



AEFA

Spring 2005



American Education Finance Association Newsletter

Call for Nominations

President and Board of Directors

Slots Open for International, Local School District and Three At-Large Positions

Please submit nominations to Richard Rothstein (rr2159@columbia.edu), chair of the nominations committee, by June 20, 2005. Additional nominations may be considered at later dates.

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LEANNA STIEFEL RECEIVES AEFA OUTSTANDING SERVICE AWARD



Jim Wyckoff presents outstanding Service Award to Professor Stiefel at 2005 AEFA Conference in Louisville

The AEFA selected Professor Leanna Stiefel to receive the **OUTSTANDING SERVICE AWARD** for 2005. The award recognizes contributions to public policy development, research, public understanding or local school finance development and service to AEFA. Dr. Stiefel is currently Professor of Economics at the Robert F. Wagner Graduate School of Public Service at New York University....

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President's Message

James W. Guthrie is a professor of public policy and education at Peabody College, Vanderbilt University. He is the chair of the Department of Leadership, Policy and Organizations. He assumed the presidency of AEFA following the March, 2005 meeting in Louisville.

The annual meeting program was able to capitalize upon prior years' planning of Past Presidents Marge Plecki and Jim Wyckoff. Not only was the conference well attended, it exhibited remarkable intellectual and networking vitality. Association members presented approximately 150 formal papers. Plenary Session speakers Michael McPherson, Spencer Foundation President, Andreas Schleicher, OECD executive officer, and Stephen Heyneman, Vanderbilt University international education policy expert, all

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Please submit your contribution to the *AEFA Newsletter* by JULY 15, 2005 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)

delivered addresses that, while concentrating on facets of education finance, were widely different in their perspectives.

The conference was aided by financial sponsorships from The University of Indiana-Bloomington, Vanderbilt University, *Education Week*, American Institutes for Research and the Galt House Hotel.

Finally, the combination of Matt Springer's and Ed Steinbrecher's organizing efforts resulted in a smooth flow of conference events and services.

Former AEFA President Leanna Stiefel was presented with the AEFA Distinguished Service Award in recognition of her sustained contributions to the field of education finance and her many significant activities on behalf of AEFA as an organization.

Early in 2006, AEFA will launch a new journal, the *Journal of Education Finance and Policy*. This research-based and practitioner-friendly publication will mark the first time in its quarter-century history that our organization has had a flagship quarterly publication fully under the organizational authority of the AEFA Board of Directors.

David Figlio, Department of Economics professor at the University of Florida and David Monk, dean of The Pennsylvania State University School of Education are serving as editors. The *Journal's* formal charter assures broad coverage of topics important to understanding and enhancing means for generating and distributing resources for formal learning. Submissions are being subjected to careful peer review.

The editors suggest the new publication will begin with a bang, replete with rigorous scholarship and policy relevant information presented in a readily accessible format for readers. The MIT Press, one of the nation's most prestigious university publishing houses, will publish the new journal. Launching of the journal is generously subsidized by a five-year grant from the American Institutes of Research (AIR). This subsidy was arranged through the leadership of AEFA Past President Jay Chambers.

Program chair, President-Elect Chris Roellke already is at work developing themes for the 2006 annual meeting to be held in New Orleans. He plans to take advantage of the new journal's inaugural appearance.

Despite successes such as those described above, AEFA also faces a significant set of challenges and issues. While membership is high and climbing, it needs to be enhanced further in order to ensure an intellectually and financially vibrant organization capable not only of sustaining its own momentum, but also able to provide the nation and the world with research perspectives on finance issues important to policy makers and practitioners.

Proposals have been placed before the AEFA Board for altering the organization's name to be more consistent with its aspirations to be global in nature and to capture the general education policy interests of a growing number of AEFA members.

A recommendation also has been made to the AEFA Board for altering the manner in which the President is nominated. Proponents of the change are seeking means by which the nominating process more fully takes into account the needs of the association, not simply the capacities and luster of the candidates themselves.

These and other issues will be the focus of deliberation at the upcoming June meeting of the board of directors. Should you, as a member, have additional matters you believe worthy of Board consideration, you are invited to inform me or other Board members. We will ensure your concerns are given consideration.

Meanwhile, it is an honor to have been selected as President of AEFA, and I look forward, during my term of office, to reinforcing the momentum that others before me have launched.

