



AEFA

WINTER 2002-03



American Education Finance Association Newsletter

President's Message

The annual conference is but a couple of months away. I am very excited by the conference program that our President-elect, Jim Wyckoff has put together for us. It includes some stimulating topics ranging from the more traditional work on adequacy and equity to analyses of the factors that affect student performance. To coin a phrase, the program clearly *leaves no topic behind*.

As you make your plans for the conference, keep in mind that the site of this year's meetings (Orlando, FL) is not only the home of many terrific family-oriented theme parks, but it is a mere 50 miles or so from Cape Canaveral and the Kennedy Space Center. If you are interested in the U.S. space program, this is a diversion that is well worth the one-hour trip to see. For more information, see <http://www.ksc.nasa.gov/>

Let me get you up-to-date on our board activities.

A New Domain Name for AEFA. We have established a new domain name for AEFA Internet website. The old name was www.ed.sc.edu/aeifa. The new name is now www.aefa.cc. Those who go to the old site will be redirected automatically to the new site. The old name will continue to work for the next couple of months. This new domain name should be much easier to remember. Just remember it is '.cc' and NOT '.org'. Please change your bookmarks ASAP to www.aefa.cc

Institutional memberships. In addition to AIR, we now have verbal commitments from four more institutions for membership in AEFA. As a reminder, the cost of institutional membership is \$1,000 annually. Universities and other organizations that elect to become institutional members of AEFA will receive the following benefits:

- Complimentary Membership for one Institutional Representative (along with two copies of the Annual Yearbook)
- Two Complimentary Conference Registrations
- Recognition in all AEFA publications (Newsletters, Conference Program, The Membership Directory, and the Annual Yearbook)
- Recognition on the Website
- Table space at the registration area to promote their Institution/Organization or publications of their organization
- Free posting of position announcements on the website
- One complimentary set of mailing labels for mailing Institution materials or announcements
- One complimentary general emailing of announcements to the membership of AEFA

Please encourage your institution to become a member to help support the programs of the organization including the scholarship programs, dissertation awards, travel grants, and our publications program.

A New Journal. The Executive Committee with the authorization of the Board has been talking to a number of possible publishers who have expressed interest in producing with us a new professional journal that will be under the control of the AEFA Board. We hope to have identified a publisher that we will recommend to the Board at the next meeting, and we are working on developing a process for the selection of the managing editor and the editorial board. I would welcome any ideas or suggestions from our membership regarding the operations of this new journal.

I look forward to seeing all of you at the end of March in Orlando. The AEFA meetings always offer a great opportunity to meet new colleagues and make new friends, as well as a chance to exchange ideas with a group of well-informed professionals in the field.

Jay G. Chambers,
President, AEFA and Senior Research Fellow, American Institutes for Research
jchambers@air.org



Nominees for the AEFA President Elect and Board Membership

Candidates for President-Elect



Sheila Murray is an economist at RAND, a part-time Associate Professor in Policy Studies at University of Maryland-Baltimore County and an adjunct instructor of Public Policy at Georgetown University. Prior to joining RAND, Sheila was a National Academy of Education/Spencer Foundation Post-doctoral Fellow and a Visiting Scholar at the Northwestern University/University of Chicago Joint Center for Poverty Research. She was also an assistant Professor at the University of Kentucky. Sheila served on the Board of Directors of the American Education Finance Association between 1998 and 2001. She received dissertation awards from the American Education Finance Association, the National Tax Association Dissertation Award and the Association of Public Policy and Management. She is a member of the NCES Finance Technical Review Panel, a research affiliate of the NU/UC Joint Center for Poverty Research and the University of Maryland Center on Population and Social Inequality. Her work has been published in the *American Economic Review*, *Economics of Education Review*,

Journal of Public Policy and Management, and the *National Tax Journal*. Sheila's research is broadly focused on the distribution of public elementary and secondary education resources and outcomes. She is co-PI on an analysis of the consequence of rising income inequality and the support for public education sponsored by the Russell Sage Foundation and a National Science Foundation grant investigating the consequences of school finance reform on the distribution of real education resources. Her current projects include an analysis of the National Longitudinal Survey of Title I Schools, an analysis of Comprehensive School Reform in Texas and Florida sponsored by the U.S. Department of Education and state and local tax and development policy. She is co-leading the RAND/Spencer Foundation Post-Doctoral Fellowship in Education Policy.



Marge Plecki is Associate Professor in the Area of Educational Leadership and Policy Studies at the University of Washington, Seattle. Her teaching and research activities focus on school finance, the economics of education, and education policy evaluation. Her experience in education includes 15 years of service as a special education teacher, a staff development specialist, and a public school administrator. She has also worked in the private sector as a management consultant. Marge received her bachelor's and Master's degrees from the University of Illinois at Urbana-Champaign and her Ph.D. from the University of California, Berkeley. Currently, she is working on studies of the relationships between resource allocation practices, teaching quality, and student achievement. Marge has published in a variety of academic journals, including the *Journal of School Finance* and the *Economics of Education Review*. She is Deputy Director for the federally-supported Center for the Study of Teaching and Policy, and is Principal Investigator for two research studies funded by private foundations. Marge has been an active member of AEFA since 1989 and served on the AEFA Board of Directors from 1999-2002. She is Co-Editor (with David Monk) of the 2003 AEFA Yearbook *School Finance and Teacher Quality: Exploring the Connections*.

