



In Pursuit of Equity

11th Annual Conference

National Education Finance Academy

11TH ANNUAL CONFERENCE

IN

PURSUIT

OF

EQUITY



www.nationaledfinance.com

PRESIDENTIAL WELCOME

Dear NEFA Members:

Welcome to the Eleventh Annual Conference of the National Education Finance Academy. In a year like no other, we gather virtually to begin the second decade of NEFA. The pandemic has impacted all parts of our lives and has disrupted P-20 education for more than a year. Funding to support educational services to schools, districts, universities, and communities has become uncertain due to declining revenues thus posing a threat to under-resourced schools serving millions of the nation's poorest students, many of them in communities of color, and threatening the sustainability of many institutions of higher education. As a result, the field of Education Finance has been thrust into the national dialogue. Guided by our theme, *In Pursuit of Equity*, the 2021 conference gives us the opportunity to interact with scholars, students, policymakers, and practitioners around this critically important concept as we fulfill the NEFA mission to promote scholarly inquiry, to advance knowledge, and to inform policy and practice in the field of education finance.

Although our conference is virtual, the conference planning committee has worked tirelessly to create an interactive environment wherein the traditions of NEFA have been preserved. You will note a new membership platform, opportunities to socialize, a focus on wellness, and a traditional format with concurrent sessions wherein all participants can interact around our research. Putting a big spotlight on the big ideas that will be shared at this conference is critical as we begin the work of reconceptualizing equity. I am sincerely grateful for your participation in the conference, and I look forward to learning from you over the course of the week.

In last year's welcoming message, I stressed the importance of social solidarity during the time of physical distance. We come together this week as a dedicated group of professionals committed to advancing the notion of equity. I invite you to engage broadly in the conference and to enjoy all that has been prepared. As we prepare for the important work ahead, I hope that you will find inspiration at the conference and that you will leave with a newfound sense of hope for a better future. Be well.

Sincerely,

Robert C. Knoepfel

Robert C. Knoepfel, President

EXECUTIVE COMMITTEE WELCOME

Welcome from the Executive Committee:

We are so excited to have so many people join us for the National Education Finance Academy's 2021 virtual conference. It is our hope that each person finds the conference experience intellectually stimulating and full of ideas that will influence individual practice following these three days together. Ultimately, it is our hope that all who attend will use their position of influence to promote educational equity for all students at all levels.

NEFA continues to go strong after more than 10 years. Our 10th anniversary was one of great upheaval as we became increasingly aware and experienced the impacts of a global pandemic, but we continued to strive, continued to move forward. While we are still not able to meet in person, we will meet virtually to consider the implications of our work, research, and action on behalf of educational equity, justice, and civil rights, the theme of last year's conference. We recognize the pursuit of equity is a continuous challenge as we grapple with pernicious issues surrounding inequality, especially as they manifest themselves in the education arena.

NEFA turns 11 in 2021, which is a tribute to the Craig Wood – who founded this group, the past presidents (Craig Wood, Anthony Rolle, Lisa Driscoll, and Nicola Alexander), a past executive director (Carlee Simon), and all of the members of this wonderful organization over the years. The first 11 years have stressed that NEFA is a dynamic organization and, as it continues to evolve moving forward, the executive committee and the board of trustees will collaboratively work with the entire membership to ensure that dynamic structures are in place designed to help NEFA flourish during its second decade of existence.

As NEFA begins its second decade, a new set of challenges emerge. As an established organization with members both inside and outside academia and in both the public and private sectors, we are well positioned to inform and influence education finance policy and law. There is universal agreement that the status quo is inequitable and often results in inadequacies and significant barriers to social mobility. Yet, there is broad disagreement about the best solutions to these problems or the most appropriate method of achieving a particular solution. NEFA can be—and will be—a significant voice in these conversations, legislative debates, and court cases. As an organization, we must provide a forum where all ideas can be discussed, advanced, and critiqued in a civil manner.

In conclusion, for each of us NEFA is more than just a professional organization – it is a family. We hope each of you feels this same sense of belonging within the academy and find the support necessary to continue your work related to equity in P-20 education.

Nicola Alexander – Past-President
Spencer Weiler – President-Elect

Robert C. Knoeppel, President
Bill Thro – Vice President

SPECIAL THANKS

William Thro of the University of Kentucky for chairing the Journal of Education Finance Outstanding Article of the Year Award along with committee members David Martínez, University of South Carolina, Amy Dagley, University of Alabama at Birmingham, Lisa Driscoll, University of Tennessee, and Luke Stedrak, Southeastern Louisiana University.

Delia Allen of Clemson University for chairing the NEFA Outstanding Dissertation of the Year Award along with committee members Philip Westbrook, George Washington University, and Iris BenDavid-Hadar, Bar Ilan University.

To William J. Fowler, Jr. & Patricia R. Fowler for their generous contribution supporting the Education Finance Policy Research Grant focused on solving applied education finance and budgeting problems.

Kern Alexander and the Journal of Education Finance for their contributions as premier partner journal of NEFA.

Henry Tran of the University of South Carolina and David Buckman of Kennesaw State University for organizing the State of the States. Special thanks also to Tyrone Bynoe of the University of Michigan-Flint and Randy Vesely of the University of Toledo for their assistance and facilitation of State of the States.

To Moak, Casey, & Associates for their generous contribution supporting the National Education Finance Academy.

To the anonymous members of the 2021 National Education Finance Academy Distinguished Research & Practice Fellow Awards Committee, the Nominations Committee, NEFA Lifetime Achievement Award Committee, and the William J. & Patricia R. Fowler, Jr. Education Finance Policy Research Grant Committee.

Luke Cornelius for his service as General Counsel of NEFA and Bill Thro for his service as Associate General Counsel of NEFA.

Lisa Driscoll and Walter Hart for serving as Co-Treasurers of NEFA.

Luke Stedrak for serving as Chief of Staff to the President of NEFA.

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ABOUT NEFA

PURPOSE

The National Education Finance Academy is the professional home to scholars, students, practitioners, and policymakers who are interested in the study of education finance broadly defined. Our purpose is to improve education by promoting interest in and understanding of education finance principles and policies. We accomplish this goal by holding scholarly meetings for the presentation and discussion of education finance issues, by stimulating the teaching of P-20 education finance, and by disseminating scholarly research in our partner journals. Membership is open to all individuals who support the goal of improving education for all persons and we welcome broad representation of perspectives, including financial, legal, political, and social.

MISSION

The mission of the National Education Finance Academy is to promote scholarly inquiry, to advance knowledge, and to inform policy and practice in the field of education finance. Our organization serves scholars, students, policymakers and practitioners in the fields of P-12 education finance, higher education finance, economics of education, education law, and educational policy.

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A special thank you to the Associate Chairs and Members of the Board of Advisors who helped build the National Education Finance Academy. Your service and continued commitment to the leadership of the Academy are sincerely appreciated.

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Osnat Zaken	

2021 DISTINGUISHED RESEARCH AND PRACTICE FELLOW AWARDS

KAREN DEANGELIS

Karen J. DeAngelis, Ph.D., is an Associate Professor of Educational Leadership in the Warner School of Education and Human Development at the University of Rochester. Between 2014 and 2020, she also served as a department chair and associate dean for academic programs. Her two primary areas of research in K-12 education focus on the utilization of educational resources, particularly related to school safety, and the recruitment, retention, and distribution of human resources, including teachers and administrators. With her colleague, Dr. Brian Brent, she is currently examining the distribution of school counselors within and across states. She serves on the review boards for the *Journal of Education Finance* and *Education and Urban Society*. From 2010-2015, she served as an Editorial Advisory Board Member for ASBO International.

WALTER HART

Walter Hart is an assistant professor and coordinator in the Department of Educational Leadership at UNC Charlotte. Prior to UNC Charlotte, he was in a similar role at Winthrop University. He teaches classes in school finance, school law, and school human resources. Before entering higher education, Hart spent three decades as a principal and superintendent in the greater Charlotte metro area. He received the North Carolina Order of the Long Leaf Pine award for his contributions to education and was among 100 superintendents from across the United States to meet with President Obama and U.S. Secretary of Education Arne Duncan to discuss school technology innovations. Hart's research interests include education finance and school human resources. His research has appeared in the *Journal of Education Finance* and he has presented at a variety of state and national conferences, including the National Education Finance Academy. Hart's professional affiliations include the National Education Finance Academy, the North Carolina Association of School Administrators, and the North Carolina Professors of Educational Leadership. In partnership with the North Carolina School Boards Association, Hart facilitates training sessions for local boards of education. He also serves on the Board of Advisors for the South Rowan YMCA and is a past recipient of the Distinguished Service Award from the YMCA of Rowan County.

MATTHEW KELLY

Matthew Gardner Kelly's research examines long-term trends in the way state governments distribute educational resources and the role of K-12 funding and taxation policies play in mitigating or exacerbating disparities rooted in inequities of race, ethnicity, income, and residence. Also trained in educational history, he is currently finished a book of the history of school finance and the general property tax. His current work is particularly focused on funding policies in Pennsylvania, where he is also an expert witness for the plaintiffs in the state's ongoing school finance case. His writing has received awards from the History of Education Society and Division F of the American Educational Research Association, and he is a senior associate editor and book review co-editor for the *American Journal of Education*.

DAVID KNIGHT

David Knight is an assistant professor of education finance and policy at the University of Washington College of Education. His research focuses on the economics of education and school finance. He studies educational systems through the lens of economic theory and methodologies. His work emphasizes distributive justice, racial/ethnic and socioeconomic equity, systematic racial segregation into under-resourced school districts, and policies aimed at reducing inequality and addressing longstanding racial and income-based disparities in educational opportunity. David holds a Ph.D. in educational policy and a master's degree in economics from the University of Southern California. He earned a master's degree in economics education and bachelor's degrees in economics and anthropology from the University of Kansas. He previously served as an assistant professor at the University of Texas at El Paso College of Education and as the Director of the Center for Education Research and Policy Studies at the University of Texas at El Paso.

TONI TEMPLETON

Toni Templeton is a Research Scientist at the Education Research Center and earned her PhD in Higher Education Leadership and Policy Studies from the University of Houston. Her research seeks to influence policy and practice by illuminating manifestations of racism and white supremacy in the public education system, with particular focus on educational outcomes and school finance.

CONFERENCE THEME

We begin our second decade during an unprecedented time - our country is in the midst of the COVID-19 pandemic and facing racial and political unrest. Equity has taken center stage as practitioners and policymakers contemplate finding balance between protecting the public health and providing an adequate system of public education. Because the pandemic has disproportionately impacted black and brown communities and people living in poverty, longstanding inequities have been magnified.

The economic hardships wrought by the pandemic have resulted in tremendous budget shortfalls across the fifty states. As recently as September 3, 2020, the National Conference on State Legislatures (NCSL) reports projected budget shortfalls in 37 of the 50 states. These shortfalls will impact funding for P-20 education which has yet to recover from cuts incurred during the great recession of 2008. Equity and the provision of an adequate education for all persons is the predominant issue facing practitioners and policymakers thus thrusting our discipline to the front of conversations surrounding education. Rather than return to pre-pandemic notions of equity, we suggest that what is needed is a *complete reimaging of the system of education finance* and a *reconceptualization of what an equitable system of education means*. We call upon our membership to inform this high purpose of defining an equitable system of education by conducting and disseminating research around the theme *In Pursuit of Equity*.

ABOUT THE 2021 CONFERENCE PROGRAM

The 2021 NEFA Conference Program provides a complete list of all presentations, registration information, and guidelines for online presentations. Each session is listed with a title, presentation time, a presider, and the list of presenters. The NEFA Conference Program is posted on the Academy's website.

REGISTRATION

NEFA Registration is available online at nationaledfinance.com until Tuesday, April 6th at noon EDT. If you need to register after that time, please email Rob Knoeppel (robert.knoeppel@gmail.com) to arrange registration.

SPONSORSHIP OF NEFA EVENTS

If you are interested in sponsoring a future conference, contact NEFA by emailing info@nationaledfinance.com. Event sponsorships are an excellent way to increase the visibility of your institution.

VIRTUAL FORMAT

In order to create a safe forum for the sharing of research on education finance, the 2021 conference is in an online, or virtual, format. All conference registrants will be sent a confirmation code that will allow them to access the [virtual conference portal](#). For questions about the conference code contact Rob Knoeppel at robert.knoeppel@gmail.com.

ONGOING TECHNICAL SUPPORT

Throughout the duration of the conference, the following individuals will be available to provide conference attendees any necessary technical support:

Spencer Weiler (spencer_weiler@byu.edu or 970-344-9140)

Amy Dagley (dagley@uab.edu or 205-719-8602)

Matt Kelly (mgk76@psu.edu or 646-918-0556)

If you encounter any technical problems with any aspect of the conference, please reach out to these individuals. It is recommended you contact all of them in one email as they will be taking turns fielding problems.

ONLINE PRESENTATIONS

Each session of the conference will have its own Zoom link. A presider is assigned to open each session and facilitate each meeting. Zoom links are accessed via the [virtual conference portal](#).

SCHEDULE OF EVENTS

ALL TIMES ARE EASTERN STANDARD

WEDNESDAY | APRIL 7

8:00 a.m. – 9:00 a.m.	Networking & Self-Care
10:00 a.m. – 11:00 a.m.	JEHR Editorial Board Meeting Graduate Student Mentoring
11:15 a.m. – 1:00 p.m.	Opening General Session Welcome, Presidential Address Keynote Speaker Derek Black Schoolhouse Burning: Public Education and the Assault on American Democracy
1:00 p.m. – 1:30 p.m.	Lunch on your own
1:30 p.m. – 3:00 p.m.	Concurrent Paper Session 1
3:15 p.m. – 4:45 p.m.	Symposium Session 1
5:00 p.m. – 7:00 p.m.	President's Welcome Reception

THURSDAY | APRIL 8

7:00 a.m. – 8:00 a.m.	Networking & Self-Care
8:00 a.m. – 9:00 a.m.	JEF Editorial Board Meeting
9:00 a.m. – 10:00 a.m.	NEFA Committees
10:15 a.m. – 11:45 p.m.	Concurrent Paper Session 2
12:00 p.m. – 1:30 p.m.	Symposium Session 2
1:30 p.m. – 3:30 p.m.	NEFA Luncheon Business Meeting
3:45 p.m. – 5:15 p.m.	Concurrent Paper Session 3
5:30 p.m. – 7:00 p.m.	Concurrent Paper Session 4

SCHEDULE OF EVENTS, CONT'D

ALL TIMES ARE EASTERN STANDARD

FRIDAY | APRIL 9

7:00 a.m. – 8:00 a.m.	Networking & Self-Care
8:30 a.m. – 9:30 a.m.	State of the States
9:45 a.m. – 11:15 a.m.	Concurrent Paper Session 5
11:30 a.m. – 1:30 p.m.	Closing General Session Award Recognition Pre-Recorded Remarks Richard Rothstein The Color of Law: A Forgotten History of How Our Government Segregated America Passing of the Gavel; Election Results

NETWORKING & SELF-CARE

WEDNESDAY, APRIL 7 | 8:00 A.M. – 9:00 A.M.

