The Inaugural National Education Finance Conference

May 4-6, 2011
Grand Hyatt Tampa Bay
Tampa Bay, Florida
Special thanks are due to the following for their help in planning the 2011 Inaugural Conference and contributing to NEFC’s success:

Lisa Driscoll, University of North Carolina-Charlotte for chairing the NEFC Outstanding Lifetime Achievement Award along with members Marilyn Hirth of Purdue University, Gary Peewey of Lincoln Memorial University, Jennifer A. Sughrue of Old Dominion University, and Andrew Wall of the University of Rochester.

William Hartman of Pennsylvania State University for chairing the Journal of Education Finance Outstanding Article of the Year Award along with members Michael Addonizio of Wayne State University, Jeffrey Maiden of the University of Oklahoma, and Deborah Verstegen of the University of Nevada-Reno.

Faith Crampton of the University of Wisconsin-Milwaukee for chairing the NEFC Outstanding Dissertation of the Year Award along with members Mary McKeown-Moak of MGT of American, F. Howard Nelson of the American Federation of Teachers, Lenford C. Sutton of Alabama State University, and Scott R. Sweetland of The Ohio State University.

Kern Alexander and Shari Hall for assisting with all collaboration components associated with NEFC and the Journal of Education Finance.

Tyrone Bynoe, University of the Cumberlands, Matt Fajack, University of Florida, and R. Anthony Rolle of the University of South Florida for graciously taking time and energy to chair the conference workshops.

Brittany Larkin and Luke Stedrak, doctoral candidates for their hard dedicated work with organizing, planning, and managing the conference.

Carlee Poston Escue as Vice Chair of the conference for her tireless work on the conference.

To the anonymous members of the 2011 National Education Finance Conference Distinguished Research & Practice Fellow Awards Committee.

Grand Hyatt Tampa Bay for cooperation and planning assistance.

THANK YOU TO OUR SPONSORS:

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University of South Florida
University of Cincinnati, College of Education, Criminal Justice, and Human Services
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Carlee Poston Escue, Assistant Professor, College of Education, Criminal Justice, and Human Services, University of Cincinnati
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Yosuke Yotoriyama, Niigata University, Tokyo, Japan
Osnat Zaken, Touro College
2011 National Education Finance Conference
Distinguished Research & Practice Fellow Awards

Scott Bauries is an assistant professor at the University of Kentucky School of Law where he teaches Education Law, State Constitutional Law, Employment Law and Civil Procedure. Scott graduated first in his law class at the University of Florida while receiving a Ph.D. in Educational Administration and Policy at the University of Florida. Before joining the University of Kentucky Law faculty, he clerked for the Honorable Emmett Ripley Cox of the United States Court of Appeals for the Eleventh Circuit and worked as an associate with McGuire Woods, LLP, where he practiced Employment Law and Higher Education Law.

Catherine Clark serves as the Associate Executive Director for governance services at the Texas Association of School Boards. She provides support to the Association in property tax and school finance policy matters and authors Guide to Texas School Finance. She is also responsible for legal services, policy service, compensation studies, salary surveys, consulting services for school districts, school board member training programs, and online learning center, an annual convention, and several leadership and training events. Prior to joining the senior staff at TASB, she was director at the Dana Center at the University of Texas at Austin.

Lisa Driscoll is associate professor of Educational Leadership in the College of Education at the University of North Carolina at Charlotte. Her area of interest is in public education finance and law, with a focus on the equitable determination of fiscal capacity differences among school districts. She is particularly interested in longitudinal analyses that examine equity or adequacy of funding over time. Her work has appeared in a number of journals including the Journal of Education Finance. She has assisted in preparing reports for education finance litigation and has served as an expert witness. Lisa serves on various editorial boards.

Mathew Fajack is the Vice President and Chief Financial Officer at the University of Florida. He joined the university staff in 2008 and previous positions include: Executive Director for Financial Affairs at Kent State University and Chief Financial Officer of the Beta Capital Group, Dallas, Texas. He is a member of the Shands Teaching Hospital and Clinics, Inc. Board of Directors, UFICO Board of Directors, Gainesville Chamber of Commerce Board of Directors and North Central Florida United Way. Matt received his bachelor’s degree in business administration from the University of Minnesota in 1984.

William Hartman is a Professor of Educational Leadership in the College of Education at Pennsylvania State University. He has a Bachelor of Mechanical Engineering with High Honors from the University of Florida, a Masters of Business Administration from Harvard University, and a Ph.D. in Administration and Policy Analysis from Stanford University. His present research focuses on understanding and investigating the impacts on school districts of the current economic crisis-the new fiscal reality. Other areas of interest include school budgeting, resource allocation at school and district levels, decision-making models in educational finance, and special education finance.

Charles Mayfield is a senior fiscal analyst with the Indiana Legislative Services Agency since 1999. The Indiana Legislative Services Agency is the non-partisan staff for the General Assembly that drafts and does fiscal impacts on proposed legislation. His focus is estimating the fiscal impact on legislation dealing with schools, including simulation of how to distribute about $6.2 billion of state money to schools. Prior to 1999, Mr. Mayfield spent 18 years with the Indiana State Budget Agency. Chuck has been the primary individual simulating the distribution of state and local operation funds to local schools for the past 30 years.