James W. Guthrie,
AEFA President



--Wrap-up--
2005 Annual Conference
Louisville, Kentucky



Michael S. McPherson, President, Spencer Foundation, speaking on higher education finance.



Andreas Schleicher, Head of the Indicators and Analysis Division, Directorate on Education Organisation for Economic Cooperation and Development (OECD), delivering a plenary session address on: "Measuring the Performance of Educational Systems Internationally".



Stephan B. Heyneman, Professor of International Education Policy, Peabody College at Vanderbilt, spoke on the possibilities of a "World Bank" for education in the United States.

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Stiefel Awarded Outstanding Service Award

Stiefel earned her Ph.D. at the University of Wisconsin and for over twenty-five years has written on a range of school finance issues that have proven to be enduring and influential. She co-authored *The Measurement of Equity in School*

Finance:

Conceptual, Methodological, and Empirical Dimensions in

1984, which has

been very influential in shaping

subsequent

discussions regarding school finance. In addition, Dr. Stiefel has written widely on issues of budgeting, resource allocation and efficiency. This written work has influenced both academic and policy audiences.



Professor Stiefel has made numerous and important contributions to AEFA, first as a member of the Board of Directors from 1997 until 2000, then serving as President in 2001-2002 and most recently as the co-editor of the 2005 Yearbook, *Measuring School Performance and Efficiency: Implications for Practice and Research*. Perhaps her greatest contribution to AEFA and the field are the many individuals she mentored on school finance, including graduate students and junior colleagues.

Dr. Stiefel has made important contributions to the development of school finance policy through her involvement on the Board of Governors of the Education Finance Research Consortium, a collaboration of researchers with the New York State Education Department to inform policy development. In addition, Stiefel has written policy briefs for EFRC that have influenced the development of policy by the New York State Board of Regents.

For these and many other contributions AEFA is pleased to award its 2005 Outstanding Service Award to Leanna Stiefel.

--Prepared by Jim Wyckoff

Submit nominations to Marge Plecki

mplecki@u.washington.edu

The immediate past president of AEFA, Marge Plecki, serves as the chair of the AEFA OUTSTANDING SERVICE AWARD committee and the Executive Committee serves as the selection committee for this award.

To be eligible for the Outstanding Service Award, individuals must either be current or previously active members of the AEFA. This award is made for contributions in one or more of the following areas of school finance:

- ✦ Public policy development
- ✦ Research
- ✦ Public understanding
- ✦ Local school finance development
- ✦ Service to the AEFA

The processes for nomination are as follows:

1. Members of the AEFA may nominate candidates by submitting no more than two double-spaced typed pages explaining why the nominee should receive the award.
2. Members may nominate themselves by submitting no more than two double-spaced typed pages explaining their qualifications for the award.
3. Nominations should be submitted along with the names and addresses of both the nominee and the nominator by June 10th.

Congratulations!

**Jean Flanigan 2005 Dissertation Award
Goes to Randall Reback**

At the 2005 Annual Conference in Louisville, Randall Reback received the annual Jean Flanigan Outstanding Dissertation Award. Randy, currently an Assistant Professor of Economics at Barnard College, was recognized for his dissertation titled, "Public Finance in General



Equilibrium: The Case of Education." His dissertation was completed in the Department of Economics at the University of Michigan, supervised by Julie Cullen. Patrick McEwan (Wellesley College), Chair of the Dissertation Review Committee, said the competition was very close and expressed his thanks to other committee members, including Sunny

**CALL FOR NOMINATIONS FOR THE 2005
OUTSTANDING SERVICE AWARD**

Ladd and Jane Hannaway, and the entrants. The AEFA makes the award annually and the recipient receives a one year membership, complimentary conference registration, a commemorative plaque and a \$200 honorarium.

**2005 New Scholars Award
Awarded To Daniel W. Player**



The 2005 recipient of the AEFA New Scholars Award is Daniel W. Player, a graduate student in economics at the University of Washington in Seattle, Washington. Player's proposal, "The Effect of Student Distribution on the Single Salary Schedule," was selected based on the thoroughness of the research design, the appropriateness of the topic and the relevance to AEFA

research interests. Amy Ellen Schwartz (New York University) chaired the selection and review committee. The Award includes a \$500 stipend to conduct the research over the next year. Player will present his research at the 2006 annual conference in New Orleans, Louisiana, March 23-25.

and Finance, State Budget Director, and Attorney General.