Welcome to the 2021 NEFA Fit. Our goal is to begin each day with the mind and body in a positive place and of course educate ourselves on how to pursue sweat equity.

Presented by:



Today's Theme: WELLness

Nutrition: Water Well

Workout:

4 Exercises

Two 2-Minute Round Robin

Each 20s On/ 10s Off

- Jump Squat
- Plyo Push Up
- Lunges
- Handcuffs

Daily Fit – Glute Reboot

Q & A

JEHR EDITORIAL BOARD MEETING

All are welcome!

WEDNESDAY, APRIL 7 | 10:00 A.M. – 11:00 A.M.

Come learn about publication, review, and editorial opportunities with editors from the Journal of Education Human Resources (JEHR) at the annual Journal of Education Human Resources Info Session at NEFC. Editors will also discuss the call for the upcoming JEHR's special education finance issue. For more questions, contact Henry Tran at htr@sc.edu.

GRADUATE STUDENT ENGAGEMENT

WEDNESDAY, APRIL 7 | 10:00 A.M. – 11:00 A.M.

Hosted by: Rob Knoeppel & Christine Kiracofe

Mentoring, according to the literature, is unique and suited to individual needs. It's not about an expert passing on wisdom, but rather understanding need and meeting that need through support and an ongoing relationship. Attrition in doctoral programs is high with students completing all coursework but not the dissertation. As a community of scholars that is committed to our membership, the goal of the graduate student mentoring session is to build relationships, to support our student members as they navigate the dissertation process, and to provide networking opportunities for students as they transition to positions in the academy, administration, as policy analysts, or advocates for improved outcomes for children, families, and communities.

OPENING GENERAL SESSION & PRESIDENTIAL ADDRESS

WEDNESDAY, APRIL 7 | 11:15 A.M. – 1:00 P.M.

Presidential Welcome
Rob Knoeppel

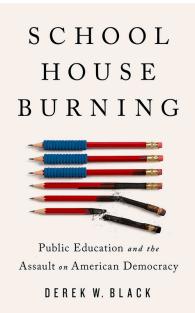
Overview of Conference Program
Amy Dagley

Overview of NEFA Election Process
Lisa Driscoll

Introduction of Keynote Speaker:
Derek Black
Henry Tran & David Martínez

KEYNOTE SPEAKER

WEDNESDAY, APRIL 7 | 11:30 A.M. – 1:00 P.M.



Schoolhouse Burning: Public Education and the Assault on Democracy

Derek Black

We are in the midst of a full-scale attack on our nation's commitment to public education. From funding, to vouchers, to charter schools, public education policy has become a political football, rather than a means of fulfilling the most basic obligation of government to its citizens.

This assault threatens not just public education, but democracy itself. Black offers both an illuminating history of our nation's establishment of a constitutional right to education, and a trenchant analysis of how such a right is being undermined today. He looks at education history with a wide view, describing both periods when our democracy has been strengthened—when the commitment to public education has been strongest—and weakened, when such a commitment has been lacking. And today, such a commitment is sorely lacking.

Schoolhouse Burning shows what is at stake: not just the right to public education as guaranteed by the constitution, but an erosion of democratic norms.



Derek Black is one of the nation's foremost experts in education law and policy. His research appears in the nation's top legal journals, including Yale Law Journal, Stanford Law Review, New York University Law Review, Cornell Law Review, and dozens more. That work has been cited several times in the federal courts, including the U.S. Supreme Court, and has led to expert testimony in school funding, voucher, and federal policy cases. He is currently a Professor of Law at the University of South Carolina, where he holds the Ernest F. Hollings Chair in Constitutional Law. His new book, Schoolhouse Burning: Public Education and the Assault on American Democracy, explains the threat that current trends pose not just to public education, but to democracy itself.

To learn more or to purchase your own copy visit derekwblack.com.

LUNCH ON YOUR OWN

WEDNESDAY, APRIL 7 | 1:00 P.M. – 1:30 P.M.

Following the opening general session, the conference schedule provides attendees a thirty-minute break for lunch before the first round of concurrent paper sessions. An optional activity is for attendees to eat lunch in a Zoom room with Derek Black to continue the conversation that occurred in the general session.

CONCURRENT PAPER SESSION 1

WEDNESDAY, APRIL 7 | 1:30 P.M. – 3:00 P.M.

1.1

Presider: Arvin Johnson

Equity in School Finance: The Case of Local Authorities' Supplemental Funding in Israel

Iris BenDavid-Hadar

Bar Ilan University, Israel

Ruth Meoded

Bar Ilan University, Israel

The literature highlights the importance of an equitable education as a key in shaping society. It suggests that when school funding policies are directly connected to equity, they have a greater impact on reducing inequality. Indeed, many countries allocate large resources from the central government to education and aspire to achieve equity. In addition, recently, local authorities play a more dominant role in funding education 'most significantly in Chile and Israel' (OECD, 2017, p. 114). The motivation for this research stems from the challenge in achieving equity in nongovernmental funds and the aspiration to achieve both competitiveness and cohesiveness. Israel serves as an interesting case, as its equity in education finance is in need of improvement (OECD, 2016 p. 11; OECD, 2018, p. 110). Yet, the extent of equity in local authorities' supplemental investment in education has yet to be examined. The funding of public schools, in Israel, is mostly governmental, yet, some local authorities allocate supplemental resources to schools at their jurisdiction. The objective of this research is to conceptualize and map the resources allocated by local authorities to the public schools in Israel. The methodology of this study is based on a qualitative approach and includes semi-structured interviews conducted through telephone calls or 'zoom' meetings, due to the limitations of social distance required in the current period - the global pandemic. The participants are Head of the Education Departments from a variety of local authorities in Israel. The sample of local authorities account for SES diversity (high vs. low SES), geographic diversity (central vs. remote locations), and ethnic diversity. Data analysis was performed using content analysis in an inductive process. The findings point out on a significant gap in local authorities' funding, ranging from \$0 to \$8,000 per student. In addition, the mapping of the resources allocated by local authorities to the public schools in Israel reveals an adverse trend departs from policy aspiration.

The Subtle Structure of Inequity: School Fees

Jacob Skousen

University of Nevada, Las Vegas

Ellianna Rodriguez

University of Nevada, Las Vegas

Education may be the most important responsibility of state governments. Nevertheless, schools have been found to be underfunded, and this may be the reason schools charge student fees. This study's purpose was to respond to the research question: What school fees are charged in middle schools and high schools in Nevada? Publicly accessible data were collected from 17 school district in Nevada. Through the use of descriptive statistics, the findings included a description of thousands of school fees, many of which may be unconstitutional. These findings provide another example of the ways in which schools may structure inequity.

School Finance Equity: An Intradistrict Equity Audit

Nicole Duplain

Greenwood Elementary School

This overview provides a synthesis of a comprehensive study of an intradistrict equity audit of one mid-Atlantic school district. The purpose of this study was to measure the intradistrict distribution of educational resources across elementary, middle, and high schools of one school district through an equity audit to determine whether or not the allocation and distribution of fiscal resources were equitable and adequate. This study utilized publicly available school-level expenditure data to determine the allocation and distribution of resources to expose any existing disparities. The researcher investigated any disparities in per-pupil expenditures, teacher quality, and academic achievement by examining Skrla, et al.'s (2004) three classifications. Being there is no other research study like this to date, the researcher designed and examined the findings to determine any inequities and inadequacies through an a priori lens suggesting differences as slight, moderate, or notable. To rate the differences in funding as slight, moderate, or notable, the researcher created three per-pupil expenditure weighting groups based on Verstegen's (2008) suggested student enrollment subgroup category weighting recommendations. The researcher's findings of this study supported slight, moderate, and notable differences in allocation disparities, teacher quality, and an association between funding and academic achievement among the elementary school level, middle school level, and high school level when utilizing the a priori guidelines. This study aimed to add to the body of literature by addressing the gap in research related to intradistrict equity and adequacy of educational funding.

CONCURRENT PAPER SESSION 1

WEDNESDAY, APRIL 7 | 1:30 P.M. – 3:00 P.M.

1.2

Presider: Tommy Jackson

Financial Access to College: Trends in Student Enrollment and Policy Shifts in Pell Grant Funding

Nathaniel Bray

University of Alabama

Stephen Katsinas

University of Alabama

John Bruno

University of Alabama

Noel Keeney

University of Alabama

This study examines tuition, fees, books, and supplies costs for college students, and compares college affordability by comparing to Pell Grant funding. We particularly study the effects of Pell Grant funding on student FTE enrollment. We report the results of analyses across sixteen states from 2008 to 2018. This time spans several critical policy changes that impacted both Pell funding and student enrollment.

Comparative Analysis of State Institutions' COVID 19 Response

Cara Ryan

Purdue University/ Florida Gulf Coast University

Miranda Endres

Purdue University

A specialized focus on state Higher Education Institutions within four geographical regions (Midwest, Southeast, Northeast and West Coast). Within this case study, we will be exploring the financial impacts that COVID-19 has had on various institutions.

CONCURRENT PAPER SESSION 1

WEDNESDAY, APRIL 7 | 1:30 P.M. – 3:00 P.M.

1.3

Presider: David Martínez

Michigan Public School Funding Fairness Measures: Investigating Structural Racism, Inequity, and Inadequacy

Phillip Caldwell II
Eastern Michigan University

Rajah Smart
Davenport University

Meaghan Polega
Eastern Michigan University

Jenne Porter
Eastern Michigan University

The primary aim of this research is to examine the persistence of racism specifically as it relates to public school funding policy, practice, and educational disparities within Michigan. This study will investigate public school funding fairness and equity of the Michigan school district. In Michigan, more than 25 years after the adoption of Proposal A, which represents an emphasis on achieving equal revenues across settings and toward identifying some benchmark for minimum educational adequacy (Baker, Weber, Srikanth, Atzbi, & Kim, 2018) a larger outcome gap (Koski and Reich, 2006) has been created across Michigan districts. Due to declines in school funding, Michigan's current financial system needs avenues for improvement, which are being explored (Arsen et al., 2019; Augenblick et al., 2016; Baker, Farrie, & Sciarra, 2018). Ladson-Billings (2006) suggested that the educational deficit or debt is equivalent to annual operating fiscal deficits. Therefore, there is a need to explain the funding formulas that serve as a basis for schooling inequities that remain in place and effectively guarantee the reproduction of the status quo (Ladson-Billings, 2009). Critical race theory (Ladson-Billings & Tate, 1995) offers a lens to the unique interplay between the political, economic, and ideological forces (Caldwell, 2016) that influence public school finance, and the inherent educational inequities along racial, ethnic, and class lines, which are endemic to the U.S. public education system and have remained through major social, political, and economic shifts (Ladson-Billings, 2006).

A Human Resources Administration Document Analysis of State of the States

Chelsea Lyles
Virginia Tech

Venice Adams
Virginia Tech

Dustin Grote
Virginia Tech

P12 and higher education finance policies and resources impact human resources administration. By examining the complete set of State of the States, annual education finance policy analyses covering 50 states written from 2013-2019 and published in the Journal of Education Finance, we illuminated human resource trends and challenges that emerged during this time. The purpose of this document analysis was to synthesize and share emerging human resources trends in education finance from across 50 states with a wide audience of P12 and higher education administrators, graduate students, and policymakers. We identified key human resources administration areas where state financial support for P12 has increased (preK, special education, and academic resources for student success), areas of priority for state policy makers for P12 (English language learning) and both P12 and higher education (career and technical education, accountability, performance-based funding), and challenges for P12 (stagnating teacher pay coupled with rising health insurance and retirement costs and increasing student enrollment).

CONCURRENT PAPER SESSION 1

WEDNESDAY, APRIL 7 | 1:30 P.M. – 3:00 P.M.

1.4

Presider: Amy Dagley

Constitutional Sovereignty: Why the Judiciary Cannot Create a Federal Right to Education

William Thro

University of Kentucky

Craig Wood

University of Florida

In recent years, there have been a number of federal lawsuits arguing that there is a federal right to education in at least a limited form such as literacy or citizenship. However, these theories ignore 'Constitutional Sovereignty'-the theory that the Constitution, not the federal government or even the People themselves, is sovereign. In Constitutional Sovereignty, the written Constitution limits governmental actors, the judiciary enforces those limits, and the judiciary is limited by having to engage in a constitutional analysis based on the original public meaning of the text. When this theory is applied to the recent federal lawsuits, it becomes clear that that there is no federal right to education.

Special Education's Lessons for Educational Reform Litigation

Spencer Weiler

Brigham Young University

Scott Bauries

University of Kentucky

Fifty years ago, in 1971, two court rulings involving distinct educational issues were adjudicated. The first, *Serrano v. Priest*, was argued in front of the Supreme Court of California and signaled the formal beginning of the litigation-based school finance reform movement. The second, *Pennsylvania Association for Retarded Children v. Commonwealth*, was argued before the District Court in the Third Circuit and represented the start to litigation focused on reforming special education services. In the ensuing years, there have been numerous legal claims in both fields contending that different aspects of funding for either public education or special education services was unconstitutional or in violation of state or federal statute. This fiftieth anniversary of the *Serrano* ruling provides an opportunity for legal scholars to assess the overall effectiveness of school finance litigation in instituting meaningful reform related to states' funding formulas for public education. When compared to the legal gains achieved in special education over the same timeframe, the paucity of tangible accomplishments related to the funding for public education stands in stark contrast to the accomplishments of special education litigation. In this Article, we make the case that the currently dominant approaches to challenging the constitutionality of a state's funding efforts have proven ineffective. Instead, future lawsuits designed to bring about lasting funding reform should learn from

the successes within the field of special education by asking courts to examine individual-rights claims based on one student, or several similarly situated individual students, and asking the court for relief tailored to that student or class. Such an approach to school finance litigation could result in a decision that limits relief to just one aspect of the entire funding formula, and the remedy would likely be focused on the plaintiff(s), not the state legislature, thus avoiding the typical separation of powers conflicts that systemic school finance litigation inevitably presents. This approach could prove laborious if the state funding formula has a multitude of inadequacies in need of redress, but our contention is that, over time and with favorable court rulings, the state funding formula would substantively improve. Most importantly, it would improve through legislative initiative, rather than judicial edict.

CONCURRENT PAPER SESSION 1

WEDNESDAY, APRIL 7 | 1:30 P.M. – 3:00 P.M.