R. Anthony Rolle, is Professor and Chair of the Department of Educational Leadership and Policy Studies at the University of South Florida. His research explores and improves relative measures of economic efficiency for public schools. His research applies measures of vertical equity to analyses of state education finance mechanisms. Anthony has published in books, journals, and monographs such as *To What Ends and By What Means? The Social Justice Implications of Contemporary School Finance Theory and Policy, Modern Education Finance and Policy, Measuring School Performance and Efficiency* as well as the *Journal of Education Finance, and Peabody Journal of Education*.

Scott R. Sweetland began his formal career as an administrator for Manufacturers and Traders Trust Company. After earning an MBA in Finance at St. Bonaventure University, he became a college professor in business schools teaching statistics, finance, accounting, and economics. Upon completing the Ph.D. in Education at SUNY Buffalo, Scott joined The Ohio State University graduate faculty. Scott teaches courses in school business administration and finance. His publications and service have led to a wide array of collaborations, primarily with distinguished scholars, state officials, and school administrators. Lifelong theoretical and professional practice interests include finance, administration, and public-private sector cooperation.

Deborah Verstegen is Professor at the University of Nevada-Reno. Her Ph.D. is from the University of Wisconsin where she was awarded an Alumni Achievement Award for development of an equity statistic, later named the ‘Verstegen Index.’ Dr. Verstegen served twice on the Board of Directors of the American Education Finance Association, Editor of the *Journal of Education Finance*, and is co-Author (with Brimley and Garfield) of *Financing Education in a Climate of Change*. Deborah was appointed Endowed Chair in Finance Management at the University of Illinois in 2007. She has served as an expert witness in state school finance litigation.
PROGRAM OVERVIEW
Inaugural National Education Finance Conference
Tampa Bay, Florida

WEDNESDAY, MAY 4, 2011
8:00 a.m. – 5:00 p.m. Conference Registration
8:00 a.m. – 12:00 p.m. Conference Workshops
1:15 p.m. – 3:15 p.m. First General Session
3:30 p.m. – 5:00 p.m. Concurrent Session I
6:00 p.m. – 8:00 p.m. Welcome Reception

THURSDAY, MAY 5, 2011
7:00 a.m. – 8:30 a.m. Journal of Education Finance Breakfast (by invitation)
8:30 a.m. – 10:00 a.m. Concurrent Session II
10:15 a.m. – 11:45 a.m. Concurrent Session III
1:45 p.m. – 3:15 p.m. Concurrent Session IV
3:30 p.m. – 5:00 p.m. Concurrent Paper Session V
5:15 p.m. – 6:15 p.m. Board of Advisors Meeting (by invitation)
6:15 p.m. – 8:00 p.m. Grand Reception

FRIDAY, MAY 6, 2011
8:00 a.m. – 9:30 a.m. Concurrent Session VI
9:45 a.m. – 11:15 a.m. Second General Session

KEYNOTE SPEAKERS
Inaugural National Education Finance Conference
Tampa Bay, Florida

Neil D. Theobald
Vice President, CFO, &
Professor of Education
Indiana University

Neil Theobald is Vice President & Chief Financial Officer of Indiana University and has been Professor of Education Finance at IU since 1993. Prior to coming to IU, he served as a:
· tenured faculty member at the University of Washington
· a high school math teacher and baseball coach, and earlier,
· as an economic analyst for the Caterpillar Tractor Co.
Vice President Theobald is a past-president of the American Education Finance Association, winning the Association’s Jean Flanigan Award for the outstanding dissertation in the study of educational finance in 1990. In 1995, the University Council for Educational Administration presented Theobald with the Jack A. Culbertson Award as the professor who, in the first seven years of his or her career, made the most outstanding contribution to the profession. In 2003, Theobald was presented the Distinguished Graduate Award by the College of Education at the University of Washington. He is a three-time winner of IU’s Teaching Excellence Recognition Award and his research interests in the appropriate role of decentralization in educational financing and in modeling educational labor markets are reflected in more than $1.5 million in funded research, numerous book chapters, journal articles, and policy reports for state governments across the U.S.
Vice President Theobald’s major accomplishments over his 9-year period as first Senior Vice Provost, and then Vice President, include boosting IU’s credit ranking to Moody’s highest level (Aaa) and Standard & Poor’s second highest-level (AA+), adding 120 tenure-track faculty members, increasing the Bloomington Campus financial aid endowment from less than $150 million to more than $550 million, and increasing the mean SAT score of the incoming class from 1099 to 1202.
Vice President Theobald and his wife, Sheona Mackenzie, who is a school psychologist in the Bloomington public schools, have 3 college-age children.
KEYNOTE SPEAKERS
Inaugural National Education Finance Conference
Tampa Bay, Florida

David S. Doty
Superintendent of Canyon School District
“America’s Newest School District”

Dr. David S. Doty is Superintendent of the nation’s newest school district in Utah’s Canyons School District, a 33,000-student district comprised of the municipalities of Cottonwood Heights, Midvale, Sandy, Draper, and Alta in the southeastern part of Salt Lake County, Utah.