**Even if you're on the right track, if you stand still
you'll get run over by the next train."
Will Rogers**

Candidates for Member at Large (3 positions)



Bruce D. Baker is an Associate Professor in the Department of Teaching and Leadership at the University of Kansas where he teaches courses in school finance policy and district business management. His recent research focuses on state aid allocation policies and practices, with particular attention to the equity and adequacy of aid for special student populations. He is a past recipient of an NCES/AEFA new scholars award and is presently studying faculty resource costs to baccalaureate degree attainment with funding from the Association for Institutional Research. He is also working with Craig Richards of Columbia University and Preston Green of the University of Massachusetts on a school finance textbook for Merrill/Prentice-Hall. He has served as an expert witness in school finance litigation in his home state of Kansas, served on a Governor's task force on school finance in Kansas, and serves as a consultant to a state policy advisory board for the

National Association for Gifted Children. In addition, he is involved extensively with technology applications in school finance for teaching, policy consulting and research. He is presently working for the Governor's office of the State of Texas developing static and dynamic computer simulations of school finance policy options.



Thomas A. Downes is an Associate Professor of Economics at Tufts University. He received his Ph.D. from Stanford University in 1988. Professor Downes's research focuses primarily on the evaluation and construction of state and local policies to improve the delivery of publicly-provided goods and reduce inequities in these services, with particular attention paid to public education. He has also pursued research on the roles of the public and private sectors in the provision of education. Among his current projects are papers that document the implications for student outcomes and community composition of school finance reforms and property tax limitations and that quantify the extent to which charter schools draw their enrollments from private schools. His published papers have appeared in such journals as Public Finance Quarterly, the National Tax Journal, Public Choice, the RAND Journal of Economics, Bulletin of Economic Research, Economics of Education Review, and the Journal of Urban Economics. Professor Downes served as a member of the Panel on Formula Allocations of the Committee on National Statistics of the National Academies and was a participant in the symposium sponsored by the New York State Board of Regents that resulted in Educational Finance to Support High Learning Standards.



Richard A. King is Professor and Director of the Division of Educational Leadership and Policy Studies at the University of Northern Colorado. Dick previously held professorships at the University of North Carolina at Chapel Hill, University of New Mexico, and State University of New York at Fredonia. He earned a Ph.D. in Educational Administration at the SUNY at Buffalo. He also serves as a Visiting professor at the University of Lincoln, United Kingdom, where he teaches financial management issues for school bursars and head teachers. Dick recently co-authored the third edition of School Finance: Achieving High Standards with Equity and Efficiency. He has published journal articles and reports of research on state school finance structures and financial rewards for school improvement. Recognition of his contributions includes awards from three professional associations, an award for an outstanding conference paper, and service on editorial boards of the Journal of Education Finance and Educational Considerations. He served on a Governor's task force and assisted the Colorado Legislative Council design the state's school finance system. Dick has been a member of AEFA since 1978, when he was awarded the Jean Flanigan Outstanding Dissertation award. He previously served on the Board of Directors (1996-

1999), overseeing the selection of dissertation awards and contributing to other committees. He has also offered three pre-conference workshops on school finance simulations. Dick looks forward to improving the ways the Board can support the professional and scholarly efforts of AEFA members.

Candidates for Member at Large (3 positions) continued...



Jennifer King Rice is Associate Professor in the Department of Education Policy and Leadership at the University of Maryland. Her research draws on the discipline of economics to explore education policy questions concerning the efficiency, equity, and adequacy of U.S. public education. As a National Academy of Education/Spencer postdoctoral fellow, her current work focuses on teachers as a critical resource in the education process. She is working on projects with the Economic Policy Institute and The Finance Project to study the costs of enhancing teacher quality through promising recruitment, retention, and professional development strategies. Her research has been published in numerous journals including *Educational Evaluation and Policy Analysis*, *Economics of Education Review*, *Educational Policy*, *Education Administration Quarterly*, and *The Journal of Education Finance* as well as multiple edited volumes including several recent AEFA yearbooks. She is co-editor (with Chris Roellke) of a book series, "Research in Education Fiscal Policy and Practice." She has shared her work with numerous local, state, and national policy organizations, has served on multiple national panels, and is currently a member of the NCES Technical Planning Panel for

School Finance. She earned her M.S. and Ph.D. degrees from Cornell University, and prior to joining the faculty at Maryland, was a researcher at Mathematical Policy Research in Washington, D.C.