1.5

Presider: Brett Geier

How are State Funds for Teacher Staffing Used by Hard-to-Staff Districts to Respond to Teacher Shortages?

Henry Tran

University of South Carolina

Douglas Smith

Iowa State University

States have increasingly relied on establishing financial policies to address teacher staffing challenges, particularly in high need areas serving diverse populations. Case in point, South Carolina developed the Rural Recruitment Initiative (RRI) to provide funding for recruitment and retention efforts in rural and other underserved districts facing teacher staffing challenges. While strategic initiatives are necessary to improve rural educator staffing across the state, little is known about the program's use or efficacy. This mixed-method study employs a concurrent triangulation design to better understand how the RRI policy was implemented within districts vis-à-vis their existing HR strategies. It also explores the potential influence of RRI on teacher staffing outcomes for districts receiving funds. Our analysis indicates districts have opted to spend time on recruitment in a triage effort to fill vacancies, with minimal effort on retention. Fixed-effects regression result suggests that for the last five years (from 2010 to 2017), the state has been experiencing an annual growing rate of teacher turnover. And while those districts that receive RRI funds appear to see less escalation, it currently remains insufficient to resolve the problem of building their human capacity.

Wage Inequality and High School Course-taking Requirements: An Examination of Recent Texas Education Policy

Toni Templeton

University of Houston

The new course-taking requirements of the Texas Foundation High School program were designed to provide educational options for living wages outside of the four-year college degree. Grounded in the Race Between Education and Technology framework (Goldin & Katz, 2007), this study employs an instrumental variable approach to examining Texas' data repository of K-12, higher education, and workforce data. Unfortunately, preliminary examinations of the program suggest increasing wage inequality among socioeconomic and racial and ethnic lines.

Does a School's Allocation of Resources Support their Teachers?

Ji Ho (Geo) Yang

University of Washington

David Knight

University of Washington

This study examines existing literature about intra-school level non-personnel resource allocation to identify trends and patterns in relation to teacher performance in servicing students and their perception of their work environment and their relationship with their administrators. Although there are many findings regarding how "money matters in schools", it will present possible knowledge gaps and ways of seeing to examining non-personnel resources in conjunction with each other and how it relates to supporting teachers, thus students. The study is a philosophical and conceptual approach to contribute to the literature on educational policy, organizations, and leadership.

CONCURRENT PAPER SESSION 1

WEDNESDAY, APRIL 7 | 1:30 P.M. – 3:00 P.M.

1.6

Presider: Gabriel Serna

Florida School Finance During the Pandemic: Budgetary Challenges at the State, District and School Levels

Carolyn Herrington
Florida State University

This paper will use textual and documentary analysis to ascertain funding policy adjustments made over the course of the pandemic to date (March 2020-March 2021) to state K-12 funding policies, district funding and school fiscal practices in the state of Florida. The theoretical framework will draw from the literature on federalism, intergovernmental relations and on state finance formula. The paper will be primarily descriptive in nature, documenting the changes that have occurred in state policy and funding as a result of the pandemic, the roles played by the legislative and executive branches at the state level and school boards and superintendents at the local level and how these new circumstances contribute to our understanding of state/district finance and policy and how they shifted issues of equity and adequacy in funding.

SYMPOSIUM SESSION 1.1

WEDNESDAY, APRIL 7 | 3:15 P.M. – 4:45 P.M.

Robbers or Victims? Charter Schools and District Finances

Mark Weber

While the effects of charter schools on educational outcomes have been studied extensively, less is known about the effects of charter growth on the finances of school districts that “host” charter schools. Using a national panel that matches charter schools to the school district boundaries within which they reside, this study finds that, on average and controlling for other factors, in many states charter school growth correlates with district growth in both spending and revenue per pupil. In many states, local revenue per pupil increases as charters proliferate; likewise, per pupil spending for support services, as opposed to instruction, grows. Substituting different measures of enrollment size as a control variable suggests the effect is related to enrollment losses in the hosting district, and not to specific characteristics of charter schools. This research suggests policymakers should consider the fiscal effects of charter school proliferation, as charter growth is not, in many contexts, fiscally neutral.



Mark Weber is the Special Analyst for Education Policy at the New Jersey Policy Perspective; a lecturer at Rutgers University's Graduate School of Education; and a music educator in Warren Township, NJ. In addition to many articles for peer reviewed journals and book chapters, Weber has authored policy briefs for the National Education Policy Center, the Education Law Center, the Fordham Foundation, the Shanker Institute, and others. He is the data analyst for the School

Finance Indicators Database, which provides comprehensive, national school finance data and analysis. Weber's blog on education policy, "Jersey Jazzman," is read nationally, and his writings on education policy and teaching have appeared in *The Washington Post*, *Education Week*, and *The PBS News Hour*, among other outlets. Weber's research work concentrates on school choice, school finance, teacher quality, and arts education.

Presider: Paul Bruno

You can download a copy of this report from the [Fordham Institute](#).

SYMPOSIUM SESSION 1.2

WEDNESDAY, APRIL 7 | 3:15 P.M. – 4:45 P.M.

How State Fiscal Policies Impact User Fees in Higher Education: A Theory of Cost-Shifting in Post-Secondary Education

Gabriel Serna

Michigan State University

As states implement more restrictive policies economic theories of cost-shifting suggest that user fees are used to make up funding gaps that arise. In this theoretical analysis, I argue that the same types of policies will have an impact on tuition and fees especially when examined under policies that limit state tax revenue generation (Tax Revolt Provisions). Indeed, because public higher education has a revenue stream that exists both with and separate from state funding, the reliance on user fees (tuition and fees) has become more robust. As a result I ask, -Does this mean that we are simply shifting the costs to students when state funds are limited in the face of Tax Revolt Provisions?



Gabriel R. Serna, is an assistant professor at Michigan State University. His research interests lie at the intersections of higher education finance, economics, and policy. He has over 17 years of experience in higher education as a teacher, scholar, and administrator. He is deeply interested in the role of education in serving the public good and enhancing social justice. He earned his BBA in economics and international business and BA in German from New Mexico State University, his MPP in Public Finance & Budgeting from the Martin School of Public Policy and Administration at the University of Kentucky, and his Ph.D. in Education Policy from Indiana University Bloomington.

Presider: Christine Kiracofe

SYMPOSIUM SESSION 1.3

WEDNESDAY, APRIL 7 | 3:15 P.M. – 4:45 P.M.

Building a Database for Teaching and Research

William Owings
Old Dominion University

A database covering 33 years of state fiscal effort and various outcome measures will be discussed and shared with participants. Outcome measures include: unemployment rates; graduation rates; migration trends; union v. nonunion status; incarceration rates; and NAEP scores. Discussion will center around using the database for teaching and further research.



William A. Owings, is a professor of educational leadership at Old Dominion University in Norfolk, Virginia. Owings has worked as a public school teacher, an elementary school and high school principal, assistant superintendent, and superintendent of schools. His scholarly publications, co-authored with Leslie S. Kaplan, include books on educational leadership and school finance as well as articles in *National Association of Secondary School Principals (NASSP) Bulletin*, *Journal of School Leadership*, *Journal of Effective Schools*, *Phi Delta Kappan*, *Teachers College Record*, the *Journal of Education Finance*, and the *Eurasian Journal of Business and Economics*. Owings has served on the state and international boards of the Association for Supervision and Curriculum

Development (ASCD) and is a member of the *Journal of Education Finance* Editorial Advisory Board. He also reviews articles for the *NASSP Bulletin Educational Administration Quarterly*, *Eurasian Journal of Business and Economics*, *Asia Pacific Journal of Education*, and *International Journal of Education Research*. He is a frequent presenter at state and national conferences and a consultant on educational leadership, school finance, and instructional improvement. He is a 2014 National Education Finance Academy “Distinguished Fellow of Research and Practice.” Owings and Kaplan share the 2008 Virginia Educational Research Association Charles Edgar Clear Research Award for Consistent and Substantial Contributions to Educational Research and Scholarship.

Presider: Craig Wood

PRESIDENT'S WELCOME RECEPTION

WEDNESDAY, APRIL 7 | 5:00 P.M. – 7:00 P.M.

Welcome to NEFA 2021!

On behalf of the NEFA Executive Committee, the NEFA Board of Trustees and all NEFA Past Presidents, I extend my warmest welcome to our 11th annual conference.

For those who regularly attend NEFA, you know that a highlight of our conference is the opportunity to network and socialize with our colleagues. While we cannot meet in person this year, there's no reason that we cannot continue our tradition of collegiality during the 2021 conference.

To that end, I have compiled a few cocktail recipes for each of you to try during the conference. There is a non-alcoholic beverage recipe as well. For those of you that prefer beer and wine, please feel free to indulge in your favorite drink during the welcome reception. I'm hoping that we have some mixologists in our midst who will demonstrate how to make these drinks for us.

In addition, we've included three games that you can play virtually during the conference and we've purchased on virtual photo booth so that you can document your attendance at NEFA and post your pictures to social media using the hashtag #NEFA2021. We are creating a Spotify play list for you to listen to using your own device during the conference and encourage you to enjoy the music and to dance, with or without your cameras on! Lastly, I will be using Flipgrid to post videos of the conference and encourage you to respond.

Please join me in thanking the Conference Planning Committee led by Dr. Spencer Weiler for their amazing job organizing our event and in thanking Dr. Amy Dagley for producing our conference program.

I hope to see everyone in Tampa in 2022.

Please enjoy the conference!
Rob

NETWORKING & SELF-CARE

THURSDAY, APRIL 8 | 7:00 A.M. – 8:00 A.M.

Welcome to the 2021 NEFA Fit. Our goal is to begin each day with the mind and body in a positive place and of course educate ourselves on how to pursue sweat equity.

Presented by:



Today's Theme: Brain Gain

Nutrition: Blueberries and Walnuts

Workout:

4 Pairs 30s Ea with a 10s Transition

- 1a. Reverse Crunch
- 1b. Out/Out & In/In
- 2a. Crunch
- 2b. Jumping Jack
- 3a. Deadbug
- 3b. Icky Shuffle
- 4a. Bicycle
- 4b. Front/Back Hops

Daily Fit – Zoom Shakes

Q & A

JEF EDITORIAL BOARD MEETING

THURSDAY, APRIL 8 | 8:00 A.M. – 9:00 A.M.

JEF Editorial Board Members are invited to attend the meeting. The invitation and Zoom meeting information were sent to members via email.

Nicola Alexander	Katie Baird
Iris BenDavid-Hadar	Alex Bowers
Brian Brent	Tyrone Bynoe
William Camp	Stephoni Case
Oscar Jiménez-Castellanos	Faith E. Crampton
Luke Cornelius	Karen DeAngelis
Jennifer Delaney	Barbara De Luca
William Doyle	Lisa Driscoll
Robert Frost	Brett Geier
William Glenn	Marilyn Hirth
William Ingle	Steven Katsinas
Rob Knoeppel	Tammy Kolbe
Dan Layzell	Jeffrey Maiden
Mary McKeown-Moak	Walter McMahon
Lynn Moak	Christopher Mullin
Yas Nakib	William Owings
Kenneth Redd	Gloria Rodriguez
Anthony Rolle	Lou Sabina
Gabriel Serna	Luke Stedrak
David Thompson	Bill Thro
Marvin Titus	Robert Toutkoushian
Angela Urick	Deborah Verstegen
Randall Vesely	Spencer Weiler
David Welsch	Craig Wood
Osnat Zaken	

NEFA COMMITTEE MEETINGS

THURSDAY, APRIL 8 | 9:00 A.M. – 10:00 A.M.

Conference Planning Committee

Chair: Bill Thro

As the name implies, the conference planning committee will work on preparing for the 2022 conference in Tampa, Florida.

Publications Committee

Co-Chairs: David Buckman & Henry Tran

This committee oversees the relationships NEFA has with two journals (*Journal of Education Finance* and *Journal of Education and Human Relations*) and works on promoting the scholarly accomplishments of NEFA members.

Membership Committee

Co-Chairs: Eric Houck & David Martínez

This committee is charged with supporting existing members and growing NEFA's membership. Both goals can be accomplished through the adoption of webinars, regular blogs, and other ongoing outreach efforts.

Communications Committee

Co-Chairs: Amy Dagley & Sharda Jackson Smith

This committee is responsible for all communications to NEFA membership. This communication will occur through a variety of platforms: email, Facebook, and Twitter.

Graduate Student Engagement Committee

Co-Chairs: Christine Kiracofe & Rob Knoepfel

This committee will work directly with graduate student membership to identify their needs and determine how NEFA can provide greater support to graduate students as they transition toward graduation. In particular, graduate students are invited to be a part of this committee (and they are welcome in all of the committees).

CONCURRENT PAPER SESSION 2

THURSDAY, APRIL 8 | 10:15 A.M. – 11:45 A.M.

2.1

Presider: Luke Cornelius

An Explanatory Quantitative Study of the Funding Policy Supporting British Academies and American Charter Schools

Tyrone Bynoe

University of Michigan - Flint

This explanatory quantitative study analyzes the efficacy of choice-school finance policies of two distinct municipalities: NYC charter schools and British academies. In particular, the study analyzes the equity, efficiency and student-performance return of choice school-finance policies in these two respective settings. The study's findings contribute significantly to the profession in they provide concrete examples of evaluating choice school-finance policy in two large urban school communities.

Intergovernmental Grants in School Districts: A Case of Miami-Dade School District, Florida

Angie Nga Le

Florida International University

Hai Guo

Florida International University

Education aid from federal and state governments is a crucial source for local school districts. However, increased funding from the Federal and states did not always improve the schools' effectiveness. Still, it may trigger higher bureaucracy and a mass-production vision of the education process. Additionally, the local discretion in grant utilization may cause widespread occurrences of grant fungibility across different grant types. The recipient governments often tend to utilize additional incomes as their wish. The grant fungibility is more likely to exist when recipient governments can access multiple fiscal transfers, have plenty of diverse income resources, and provide a large number of public services. This paper aims to shed more light on the effects of education intergovernmental grants on local education. The research question is: What is the impact of education grants on expenditure decisions and the performance of school districts? The paper applies the analytical technique of time series on the educational expenditures and performance indicators of the Miami-Dade school district in Florida from 2003 to 2017. The main studied grant programs are the Foundation Program and the Race to the Top in Florida. The Foundation Program presents the most prevalent state transfers to local school districts. The Race to the Top represents a promising grant scheme due to its potential to result in local governments' accountable and responsive performance. Data is collected from the Florida Education Department, the US Census, and the Council of the Great City Schools. The research is expected to provide an empirical analysis that can efficiently inform policy reform in school finance.

How Do Weighted Funding Formulas Affect Charter School Enrollments?