Kim Rueben, Private-Nonprofit Affiliate, is a visiting scholar at the Tax Policy Center at the Urban Institute and is on leave from the Public Policy Institute of California. She examines issues of state and local public finance and the economics of education.



Jennifer Imazeki, San Diego State University, teaches courses in public finance and applied microeconomics. She received her M.A. and Ph.D. in economics from the University of Wisconsin-Madison, where she also worked as a researcher for the Consortium for Policy Research in Education.



Anthony Rolle, Vanderbilt University, has conducted K-12 education finance and policy research for the University of Washington's Institute for Public Policy and Management, the Washington State Legislature and Democratic House

Majority Whip, the Indiana Education Policy Center, and the National Education Association.



Richard Rothstein is a research associate of the Economic Policy Institute and a visiting lecturer at Teachers College, Columbia University. He is a senior correspondent of *The American Prospect*, and from 1999 to 2002 was

the national education columnist of *The New York Times*.

**New President and Board
Members Elected**

At the 2005 AEFA conference in Louisville, members chose Christopher Roellke of Vassar College as AEFA's President-Elect. Chris will serve as program chair for the 2005 conference in New Orleans, after which, he will succeed current President Jim Guthrie. Congrats also go to newly elected Board members:



Christopher Roellke, President-Elect, teaches and conducts research in education policy, teacher education, and urban education reform. He serves as Director of both the Vassar College Urban Education Initiative and the Ford Scholars Program. A former

public high school history and social studies teacher, Chris received his M.S. and Ph.D. degrees from Cornell University.



Lawrence Getzler, State Government Affiliate, works in the executive branch of Virginia's government. He provides analysis and forecasts for the Governor, Secretaries of Education

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CALL FOR NOMINATIONS

The Board of Directors of AEFA is a working group charged with governing, planning and overseeing all of the activities of the organization. The President-Elect is primarily responsible for the program at the annual conference and after one year becomes the President, serving as the formal leader of and spokesperson for AEFA, initiating new policies, practices, and organizational relationships. For more details on the specific [duties of the AEFA Board](#), the [President](#) and the [President-Elect](#) see the attachment to this newsletter.

Any member in good standing can be nominated for these elected positions although prior service on the Board is suggested for the President-Elect nominees. Directors on the Board reflect the demographic and experience diversity of the membership, running the gamut from new assistant professors to experienced public servants. Typically, only about half of the Board has academic affiliations.

Board slots open in 2005 include:

- ✦ Member at Large (Three Positions)
- ✦ International Affiliate (One Position)
- ✦ Local School District Affiliate (One Position)

Board of Directors. Active, thoughtful, and dedicated Board members are critical to the successful operation of AEFA. Thus, Board members and officers must agree, prior to having their names placed in nomination, to participate actively in Board meetings and the annual conference for three consecutive years following their election.

Board members represent the entire membership of the organization. Knowledge of the profession and the field, ability to think independently, and willingness to lead effectively and to work cooperatively with others are very important attributes to our members.

President-Elect. It is suggested that nominees for President-Elect have previously served a full term on the Board of Directors. The President-Elect is elected at the annual conference and assumes the presidency following the year of service as President. During this term of office, the President-Elect serves in the absence of the President, but is primarily responsible for the program at the annual conference. The President serves as the formal leader of and spokesperson for AEFA, initiating new policies, practices, and organizational relationships for one year following the year of service as President-Elect. The President oversees all new and continuing organizational activities during the year of service in this role.

Please submit nominations to Richard Rothstein (rr2159@columbia.edu), chair of the nominations committee, by June 20, 2005. Additional nominations may be considered at later dates.

Highlights

AEFA Spring Board of Directors Meeting

The Board met on March 17 and March 21 at the Annual Conference in Louisville.