Prior to his appointment as Superintendent, Dr. Doty was Assistant Commissioner & Director of Policy Studies for the Utah System of Higher Education, and the Director of Utah Scholars, a business/education initiative that motivates high school students to complete a rigorous college-prep curriculum. He earned a B.A. in Spanish from Brigham Young University (1989), as well as a J.D. from BYU’s J. Reuben Clark Law School (1993), where he was a Senior Editor of both the BYU Law Review and the BYU Education & Law Journal. He also earned an M.A. from the Graduate School of Education at Stanford University (1990), and a Ph.D. in Educational Leadership from BYU’s David O. McKay School of Education (1999). Dr. Doty also worked previously as an attorney in private practice with the Columbia, South Carolina law firm of Duff, Turner, White & Boykin, where he provided legal counsel to public school districts and colleges across South Carolina. A member of both the Utah State Bar and the South Carolina Bar, Dr. Doty is a frequent presenter at state and national conferences, and is active in a number of professional organizations, including the Education Law Association and the Council of School Attorneys. In addition, Dr. Doty has taught graduate-level courses in education law and public policy at the University of Utah, Winthrop University, and the University of South Carolina.

Dr. Doty and his wife, Rori, a University of Utah graduate who is an R.N. at Intermountain Medical Center, reside in Sandy and have three children in public school.

Conference Registration: 8:00 a.m. – 5:00 p.m.

First Floor

Conference Workshops: 8:00 a.m. – 12:00 p.m.

1. Education Finance in School Principal Preparation Programs

   Room: Audubon D

   Workshop Chair and Facilitator:
   Tyrone Bynoe, University of the Cumberlands

   This workshop is a brainstorming session to scope and to identify the expected outcomes that a graduate student should meet in an education finance course, which is part of a school principal preparation program. The brainstorming session recognizes that the current and dynamic redesign of school principal preparation programs across the country warrant reflection and reconsideration concerning what is taught in education finance to ensure job relevance in a course used to train school principals. All conference attendees are welcomed. Faculty that teach courses in school principal programs are particularly welcomed.

Room: Audubon E

Workshop Chair and Facilitators:
Matt Fajack, Vice President and CFO, University of Florida
Sheri Austin, Assistant Vice President-Budgeting, University of Florida
Michael Leardi, Strategic Business Alliances
Noah Rosenberg, Education Advisory Board

This workshop will highlight the use of the cost of delivery to determine the allocation of state appropriations and tuition to colleges. Historically, universities that implement RCM use permanent or temporary subvention to deal with cost differences among delivering different programs. The University of Florida created a unique weighting scale by Classification of Instructional Program to effectively deal with the cost differences. The weights are on a relative schedule so you can compare your university to other universities or systems that may receive differing dollar amounts of tuition and appropriations per student.


Room: Audubon F

Workshop Chair and Facilitators:
R. Anthony Rolle, University of South Florida
Luke Cornelius, University of West Georgia
Veronica Garcia, Texas Charter Schools Association
Eric Houck, University of North Carolina, Chapel Hill
Ed Hurley, National Education Association
Denise Pierce, Texas Charter Schools Association

Despite a history of financial, litigation, and policy reform efforts intended to generate quality academic programs and produce well-educated students, claims that “money does matter” in the improvement of educational outcomes still are common. Of course, money matters—particularly in tough economic times—the larger question that necessitates an answer is: How? An expert panel will participate and discuss the current national and state political, policy, and litigation events that states face during recessionary times.
First General Session.
Wednesday, May 4; 1:15 p.m. - 3:15 p.m.

Room: Audubon D-E-F

Welcome
R. Craig Wood, NEFC Chair

Introduction of the Board of Advisors
Carlee Poston Escue, University of Cincinnati, NEFC Vice Chair

NEFC Chair’s Address

NEFC Outstanding Education Finance Dissertation of the Year Award presented by Faith Crampton, University of Wisconsin-Milwaukee

NEFC Lifetime Achievement Award presented by Lisa Driscoll, University of North Carolina, Charlotte

Introduction of the Keynote Speaker
R. Anthony Rolle, University of South Florida

Opening Keynote Speaker:
Neil D. Theobald, Vice President, CFO, & Professor of Education, Indiana University
Myths and Realities of Higher Education Finance

Concurrent Session I.
Wednesday, May 4; 3:30 p.m. – 5:00 p.m.

1.1 Symposium - Train Wreck Ahead: Financial Conditions Facing School Districts
Room: Audubon D

A variety of economic, political, and educational factors are combining to create the most threatening fiscal climate for school districts in decades. It will no longer be business as usual. This symposium will focus on the upcoming fiscal crisis facing states and school districts. Using Pennsylvania as a representative state, the presenters will review the conditions causing severe fiscal stress, measuring and improving financial performance, and implementing improved budgeting practices to deal with the crisis. While the examples will be from a single state, the generalization to other states will be straightforward.