Paul Bruno

University of Illinois at Urbana-Champaign

The proliferation of charter schools has raised concerns that they will 'cream skim' students from local districts, selectively enrolling students based on the likely cost of educating them. At the same time, states have increasingly adopted weighted student funding formulas to direct additional resources to schools and districts enrolling students thought to have greater educational needs. Despite both policy developments being similarly informed by the belief that some students are costlier to educate than others, researchers have only rarely considered how weighted student funding formulas might impact charter school supply decisions, and the studies that exist have focused on charter school location decisions. To examine charter school enrollment decisions, I use the adoption of the Local Control Funding Formula (LCFF) in California in 2013 as a natural experiment that substantially increased the revenue that schools could expect to receive for low-income students. I compare the enrollment shares of low income students in charter schools to those in traditional public schools in California before and after the funding reform in a series of difference-in-differences and triple-difference analyses using school-level data from the Common Core of Data. Preliminary results suggest that LCFF increased low-income student shares in charter schools, but only in charter schools previously enrolling smaller shares of low-income students than their surrounding districts. Among these schools, free and reduced-price lunch-eligible student populations increased by roughly four percentage points relative to traditional public schools in the five years after the reform (2012-2017). The fact that charter schools appear to be sensitive to LCFF's financial incentives indicates that cream-skimming could be a problem among some charter schools. Particularly if they are not mission-driven to serve educationally marginalized students, charter schools might therefore exacerbate educational inequities in at least some cases. At the same time, these results point to the potential of weighted school funding formulas to discourage such cream-skimming. To the extent that weighted student funding makes between-district funding more equitable and is similarly applied to charter schools, it may also make educational opportunities more equitable between the charter and TPS sectors.

CONCURRENT PAPER SESSION 2

THURSDAY, APRIL 8 | 10:15 A.M. – 11:45 A.M.

2.2

Presider: Iris BenDavid-Hadar

The Theory of Education Finance: Equity, Adequacy, and Efficiency for Achieving the Good Society

Walter W. McMahon

University of Illinois at Urbana-Champaign

This paper develops a more general theory of education finance that relates equity, adequacy, and efficiency in the financing of education. Human capital formation creates skills and knowledge that increase the productivity of time on the job and at home, leading to more adequate and equitably distributed outcomes of well-being characteristic of the good society. As such it is a reconceptualization of what an equitable and adequate system of education means.

The outcomes of wellbeing are consistent with work by psychologists that now measure happiness cardinally enabling economists to reveal the declining utility of income in producing happiness. This allows greater equality per student in financing to be related to increased social welfare. The model also shows that economic efficiency in levels of adequacy and in public financing lead to higher rates of sustainable development with better standards of living and quality of life than families and communities that do not provide for adequacy and equity in funding.

The solution of the model includes a proof that an adequate level of public funding creates education externalities and higher productivity leading to greater well-being than in communities with only private schooling. The paper concludes with empirical illustrations from prior research that show more specifically how equity and adequacy in funding lead to good paying jobs, greater equality in the distribution of income and well-being, and other specific outcomes such as better health, better civic government, less political instability and civic unrest, larger tax receipts, lower state welfare costs, and other aspects of the educated, good, society.

Analysis of Uneven Education Funding Distribution for Compulsory Education in China from 2007 to 2016

Kai Cui

The University of Florida

Qunwei Yin

University of California, Irvine

The purpose of this study was to determine the level of uneven distribution of education investment in China from 2007 to 2016. By analyzing per student budgetary funding and per student public use budgetary funding from various provinces at compulsory education (Grade 1-9) level, this study examined the uneven education funding distributions in four regions of China. Four measures of inequity in education finance have been examined and the statistics showed that uneven education funding investing exists not only among regions, but also within regions. The gaps also exist between urban and rural areas at compulsory education but to a lessened extent. It is suggested that the central government and local governments at all levels shall increase the investment in education to keep the balanced development among its four regions as well as the rural areas.

The Effects of Socioeconomic Status Blocks on Academic Achievement Pass Rates

Roberto Basurto

Ysleta ISD

Royce George

University of North Texas

Bill Camp

University of North Texas

Specifically, the Texas Education Agency through the inception of House Bill 3 overhauled its current State Compensatory Education funding model (TEA, 2019). The role of the State Compensatory Education (SCE) program provided resources to educationally disadvantaged students and reduced the disparity in student achievement outcomes. Prior to the passage of House Bill 3, SCE funding was appropriated through a single multiplier for each student eligible under the free and reduced lunch program. This model did not attribute for other at-risk indicators as means of allocating funding and programs. According to the Texas Education Agency (2018), living in a single parent household, level of parental education, and home ownership were socioeconomic variables that increased the statistical reliability of identifying children living in poverty.

CONCURRENT PAPER SESSION 2

THURSDAY, APRIL 8 | 10:15 A.M. – 11:45 A.M.

2.3

Presider: Mary McKeown-Moak

Budgetary and Operational Shifts during COVID-19: Sensemaking and Equity in Higher Education

Beth Paris

Virginia Commonwealth University

Higher education has struggled to adapt to the changing demands of students and society as America manages the COVID-19 pandemic. The transition to online instruction has significant positive effects on student safety in a global health crisis, but drastically reduces the role of on-campus student services (despite flexibility and accessibility for students in an online environment). As a result, the budgetary priorities and available resources to meet student service needs in a virtual environment have shifted and to some extent, have challenged the very purpose of a college education. This session will seek to evaluate the layered impacts of pandemic operations within the Division of Student Affairs (DSA) at Virginia Commonwealth University, particularly how adjustments in auxiliary department budgetary priorities 'trickle up' to other areas of university operations. Additionally, through a sensemaking framework, participants will evaluate operational decisions and their impact on staff and students and present critical questions for continued reflection and consideration in future planning.

Course Development During Challenging Times: Elements Impacting Success

Dee Bennett

Troy University

Duane Gunn

Troy University

The pandemic and challenging times throughout the world brought to light the need to be agile and adaptable in addressing the changing environment while at the same time continuing to provide quality education. In approximately 6 weeks, the university was able to develop, market, and execute an online leadership course enrolling over 3,500 students from around the world. Through communication, cross campus cooperation and delegative leadership, enrollment for Fall 2020 increased and a worldwide audience became aware of the many programs available at the university.

Revenue Inequalities Across Public Universities in the Midwest: What Differentiates the Haves and Have Nots?

Edward Vize

Illinois State University

There is growing concern about a deepening divide between higher education institutions that can sustain themselves fiscally in the wake of declines in state funding and those institutions that, on the other hand, are struggling to sustain needed revenues. Writing in 2017, Archibald and Feldman argued that 'the last thirty years have seen a growing bifurcation of the higher education system into well-resourced institutions (the haves) and under-resourced institutions (the have nots)' (p. 200). They trace this growing divide to several factors that make some institutions less vulnerable than others to 'the turbulence buffeting the higher education system' (p. 200). Public flagship institutions, they argue, are less vulnerable to declines in the college-age population because they have 'loyal followings in the state population as a whole' and are more able to attract out-of-state and international students (p. 201). In addition, they are often the first-choice institutions of college aspirants. The flagships are also more able to weather ups and downs in state funding because of relatively strong alumni bases, deeply rooted athletic brands, and the capacity to raise research funding for graduate programs. Over time, the under-resourced institutions, according to Archibald and Feldman, may become less able to thrive fiscally even as they serve disproportionately high numbers of low-income students who tend to enroll in these colleges and universities.

Another recent analysis by Taylor and Cantwell (2019) has also warned of growing inequality between institutions. They attribute this inequality to financial uncertainty and heightened competition, features of the higher education landscape that some institutions, particularly those that are more selective, are more able to deal with and use to their advantage than others. For instance, Taylor and Cantwell argue that costs have risen since the 1970s not only because colleges and universities are offering more services than in the past, but also because the pursuit of prestige has overshadowed the pursuit of efficiencies. In other words, in the pursuit of status, highly resourced institutions have chosen to offer more services and programs while at the same increasing selectivity, placing under-resourced institutions that cannot compete in this race for prestige at a great disadvantage. Rising costs in the drive to enhance prestige and heightened competition become unsustainable for many less-selective colleges and universities that are highly tuition dependent and do not have the alternative revenue streams needed to make up for attenuated government funding. As a consequence, the more selective institutions increase their competitive stance in the higher education marketplace while the less-selective institutions become less competitive. Over time, the rich become richer and the poor become poorer. Although national data have highlighted a growing divide between under-resourced and well-resourced institutions, researchers have yet to analyze variations in this gap across individual institutions (as opposed to higher education sectors) and across states. What are these variations, and what might account for them?

CONCURRENT PAPER SESSION 2

THURSDAY, APRIL 8 | 10:15 A.M. – 11:45 A.M.

2.4

Presider: Henry Tran

State of the States: A Document Analysis of P12 Educational Inequities

Chelsea Lyles

Virginia Tech

Venice Adams

Virginia Tech

Dustin Grote

Virginia Tech

Education reform efforts have not helped all students equitably achieve performance standards because of a policy-practice gap. First wave reform efforts focused on an outside-in approach, second wave reform efforts focused on in-school solutions, and both approaches have failed. The purpose of this study is to identify and classify trends and funding strategies according to the first wave, second wave, and a new, third approach titled 'crafting coherence' which uses a reiterative, dynamic process and combines elements of external and internal strategies. Honig and Hatch (2004) define coherence as 'a process, which involves schools and school district central offices working together to craft or continually negotiate the fit between external demands and schools' own goals and strategies' (p. 16). In this way, school administrators can decide how or whether to respond to external demands and obtain central school district support for their chosen approach. We will conduct a document analysis of State of the States (SOS), an annual special issue published in the Journal of Education Finance that contains policy summaries which capture trends and funding priorities in P12 education finance and policy. We will excerpt narratives focused on educational inequities in P12 education from the 215 SOS articles written from 2013-2019 and use an iterative hybrid inductive-deductive coding process to inform a thematic analysis of our findings. We will identify examples of education finance policies and funding priorities that align with first wave, second wave, and crafting coherence approaches in order to identify their linkages with educational inequities in P12 education. We aim to identify external policy demands at the state level, evidence of schools' goals and strategies, and educational inequities impacting students and employees to provide insight on how states are funding educational reform efforts. By classifying these education finance policy efforts, we hope future research can examine these areas to determine if Honig and Hatch's (2004) framework, crafting coherence, reduces the policy-practice gap and results in improved outcomes for historically marginalized students and employees in P12 education.

Labor Monopsony in Central Pennsylvania and its Implications for Teacher Turnover

Ethan Ake-Little

American Fed of Teachers - Pennsylvania

Teacher turnover is a well-studied phenomenon, particularly in highly urbanized locales, but not well researched in a state as geographically and demographically diverse as Pennsylvania, which is a composition of two major metropolitan areas combined with smaller urban centers and expansive rural regions. Those retention studies that do exist have been mainly exclusive to the Philadelphia region, with limited research devoted to the remainder of the state. This lack of comprehensive research that seeks to understand teacher turnover in the state's non-urban locales not only overlooks the unique geographic and socioeconomic factors at play in these regions but also results in a limited understanding of the issue, which, in turn, can lead to incomplete policy considerations.

This paper presentation draws from Pennsylvania Department of Education data from 2012-2017, which describes the entire public-school workforce in all local education agencies (LEAs), to study how compensation and auxiliary spending (per student spending sans instructional costs) influence teacher turnover using multiple, parallel Cox Proportional Hazards survival models. Findings suggest that despite a 'one size fits all' approach to public school funding policy popular amongst politicians on both sides of the political aisle, the effects of a monetary increase in reducing the likelihood of turnover varies considerably when accounting for the region, Title I status, and experience. One major influencing factor is labor market fluidity as a function of limited employment options (labor monopsony). In non-urban locales, labor monopsony not only limits the choice of an employer (since school districts are geographically bound) but also limits labor mobility options for teachers dissatisfied with their current employment. The study discusses the lack of monetary investment can lead teachers to either seek employment elsewhere or altogether leave the profession in non-urbanized locales since low pay functions as a strong demotivator. Additionally, the results suggest that while a pay raise may arrest turnover risk, it is a poor long-term motivator and explores how administrative support can considerably increase job satisfaction.

CONCURRENT PAPER SESSION 2

THURSDAY, APRIL 8 | 10:15 A.M. – 11:45 A.M.

2.5

Presider: Spencer Weiler

The Judiciary is the Least Dangerous Branch: Recent Developments in School Finance Litigation

William Thro

University of Kentucky

Lisa Driscoll

University of Tennessee

Christine Kiracofe

Purdue University

Craig Wood

University of Florida

This panel will discuss recent developments in school finance litigation.

SYMPOSIUM SESSION 2.1

THURSDAY, APRIL 8 | 12:00 P.M. – 1:30 P.M.

IEPs for All: Democratic, Equitable, & Respectful Remedy

Joshua Weishart

Demands to “reimagine education” during a pandemic-shattered era of uncertainty and division present an opportunity to take seriously a constitutional remedy that can democratize education rights: an individualized education plan (IEP) for all schoolchildren. Borrowing a process from its namesake in special education law, the IEPs-for-all remedy signals that all education is special by giving students a voice and teachers more autonomous choices over how to address their students’ needs, capacities, and interests. Retooled for data collection, the IEP can fill critical knowledge gaps about educational needs, interventions, and effective instructional practices to better inform researchers, educators, and policymakers about how to deliver an adequate, equitable, and democratic education.



Joshua Weishart is a Professor of Law at West Virginia University College of Law. His research centers on K-12 education rights and remedies, with a particular focus on the constitutional demands of equity and adequacy. Weishart is the recipient of multiple teaching and scholarship awards. He earned his JD from the University of California, Berkeley School of Law, an MPhil from the University of Cambridge, and a BA from West Virginia University.

Presider: Jacob Skousen

SYMPOSIUM SESSION 2.2

THURSDAY, APRIL 8 | 12:00 P.M. – 1:30 P.M.

Education Advocate to Superintendent: Pursuits of Equity

Carlee Escue Simon

Superintendent, Alachua County Public Schools

After decades of advocating for education as a teacher, professor, and community advocate I stepped into the unlikely role of a district superintendent in the state of Florida during the year of COVID-19. I will share my journey from advocate to the superintendent of a district with over 4000 employees and almost 27,000 students. This presentation is a reflection on the contextual background, competing interests, external/internal pressures, and the challenging effort to change the status quo of a well-established community culture. I will share my vision and my strategy to achieve the goals of increasing equity by providing high equity education to all students within our district.



Carlee Escue Simon, Ph.D., is currently the superintendent for Alachua County Public Schools in Gainesville, Florida. She has previously served as a faculty member at the University of Cincinnati, an adjunct faculty member at the University of North Florida, and ten years of instructional and curriculum experience in the K-12 setting. For eight years, Dr. Simon served as the founding Executive Director of the National Education Finance Academy.