- ✦ **Update on the New Journal- Education Finance and Policy:** According to David Figlio and David Monk, the co-editors of the Journal, the plan is to mail the new Journal by February of 2006. The Journal had received 20 manuscripts to date and had accepted 2, rejected 3, returned without review 2, had under revision 4 and had 9 additional that were currently under review. A mock-up of the "look" that the Journal will have was distributed.
- ✦ **Proposed Handbook on Education Finance:** Publisher Lawrence Erlbaum is still interested in AEFA producing a handbook. It would be a big undertaking, providing an in-depth discussion and literature review of the entire field of education finance. AEFA would receive royalties for the Association.
- ✦ **By-Laws** regarding nominations of Officers and Board of Directors were amended to allow more flexibility for nominations during the annual conference.
- ✦ **The Dissertation Committee** recommended that the issue of honorable mention or similar acknowledgement should be considered at the summer Board meeting.
- ✦ **New Scholars Initiative:** The committee received a limited number of submissions and only one pre-doctoral award for \$500 was recommended. The committee felt more submissions were needed, and perhaps the reduced number submitted was because of the limited funding this year.
- ✦ **Dues Comparisons:** Janet Hansen reported on her charge to review the dues structure of other associations. She reviewed seven others including APAM, AERA, ASBO, CIES, and the American Law Association. Of these, four have flat dues structures ranging from \$55-\$135. Others have an income related structure and range up to \$190.
- ✦ **Year Book Status:** The 2005 Yearbook has been completed. *Measuring School Performance and Efficiency: Implications for Practice and Research* is edited by Leanna Stiefel, Amy Ellen Schwartz, Ross Rubenstein, and Jeffery Zabel.



- Financial Report 2004:** The General Ledger was distributed to show all activity for the 2004 year by the various accounts in the budget. This will be reviewed again at the summer Board meeting when the 2006 budget is up for adoption.

In 2006, AEFA will be in New Orleans, Louisiana

March 23-25, 2006

Hyatt Regency Hotel

<http://neworleans.hyatt.com/property/index.jhtml>



Located adjacent to the Louisiana Superdome and New Orleans Shopping Center; the Hyatt is a short walk from the French Quarter, Bourbon Street and the Mississippi Riverfront.



Future AEFA Conferences

2007 in Baltimore

March 22-24

Sheraton Inner Harbor Hotel

2008 in Denver

March 27-29

Westin Tabor Center Hotel

Every member is important to the strength of the AEFA and your best way to stay involved and contribute to your Association is to maintain your current mailing address and e-mail address in order to receive regular communications. Send changes to:

Ed Steinbrecher, Executive Director
8365 S. Armadillo Trail
Evergreen, CO 80439
Ph. (303) 674-0857
Fax (303) 670-8986

E-mail EdS@aefa.cc



AEFA Officers: James W. Guthrie, President; Christopher Roellke, President-Elect; Marge Plecki, Immediate Past President; and Ed Steinbrecher, Executive Director. **Board of Directors: Terms Expire at Adjournment of the 2006 Conference:** Thomas Downes, Jennifer King Rice, Lyle Krause, William Mathis and Amy Ellen Schwartz. **Terms Expire at Adjournment of the 2007 Conference:** Dave Danning, Jane Hannaway, Helen F. Ladd and Patrick McEwan; **Terms Expire at Adjournment of the 2005 Conference:** Lawrence Getzler, Jennifer Imazeki, Kim Rueben, Anthony Rolle and Richard Rothstein. **Designees of Sustaining Members:** Edward J. Hurley, National Education Association; Jewell C. Gould, American Federation of Teachers; and Anne W. Miller, Association of School Business Officials International. **Institutional Members:** American Institutes for Research, New Jersey Department of Education, Ontario Secondary School Teachers Federation, Rand Corporation, University at Albany-SUNY, Vanderbilt University. **Newsletter Editor:** F. Howard Nelson. **Education Finance and Policy, Executive Editors:** David Figlio and David Monk. **Executive Director Emeritus:** George R. Babigian. **Website:** <http://www.aefa.cc/>.

DUTIES OF THE BOARD OF DIRECTORS THE AMERICAN EDUCATION FINANCE ASSOCIATION

The Board of Directors of the American Education Finance Association is a working group charged with governing, planning and overseeing all of the activities of the organization. Board members and officers must agree, prior to having their names placed in nomination, to participate actively in Board meetings and the annual conference for three consecutive years following their election.