Participants:
WILLIAM HARTMAN, Pennsylvania State University, The New Fiscal Reality for Education

ROBERT SCHOCH, North Penn School District, Financial Performance: From Measurement to Management
1.2 Papers

Room: Audubon E
Chair: Richard A. King, University of South Florida

AIN GROOMS, University of Georgia; Equity and Adequacy- Measuring Vertical and Horizontal Equity in Georgia Using Traditional and Alternative Methods, 2004-2009 (co-author ERIC HOUCK, University of North Carolina at Chapel Hill)

JOHN STEACH, Richland School District/Washington State University; Equity and Adequacy- Quantifying the Principal’s Workload: Developing an Alternative to Enrollment-Driven Administrative Staffing

1.3 Panel Discussion-Financing Public Education in Texas Within the Present Economy

Room: Audubon F

This panel discussion will discuss the challenges currently facing policy makers in Texas in the present economy. The panel participants will approach the issue from different perspectives offering insight into one of the largest state systems of public education.

Chair: R. Anthony Rolle, University of South Florida

Participants:
William Camp, University of North Texas
Catherine Clark, Texas Association of School Boards
Koy Floyd, Tarleton State University
Timothy Jones, Sam Houston State University
Lynn Moak, Moak, Casey & Associates
John Slate, Sam Houston State University

1.4 Papers

Room: Cormorant
Chair: Marilyn Hirth, Purdue University

ROBERT KNOEPPEL, Clemson University; Finance Litigation- Intentions vs. Reality in Kentucky School Finance: Examining the Link between Wealth and Student Achievement (co-authors W. BLAKE HASELTON, University of Louisville, TIMOTHY KEOWN, Clemson University MATTHEW L. MOORE, Clemson University, and BRIAN O’NEIL, Clemson University)

SPENCER WEILER, University of Northern Colorado; Other- Leadership Development Program: A Cost Effective Effort to Increase the Leadership Capacity of a School District (co-author KEVIN HAHN, Poudre School District, Fort Collins, Colorado)

1.5 Papers

Room: Snowy Egret South
Chair: Osnat Zaken, Touro College

WALTER A. GARRETT, JR., Saint Louis University; Budget Development and Management- Benchmarking School District Performance (co-author MARTHA GARRETT, Special School District of St. Louis County)

EDWYNA SYNAR, Met-Lombard High School; Private/For Profit K-12 and Higher Education- The Financial Impact of Teacher Turnover: A Comprehensive Model (co-author JEFFREY MAIDEN, University of Oklahoma)
Concurrent Session I.
Wednesday, May 4; 3:30 p.m. – 5:00 p.m.

1.6 Papers
Room: Snowy Egret North
Chair: Christopher M. Mullin, American Association of Community Colleges

LENFORD SUTTON, Alabama State University; Private/For Profit K-12 and Higher Education- Fiscal Leadership at Historically Black Colleges and Universities in a Climate of Change

1.7 Roundtables
Room: Roseate Spoonbill

BETTY COX, University of Tennessee at Martin; Budget Development and Management- Big Business, So Where’s the Money?
(co-author LUKE CORNELIUS, University of West Georgia)

DEBORAH A. VERSTEGEN, University of Nevada at Reno; Budget Development and Management- Budget Dilemmas and the Great Recession in Nevada

1.8 Roundtables
Room: Herring Gull

DANA DAVIS, Gadsden State Community College; Other-Student Costs And Enrollment In Private, Less Than Highly Competitive, Baccalaureate Institutions
(co-author DAVID HARDY, University of Alabama)

KARI MATTOX; Frederic G. Levin College of Law at the University of Florida; Virtual Education- Utilizing Virtual Education in Florida to Meet Mandated Class Size Limitations

Welcome Reception.
Wednesday, May 4; 6:00 p.m. – 8:00 p.m.

Room: Audubon Ballroom A
Cigars on the Promenade
Concurrent Session II.
Thursday, May 5; 8:30 a.m. – 10:00 a.m.

2.1 Papers
Room: Audubon D
Chair: Charles Mayfield, Indiana Legislative Services Agency

NICOLA ALEXANDER, University of Minnesota; Equity and Adequacy- The Growth of Education Revenues from 1998-2008: An Update on What Accounts for Differences Among States in the Context of Adequacy

RICHARD KING, University of South Florida at Sarasota-Manatee; Equity and Adequacy- Balancing Budgets When Meeting Strict Policy Mandates: Financing Florida’s Class Size Limitations
(co-author LENFORD SUTTON, Alabama State University)

Concurrent Session II.
Thursday, May 5; 8:30 a.m. – 10:00 a.m.