Presider: Amber Hunt

SYMPORIUM SESSION 2.3

THURSDAY, APRIL 8 | 12:00 P.M. – 1:30 P.M.

The Role of Poverty Measurements in Achieving Equity in Student Outcomes in Texas: A Guide to School Finance Reform

Lori Taylor

Bush School/ Texas A&M University

Shawna Grosskopf

Oregon State University

Kathy Hayes

Southern Methodist University

Laura Razzolini

University of Alabama

The school funding and finance literature has identified three main drivers of educational cost: student needs, input prices, and economies of scale. Each of these factors can influence the funding needed to help narrow the achievement gap for disadvantaged students. Therefore, each has been the subject of considerable research. Student socioeconomic status (SES) is the most commonly researched metric of student need-and the most problematic. School finance scholars seldom have access to data on actual student incomes. Instead, they are forced to rely on data about whether or not students participate in the National School Lunch program, or on poverty rates from the US Census Bureau's Small Area Income and Poverty Estimates (SAIPE) program. Furthermore, the recent introduction of the Community Eligibility Provision program, which allows schools with high concentrations of 'poor' students to provide free lunches to all students, is degrading the link between FRL participation and income. Policymakers in the U.S. frequently use data on student participation in the National School Lunch program to develop operational proxies for SES. FRL has also been used as a proxy for SES in many school efficiency studies (see de Witte and López-Torres (2017) for a partial listing), largely because of its ubiquitous availability. Recently, however, the National Center for Education Statistics has designed a supplemental poverty indicator for school neighborhoods. This measure uses Census Bureau American Community Survey (ACS) poverty data near the school by Spatially Interpolating Demographic and Economic (SIDE) estimates. The SIDE estimates provide more fine-grained measures of neighborhood poverty than are available through the SAIPE program (which measures poverty at the school district level). In this paper, we use Texas data to look at the sensitivity of school efficiency models to alternative SES measures. We measure student outcomes and resources at the school level for a short panel of more than 8,000 Texas public schools, and relate them to two alternative poverty measures that policy makers could consider including in their school cost assessment. The goal is to determine if location poverty (the new SIDE estimates) affects education cost and efficiency models differently than FRL-based measures of student poverty, and to demonstrate the sensitivity-or robustness-of the models to alternative measures of SES. Thus, we estimate school frontier cost functions, holding student outcomes constant to verify whether these different measures of poverty lead to different conclusions. Although both measures focus on income at the school level, the FRL captures variation in income of students, whereas the SIDE captures variation in family income in the neighborhood of the school, which may miss information on students who may be bused into that school, for example. We find that the two measures are effectively providing complementary information concerning income inequality, suggesting that we should include both measures in the school cost function. We conclude that using both measures--in policy and in analysis--is preferred to relying on either one alone.

Presider: Rob Knoeppel

NEFA LUNCHEON | BUSINESS MEETING

PANEL PRESENTATION

THURSDAY, APRIL 8 | 1:30 P.M. – 3:30 P.M.

Call to Order

Rob Knoepel

Introduction of Panelists

Delia Allen

Panel Discussion: Equity Issues in P-20 Education and the Pandemic

Mark Lieberman & Stephen Katsinas

EdWeek

University of Alabama

Outstanding Dissertation Award

Delia Allen

Business Meeting

Rob Knoepel

CONCURRENT PAPER SESSION 3

THURSDAY, APRIL 8 | 3:45 P.M. – 5:15 P.M.

3.1

Presider: Chelsea Lyles

Pre and Post Serrano: Systemic Racism, School Funding Disparities and Mexican American Communities (1848-2021)

Oscar Jiménez-Castellanos
Trinity University/USC Rossier

Matthew Kelly
Penn State University

Leila Carranza
USC Rossier

The anniversary of Serrano gives us an opportunity to reflect on the past using this case as an analytical focus. This article argues that the funding disparities revealed in Serrano have a historical legacy since the Mexican-American war of 1848 grounded in systemic racism in particular against Mexican-Americans. Thus, it is imperative to critically examine the policies before Serrano to better understand how systemic racism contributed to the creation of these school funding disparities in Mexican-American communities in California.

Measuring Cross-District Segregation within Labor Market Areas: Implication for Policy

David Knight
University of Washington

Nail Hassairi
University of Washington

After decades of school finance reforms, U.S. schools systems allocate approximately the same level of resources, on average, to high-poverty and low-poverty school districts. Many states have substantial resource disparities for school districts enrolling greater percentages of students of color or low-income students. These inequities originated from long-standing discriminatory housing policies and efforts to disenfranchise Black, Indigenous, Latinx, and immigrant communities. Initially, the segregation was mostly to be found between different schools within the same school district. However, with court mandated school district reforms, segregation has moved cross-district. This brings forth the question of how school districts should be structured to minimize cross-district segregation. In this paper, we argue that aligning with labor market areas within which teachers are known to show geo-graphical flexibility when searching for employment has the potential to decrease overall segregation by a meaningful amount.

CONCURRENT PAPER SESSION 3

THURSDAY, APRIL 8 | 3:45 P.M. – 5:15 P.M.

3.2

Presider: David Buckman

Allotting Inequity: Evaluating North Carolina's Classroom Teacher Funding

Eric Houck
UNC-Chapel Hill

Chris Needham
UNC-Chapel Hill

Research in the intra-district allocation of educational resources has demonstrated that the distribution of teacher qualities and characteristics drives resource inequities. Schools with higher concentrations of poor and Black students tend to be resourced with greater numbers of less qualified and less expensive teachers. Determining the extent of these inequities is difficult, because of limited data and district latitude in school resource distribution decisions. Aback of these more mechanical challenges lies, we assert, a greater conceptual one: district leaders see the allocation of teachers across schools as a human resource endeavor and not a school finance one. They therefore, we assert, make decisions on the allocation of human resources with relatively little consideration of the resource allocation impacts of these decisions.

This paper attempts to demonstrate and address these challenges by longitudinally examining the distribution of teacher salaries across North Carolina school districts. We leverage North Carolina's resource allocation mechanism which utilizes a position allotment finance system that is unique in the nation to approximate the allocation of teachers into schools within districts. As the largest share of state education expenditure - \$3.8 billion accounting for 45% of all education expenditure for the fiscal year 2014-15 - the teacher position allotment represents North Carolina's primary funding source for districts (Joint Legislative Program Evaluation Oversight Committee, 2016).

To conduct this analysis we update the methodology of Rolle, Houck and McColl (2008) to understand changes in horizontal and vertical equity in the North Carolina's funding mechanism stemming from the position allocation component from 2010-11 through 2016-17. To better align our analysis with state policy, we shift from focusing on per pupil funding to analyzing North Carolina's unique teacher position allotments and their usefulness in providing equitable funding across districts. We analyze the model for distributing teacher salary dollars based on the structural components resident within the NC funding mechanism, and we expand our analysis to explore other factors unaddressed in the model; specifically the concentration of Black and Hispanic students within a district.

OPEB Accounting and Teacher Diversity

Paul Bruno

University of Illinois at Urbana-Champaign

Despite extensive literatures documenting the importance of teacher diversity and teacher compensation, few studies explore relationships between the two. Fewer studies still examine effects of governmental accounting standards, even though these standards evolve regularly and could have substantial implications for how school districts allocate resources. I use staff- and district-level data from California to explore the effects on the teaching force of a change in accounting standards that required districts to recognize the costs of retiree health benefits (and other post-employment benefits) as employees earned them. Because this reform made the true costs of this deferred compensation more apparent, it may have changed teachers' incentives or encouraged districts offering such benefits to shift expenditures toward other aspects of compensation or working conditions more highly valued by relatively novice teachers (e.g., higher salaries). I illustrate how such reforms could impact the diversity of the teaching force by showing how teachers of different races and genders were likely to be differentially affected by deferred compensation policies due to differences in previous experience (and thus proximity to retirement). However, comparative interrupted time series analyses do not show that districts affected by the change in accounting standards saw their teaching staffs diversify at different rates than other districts. Thus, while the costs of deferred compensation are likely an important ?? and underdiscussed ?? factor in determining the diversity of the teaching force, accounting reforms alone are unlikely to moderate their impacts on the race and gender composition of teachers, at least in the medium-term. This submission is part of a series of submissions coordinated by editors of a special issue of the Journal of Education Human Resources looking at the intersectionality of HR and finance.

CONCURRENT PAPER SESSION 3

THURSDAY, APRIL 8 | 3:45 P.M. – 5:15 P.M.

3.3

Presider: Davíd Martínez

DACA Funds of Knowledge: Testimonios of Human Capital for Access to and Success in Higher Education

Steve Przymus

Texas Christian University

Karrabi Malin

Texas Christian University

Alejandra Lopez

Texas Christian University

In the last decade, educational research advocating for the rights of DACA recipients has largely framed these individuals as vulnerable, powerless children brought to the U.S. and who simply deserve the right to higher education (Przymus, Lengeling, Mora-Pablo, & Serna-Gutiérrez, 2020). These attempts to appeal to the emotions and tug on the heart strings of policy makers has made little impact on the higher educational opportunities afforded to DACA recipients and can act to erase these individuals' agency, creativity, criticality, and educational achievements. We suggest that the DACA recipients who are current and potential future university students are often times misrepresented as just passive victims of political debate and are undervalued in what they can teach educational stakeholders.

In this presentation we tap into these students' funds of knowledge, 'historically accumulated and culturally developed bodies of knowledge and skills essential for household or individual functioning and well-being' (Moll, Amanti, Neff, & Gonzalez, 1992, p. 132), as various forms of human capital that can inform solutions to inequalities in the P-20 and specifically higher education pipeline. We bridge funds of knowledge with capital, by introducing the term DACA funds of knowledge for specifically considering these individuals lived experiences as social, cultural, educational, linguistic, and at times economic capital.

Through sharing the testimonios of six current Latina DACA university students, we document what Human resources these successful women have leveraged in the past to graduate high school and apply for DACA (parents, siblings, aunts/uncles, cousins, neighbors, Go Center advisors, friends), those Human resources that they lean on now as current university students (members of persons of color campus organizations, university professors, friends), and what Human resources are still under-developed, under-utilized, and in dire need of professional development and education around the needs of undocumented students on campuses (high school and university educators, high school and university counselors, provosts, chancellors, etc.). Analysis of the testimonios illuminates that yes, their legal status makes DACA and undocumented students vulnerable, but they are also some of the most successful adults, with the agency, creativity, and criticality to achieve educational success and to teach

the rest of us. We believe these individuals to be some of the most valuable Human Resources/Human Capital for finding novel solutions that reduce existing educational/life disparities.

Presentation attendees will hear the stories of how these university Latina DACA students leveraged their DACA funds of knowledge to creatively and critically forge new pathways to P-20 educational success. These new pathways present potential novel solutions (institutionally provided legal services, financial aid, campus-work programs, civil rights and safety protections, increased commitments of support/allyship from university presidents, provosts, faculty, etc., new scholarships, and purposeful conversations/action around civil rights, immigration, and an expanded paradigm of civic preparedness curriculum in schools). Sharing DACA funds of knowledge can begin to change policy, hearts, and minds.

Clerical Turnover in the K-12 Campus Office

Catherine Robert

The University of Texas at Arlington

Clerical staff in the campus office (i.e., secretaries and registrars) perform critical functions essential to the operation of schools, yet do not receive research attention regarding their contributions. This study describes turnover rates of K-12 campus clerical employees in order to establish base information in the field. Eight years of employment data within a large suburban school district in Texas are examined to determine the number of clerks moving to different positions and/or leaving campus clerical employment. Reasons for turnover are reviewed in addition to the cost of clerical turnover per year.

Findings reveal the average clerical employee in this district is female, 50 years old, White or Hispanic, has 11 years of experience, changed positions at least once, and earns \$15.61 an hour. The demographics of clerical staff more closely resemble student demographics than the teachers within the district. Turnover averaged 22% per year, with 16% of turnover representing leavers and under 7% representing movers; by experience level, 25% of clerks left in their first year. Although teacher turnover is more frequent in high poverty schools and varies based on level of campus, clerical staff turnover is significant based on the level of position and pay. Results confirm findings from paraprofessional research (who have similar levels of pay) that the level of pay and the perceived lack of support are reasons for leaving. By providing induction activities and additional training, districts can reduce turnover costs of clerical staff despite the added cost of training. The findings contribute an added dimension to heightened calls for Pursuit of Equity by questioning common assumptions of efficiency within employee pay structures.

CONCURRENT PAPER SESSION 3

THURSDAY, APRIL 8 | 3:45 P.M. – 5:15 P.M.

3.4

Presider: Tyrone Bynoe

Global Comparative Study on Higher Education Funding, with an Emphasis on Education Finance Equity

Charlotte Bingham

Purdue University

This study will compare higher education funding between institutions across the globe, including institutions located in Europe, North America, South America, and Asia. The purpose of this study is to analyze how funding is allocated, and its impact on equity.

Developing a Computational Model of Responsibility Center Management

David Reeping

University of Michigan

Gabriel Serna

Michigan State University

This presentation concerns the development of a revised conceptual model of the Responsibility Center Management budgeting methodology that can be implemented in a computational environment. Responsibility Center Management is a budgeting approach that aims to increase transparency by moving the responsibility for revenue generation and management to individual units. Moreover, revenue and cost allocation are determined by formulas intended to be objective. Accordingly, the methodology is an attempt to bring a greater sense of fairness to budgeting. The methodology is not without critiques, however. Whalen (2002) claims that although RCM is theoretically rational, its effectiveness does not necessarily come forth in practice. In some cases, the model may promote a 'perversion of principles' (Whalen, 1991, p. 150), which may cause individual units to be unable to see beyond their own goals by overestimating their independence (Stocum & Rooney, 1997) and breeding competition between other units. The RCM methodology rewards credit hour generation, so academic units have sought to offer topical courses or duplicates of other unit's courses to maximize in-house credit hours, leading to what is called 'curricular glut' (Bugeja, 2008; Bugeja, 2016). Likewise, internal competition for students has also been observed at the University of Minnesota (Pappone, 2016). This presentation seeks to advance the conversation on Responsibility Center Management from a computational modeling perspective, aiding in visualizing and analyzing such observed fears and benefits. We have developed a revised conceptual model for simulating the effects of Responsibility Center Management on an institution. We leverage the computational modeling paradigm, agent-based modeling, and new thinking on analyzing curricula to operationalize credit hour generation - i.e., the curricular analytics framework (Heileman et al., 2018). Agent-based modeling is an approach to simulating how interactions between autonomous agents in a system affect the whole. The curricular analytics framework represents the curriculum as a network of its prerequisites, allowing us to simulate how students flow through the curriculum and account for credit hour generation. Taken together, our conceptual model outlines how we can examine the effects of Responsibility Center Management on an arbitrary or specific institution.