Ross Rubenstein is assistant professor of public administration and educational policy studies in Georgia State University's Andrew Young School of Policy Studies and College of Education. His research focuses on K-12 school performance, equity and adequacy, and merit-based financial aid for college, specifically Georgia's HOPE Scholarships. He has been an active AEFA member since graduate school at New York University, where he earned his Ph.D. in 1997. He received AEFA's Jean Flanigan Dissertation Award in 1998, the 2002 Miriam Mills Award from the Policy Studies Organization ("outstanding young person in the policy studies field"), an AEFA/NCES New Scholars Award, and the 1999 Joseph Wholey Distinguished Scholarship Award (with Leanna Stiefel and Amy Ellen Schwartz) from the American Society for Public Administration. Ross's research has appeared in journals including the *Journal of Education Finance*, *Journal of Policy Analysis and Management*, *National Tax Journal*, *Public Budgeting and Finance*, and *Public Administration Review*, and chapters in books including *School-Based Financing* (1999 AEFA Yearbook) and *Improving Educational Productivity*. His work has been funded by the World Bank, U.S. Department of

Education and American Education Research Association. Ross also spent a year on the staff of the Governor's Education Reform Study Commission in Georgia.



Amy Ellen Schwartz is Associate Professor of Public Policy at NYU's Wagner School of Public Service. Her research interests span a wide range in K-12 and higher education. Since earning a PhD in economics from Columbia University in 1989, she has conducted research on education spending, school aid, private support for public schools, and the evaluation of school reforms. Current research in K-12 education, joint with Leanna Stiefel, focuses on the measurement of school performance, the education of immigrant and native-born children in urban schools, and the black-white test score gap. The U.S. Department of Education, Spencer Foundation, and New York State Education Department support this work. Other projects consider the affordability of college, and the financing of charter schools. Her work has been published in a variety of journals including *The Journal of Education Finance*, *American Economic Review*, *Public Administration Review*, *National Tax Journal*, and

Brookings-Wharton Papers on Urban Affairs. She has recently served as a consultant to the New York City Board of Education and the Campaign for Fiscal Equity. Previously, she was an assistant professor at Tufts University. She is a member of the editorial board of *Public Budgeting and Finance*, the director of the Wagner School's doctoral program and a member of the School Leadership Team at PS41 Manhattan, in New York City.

Candidates for Local Affiliate (1 position)



Denny G. Bolton is employed as the chief business official (CBO) in the Owen J. Roberts School District in Pottstown, Pennsylvania. Dr. Bolton also serves on the Board of Directors of the American Education Finance Association (AEFA). He is Vice-Chair of the Editorial Board and a member of the Accounting, Auditing, and Budgeting Committee of the Association of School Business Officials (ASBO) International. He is also an Associate Professor at the Pennsylvania State University where he teaches graduate courses in school finance and human resources management. In addition, he has served on the adjunct faculty of the Pennsylvania School Boards Association for whom he has designed courses and provided training in school finance and technology to over 3000 governing board members. Dr. Bolton holds a Ph.D. from the University of Pennsylvania, M.B.A. from the Wharton School, M.Ed. from Lehigh University, M.A. from the University of Pennsylvania, and B.A. from Ursinus College. He has served as the President of both the Pennsylvania Association of School Business Officials (PASBO) and the Association of

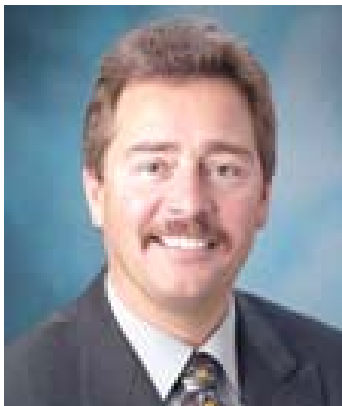
School Business Officials (ASBO) International. He has spoken extensively both nationally and internationally as well as authored numerous publications on issues in school finance and technology. He has been recognized as the outstanding school business official of the year at the state (the Gary Reeser Award from PASBO) and national (the International Eagle Award from ASBO) levels.



Bill Mathis is the current Vermont Superintendent of the Year and has received similar honors from the New England Association of School Administrators, arts educators and special educators. With a strong commitment to bridging the gap between researchers, policy makers and practitioners, Bill has written over 50 legislative policy briefs and newspaper columns. A regular presenter at AEFA and AERA, his research focuses on equity, adequacy, teacher compensation, vouchers, and the evaluation of state funding systems. He was a plaintiff and finance consultant in the Vermont court case and teaches education finance at the University of Vermont. Consulting with the Rural School and Community Trust, Bill has worked for finance reform with organizations in ten states. Previously, he served as Deputy Assistant Commissioner in New Jersey where he directed the state assessment program and evaluated the Constitutionality of the state's funding and school reform systems. On large-scale assessment, he consulted for the U. S. Senate, NAEP, and eight other states. He has also published works in history, law, school reform and the civil society. He received his Ph.D. from

the University of Texas, Austin.