2.2 Papers
Room: Audubon E
Chair: Andrew Wall, University of Rochester

MARILYN HIRTH, Purdue University; Equity and Adequacy- The Status of Funding Indiana’s Public School Districts: An Analysis of Equity and Adequacy
(co-author EDWARD EILER, Lafayette School Corporation)

HEE KYUNG HONG, Hong Kong Institute of Education; Private/ For Profit K-12 and Higher Education- Student Loan Policies and Higher Education Expansion in Korea
(co-author JAE-EUN CHAE, Kyungwon University, South Korea)

2.3 Papers
Room: Audubon F
Chair: William Thro, Christopher Newport University

JEANNE POWERS, Arizona State University; Finance Litigation- Social Science Research and Judicial Decision Making in School Finance Litigation

VANCE VAUGHN, The University of Texas at Tyler; Finance Litigation- A Public School Finance Issue in Texas and Nationally
(co-authors WESLEY HICKEY, The University of Texas at Tyler and DARLA NOLAN, Corsicana Independent School District)
### Concurrent Session II.
Thursday, May 5; 8:30 a.m. – 10:00 a.m.

#### 2.4 Papers
**Room:** Cormorant  
**Chair:** Jeffrey Maiden, University of Oklahoma

SCOTT SWEETLAND, The Ohio State University; Equity and Adequacy- A Tale of Two Fiscal Policies: Entrepreneurial and Entropic

MARGARET WESTON, Public Policy Institute of California; Equity and Adequacy- Pathways for School Finance in California  
(co-authors JON SONSTELIE, University of California at Santa Barbara and HEATHER ROSE, University of California at Davis)

#### 2.5 Papers
**Room:** Sandhill Crane South  
**Chair:** Patricia First, Clemson University

BARBARA DELUCA, University of Dayton; Other- The Accuracy of Perceptions of Education Finance Information: How Well Local Leaders Understand Local Communities  
(co-authors STEVEN HINSHAW, Chief Financial Officer, City of Centerville and KORRIN ZISWILER, University of Dayton)

BARBARA LACOST, The University of Nebraska; Budget Development and Management- Paying for and Managing Mandated Cooperation: The Experience of 11 Nebraska Urban Districts

#### 2.6 Papers
**Room:** Sandhill Crane North  
**Chair:** Phillip Westbrook, University of Alabama

LISA DRISCOLL, University of North Carolina at Charlotte; Other- Starving the Education Beast: Supplanting Tax Revenue from Property with Consumption  
(co-author JIM WATSON, University of North Carolina at Charlotte)

WARREN CRAIG POUNCEY, Division of Administrative and Financial Services, State of Alabama; Equity and Adequacy- School Funding Issues In Alabama: The State Legislature And School Superintendents - Adversaries Or Allies?  
(co-author LESLIE ENNIS, Samford University)

#### 2.7 Roundtables
**Room:** Herring Gull

WALTER A. GARRETT, JR., Saint Louis University; Budget Development and Management- Educational Efficiency in an Era of Financial Crisis  
(co-author MARTHA GARRETT, Special School District of St. Louis County)

MIKE PROMBO, Community Unit School District No. 300; Budget Development and Management- The Educational Program Review Technique (EPRT): A Budget Management Technique That Works
Concurrent Session II.
Thursday, May 5; 8:30 a.m. – 10:00 a.m.

2.8 Roundtables

Room: Roseate Spoonbill

LUKE STEDRAK, University of Florida; Virtual Education-The Funding of Virtual Schools & Developmental Technology in Education
(co-author JUSTIN ORTAGUS, University of Florida)

Concurrent Session III.
Thursday, May 5; 10:15 a.m. – 11:45 a.m.

3.1 Symposium-Top Ten Ways to Save Money with Regard to Special Populations

Room: Audubon D

The symposium will present multiple ways to improve student accountability without increasing a local education agency’s expenditures while continuing to generate revenue. The audience will learn how to save money with regard to special populations, which are those students that cost the most to educate as well as harm a district’s accountability ratings if they were not successful. The symposium primarily will focus on more accurate evaluation, early intervention, and a timely exit from special services.

Participants:
MICHELE HARMON, University of Texas at the Permian Basin

3.2 Papers

Room: Audubon E
Chair: Spencer Weiler, University of Northern Colorado

PATRICIA FIRST, Clemson University; Finance Litigation-Judicial Inaction and the Failure of Justice: The Case of ELL Students in Arizona
(co-author ROBERT KNOEPPEL, Clemson University)

DEBORAH A. VERSTEGEN, University of Nevada at Reno; Other- Fifty State Survey of School Finance Policies and Programs-2011
(co-author ROBERT KNOEPPEL, Clemson University)
Concurrent Session III.
Thursday, May 5; 10:15a.m. – 11:45 a.m.

3.3 Papers
Room: Audubon F
Chair: Lewis Wasserman, University of Texas at Arlington

ANTHONY ROLLE, University of South Florida; Other-
Remembering the Importance of Student Effort

JOHN R. SLATE, Sam Houston State University; Other-
An Educational Database: A Plethora of Research Possibilities

3.4 Papers
Room: Cormorant
Chair: Richard G. Salmon, Virginia Polytechnic Institute and State University

KATIE BAIRD, University of Washington at Tacoma; Private For/Profit K-12 and Higher Education-
Rethinking the Financing of Higher Education

WALTER MCMAHON, University of Illinois; Other-
Higher Education and Development in the US and UK
(co-author MOSES OKETCH, University of London)

Concurrent Session III.
Thursday, May 5; 10:15a.m. – 11:45 a.m.