CONCURRENT PAPER SESSION 3

THURSDAY, APRIL 8 | 3:45 P.M. – 5:15 P.M.

3.5

Presider: Bill Owings

Are Specialized Technical High Schools Worth the Investment?

Shaun Dougherty
Vanderbilt University

Mary Smith
Vanderbilt University

Background: Interest in career and technical education (CTE) programs at the secondary school level has increased in recent years. Concurrently, there is new evidence about the efficacy and impact of stand-alone technical high schools where all students enrolled in the school participate in some form of CTE (Bonilla 2020; Brunner et al. 2019; Dougherty 2018; Hemelt et al. 2018). Advocates for these programs often reason that they confer positive impacts on student engagement and employment outcomes, and recent evidence bolsters such claims. While most research has focused on examining whether these potential benefits of CTE participation exist, much less research directly addresses what drives the costs of operating CTE programs, relative to traditional comprehensive high schools, and how these cost differences compare to the overall economic benefits they have been shown to produce. This paper adds to the literature in two ways. First, it estimates whether the impacts of CTE-specific schools are a cost-effective means to improve student outcomes. Second, it explores the cost determinants of technical education to understand the source of any costs differences, which could also shed light on the source of program impacts.

Data and methods: We use impact estimate of specialized technical high schools from Brunner et al. (2019) as well as Dougherty (2018), in combination on education public finance and spending data from the National Center for Educational Statistics to perform our analyses. Specifically, we first establish what factors explain differences in spending between technical and comprehensive high schools. We then used the net differences in spending as part of a cost-benefit analysis to establish whether the additional expenditures on technical high schools outweigh the benefits associated with the improved educational and workforce outcomes established in these recent studies. **Preliminary findings:** Overall, we find that there are higher costs of providing an education in the CTHSS schools, but that the established earnings differences, and value of additional high school graduates results in lifetime benefits that likely exceed cost differences. We use estimates from Brunner et al. (2019) as well as known estimates of the economic public benefits to an increase in the high school graduation (Levin & Belfield, 2007) to conclude that there is a substantial net positive benefit. Preliminary estimates also suggest that much of the difference in average cost per pupil can be explained by differences in student-teacher ratios.

Framing Public Opinion of Career and Technical Education

Walt Ecton

Vanderbilt University

This paper uses a survey-based randomized control trial to examine the role of different framing messages in shaping support for Career and Technical Education. Using a nationally-representative sample of parents, we randomly assign students to receive different messages about CTE framed in various ways, some positive, some negative, some value-based, and some financial-based. We find evidence that parents are most responsive to messages about CTE that focus on the financial implications, such as the likelihood of gaining meaningful employment, rather than value-based messages regarding equality or individualism. We also examine how different populations respond differently to various framing messages. This study represents an attempt to better understand what attracts parents to (or dissuades parents from) supporting CTE; it also helps provide useful insight into what types of goals and objectives are especially salient as parents consider curricular options for their students. Given the increasing policy interest in CTE, this study sheds light on how parents might come to their views, and helps enhance our understanding of how parents develop opinions about a crucial component of education policy.

The Relationship Between the Earning of Career and Technical industry Credentials and the Virginia Economy

Anjanette Hendricks

Old Dominion University

Nationally, the labor market is calling out for workers to fill the increasing number of job vacancies, but those qualified, skilled, and able to fill them are limited in supply or retiring in large numbers. As America's key industries offer high salaries in return for candidates with the necessary skills and credentials to fill their vacancies, the skills learned and third-party industry credentials earned in secondary Career and Technical Education (CTE) programs seem to make a perfect fit for the student, employer, and the economy. However, widely held misperceptions of CTE and unfamiliarity with industry credentials perpetuate this skills crisis while undermining high school students' economic potential. Using a non-experimental, quantitative study employing ex post facto data, a Likert survey, and a closed-ended question survey, this study shows CTE industry credentials' economic value in dollar terms for students and for Virginia's Treasury in potential income tax revenue for the next five years.

CONCURRENT PAPER SESSION 4

THURSDAY, APRIL 8 | 5:30 P.M. – 7:00 P.M.

4.1

Presider: Barbara De Luca

Identifying District-Level Demographic, Actions and Funding Factors that Predict English Learner Achievement and College

Marianna Olivares

California State University, Los Angeles

Education finance policy is intended to address inequalities in the schooling of children. In implementation, however, those policies often fail to produce the sought-after academic progress of students. In fact, they frequently perpetuate systems of racial and social injustice. Rather than approaching the problem with a deficit mindset and blaming students and their communities for their shortcomings, researchers and agents of social change need to look critically at the historical context and the underpinnings of financial policies and school funding reform. The purpose of this mixed methods study was to critically evaluate district-level spending and use mixed methods analysis to explore resource allocations that relate to English learner (EL) student outcomes and college readiness in California school districts. Quantitative data analysis determined how district demographics and uses of funds were related to specified student outcomes. Content analysis of district Local Control and Accountability Plans (LCAPs) served as qualitative data that were used in conjunction with quantitative data to build a thorough understanding of how the district-level implementation of EL funding policies and practices affected the educational outcomes of ELs. Purposeful, selective sampling of six districts in the state of California was used for three phases of analysis. Reviews of LCAPs showed a clear lack of targeted spending for English language learners. Furthermore, thirteen categories of spending were consistent and evident among the six districts. Only the category of 'college and career readiness' funding was found to have a significant relationship with the achievement of English language learners. Differences between high achieving and low achieving districts were found in categories of funding. Additionally, per pupil spending and the percentage of students eligible for free and reduced-price meals was significantly correlated with EL achievement. The current state funding system lacks effectiveness, and greater mandated transparency of funding practices is called for.

Promoting Equity: Differences in Resource Allocation Between Urban Early College High Schools & Traditional High Schools

Steven Hinshaw

Dayton Early College Academy

This exploratory study was designed to analyze the distribution of financial resources to predict student achievement in early college high schools and traditional high schools. The premise was to discover if there were differences in the predictor variables for allocation. If so, then the allocation could be changed in traditional high schools to address the needs of those students unable to attend early college high schools thus creating more equity for those underserved students. This study included 12 of Ohio's first early college high schools and the 36 traditional high schools in the public districts where the early college high schools are located. Multiple regression was used to analyze the relationship between the predictor variables (percent spent on instruction, administration, operations, student support, and staff support) and the criterion variable of the student performance index score. The early college high schools outperformed their traditional high school peers with a mean performance index score of 76.4 compared to a traditional high school mean performance index score of 51.6, which confirmed the inequity in student performance between these two types of high schools. The percent spent on instruction was the highest in both types of schools with the early college high schools spending a mean of 57.0% and traditional high schools spending a mean of 52.5% yet only entered the regression model for the traditional high schools. The financial resources allocation regression model explained 29.9% of the variance in early college high schools and 27.8% of the variance for traditional high schools.

CONCURRENT PAPER SESSION 4

THURSDAY, APRIL 8 | 5:30 P.M. – 7:00 P.M.

4.2

Presider: Bill Thro

An Unconscionable Contract: The NCAA's Unfair Deal with Student-Athletes

Tommy Jackson

University of West Georgia

Shanna Smith

University of West Georgia

Student-athletes produce billions of dollars annually but are not permitted to benefit from their own talent, name, image, or likeness (Gaston-Gayles, Comeaux, Ofoegbu, & Grummert, 2018). The NCAA claims that not permitting student-athletes to be paid for their athletic talent is to keep a delineation between professional sports and collegiate sports and that it benefits the student-athlete (NCAA Manual, 2021). However, after a simple analysis of whom the NCAA and its members recruit for their talent and reviewing their socioeconomic status, I beg to differ. The NCAA recruits impoverished minorities that could benefit greatly from their own athletic talent. If the NCAA were deemed to have an unconscionable contract with student-athletes then the Court could void the entire contract or portions. This paper intends to address if the NCAA is indeed in an "unconscionable contract" with student-athletes and if so, what could be equitable remedies?

Reflections from the Principal's Office: Leadership Lessons Learned from Retired Career Administrators

Spencer Weiler

Brigham Young University

Jacob Skousen

University of Nevada, Las Vegas

Brianna Pesci

Brigham Young University

Adam Johnson

Brigham Young University

Research on attributes of effective educational leadership has focused almost exclusively on two essential segments of the continuum of educational leaders – pre-service preparation programs and current educational leaders. However, an important voice is virtually absent from this research and our intention with this grant proposal is to begin to fill this gap in the literature. The missing voice is that of retiring educational leaders who possess a wealth of practical experience after a career of leading schools. The aim of this research project is to capture the perspective of retiring principals related to the essential elements of good leadership.

CONCURRENT PAPER SESSION 4

THURSDAY, APRIL 8 | 5:30 P.M. – 7:00 P.M.

4.3

Presider: Matt Kelly

Intersection of Anti-Black Racism and School Finance from Slavery to Post Civil Rights (1619-2020)

Oscar Jiménez-Castellanos
Trinity University/USC Rossier

Taylor Enoch-Stevens
USC Rossier

Preston Green
University of Connecticut

This study examines the intersection of anti-Black racism and school finance in the US. Through a critical historical policy analysis, our study reveals that disparities in school funding in Black communities have been institutionalized by anti-Black laws, policies and structures since the enslavement of Black people in the United States. Such disparities, by design, have compounded over time, and education finance systems were integral to the concretization of racial disparities in education. We maintain that education leaders must move toward an anti-racist school finance system as a critical step in disrupting systemic racism in Black communities.

The Role of State Funding in School Desegregation: Evidence from Saint Louis

Cameron Anglum
Saint Louis University

Haisheng Yang
University of Pennsylvania

Aaron Park
Saint Louis University

We seek to address two questions: Do districts reduce the quantity of transfer enrollments of Black students after state reimbursements decline? If so, do schools become more racially segregated? This analysis will help illuminate the role state funding policies may serve in redressing school segregation amid weaker judicial mandates. In light of legal challenges to race-based school assignment policies, state governments may foster similarly desirable enrollment outcomes through regional funding mechanisms. Conversely, the reversal of such mechanisms may stymie integration progress. We construct a school*year panel dataset spanning the 2005-06 through 2018-19 academic years. From the Common Core of Data, we observe school-level demographics, enrollments, school type, location, and grade span. We include VICC data which indicates school-level proportions of Black VICC students. We add zip code level demographics from the U.S. Census Bureau to control for shifts in demographics and to estimate whether changes in a school's racial makeup affected neighborhood demographics.

CONCURRENT PAPER SESSION 4

THURSDAY, APRIL 8 | 5:30 P.M. – 7:00 P.M.

4.4

Presider: Walter Hart

The Growing Importance of Risk and Innovation in a VUCA World

Maureen McClure
University of Pittsburgh

Lou Sabina
Stetson University

Kiara L Sabina
Seminole State

The VUCA (volatility, uncertainty, complexity, ambiguity) concept stands for the almost intractable conditions that drive increases in budgetary risk. Many important problems in education are contested, deeply interdependent, and resist causal modeling. When combined with limited access to resources, it can lead to a chronic search for low cost, high value, grassroots innovations. Many districts and states have been creative in their responses to limited resources in VUCA conditions. This resourcefulness is found globally, in part, as a way to preserve the institutional sustainability needed to ensure the viability of equity efforts. These efforts need longevity. VUCA conditions can threaten education finance efforts to improve both access and quality. In order to build the institutional capacity needed for sustainability, both advocacy for revenue generation and creative use of expenditures are needed. Grassroots innovation is common, but rarely acknowledged. These efforts need to be more visible and shared.

The Highly Nonlinear Relationship Between the Cost of Education and English Learners in Texas

Caroline Bartlett
Michigan State University

Lori Taylor
Bush School / Texas A&M University

The school funding and finance literature has identified three main drivers of uncontrollable variation in educational cost, one of which is student need. English learners (ELs) are students that require additional educational resources to access grade-level academic content in English. Unfortunately, many educators face challenges effectively educating ELs or lack resources specific to their needs. Thus, a key issue facing researchers and policymakers is determining the level of funding needed to expand ELs' opportunities to succeed academically. We use cost function analysis to estimate how school districts combine educational inputs that are purchased (such as staff, software, or air conditioning) with an array of environmental factors that are not purchased (such as the percentage of students requiring EL services) to produce educational outcomes (such as test scores) using data from Texas public schools and other sources during school years 2014-15 to 2019-20. One key to this analysis was including a measure of student need that was outside of school district control. In Texas, a student's EL status is a function of their academic performance, and districts influence academics. Therefore, we constructed an alternative measure of student need that was clearly outside of school district control—the percentage of students in the district who had ever been considered an EL. Another key to this analysis was the development of labor cost measures that were also outside of school district control. We developed a Teacher Cost Index (TCI) that measured geographic differences in labor cost across the state based on an analysis of teacher compensation within the state. Results of the TCI suggest that districts with higher student needs also have systematically higher labor costs. For example, a one standard deviation increase in the percentage of students who have ever been designated EL is associated with a 2 percentage point increase in the TCI. Ultimately, we used our measures of EL status and the TCI to estimate a cost function for Texas public school campuses. Results of the cost-function analysis show that the marginal cost of serving an increased percentage of ever-EL students is sharply higher for campuses that already have a high percentage of ever-EL students. For example, a district where 100 percent of the students have ever been identified as EL has predicted costs that are more than 6.5% above the minimum, all other things being equal. On the other hand, we estimate that the marginal cost of serving EL students was negligible for very low fractions of EL students. These findings suggest that funding formula adjustments are needed to ensure equity for EL students. While Texas currently provides compensatory funding to schools serving EL students through a per-pupil weight in the state funding formula, funding practices can be adjusted to more equitably serve schools with high proportions of EL students. Varying the compensatory funding provided to schools based on the percentage of ELs served may be an effective strategy to enhance equity. These adjustments will provide schools the ability to purchase resources specific to ELs' academic needs.

CONCURRENT PAPER SESSION 4

THURSDAY, APRIL 8 | 5:30 P.M. – 7:00 P.M.

4.5

Presider: Anthony Rolle

Higher Education: Children's Savings Account Programs Can Help Families Build Savings and Envision College, GAO-21-10

Jessica Ard
U.S. Government Accountability Office

Rising college costs have outpaced federal grant aid and placed more of the financial burden on students and their families. It can be hard for lower-income families to save for their children's higher education. Children's savings account programs can help by providing financial contributions-like initial deposits-to savings or investment accounts. Some programs also offer financial education or other support to families. While amounts saved by some families are small, there is evidence that children's savings account programs have had positive effects so far. For example, studies show modest increases in savings and higher educational expectations among families. According to the nonprofit organization Prosperity Now, states, cities, and other organizations operated 82 of these programs in 2019.