Candidate for International Affiliate



Lyle Krause is an Executive Staff Officer in Teacher Welfare program area of The Alberta Teachers' Association (ATA), Alberta, Canada. His specialized areas of responsibilities include education finance at the provincial level in Canada and public education sector labor relations. He taught in Alberta's public school system for 21 years before joining the Executive Staff of the Association. Mr. Krause has received specialized training in human rights issues and conflict resolution. He has also served on the Association's Professional Conduct Committee and the Teacher Welfare Services Committee. Mr. Krause served as Secretary to the ATA Public Education Facilities Committee and represented the ATA at the Government of Alberta's "Learning Facilities for Tomorrow's Communities" symposium. He holds bachelor's degrees in science and education and a master's degree in educational administration from the University of Alberta. His training also includes the Certificate Program in Conflict Management (Alberta Arbitration and Mediation Society), Negotiation Skills (Industrial Relations Centre, Queen's University) and course work at the Centre for Employee Benefits, Humber College, Ontario. As an

AEFA Board member he would promote enhanced involvement and interaction among the diverse members of the AEFA. As an education finance practitioner he is committed to identifying and strengthening the connections between education finance research and practice. If elected, he looks forward to serving you in his role as International Affiliate on the AEFA Board.

**AEFA American Education Finance Association
2003 Annual Conference
Orlando, Florida
March 27-29, 2003**

***Policy Influencing Research,
Research Informing Policy***

Dear AEFA members,

The 2003 Annual Conference will soon be here! In case you had thoughts about our location in Orlando this year, this ain't no Mickey Mouse Conference. The program is coming together nicely, with what look to be very good papers and panels, based on a very good response from you.

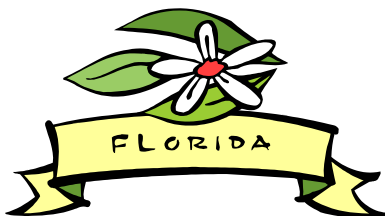
For those interested in training opportunities, AEFA is offering four pre-conference workshops: the attorney's workshop, geographic information systems for education, special education finance, and tools to cope with fiscal stress.

The conference offers three plenary sessions. Dr. Grover (Russ) Whitehurst, Director of the Institute of Education Sciences at the U.S. Department of Education (formerly OERI) will kick off the conference with a talk on "Evidence-based education: Making money matter." At the Friday luncheon, Richard Mills, President of the University of the State of New York and Commissioner of Education will discuss "Cycle Time: Aligning—and Accelerating—the Research and Policy Decision Calendars. Ron Ehrenberg, Irving M. Ives Professor of Industrial and Labor Relations at Cornell University will close the conference with a discussion of financing American higher education. In between these plenary sessions, you will find stimulating colleagues, papers, roundtables, and hall conversation.

As usual, we have the Special Interest Groups and the State of the States. Be sure to check out the AEFA Web site for more conference information and a downloadable copy of the program (on which the finishing touches are being put as this goes to press): <http://www.aefa.cc>

Hope to see you in March!

Jim Wyckoff, President-Elect AEFA



**A Call to States:
Improving State Education Reform Strategy
In Difficult Economic Times**

By
Deborah H. Cunningham
New York State
Education Department

This year's theme for the American Education Finance Association is *policy-influencing research, research-informing policy*. This theme is intensely meaningful to me because I have watched this interaction for almost 15 years in New York State K-12 education. I hope that sharing these experiences will reveal to other states the potential of collaborative research for improving the quality of education reform. Although I refer to state-education-agency policy makers, state legislative and executive branch representatives could be involved in a similar way.

Like many departments of education, the New York State Education Department has an in-house research capacity. For K-12 education, this is focused primarily on modeling school aid formulas, reporting student achievement and demographic data, and assessing standards implementation. Our research staff is small and not likely to increase in the foreseeable future. To complement our in-house research, we have looked to researchers outside the Department.

My participation in AEFA has helped the New York State Education Department to strengthen the extent to which research contributes to State education policy development and decisions. For more than a decade we have collaborated with researchers within and outside our State to help ensure that state education policies are research based and benefit from the latest and best thinking in the research community. Researchers who are members of AEFA have been especially useful to us concerning matters of education and finance. Examples of topics we have researched include developing a financial indicator system for school district fiscal health, assessing resources needed to meet state learning standards, identifying alternatives concerning the generation of local revenues for education, strengthening the teaching workforce in high poverty schools, evaluating standards implementation, and improving cost-effectiveness in education.

While joining AEFA does not automatically lead to full-blown research collaboration in a state, it is an excellent opportunity to expand a state's exposure to national research. It also is a direct response to the federal No Child Left Behind Act's call for research-based initiatives. An on-going collaboration between researchers and state policy makers has several potential benefits for states.