3.5 Papers
Room: Sandhill Crane South
Chair: Scott Sweetland, The Ohio State University

SUNG-WOO CHO, Community College Research Center;
Equity and Adequacy-
Developmental Education Program Effect Analysis: A Within-State Difference-in-Differences Approach
(co-authors THOMAS BAILEY, Community College Research Center, and DAVIS JENKINS, Community College Research Center)

JEAN W. VAN ROOYEN, University of Pretoria/CELP;
Equity and Adequacy-
Money Matters – Does Money Matter?

3.6 Papers
Room: Sandhill Crane North
Chair: Lenford Sutton, Alabama State University

SCOTT BAURIES, University of Kentucky; Finance Litigation-
Destabilizing Systems, Devaluing Rights: The Institutional Reform Model in School Finance Litigation

WILLIAM THRO, Christopher Newport University; Finance Litigation-
Rosenkranz Constitutional Subjects and School Finance Litigation
Concurrent Session III.
Thursday, May 5; 10:15 a.m. – 11:45 a.m.

3.7 Roundtables
Room: Herring Gull

KENDALL DEAS, University of Georgia; Finance Litigation- Race-Based School Funding as a Provision of NCLB: An Evaluation of Potential Legal Challenges

COURTNEY LOCKRIDGE, Oklahoma State University; Finance Litigation- The Tangible Impact of School Finance Litigation on Student Achievement (co-author JEFFREY MAIDEN, University of Oklahoma)

3.8 Roundtables
Room: Roseate Spoonbill

FAITH CRAMPTON, University of Wisconsin at Milwaukee; Other- The Road Ahead for School Finance Reform (co-author DAVID THOMPSON, Kansas State University)

GARY PEEVELY, Lincoln Memorial University; Other- Following the Money: Utilization of American Recovery and Reinvestment Act 2009 Funds by Public School Districts in Tennessee (co-author LORI HUTCHINSON)

Concurrent Session IV.
Thursday, May 5; 1:45 p.m. – 3:15 p.m.

4.1 Symposium- Teacher Performance Pay: At the Price of What?
Room: Audubon D

The main focus of the symposium is to discuss the merits of teacher pay in the context of eliminating programs and services that perhaps provide the value benefits of non-academic programs. In addition, the participants will address the merits of teacher pay in the context of the national discussion on the value of an education degree from some of America’s top universities relative to the pay for performance movement. This session is on the value of teacher performance pay from different educational perspectives. The participants on this panel/symposium consists of a public school teacher from the Atlanta Public Schools; a retired chief fiscal officer and University Professor; and a Professor of Educational Leadership who also served as an Assistant Superintendent for High School education where Teacher pay for performance was emerging as a possibility several years ago. These views will be responded to a discussant with a national reputation in public school finance at both K-12 and higher education levels.

Participants:
DEBORAH PEARSON, Atlanta Public Schools
BERNARD OLIVER, University of Florida
BRUCE MOUSA, University of Florida
Concurrent Session IV.
Thursday, May 5; 1:45 p.m. – 3:15 p.m.

4.2 Papers

Room: Audubon E
Chair: Catherine Clark, Texas Association of School Boards

KRISTI BOWMAN, Michigan State University; Other- Before School Districts Go Broke: A Proposal for Federal Reform

JOHN R. SLATE, Sam Houston State University; Charter Schools- Charter Schools: The 65% Instructional Expenditure Ratio and College-Readiness (co-authors TIMOTHY B. JONES, Sam Houston State University, and DON P. SCHULTE, University of Texas at El Paso)

4.3 Papers

Room: Audubon F
Chair: Dwight Raines, St. Leo University

RICHARD SALMON, Virginia Polytechnic Institute and State University; Equity and Adequacy- The Evolution of Virginia Public School Finance: From the Beginning to Today’s Difficulties

LEI ZHOU, MacroSys LLC; Equity and Adequacy- A Longitudinal Analysis on Fiscal Equity Among School Districts

Concurrent Session IV.
Thursday, May 5; 1:45 p.m. – 3:15 p.m.

4.4 Papers

Room: Cormorant
Chair: Barbara DeLuca, University of Dayton

SUNG-WOO CHO, Community College Research Center; Technical Education- New Evidence from a Causal Analysis of Washington State’s I-BEST: A Difference-in-Differences Approach (co-authors DAVIS JENKINS, Community College Research Center, and MATT ZEIDENBERG, Community College Research Center)

JUDITH GREEN, Southern Illinois University; Other- What P-12 Educators Don’t Know: Performance-Based Pay’s Impact on Funding and Policy Issues

4.5 Papers

Room: Sandhill Crane South
Chair: Mary McKeown Moak, MGT of America

KEN HANCOCK, Northeastern State University; Equity and Adequacy- The Effect of Adequacy on the Equity of Oklahoma’s Funding Formula

SPENCER WEILER, University of Northern Colorado; Equity and Adequacy- Bonding, Overriding, and Net Assessed Value: An Analysis of Colorado’s Funding Formula and Election Results (co-authors JEN MATHIS, University of Northern Colorado and FRED KINNEY, Eaton School District, Eaton, Colorado)
Concurrent Session IV.
Thursday, May 5; 1:45 p.m. – 3:15 p.m.