Big Ten Universities' Mental Health Investments: Considerations for Equitable Policy

Stephen Stewart
Purdue University

Poor mental health is correlated with negative academic outcomes in higher education. Likewise, investment in mental health services at the appropriate scale generates a positive return on investment. This paper provides a theoretical underpinning for higher education investment into mental health services, both preventative and treatment-based, as well as an analysis of policy related to investment in mental health services at Big Ten universities. Specifically, a critical content analysis of Big Ten websites and related public databases will assess investment in mental health. Findings will be discussed in relation to human capital theory and through a lens of equitable access.

The Impact of Revenue Trends on Student Access and Affordability at Iowa's Community Colleges

Jeffrey Fletcher

Iowa Department of Education

Jan Friedel

Iowa State University

The purpose of this quantitative methods research study is to investigate correlational relationships and time-series trend analysis of financial data covering fiscal years 2006 – 2018 for each Iowa community college (tuition & fees, state appropriations, local support, Federal Grant Aid); per FTE, and its impact on the community college mission of affordable, and open, access. There has been no comprehensive analysis nor the testing of statistically significant differences of financials and impacts on populations for and between Iowa's community colleges within the last decade nor any decade in Iowa's history. The dissemination of this study will increase awareness about changes and trends in community college finance for the state of Iowa, along with implications and findings for community college finance across the United States. The results also serve as a means to start a serious conversation about sustainable community college finance models across the United States. Upon investigating the finance trends of Iowa's community colleges, it is apparent that additional levers are needed at the state-level to ensure more equitable funding per FTE for all student populations. Results further show that the change in the revenues from tuition & fees has increased at a statistically significant growth rate, while state support and federal financial aid have not kept pace. Moderate increases in Pell Grant aid have helped mitigate some of the differences in unmet needs in the State of Iowa. However, a disproportional rise in student tuition and fees conflicts with the community college's mission of affordable and open access, which requires sound and compatible state-level funding if they are to remain viable institutions in the future.

NETWORKING & SELF-CARE

FRIDAY, APRIL 9 | 7:00 A.M. – 8:00 A.M.

Welcome to the 2021 NEFA Fit. Our goal is to begin each day with the mind and body in a positive place and of course educate ourselves on how to pursue sweat equity.

Presented by:



Today's Theme: Fight to the Finish

Nutrition: Trail Mix

Workout:

Two 7-minute AMRAPs – As Many Reps As Possible

5 Push Ups

10 Squats

15 Supermans

20 Crunches

Daily Fit – Around the World Stretch

Q & A

STATE OF THE STATES

FRIDAY, APRIL 9 | 8:30 A.M. – 9:30 A.M.

Alabama	Philip Westbrook & Brenda Mendiola
Alaska	Amy Dagley
Arizona	Davíd G. Martínez
Arkansas	Steve Bounds
California	Mazen Aziz & Oscar Jiménez-Castellanos
Colorado	Tommy Jackson
Connecticut	Lesley Denardis
Delaware	Tommy Jackson
District of Columbia	Philip Westbrook
Florida	Lou Sabina
Georgia	David Buckman
Hawaii	Brenda Mendiola
Idaho	Clay Webber
Illinois	JD Roseboom
Indiana	Scott Sweetland
Iowa	Jeffrey Fletcher & Jan Friedel
Kansas	Christopher Thompson
Kentucky	Bill Thro & Angie Martin
Louisiana	Sharda Jackson Smith & Venice Adams
Maine	Sharda Jackson Smith
Maryland	Chelsea Lyles
Massachusetts	Tyrone Bynoe
Michigan	Brett Geier
Minnesota	Nicola Alexander
Mississippi	Spencer Stone & Josh Money

Missouri	Lisa Lambert Snodgrass
Montana	Kiara Sabina
Nebraska	Cedric Brown
Nevada	Davíd G. Martínez
New Hampshire	Sharda Jackson Smith
New Jersey	Luke Stedrak
New Mexico	Davíd G. Martínez
New York	Osnat Zaken
North Carolina	Eric Houck, Walter Hart, & Jim Watson
North Dakota	Anna Peters
Ohio	Randy Vesely
Oklahoma	Jeffrey Maiden & Rex Wall
Oregon	Joshua Cohen
Pennsylvania	Matthew Kelly & Frank Ayata
Rhode Island	Jacob D. Skousen
South Carolina	Mazen Aziz & Sharda Jackson Smith
South Dakota	Jeffrey Maiden & Seth Meier
Tennessee	Lisa Driscoll
Texas	Ken Helvey & Oscar Jiménez-Castellanos
Utah	Arvin Johnson
Vermont	Frank Ayata & Jeremy Anderson
Virginia	Bill Owings & Leslie Kaplan
Washington	Tommy Jackson
West Virginia	Jeffrey Maiden
Wisconsin	Lisa Lambert Snodgrass
Wyoming	Neil Theobald

CONCURRENT PAPER SESSION 5

FRIDAY, APRIL 9 | 9:45 A.M. – 11:15 A.M.

5.1

Presider: Oscar Jiménez-Castellanos

Does State Support to Higher Education Function as a Reverse Subsidy? Some Evidence from Economic Theory

Gabriel Serna

Michigan State University

This paper explores the theoretical notion that state funding operates as a reverse subsidy thus impacting equity and marginalized populations in the college going process. Using fundamental microeconomic models, I examine the role of state funding from the perspective of students in terms of price-response. Additionally, it explores what occurs for institutions if such funding were to be changed to a more need-based form.

Outcome-Based Funding Models with At-Risk Incentives: Are They Working in Ohio's Higher Education Institutions?

Amber Hunt

University of Mount Union

Ohio is considered a leading state in the current outcome-based funding models as the state-level policy includes all public institutions and allocates a significant portion of dollars based on identified performance metrics? (BOR, 2014). Ohio's funding policies align with commonly accepted, research informed, best practices by engaging institutions, using limited and clearly defined metrics, differentiating across missions, focusing on the student completion and "at risk" student populations, and allocating a significant amount to outcomes (BOR, 2014). Institutions are rewarded for successfully serving traditional underserved ("at-risk") student populations. This process is the framework for progressive research analyzing the improvements the outcome-based funding model has had on these student populations and overall higher education equity. The adjusted funding allocation has been in place for over five years and this study identifies the results of outcomes-based funding and subsequent course and degree completion of at risk student populations. The main question that will be addressed is: Has the current outcomes-based funding model, which utilizes at-risk models to successfully serve underserved student population, benefited the at-risk student population?

CONCURRENT PAPER SESSION 5

FRIDAY, APRIL 9 | 9:45 A.M. – 11:15 A.M.

5.2

Presider: Sharda Jackson Smith

Supervising the Supervisor: A National and Local Examination of Teachers Serving as School Board Members

Spencer Weiler

Brigham Young University

Lyræ Dantes

Brigham Young University

State statute in 20 states does not explicitly prohibit school district employees from serving as school board members in the same school district. This could be due to a number of factors, including: the need to fill vacancies in geographically isolated areas and a desire to have people knowledgeable about educational issues serving on the board. However, this arrangement also presents numerous legal and logistical complications.

Teacher turnover in high-poverty schools: Intended outcomes of unitary salary schedules and transfer policies?

William Owings

Old Dominion University

Leslie Kaplan

Newport News Public Schools, Retired

Policy makers wanting to close the well-documented achievement gap between students in high- and low-poverty schools have increasingly focused on teacher quality. Yet experienced teachers tend to leave high-poverty schools, replaced by novice, less effective teachers. Research suggests that this churn creates serious academic and equity issues, jeopardizing these children's opportunities for an adequate education. Although teachers' unitary salary schedules and school district transfer policies are not among explicit causes, might turnover be an unintended outcome of such policies? Or might these policies intend to remove experienced educators from high poverty schools? This article takes a fresh look at this issue.

Providing Guidance: An Intra- and Interstate Analysis of the Distribution of School Counselors

Karen DeAngelis

University of Rochester

Brian Brent

University of Rochester

There is mounting evidence that school counselors positively affect student academic and behavioral outcomes. Yet, federal policymakers do not seem to view counselors as principal agents of school improvement. At the state level, policies vary widely with regard to schools' need for counselors. Little empirical work has been done to document the distribution of counselors across districts and factors associated with inequities in their distribution. In this study, we use national population data and descriptive and multivariate, fixed-effects models to examine intra- and inter-state variation in districts' use of school counselors. We reveal significant variation in the use of school counselors with the preponderance of variation occurring within states. Moreover, we consider the district factors that contribute to this variation.

CONCURRENT PAPER SESSION 5

FRIDAY, APRIL 9 | 9:45 A.M. – 11:15 A.M.

5.3

Presider: Jeffrey Maiden

Let's Talk Budget! Teaching Practical Budgeting to Educators

Luke Cornelius

University of North Florida

This session will introduce the authors' "Practical Budgeting System for Educators" to those seeking to enhance budget training for educational leaders in graduate and certificate programs. The session will be a discussion of the PBS and how to integrate into courses. Topics covered include budget analysis, projection techniques, terminology, budget cycles, and capital planning. Although the version presented will be for Higher Education, those interested in K12 budgeting are encouraged to attend and participate as there is also a companion School version in development. Sample materials will be provided and review copies will be available.

'Financial Literacy Programming in Higher Education' Phase I: What's There and What's Missing (IRB2020-1503)

Terron Phillips

Purdue University

Christine Kiracofe

Purdue University

This presentation provides an overview of data collected about the general content, delivery modalities, and undergraduate student participation in financial literacy programming at institutions across the country. Financial literacy program representatives and/or directors from some of the largest institutions in America responded to our survey and shared information about the financial literacy programming offered at their institution. Presenters will share and discuss the programmatic generalities, commonalities, and differences revealed in the data.

CONCURRENT PAPER SESSION 5

FRIDAY, APRIL 9 | 9:45 A.M. – 11:15 A.M.

5.4

Presider: Philip Westbrook

What We Know about the Impacts of Charter Schools on District School Finances

Paul Bruno

University of Illinois at Urbana-Champaign

Even as charter schools have steadily proliferated since the early 1990s (Hussar et al., 2020), the large majority of school-age children remain enrolled in district(-run) schools, even where charter schools are present. Indeed, both advocates and opponents of charter schools have motivated their positions in part by highlighting the implications – or potential implications – of charter schools for nearby district schools. This has led to a large body of literature examining the effects of charter schools on the outcomes of students in nearby district schools, though the results of these studies are somewhat mixed (e.g., Epple, Romano, & Zimmer, 2016). Similar concerns motivate a smaller, but growing, literature exploring the financial implications of charter schools for district schools. I review and synthesize the research literature on the financial impacts of charter schools on district schools. In particular, I focus on the quasi-experimental literature that can offer credibly causal answers to the questions of how charter school competition affects the (i) revenues, (ii) expenditures, and (iii) financial health of district schools. The existing evidence collectively offers important lessons about the financial effects of charter schools on district schools. Charter school competition appears to reduce district school revenues over and above the revenue diverted for each enrolled student. This seems to be due at least in part to negative effects on property tax revenue. District school expenditures also fall, but often not as much as revenues. This results in net deterioration in districts' overall financial health. The composition of district expenditures does not appear to substantially change in the face of charter school competition, however. These findings have important implications for both researchers and policymakers.

Assessing the Impact of a Large Starting Teacher Raise on Veteran Teachers in the State of Florida

Lou Sabina

Stetson University

Anna Peters

University of Florida

Upon his election, Governor Ron Desantis declared that 2019-2020 would begin what he would like to describe as the term of the teacher. In doing so, he focused on two things - (1) first the elimination of Common Core in favor of something that was much more Florida specific, and (2) increasing the starting teacher salary to \$47,500, which now becomes the second highest state in the country for starting teacher pay. But what about veteran teachers? Will they benefit from this initiative? Work with them is spotty at best, as this has really been left up to the hands of each school district; some of which have much more money than others.

Funding Structures and State Capacity for School Improvement Under the Every Student Succeeds Act: Case Studies of Five States

Hailey Karcher

University of Washington

David Knight

University of Washington

Under the Every Student Success Act, the federal government allocates 7 percent of Title I funds, about \$1 billion per year, for school improvement. States have substantial autonomy over how to allocate these funds, including which schools are identified for federal school improvement, what improvement strategies are used, and whether external intermediaries are involved. A growing area of research explores the private, often for-profit school improvement industry, but few studies track the policy structures which funnel public funds to external K-12 intermediaries. In this study, we draw on document analysis and interview data to explore school improvement practices and finance policies in five case study states. We find that states use varied methods for identifying schools for improvement, and also vary in the extent to which they provide local autonomy to school districts. Some states, like Texas and Tennessee, incentivize schools to adopt particular strategies or encourage partnering with an external intermediary. Texas provides a list of vetted external intermediaries they expect districts to work with (and support financially). Other states, such as California and New York, provide more state-led school improvement strategies through regional offices and give districts greater local autonomy. Findings point to possible benefits of local autonomy, while highlighting potential challenges associated with unregulated market-based reforms in education.

CONCURRENT PAPER SESSION 5

FRIDAY, APRIL 9 | 9:45 A.M. – 11:15 A.M.

5.5

Presider: Eric Houck

Monitor & Adjust: Maryland, the Bridge to Excellence Act and the New Adequacy

Rob Knoeppel

William & Mary

Lisa Driscoll

University of Tennessee

In 2002, the Maryland legislature enacted a new state education finance system called the Bridge to Excellence in Public Schools Act that was adequacy based. The change to the state education finance system was the result of finance litigation beginning in 1981. Using legal realism as a theoretical framework, this study examines the history of the litigation in Maryland, the adequacy studies in Maryland, and the legislation resulting from the court decisions to discern the impact and changes in policy to meet the demands of the current times. The requirement to continually monitor the adequacy of the state funding formula and to make adjustments to the formula makes Maryland unique in the study of educational finance.

Workforce Alignment with Labor Markets

CyLynn Braswell

NISD

Bill Camp

University of North Texas

Royce George

University of North Texas

Workforce systems vary greatly across local communities throughout the country. To align secondary education with labor market demands, the federal government has taken additional steps to address workforce system quality, quantity, and effectiveness through the creation of new policy that requires local program alignment with area labor markets to be eligible to receive funding for Career and Technical Education.

CLOSING GENERAL SESSION

FRIDAY, APRIL 9 | 11:30 A.M. – 1:30 P.M.