- Research can provide or confirm a conceptual framework to help states pursue reform agendas over a period of years;

- A research collaboration can provide a framework for studying and identifying possible solutions to a state's most difficult educational problems;
- Information provided can reduce resistance within a state that results from divergent positions by providing state policy makers with constructive alternatives to reach agreed upon goals;
- Use of a research capacity independent from the state allows investigation of a number of issues that the state may not wish to pursue directly;
- A research collaborative contributes to capacity-building through sharing of information and methods—in scholars, and policy makers, in graduate assistants, and in state policy and research staff members;
- Broad dissemination of findings will raise the level of knowledge generally in a state about educational finance issues, connections between finance and program results, and reform efforts;
- A research collaborative can reduce the disruption that may result from a court ruling by providing coordinated and focused information on alternative solutions in a timely manner; and
- A research collaborative can increase a state's accomplishment with fewer resources than conducting research with permanent staff.

AEFA is a relatively small research association whose members are diverse in their backgrounds and occupations but who share an interest in issues of school finance broadly defined. Its members have a strong record of research productivity and policy leadership using state-of-the-art research methods.

My involvement in AEFA has affected the way I approach my position by giving me a comprehensive understanding of what research has to say about issues of particular relevance and by sharing what other states are doing to solve similar problems. Because of the New York State Education Department's commitment to linking research and policy through selected strategic, collaborative research studies over the years, I have been able to watch many of my state colleagues learn from the research, make thoughtful contributions, and assess and adjust policy directions. They have benefited by reacting to the research and by offering advice, clarifications and corrections to the authors. The authors revise the research accordingly, improving the research for our uses. The collaboration strengthens the capacity of SED staff and researchers (including graduate students) simultaneously.

The Board of Regents, which oversees education policy and performance in New York State, has been eager consumers of research studies and findings generated by these collaborative research studies. In the Regents deliberations about state education policy, I have observed an increasing concern and need to review data that inform particular policy directions.

Cost Savings

Participating in this and other collaborative research activities saves the Department money by allowing us to get needed research accomplished without having to hire staff on a permanent basis. It has also benefited the Department directly when we were able to hire staff that we were familiar with because of this collaboration. (In recent years, for example, we hired three staff members; based on our collaborative research experience and they have already become excellent contributors to Department work.)

Cost savings are exemplified with the collaborative, four-year Education Finance Research Consortium, created in 1999 in New York State. The State Department of Education uses a modest amount of discretionary funds to access up to 16 school finance experts on an on-going basis. While the actual number of scholars actively involved in and contributing to the Consortium will likely vary from three to ten, depending on the year, this is a considerable increase in access to research and analytical talent compared with the previous system where typically one school finance scholar would be employed in-house.

Potential Growth

What can AEFA do to improve what happens in state education agencies?

Imagine working panels that bring folks together from state education agencies and research institutions. Meetings could occur at the annual AEFA meeting, together with a review of the research pertinent to the topic of focus, and also during the remainder of the year. State education agency representatives would identify those important topics relevant to their state's circumstances. Possible topics might include:

- * Preventing fiscal crises in school districts, that result in disruption of educational programming, in times of state economic decline;
- * Recruiting and retaining qualified staff in low-performing schools;
- * Moving toward adequate funding to meet higher state learning standards;
- * Increasing the State share of education revenues and reducing reliance on the property tax for school funding;
- * Creating state data centers to improve data quality and data access to stimulate education research in the state.

Research like that presented at the AEFA conference is an important first step. The next challenge is to make meaningful policy progress by using selected information strategically. The collaboration between researchers and state education policy makers, both

focused on solving difficult, real and complex problems, offers the promise of education achieving its potential: that of educating all students to high levels regardless of background or learning need.



**Call for Proposals
Editorship of the
2005 Annual Yearbook**

The American Education Finance Association (AEFA) invites you to submit a proposal for editorship of the 2005 Annual Yearbook. For the past 23 years, the yearbook has produced some of the most important scholarly research and thought regarding the financing of public, private, and higher education in the United States and Canada and throughout the world.

In order to be considered by the Yearbook Review Committee, each proposal should be highly detailed and as complete as possible, including the following:

- ◆ a detailed description of the organizing theme or issue,
- ◆ an outline of proposed chapters with a brief description of each,
- ◆ a listing of potential chapter contributors with their institutional affiliations and a brief biography (approximately one paragraph),
- ◆ a vitae of the proposed editor.

It is expected that proposals will be original, not under consideration for publication, nor published elsewhere.

The deadline for receipt of proposals is March 15, 2003.

Proposals may be sent as an attachment to an email (MSWord preferred), embedded in the email itself, or in hardcopy to:

Jim Wyckoff
c/o Barbara Downs
Center for Policy Research
Milne 300
135 Western Ave
Albany, NY 12222

Phone: 919.613.7313
Fax: 919.681.1533
E-mail: wyckoff@albany.edu



**State of the States and
Provinces**

by Cathy Sielke

Our conference in Orlando will be upon us shortly. I am still trying to find individuals to represent many states and provinces. Following is a list of states/provinces that I do not have confirmed representatives for. It is possible that emails went astray. If you are willing to participate in the session, please contact me immediately at csielke@coe.uga.edu.