4.6 Papers
Room: Sandhill Crane North
Chair: Jenifer Sughrue, Old Dominion University

ERIC HOUCK, University of North Carolina at Chapel Hill; Equity and Adequacy - Intra-District Funding Inequities: The State’s Role
(co-author ADRIENNE SMITH)

PHILIP WESTBROOK, The University of Alabama; Equity and Adequacy - Do Free and Reduced Lunch Participation Rates Under-Identify Secondary Students Who Are Eligible to Receive Federal Funds for Supplemental and Compensatory Educational Services in the State of Alabama?
(co-authors JOHN DUBOIS, The University of Alabama, and JOHN ANSELMO, The University of Alabama)

4.7 Roundtables
Room: Herring Gull

VIVIAN IKPA, Temple University; Equity and Adequacy - Balancing Public Values: Equity, Adequacy and Excellence

4.8 Paper
Room: Roseate Spoonbill
Chair: Faith Crampton, University of Wisconsin at Milwaukee

AMY SCOTT, University of Virginia; Budget Development and Management - Navigating an Economic Downturn: Budgetary Decisions and Justifications of Nine Virginia School Divisions.

Concurrent Session V.
Thursday, May 5; 3:30 p.m. – 5:00 p.m.

5.1 Symposium-Holistic Education
Room: Audubon D

A new development in a troubled neighborhood of St. Paul, Minnesota recognizes the intersection of these realms of learning. The Payne Maryland Community Center embraces informal education ideals while representing a new model of holistic development, caring for the Body, Mind and Spirit. This case study presentation will explain how this project evolved from a conceptual idea of a passionate group of residents to the current design.

Participants:
CHRIS GIBBS, Hammel, Green and Abrahamson, Inc. (HGA)

5.2 Papers
Room: Audubon E
Chair: Randall S. Vesely, Indiana University-Purdue University

PATRICK GAFFNEY, Barry University-ADSOE; Private/For Profit K-12 and Higher Education - Enhancing the Relevancy of a School Finance Course through Student-Conducted Interviews of Principals

F. HOWARD NELSON, American Federation of Teachers; Other - The Cost Effectiveness of Sort and Fire Strategies to Improve the Teacher Effectiveness
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<td><strong>SHAWN FELTON</strong>, Florida Gulf Coast University; <strong>Other-Florida’s Public Higher Education Enrollment: The Effects of Tuition Differences Between Institution Types When Accounting for State Resources Influence</strong></td>
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| **TIMOTHY B. JONES**, Sam Houston State University; **Budget Development and Management- College-Readiness and the 65% Instructional Expenditures Ratio: A Relationship?**  
(co-authors **DON P. SCHULTE**, University of Texas at El Paso, and **JOHN R. SLATE**, Sam Houston State University) |

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| **Chair**: Walter McMahon, University of Illinois |
| **ANTHONY ROLLE**, University of South Florida; **Charter Schools- A Comparative Analysis of Texas Public and Charter School Revenue Distributions** |
| **SPENCER WEILER**, University of Northern Colorado; **Charter Schools- Following the At-Risk Dollars: How Colorado’s Funding Formula Denies At-Risk Students Sufficient Intervention Money**  
(co-authors **SUPATTRA W. ADRADE**, University of Northern Colorado, **J. BRADFORD EVERY**, University of Northern Colorado, **ABBY HILMIE**, University of Northern Colorado, **FENG-CHEN LIN**, University of Northern Colorado, and **TED BROOKS**, University of Northern Colorado) |

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| **Chair**: Betty Cox, University of Tennessee at Martin |
| **MONICA JEANCOLA**, Stetson University; **Virtual Education- An Investigation into the Perception of Online Degrees Earned as Credentials for Employment in Public Accounting Firms** |
| **JUDSON STRYKER**, Stetson University; **Virtual Education- Creating an On-line Accounting Program on a Shoestring** |

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| **MARY JANE GUY**, Winona State University; **Private/For Profit K-12 and Higher Education- Sustainability in Education** |
| **CLAYTON SLAUGHTER**, Attorney at Law; **Private/For Profit K-12 and Higher Education- Regulating the Higher Education Industry – Is Tuning the Antidote to Federal Regulation** |
Concurrent Session V.
Thursday, May 5; 3:30 p.m. – 5:00 p.m.