NEFA Election Results

Lisa Driscoll

Awards Recognition

William J. Fowler & Patricia Fowler Education
Finance Policy Research Grant
Nicola Alexander

Journal of Education Finance Article of the Year
Bill Thro

Distinguished Research & Practice Fellow Awards
Rob Knoeppel
Lifetime Achievement Award
Nicola Alexander

Introduction of Richard Rothstein

Christine Kiracofe
Oscar Jiménez-Castellanos

Town Hall Meeting

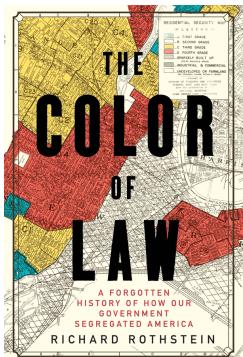
Christine Kiracofe
Oscar Jiménez-Castellanos

Passing of the Gavel

Rob Knoeppel

PRE-RECORDED REMARKS

FRIDAY, APRIL 9 | 11:45 A.M. – 12:45 P.M.



THE COLOR OF LAW *A Forgotten History of How Our Government Segregated America*

Richard Rothstein

Racial segregation characterizes every metropolitan area in the U.S. and bears responsibility for our most serious social and economic problems – it corrupts our criminal justice system, exacerbates economic inequality, and produces large academic gaps between white and African American schoolchildren. We've taken no serious steps to desegregate neighborhoods, however, because we are hobbled by a national myth that residential segregation is *de facto*—the result of private discrimination or personal choices that do not violate constitutional rights. *The Color of Law* demonstrates, however, that residential segregation was created by racially explicit and unconstitutional government policy in the mid-twentieth century that openly subsidized whites-only suburbanization in which African Americans were prohibited from participating. Only after learning the history of this policy can we be prepared to undertake the national conversation necessary to remedy our unconstitutional racial landscape.



Richard Rothstein is a research associate of the Economic Policy Institute and a Fellow at the Thurgood Marshall Institute of the NAACP Legal Defense Fund. He lives in California, where is a Fellow of the Haas Institute at the University of California–Berkeley.

2021 NEFA LIFETIME ACHIEVEMENT AWARD

Purpose: To recognize outstanding service in the field of education finance and to the (NEFA By-Laws). This is NEFA's most prestigious award and recognition.

Committee Composition: In past practice this committee has been composed of NEFA past-presidents and the current NEFA president who serves as the Chair of the committee.

Nomination Process:

- (1) Annual call for nominations will be made by Lifetime Achievement Committee in a timely fashion (NEFA By-Laws). This can be done by email,
- (2) Nominating individuals should address the Lifetime Achievement Award criteria in some detail in their letter. The discussion of contributions to the field should include specific publications, presentations, and other accomplishments, and the discussion of service to NEFA should identify specific committees and leadership roles (NEFA By-Laws).
- (3) Members of the Lifetime Achievement Award Committee can make nominations themselves (NEFA By-Laws).
- (4) Per past practice the nominating individual submits a letter and the vita of the nominee in one of two ways: (1) to the Chair of this committee per their email address; or (2) via a portal on the NEFA Website (<https://www.nationaledfinance.com/nomination-for-the-nefa-lifetime-achievement-award.html>) a letter of nomination with the candidate's vita for consideration in response to the email and NEFA website solicitation.

Eligibility for the Award:

- (1) Must be an NEFA member (NEFA By-Laws).
- (2) Individuals receiving the award must have significant service to the NEFA (NEFA By-Laws).
- (3) The individual's work has had an impact nationally in the field of education finance through publications, teaching and service to the profession, especially through publications (NEFA By-Laws).
- (4) Receipt of Nomination letter and vita by November 1, 2020.

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JOURNAL OF EDUCATION FINANCE

Journal of Education Finance

VOLUME 45 NUMBER 3 WINTER 2020

Expanding and Contracting Support for Public Education: Commentary on the 2019 State of the States

Spencer C. Weiler and Christine Kiracofe

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Alaska – Amy Dagley
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TERM APRIL 2021 THROUGH APRIL 2022



Eric A. Houck is an Associate Professor of Leadership and Policy in the School of Education at the University of North Carolina at Chapel Hill. A noted authority on school finance, Eric studies the distributional inequities created by school finance mechanisms. He also studies the resource allocation implications of school resegregation. He is a Distinguished Research and Practice Fellow of the National Education Finance Academy, where he currently serves on the Board of Trustees.

NEFA BOARD OF TRUSTEES CANDIDATES

TERM APRIL 2021 THROUGH APRIL 2024



David Buckman

David G. Buckman is an associate professor of Educational Leadership and Ed.S. coordinator in Kennesaw State University's Department of Educational Leadership. He completed his Doctor of Philosophy degree in the Educational Leadership and Policies Department at the University of South Carolina and his research spans both K-12 and Higher Education spectrums in school finance and human resources. Dr. Buckman has been an active member of the National Education Finance Academy since 2015 and has aided in recruiting new members for the organization, served on the conference planning committee, and served as co-chair of the state of the states committee.



Brett Geier

Brett Geier is an associate professor at Western Michigan University in the Department of Educational Leadership, Research, and Technology specializing in K-12 leadership. He was a teacher, principal, and superintendent in Michigan for over 17 years. Dr. Geier's research focuses on public education law and school finance. His scholarship has been widely published in various journals and law reviews. He has composed multiple book chapters and is the author of Quality Facilities for Enhanced Student Achievement. Dr. Geier is a 2016 NEFA Distinguished Fellow. He is a regular presenter at national and state conferences on law and finance topics. Dr. Geier is substantially involved with local schools and state departments providing expertise and support for the education system and current and future administrators.



Walter Hart

Walter Hart is an Assistant Professor and coordinator in educational leadership at the University of North Carolina at Charlotte. Before entering higher education, he was a school district superintendent in North Carolina. His research interests include school funding litigation and the impact of state lotteries on public education finance. He has presented his research multiple times at NEFA. He teaches graduate courses in education finance and education law. He is also a member of the North Carolina Association of School Administrators and is a board of education trainer for the North Carolina School Boards Association. He is a board member for the South Rowan YMCA, and a volunteer "Uber driver" for his teenage daughter.



Sharda Jackson Smith

Sharda Jackson Smith currently serves as Interim Assistant Dean and Assistant Professor for the School of Education, Human Performance, and Health at the University of South Carolina Upstate. As a first-generation college student and three-time University of Florida graduate, Jackson Smith understands the importance of a quality educational experience. With the goal of creating a pathway to equitable opportunity for students, her post-secondary teaching experience caters to P-12 pre-service and practicing teachers. Jackson Smith is involved in professional and community initiatives that focus on state and federal public education policy, disproportionate funding, and teacher advocacy.



Oscar Jiménez-Castellanos

Oscar Jiménez-Castellanos, Ph.D. is a Professor at Trinity University and Visiting Scholar at USC Rossier School of Education. He previously served as faculty at Arizona State University and Santa Clara University. His research has focused on school finance policy as it relates to English Learners and has been published in the Education Finance Journal, Review of Educational Research, Review of Research in Education, Teachers College Record, and Education Policy Analysis Archives among others. His current research focuses on anti-racist, anti-xenophobic and civil rights in school finance. He is a 2015 Distinguished Fellow of the National Education Finance Academy (NEFA). He previously served on the NEFA Board of Advisors (2012-2015) and NEFA Dissertation Award Committee (2017).



Matthew Kelly

Matthew Kelly is an Assistant Professor of Educational Leadership at Pennsylvania State University, where he teaches courses in educational leadership and school finance. Before graduate school, he was a middle school math and special education teacher in New York City. His research examines long-term trends in state education funding policies. He currently serves on the 2021 NEFA Conference Planning Committee. If elected, he'd be excited to serve the organization in new ways and support opportunities to strengthen the organization while maintaining the collegiality and spirit of open inquiry that makes NEFA such a wonderful academic home for so many.

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- 2020** William J. Fowler
- 2019** Barbara De Luca
- 2018** Walter McMahon
- 2017** R. Craig Wood
- 2016** Deborah Verstegen
- 2015** Mary McKeown-Moak
- 2014** William Hartman
Richard G. Salmon
- 2013** David C. Thompson
- 2012** Lynn Moak
- 2011** Kern Alexander

JOURNAL OF EDUCATION FINANCE SCHOLARLY PAPER AWARD

- 2020** Paul Bruno
“Charter Competition and District Finances: Evidence from California.” *Journal of Education Finance*, 44, no. 4 (2019), 361-381.
- 2019** Robert Kelchan
“Do Financial Responsibility Scores Affect Institutional Behaviors?” *Journal of Education Finance*, 43, no. 4 (2018), 417-439.
- 2018** David S. Knight
“Are High-Poverty School Districts Disproportionately Impacted by State Funding Cuts? School Finance Equity Following the Great Recession.” *Journal of Education Finance*, 43, no. 2 (2017), 169-194.
- 2017** Matthew G. Springer and Lori L. Taylor
“Designing Incentives for Public School Teachers: Evidence from a Texas Incentive Pay Program.” *Journal of Education Finance*, 41, no. 3 (2016), 344-381.

- 2016** Jennifer A. Delaney and Tyler D. Kearney
“Guaranteed Tuition Policies and State General Appropriations for Higher Education: A Difference-inDifference Analysis.” *Journal of Education Finance*, 40, no. 4 (2015), 359-390.
- 2015** Gabriel Serna and Gretchen Harris
“Higher Education Expenditures and State Balanced Budget Requirements: Is There a Relationship?” *Journal of Education Finance*, 39, no.3 (2014), 175-202.
- 2014** Robert Toutkoushian, M. Najeeb Shafiq, and Michael J. Trivette.
“Accounting for Risk of Non-Completion in Private and Social Rates of Return to Higher Education.” *Journal of Education Finance*, 39, no. 1 (2013), 73-95.
- 2013** Carlee Escue Simon
“Adequate Yearly Progress as a Means of Funding Public Elementary and Secondary Education for Impoverished Students: Florida Funding.” *Journal of Education Finance*, 37, no. 4 (2012), 347-373.
- 2012** Jennifer A. Delaney and William R. Doyle
“State Spending on Higher Education: Testing the Balance Wheel over Time.” *Journal of Education Finance*, 36, no. 4 (2011), 343-368.
- 2011** Bruce Baker and Matthew Ramsey
“What We Don’t Know Can’t Hurt Us?: Equity Consequences of Financing Special Education on the Untested Assumption of Uniform Needs.” *Journal of Education Finance* 35, no. 3 (2010), 245-275.

OUTSTANDING DISSERTATION AWARD

- 2020** Hyunjun Kim, *University of Minnesota*
- 2019** Pakethia Harris, *University of South Florida*
- 2018** Jolande Morgan, *University of Florida*
- 2017** Jason Inkrott, *University of Dayton*
- 2016** C. Edward Brooks, *University of Northern Colorado*
Joshua M. Cohen, *University of Northern Colorado*
Jessica M. Ellison, *Old Dominion University*
Joel R. Malin, *University of Illinois*
- 2015** Brittany Larkin, *University of Florida*
- 2014** Timothy Shrom, *Pennsylvania State University*
- 2013** Luke J. Stedrak, *University of Florida*
- 2012** Carlee Poston Escue, *University of Florida*
- 2011** Amy Scott, *University of Virginia*

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- 2020** Bruce D. Baker, Rutgers University
Lori L. Taylor, Texas A&M University
Gloria M. Rodriguez, University of California – Davis
Steve Katsinas, University of Alabama
Bill Camp, University of North Texas
- 2019** Luke Cornelius, University of North Florida
Philip Westbrook, University of Alabama
Marge Plecki, University of Washington
Neil Theobald, University of Wyoming
- 2018** William J. Fowler, Jr., National Center for Education Statistics (NCES)
John M. Graves, Private Practice Attorney, Former District Superintendent
Robert K. Toutkoushian, University of Georgia
Osnat Zaken, Touro College & University System
- 2017** Steve Bounds, Arkansas State University
Tyrone Bynoe, University of Michigan – Flint
Jennifer A. Delaney, University of Illinois at Urbana-Champaign
Craig Schilling, Concordia University Chicago
Henry Tran, University of South Carolina
- 2016** Kristi Bowman, Michigan State University College of Law
Thomas A. DeLuca, University of Kansas
Carlee Escue Simon, University of Cincinnati
Lisa Dawn-Fisher, Chief School Finance Officer at the Texas Education Agency
Robert A. Frost
Brittany Larkin, Auburn University
Maureen W. McClure, University of Pittsburgh
Brett Geier, Western Michigan University
Gabriel R. Serna, Virginia Polytechnic Institute and State University
Randall Vesely, University of Toledo
- 2015** M. David Alexander, Virginia Polytechnic Institute and State University
Kevin P. Brady, North Carolina State University
Matthew R. Della Sala, Purdue University
Patricia F. First, Clemson University
W. Blake Haselton, University of Louisville
Oscar Jiménez-Castellanos, Arizona State University
C. Aaron LeMay, Sam Houston State University
Luke J. Stedrak, Seton Hall University
Walter Garrett, Special School District, St. Louis; Saint Louis University
Robert A. Schoch, Pennsylvania

- 2014** Iris BenDavid-Hadar, Bar Ilan University, Israel
Stephoni Case, Oklahoma State University
Leslie Kaplan, Old Dominion University
Barbara LaCost, University of Nebraska
Mary McKeown-Moak, Moak, Casey & Associates
Christopher M. Mullin, State University System of Florida Board of Governors
William Owings, Old Dominion University
Robert A. Schulman, Schulman, Lopez & Hoffer, San Antonio, Texas
Spencer Weiler, University of Northern Colorado
Lewis Wasserman, University of Texas at Arlington
- 2013** Nicola A. Alexander, University of Minnesota
Edward Eiler, Purdue University
Marilyn A. Hirth, Purdue University
Teresa S. Jordan, University of Nevada – Las Vegas
Christine Rienstra Kiracofe, Northern Illinois University
Robert C. Knoeppel, Clemson University
Timothy J. Shrom, Solanco School District
Lenford C. Sutton, Alabama State University
Gary Peevely, Lincoln Memorial University
Barbara M. De Luca, University of Dayton
- 2012** Ron Cowell, *The Education Policy & Leadership Center in Pennsylvania*
Eric A. Houck, University of North Carolina at Chapel Hill
Richard King, University of South Florida Sarasota-Manatee
Jeffrey Maiden, University of Oklahoma
Walter W. McMahon, University of Illinois at Urbana-Champaign
Richard G. Salmon, Retired, Virginia Tech
David C. Thompson, Kansas State University
William E. Thro, Christopher Newport University
Jean W. Van Rooyen, University of Pretoria
Faith E. Crampton, *Journal of Education Finance, Educational Considerations*
- 2011** Scott Bauries, University of Kentucky School of Law
Catherine Clark, Texas Association of School Boards
Lisa Driscoll, University of North Carolina at Charlotte
Matthew Fajack, University of Florida
William Hartman, Pennsylvania State University
Anthony Rolle, University of Houston
Deborah Verstegen, University of Nevada-Reno
Scott R. Sweetland, The Ohio State University
Charles Mayfield, Indiana Legislative Services Agency
F. Howard Nelson, American Federation of Teachers