Still needing representatives:

- | | |
|------------------|----------------|
| Alaska | New Jersey |
| Arizona | New Mexico |
| Connecticut | North Dakota |
| Idaho | Oregon |
| Indiana | Pennsylvania |
| Kentucky | Rhode Island |
| Maine | South Dakota |
| Maryland | Utah |
| Missouri | West Virginia |
| New Hampshire | Wyoming |
| | Washington, DC |
| Alberta | New Brunswick |
| British Columbia | Ontario |
| Manitoba | Quebec |

**"If you don't have confidence, you'll
always find a way not to win."
Carl Lewis**



Education Finance Databases
Training Seminar Announcement
Using the NCES Education Finance
Databases for Research and Policy Analyses
Tuesday, May 27, through Friday, May 30, 2003
Washington, DC

The National Center for Education Statistics (NCES), U.S. Department of Education, will sponsor a 3½-day advanced studies seminar on the use of the NCES education finance databases for research and policy analyses.

This seminar is open to institutional researchers, education practitioners, and policy analysts from state and local education agencies and professional associations as well as advanced graduate students and faculty members from colleges and universities nationwide. Preference will be given to “new scholars” interested in utilizing the NCES elementary/secondary education finance databases for research and policy studies.

PURPOSE

The overall goal of the seminar is to provide researchers with opportunities to gain access to one of the most comprehensive education resources in the nation and to use the data in substantive research. The 3½-day seminar will include both lecture and hands-on instruction. Specifically, the seminar will include the following:

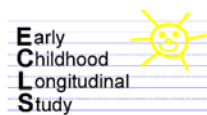
- An overview of CCD, ECLS-K, and SASS sample design, data components, and coverage;
- Methodological and technological issues relevant to data use;
- Instruction and hands-on practices on how to analyze NCES finance data; and
- Individual assistance in designing and carrying out a research study.

NCES DATABASES & USEFUL PUBLICATIONS



The **Common Core of Data (CCD)** is the Department of Education’s primary database on public elementary and secondary education in the United States. CCD is a comprehensive, annual, national statistical database of information concerning all public elementary and secondary schools (approximately 91,000) and school districts (approximately 16,000), which contain data that are designed to be comparable across all states. CCD consists of five surveys completed annually by state education departments from their administrative records. Information included are: a general description of schools and school districts, including name, address, and phone number; data on students and staff, including demographics; and fiscal data, including revenues and current expenditures.

For more information about CCD, please review the materials posted on the NCES Web Site (<http://nces.ed.gov/ccd/>).



The **Early Childhood Longitudinal Study (ECLS) Program** has both descriptive and analytic purposes. The descriptive purposes are to provide national data on (1) children’s status at birth and at various points thereafter; (2) children’s transitions to nonparental care, early education programs, and school; and (3) children’s experiences and growth through the fifth grade. The analytic purpose of the program is to provide data to test hypotheses about the effects of a wide range of family, school, community, and individual variables on children’s development, early learning, and early performance in school. Kindergarten teacher and principals’ salaries and fringe benefits have been obtained from school district payroll information. School facility condition has been reported by on-site observers.

The ECLS program has been designed to include two overlapping cohorts: a birth cohort and a kindergarten cohort. The birth cohort will follow a sample of children from birth through the first grade. The kindergarten cohort will follow a sample of children from kindergarten through the fifth grade.

For more information on the ECLS, contact the ECLS staff at ECLS@ed.gov or review the materials posted on the NCES Web Site (<http://nces.ed.gov/ecls/>).



The Schools and Staffing Survey (SASS) is a data collection system designed to address a wide range of education-related issues. The 1999–2000 SASS is the nation’s largest sample survey of America’s public and private schools and the teachers and principals who work in them. It also collected data from public charter schools in the United States and schools operated by the Bureau of Indian Affairs (BIA).

The 1999–2000 SASS consisted of five components: the School District Questionnaire, the School Principal Questionnaire, the School Questionnaire, the School Teacher Questionnaire, and the School Library/Media Center Questionnaire. These questionnaires were sent to respondents in public, private, Bureau of Indian Affairs/tribal schools, and public charter schools. Teacher and principal salaries were self-reported.

For more information about SASS, please review the materials posted on the NCES Web Site (<http://nces.ed.gov/surveys/sass/>).



A Primer for Making Cost Adjustments in Education (NCES 2001–323)

This publication was undertaken so that educators, the public, and policymakers might better understand both geographic and inflation adjustments, and how they might be applied to elementary/secondary education. The authors seek to inform these audiences of the differences in expenditures and costs, as well as how both geographic and inflation education cost adjustments can be used to assist in differentiating nominal and real costs.

To download, view, and obtain a copy of this report, visit the NCES Electronic Catalog (<http://nces.ed.gov/pubsearch/>).

QUALIFICATIONS

Participants attending this seminar should have a solid understanding of statistical methods, be experienced in using personal computers, and be proficient in the use of the SAS or SPSS statistical software package.