Board members represent the entire membership of the organization. The powers and authority of Board members and officers are derived from the articles of incorporation and the by-laws of the organization. The Board meets three times a year--prior to the annual conference, immediately after the annual conference, and once during the summer months. The pre-conference meeting is usually 9:00 a.m. to noon the first day of the conference. The post-conference meeting is usually from 1:00-3:00 p.m. immediately following the last general session. The summer Board meeting, usually in June or July, begins early on a Friday morning and is completed by early afternoon on Saturday.

Board member responsibilities are as follows.

- ✦ Serve as chairpersons and members of standing and ad hoc committees.
- ✦ Participate in conference planning, including site, themes, and logistics.
- ✦ Assist in the implementation of conference plans.
- ✦ Assist with the development of newsletter copy.
- ✦ Provide policy and administrative leadership and advice.
- ✦ Participate in the development and approval of the annual budget.
- ✦ Participate in membership drives.
- ✦ Render internal and external leadership to the organization.

Committees of the Board include:

- ✦ Outstanding Dissertation
- ✦ Outstanding Service
- ✦ Nominations
- ✦ Long Range Planning and Administration (Immediate Past President, President, President-Elect, Secretary-Treasurer, and at least one other Board member.)
- ✦ Membership (Secretary-Treasurer/Executive Director and a minimum of two representatives of the Board plus a minimum of two representatives of sustaining members of the Board.)
- ✦ Special Committees (e.g. Constitutional Revisions, Study Groups, Research Initiative.)

DUTIES OF THE PRESIDENT OF THE AMERICAN EDUCATION FINANCE ASSOCIATION

The President serves as the formal leader of and spokesperson for AEFA, initiating new policies, practices, and organizational relationships for one year following the year of service as President-Elect. The President oversees all new and continuing organizational activities during the year of service in this role. Specific on-going responsibilities include:

- ✦ Prepares agendas and presides over the Board meetings that follow the annual conference in which the person served as President-Elect, the summer Board meeting, and the Board meeting prior to the next annual conference.
- ✦ Chairs the executive committee and serves on the long range planning committee of the Board.
- ✦ Appoints chairpersons and members to Board committees immediately after the annual conference and oversees the work of these committees.
- ✦ Works with the newsletter editor to plan and provide copy for newsletters.

- ✚ Presides, wherever needed, at the annual conference.
- ✚ Presents a brief presidential address at the annual conference.
- ✚ Sends follow-up letters to all committee chairs and Board members who served during the year and retiring Board members.
- ✚ Advises the President-Elect on matters pertaining to the annual conference.

DUTIES OF THE VICE PRESIDENT AND PRESIDENT-ELECT OF THE AMERICAN EDUCATION FINANCE ASSOCIATION

The Vice President also serves as President-Elect. It is suggested that nominees for the position have previously served a full term on the Board of Directors. The Vice President is elected at the annual conference and assumes the presidency following the year of service as vice-president. During this term of office, the Vice President serves in the absence of the President, but is primarily responsible for the program at the annual conference. Tasks associated with the President-Elect include.

- ✚ In the absence of the President, presides over meetings and annual conference activities.
- ✚ Appoints and presides over a program committee at the Board meeting following the annual conference.
- ✚ Solicits proposals for sessions at the annual conference.
- ✚ Presents tentative conference plans and a theme at the summer Board meeting and solicits Board input and other specific assistance with conference planning.
- ✚ Identifies and contracts for services with major speakers during the summer prior to the annual conference; determines their travel arrangements, lodging and audio-visual needs.
- ✚ Prepares and distributes pre-registration mailers describing conference highlights and logistics in conjunction with the secretary-treasurer and president.
- ✚ Provides copy about the conference and keynote speakers to the newsletter editor for the late summer and winter editions of the newsletter.
- ✚ Acknowledges receipt of proposals, oversees selection of proposals, organizes presentations thematically, schedules presentations, determines audio-visual requirements, and notifies presenters of their participation and conference logistics.
- ✚ Prepares the annual conference program, makes room assignments, schedules breaks and socials, and audio-visual schedules with the secretary-treasurer. Programs are printed and brought to the conference site.
- ✚ Mails copies of the conference program to major speakers and confirms travel, lodging, and audio-visual plans about one and one-half months prior to the conference.
- ✚ Prepares follow-up letters to major presenters and others who played significant roles in the annual conference.
- ✚ Selects the recipients for the Roe John's Travel Award.