5.7 Roundtables

Room: Herring Gull

MATTHEW FINSTER, University of Washington; Collective Bargaining- The Impact and Equity of “Seniority-Based” Layoff Policies: An Examination of Teacher Layoff Notices in Washington State
(co-author MARGE PLECKI, University of Washington)

M. DAVID MILLER, University of Florida; Other- Teacher Incentive Funds: Keeping High Quality Teachers in Low Performing Schools

_board of advisors meeting_

Concurrent Session VI.
Friday, May 6; 8:00 a.m. – 9:30 a.m.

6.1 Papers

Room: Audubon D
Chair: Shawn Felton, Florida Gulf Coast University

KOY FLOYD, Tarleton State University; Budget Development and Management- Private Fund Raising and University Presidents’ Leadership Style

CHRISTOPHER MULLIN, American Association of Community Colleges; Other- The Pell Grant Program: Shifting Objectives and Realities

6.2 Papers

Room: Audubon E
Chair: Scott Bauries, University of Kentucky School of Law

BERNARD OLIVER, University of Florida; Equity and Adequacy- Student Based Funding: Is it a Path to Equity

LENFORD SUTTON, Alabama State University; Finance Litigation- Funding English Language Learners: Will the Federal Courts Remain Relevant?
(co-author LUKE CORNELIUS, University of West Georgia)

Concurrent Session VI.
Friday, May 6; 8:00 a.m. – 9:30 a.m.

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Concurrent Session VI.
Friday, May 6; 8:00 a.m. – 9:30 a.m.

6.3 Papers
Room: Audubon F
Chair: Barbara LaCost, University of Nebraska

ROBERT MURRAY, Lake Trafford Elementary School;
Equity and Adequacy-Migrant Education Funding and
Programs in the State of Florida
(co-author JENNIFER SUGHRUE, Old Dominion
University)

RANDALL VESELY, Indiana University-Purdue University
Fort Wayne; Equity and Adequacy-The Incidence of At-Risk
Students in Indiana: A Longitudinal Study

6.4 Papers
Room: Cormorant
Chair: William E. Camp, University of North Texas

JUSTIN BATHON, University of Kentucky; Other-The
Effects of Pension Plans on School Administrator Mobility
(co-authors ROBERT TOUTKOUSHIAN, University of
Georgia, and MARTHA MCCARTHY, Indiana University)

TYRONE BYNOE, University of the Cumberlands; Budget
Development and Management-A Comparative Analysis of
School Leadership Perception in Two Similar Resource Allocation
Systems

Concurrent Session VI.
Friday, May 6; 8:00 a.m. – 9:30 a.m.

6.5 Papers
Room: Sandhill Crane South
Chair: M. David Miller, University of Florida

ERIC HOUCK, University of North Carolina at Chapel Hill;
Other-We Promised To Do What? Examining Teacher
Compensation Policies of Race to the Top Winners

JIM WATSON, University of North Carolina at Charlotte;
Other-A Trend Analysis of Financing New Public School
Construction in North Carolina, 2005-2009
(co-author LISA G. DRISCOLL, University of North Carolina
at Charlotte)

6.6 Roundtables
Room: Herring Gull

VIVIAN IKPA, Temple University; Equity and Adequacy-
Funding Urban Schools: Adequacy vs. Equity

TIMOTHY B. JONES, Sam Houston State University; Budget
Development and Management-The 65% Instructional
Expenditures Ratio: A Critical Analysis
(co-author JOHN R. SLATE, Sam Houston State University)
### Second General Session
**Friday, May 6; 9:45 a.m. – 11:15 a.m.**

**Room: Audubon D, E, & F**

*Journal of Education Finance Outstanding Article of the Year Award*
presented by William Hartman, Pennsylvania State University

*NEFC Distinguished Fellow Awards*
presented by R. Craig Wood, NEFC Chair

*Introduction of the Keynote Speaker*
M. David Alexander, Virginia Polytechnic Institute and State University

*Keynote Speaker:*
David S. Doty, J.D., PhD
Superintendent of America’s Newest School District: Canyon School District
*Going Through the Big D and I Don’t Mean Dallas: The Legal and Financial Implications of Dividing The Jordan School District.*

*Closing Remarks*
R. Craig Wood, NEFC Chair

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### Concurrent Session VI.
**Friday, May 6; 8:00 a.m. – 9:30 a.m.**

**6.7 Roundtables**

**Room: Roseate Spoonbill**

MARY HARRIS-JOHN, Marshall University; Charter Schools- *Funding Challenges for Cyber Charter Schools in Pennsylvania*

CRAIG SCHILLING, Concordia University at Chicago; Budget Development and Management- *Dashboard Reports*

**6.8 Papers**

**Room: Sandhill Crane North**

**Chair:** Chris Gibbs, HGA

CHAD PACKER, University of Cincinnati; Equity and Adequacy- *The Financial Health of Ohio Public School Districts During and After DeRolph v State I-IV: Economic Health and Legislative Mandates*
(co-author CARLEE POSTON ESCUE, University of Cincinnati)

AUGUSTINA REYES, University of Houston; Perceptions of Elementary School Principals on Their Role in a Decentralized School District
(co-author CHRISTOPHER POVICH, University of Dayton)
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