Applicants will be evaluated on:

- Recent graduation from a master's program or doctoral program (or ABD); or recentness of attainment of an assistant professor or research associate appointment at an institution of higher learning or its equivalent;
- Significance of the proposed research project and potential benefit to the education finance community and to NCES from participation in the seminar. It is anticipated that the proposed research design may be modified as a result of the seminar. The seminar is intended to provide exposure to data sets and analytic approaches that might be used to subsequently complete the proposed research and to refine the proposed research design;
- Consistency of the proposed research agenda with the data available in NCES finance databases;
- Experience in educational research, particularly with financial data;
- Knowledge and skills in statistical analyses and the use of statistical computer packages, such as the Statistical Package for the Social Sciences (SPSS) or Statistical Analysis System (SAS);
- Knowledge and skills in public and private financial accounting, such as familiarity with the publications and exposure drafts and statements of the Governmental Accounting Standards Board (GASB) (<http://www.gasb.org/>) or the Financial Accounting Standards Board (<http://accounting.rutgers.edu/raw/fasb/index.html>); and
- Membership in an education finance association, such as the American Education Finance Association (AEFA) (<http://www.ed.sc.edu/aeafa/>), or the Finance SIG of the American Education Research Association (AERA) (<http://www.ed.sc.edu/drt/fiscalsig/index.html>), or the Association of School Business Officials (<http://www.asbointl.org/>), or the American Economic Association (<http://www.vanderbilt.edu/AEA/>), or the National Bureau of Economic Research (<http://www.nber.org/>), or the National Association of State Budget Officers (<http://www.nasbo.org/>), or an equivalent association.

Please see the attached application form for specific questions pertaining to your level of experience and knowledge.

EXPECTED OUTCOME

At the conclusion of the seminar, participants shall submit a summary of a preliminary study design that uses NCES finance data, including a clear specification of study issues, rationale for the study, study approach (specification of population, variables, etc.), and preliminary analysis results if available. When the analysis is completed and a paper or report drafted, a complimentary copy of the paper or report should be sent to NCES.

FINANCIAL SUPPORT FOR THE SEMINAR

There is no fee to attend this seminar. NCES will provide training materials as well as computers for hands-on practice. NCES will also pay for transportation, hotel accommodations, and a fixed per diem for meals and incidental expenses during the training seminar.

LOCATION

The seminar will be held in the Washington, DC metropolitan area, Tuesday, May 27, 2003, through Friday, May 30, 2003. The exact location has not yet been confirmed. Accepted applicants will be sent information about both the meeting and lodging arrangements.

APPLICATION FOR ADMISSION

If you are interested in attending the seminar, please complete and return:

1. The application form.
2. A copy of your resume.
3. A 1- to 2-page statement, clearly describing your research study and how the study can be furthered by your participation in the seminar.
4. The applicant must submit a letter of recommendation from someone familiar with the applicant's ability to complete the proposed research project (e.g., dissertation chair; faculty member; or supervisor).

Your proposed research study should include specification of issues, rationale, finance data, and study approach.

Space is limited for the seminar. Only completed applications will be considered, and only two applicants from the same organization or institution can be accepted.

Please note: Applicants are allowed to attend no more than any two NCES training seminars within a 6-year period.

APPLICATION DEADLINE

All applications should be received no later than **April 19, 2003**. Applications will be reviewed and selected candidates will be informed by April 26, 2003. Selected candidates will receive the seminar agenda and information about travel arrangements.

Applications should be returned to: Joy Butler, Synectics for Management Decisions, Inc., 1901 N. Moore Street, Suite 900, Arlington, VA 22209.

Contact Joy Butler through e-mail at joyb@smdi.com or by telephone at (703) 807–2315, or by fax at (703) 528–2857, if you have any questions regarding this seminar.



Application
Education Finance Database Training Seminar
National Center for Education Statistics (NCES)
U.S. Department of Education
May 26-30, 2003
Washington, DC

Dr. Mr. Ms.

NAME: _____
 (please type or print clearly)

AFFILIATION: _____

TITLE/POSITION: _____

MAILING ADDRESS: _____

CITY: _____ STATE: _____ ZIP CODE: _____

TELEPHONE: _____ FAX: _____

E-MAIL: _____

New Scholar qualification:
 Please note: "New Scholars" will be given preference.
 To qualify as a "new scholar" participants should be less than 3 years past graduation or appointment.

- Please answer the following:**
- Have you recently graduated from a master's or doctoral program (or ABD)?
 Or obtained an assistant professor or research appointment? yes no
 If so, degree from what program/institution _____?
 Date (mm/dd/yy) : _____? Degree _____?
 Field _____?
 - Have you previously conducted education finance research using NCES data? yes no
 If so, with what data set(s) _____?
 - Have you been educated in a field other than finance (e.g., sociology), but have an interest in undertaking research in education finance? yes no
 If so, what is your current field? _____?

