for *Education Finance and Policy*. Dynarski's research focuses on charter schools, demand for private schooling, historical trends in inequality in educational attainment and the optimal design of financial aid. Her previous research explored the impact of grants and loans on educational attainment and the distributional consequences of tax incentives for college saving. Dynarski has testified to the US Senate Finance Committee, the U.S. House Ways and Means Committee and the President's Commission on Tax Reform. Her research has been funded by the Institute of Education Sciences, Russell Sage Foundation and the National Institute of Aging. Dynarski holds a B.A. and a Master in Public Policy from Harvard and a Ph.D. in Economics from MIT.

Candidates for Member At Large (Three Positions) continued

Robert M. Costrell **University of Arkansas**

Bob Costrell has both an academic and policy-making background. His publications include the economic theory of educational standards, income distribution and testing, teacher pensions, education cost functions, and school finance litigation. These have appeared in the *American Economic Review*, *Journal of Political Economy*, *EFP*, and *Peabody Journal* as well as general interest publications. From 1999 to 2006, Bob served in major policy roles for three governors of Massachusetts. He worked on a broad array of Massachusetts' education reform policies, and led reforms of the state's district and charter funding formulas. Bob recently served on the U.S. DOE's National Technical Advisory Council for NCLB. He joined the faculty at the University of Arkansas in 2006 as Professor of Education Reform and Economics and holds the Endowed Chair in Education Accountability; he is the Founding Graduate Director of UA's Ph.D. program in Education Policy. He received his Ph.D. in Economics from Harvard University.



Marguerite Roza **University of Washington**

Marguerite serves as a Research Associate Professor with the Center on Reinventing Public Education at the University of Washington's College of Education. Dr. Roza's research focuses on education spending and productivity at all levels of government. Recent research has documented the real dollar implications of education policies once realized inside schools across schools within. Her brief entitled, "Projections of State Budget Shortfalls on K12 Public Education Spending and Job Loss" was widely cited by the current administration in proposing the State Fiscal Stabilization Fund. Other research has explored fiscal tradeoffs of wages and layoffs, cost implications of digital learning, likely results of proposed changes to Title I, and state-by-state projections of education spending. Her work has been published by Education Sector, the Brookings Institution, *Public Budgeting and Finance*, *Education Next*, and the *Peabody Journal of Education*. Dr. Roza earned a Ph.D. in Education from the University of Washington. She has a B.S. from Duke University and has studied at the London School of Economics and the University of Amsterdam.

Robert P. Strauss **Carnegie Mellon University**

Robert P. Strauss has been Professor of Economics and Public Policy at Carnegie Mellon's Heinz College since 1979. He also taught at the Bush Institute for Family Policy at the University of North Carolina-Chapel Hill and was a member of the economics department at Chapel Hill for 10 years. He received his PhD at the University of Wisconsin-Madison's Economics department. He served twice in the federal government, and received presidential pens for his contributions to the creation of general revenue sharing legislation at Treasury and its renewal while on the staff of the Joint Committee on Taxation, U.S. Congress. More recently he received the Steven M. Gold Award from the Association of Public Policy and Management for his contributions to intergovernmental fiscal policy and management. His interests in education policy have been a result of several large studies of teacher preparation and quality for the Pennsylvania State Board of Education. He has written, commented, and testified widely on matters of federal, state, local municipal and school finance as well as the preparation and hiring of classroom teachers.



Candidates for Member At Large (Three Positions) continued

Bruce Baker **Rutgers University**

Bruce is an Associate Professor in the Graduate School of Education at Rutgers, The State University of New Jersey. From 1997 to 2008, he was a professor at the University of Kansas in Lawrence, KS. He is lead author (with Preston Green and Craig Richards) of a graduate level textbook on school finance. Professor Baker has written a multitude of peer reviewed research articles on state school finance policy, teacher labor markets, school leadership labor markets and higher education finance and policy. His recent work has focused on measuring cost variations associated with schooling contexts and student population characteristics, including ways to better design state school finance policies and local district allocation formulas (including Weighted Student Funding) for better meeting the needs of students. Professor Baker also has consulted for state legislatures, boards of education and other organizations on education policy and school finance issues and has testified in state school finance litigation in Kansas, Missouri and Arizona. He is a member of the Think Tank Review Panel, a group of academic researchers who conduct technical reviews of publicly released *Think Tank* reports on education policy issues.



David Mustard **University of Georgia**

David is an Associate Professor of Economics in the Terry College of Business, a Fellow at the Institute of Higher Education, and an Adjunct Professor in the Department of Public Administration and Policy. He also is a Research Fellow at the Institute for the Study of Labor in Germany and an Associate Editor of *Economics of Education Review*. Mustard's research is published in *The Review of Economics and Statistics*, *Journal of Labor Economics*, *Journal of Human Resources*, and *Journal of Law and Economics*. His external research grants exceed \$550,000. Mustard has testified before state legislatures and as an expert witness in the courtroom. His research has been featured in the *New York Times*, the *Wall Street Journal*, *Talk of the Nation*, *Washington Post*, and many other outlets. Mustard has won numerous teaching awards and regularly teaches in UGA's honors college. Mustard earned a B.A. from the University of Rochester, M.Sc. from the University of Edinburgh, and a Ph.D. from the University of Chicago.