NCES Finance Data Experience:	Level of experience			
	Extensive	Some	Very Little	None
CCD				
SASS				
ECLS-K				
Cost adjustments				

Membership in an education finance association:
 Please indicate the name(s) of the education finance associations to which you belong:

Computer Statistical Software Experience:

**ALL PARTICIPANTS MUST HAVE AT LEAST 2 YEARS OF SPSS & SAS EXPERIENCE.
Preference will be given to those with at least 2 years of experience**

Level of experience

	Extensive	Some	Very little	None
SPSS (Windows)				
SAS (Windows)				
WesVarPC				
Other (specify)				

Please answer the following:

- 4. Do you have experience merging files in SPSS or SAS? yes no
- 5. Do you have experience recoding variable values in SPSS or SAS? yes no
- 6. Have you used weights in your analysis using SPSS or SAS? yes no
- 7. Have you run statistical analyses using SPSS or SAS? yes no
- 8. How many years of experience do you have using SPSS or SAS?

Area of Research Interest:

Please attach a clearly written description of your research interest and how that can be furthered through the use of NCES data (1–2 typewritten pages). Be as specific as possible. The applicant must submit a letter of recommendation from someone familiar with the applicant's ability to complete the proposed research project (e.g., dissertation chair; faculty member; or supervisor).

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1901 N. Moore Street, Suite 900
Arlington, VA 22209
tel: (703) 807–2315
fax: (703) 528–2857
e-mail: joyb@smdi.com

Sheraton World Hotel



Sheraton World Resort

The Sheraton World Resort is a recently renovated, year-round resort, situated on 28 tropically landscaped acres, 12 miles from Orlando International Airport. The hotel is located within walking distance of SeaWorld, and just a half-mile from the Orange County Convention Center. Universal Studios and Walt Disney World are only minutes away from the Sheraton World Resort. The hotel offers onsite car rental, as well as discounted tickets to area attractions.



Sheraton World Resort

The Sheraton World Resort features beautifully decorated, deluxe accommodations that are comfortable and well appointed with all modern amenities. The Sheraton's outstanding facilities include three heated outdoor swimming pools, a fitness center, two lighted tennis courts and 55,000 square feet of meeting space. The hotel also offers a business center onsite and full concierge services. The Sheraton World Resort is only minutes away from dining, shopping and local theme parks.

It is funny about life: if you refuse to accept anything but the very best you will very often get it. -- W. Somerset Maugham

Have You Moved or Changed Your E-Mail Address:

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Ed Steinbrecher, Executive Director AEFA
8365 Armadillo Trail
Evergreen, CO 80439
Phone: 303/674-0857
Fax: 303/670-8986
Email: esteinbr@du.edu

For membership and other information on AEFA, go to our NEW web site at www.aefa.cc.

NEXT ISSUE HIGHLIGHTS:

- ❖ **Election Results**
- ❖ **President's Message (our first message from Jim!)**
- ❖ **Note from Past President (last time Jay!)**
- ❖ **Meet the Award Winners**
- ❖ **and much more.....**

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Date _____ Please type or print information.

(Please Circle)

Name _____
 Dr. Mr. Mrs. Ms. Last First

2003 Regular Membership Dues \$50
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Middle _____

Position _____

School/Organization _____

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(Begin 8:00 a.m. Thurs .March 27)

Address _____

1. Attorneys Workshop \$100
 2. Special Education Finance\$ \$100
 3. School Districts and Fiscal Stress \$100
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City _____ State _____ Zip _____

Home Phone (____) _____ Office Phone (____) _____

TOTAL DUE..... \$ _____

FAX _____ e-mail _____

2003 CONFERENCE AND PRE-CONFERENCE ATTENDEES MUST BE 2003 AEFA MEMBERS.

Please make your check payable to AEFA and send to:

**AEFA
 c/o Ed Steinbrecher, Executive Director
 8365 S. Armadillo Trail
 Evergreen, CO 80439**

CONFERENCE HOTEL – The Sheraton World is the 2003 Conference hotel. Call **1-800/327-0363** to make your reservation. Identify yourself as an **AEFA** member in order to get the special rate of \$143.00 per day.

Reservations must be made prior to February 26, 2003, in order to protect this rate.

AIRFARES – Airlines no longer subsidize travel agents. A reduced fee will be added. If you desire assistance in arranging your travel please call, **Weaver’s Travel Center** at **1-800/767-3483**, 637V S. Broadway, Boulder, CO 80305. Identify yourself as an **AEFA** member. The best rates will be searched for you. Also for your convenience **SPECIAL AUTOMOBILE RENTAL RATES** for car rentals may be made with **AVIS Car Rental**. Call **1-800-331-1600** ask for Group # AWD-J098841.

Car Class	Daily	Weekly	Weekend
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Compact	\$38.99	\$124.99	\$32.99
Intermediate	\$40.99	\$157.99	\$34.99
Full Size 2 Door	\$44.99	\$180.99	\$38.99
Full Size 4 Door	\$46.99	\$195.99	\$40.99
Premium	\$49.99	\$206.99	\$43.99
Luxury	\$59.99	\$293.99	\$61.99