

## Reference Call Summary for Augenblick, Palaich and Associates

<b>Education Adequacy Consulting Services Proposal References:</b>	<b>Maryland Department of Education</b>
<b>Date of Contact</b>	4/18/2019
<b>Person Spoken To (including Title)</b>	Donna Gunning, Executive Director Maryland State Department of Education Office of Finance and Administration Office of Policy and Fiscal Analysis
<p><b>1. Can you describe the project or work that APA has completed for you? Please describe the level of detail APA has provided in completing its work/project.</b></p>	<p>Ms. Gunning stated that in the late 90's, Augenblick and Associates (predecessor to APA) completed Maryland's (MD) original adequacy study. She said as a result of the study, they developed a standards based funding model that distributed funds to school districts (SDs) in a block grant format based on student population so there was a base amount with special weights for special education, English Language Learner, and economically disadvantaged students. As part of the 2001 law that enacted the results of their adequacy study, MD was required by law to re-evaluate educational adequacy 10 years down the road. Due to the recession they did not issue their RFP to complete this re-evaluation until 2014, at which time they issued the RFP for a comprehensive analysis of educational funding, school capacity, Pre-K return on investment, methods for identifying economically disadvantaged students, and original adequacy study values to determine if they needed to be updated. She indicated that they were using Free and Reduced Price Meal eligibility to identify economically disadvantaged students, but they wanted a deeper dive into this issue, to include a review of the impact of the Community Eligibility Program on identifying these students.</p> <p>She said MD also created a new commission whose charge was to help the MD educational system be more world class, or in other words, comparable to other high performing countries. MD has 24 dependent school districts that are structured around MD's 24 local jurisdictions. She said the small number of districts presented problems with the statistical analysis being done in the study. She said they have 1,400 schools across all jurisdictions. She said APA prepared a model to help MD go to a world class system.</p>
<p><b>2. Was APA responsive, accessible and available to you throughout the term of the project/work?</b></p>	<p>She said yes, they were responsive, accessible and available both during the original study, the 2014 study, and with the current commission. She further explained that they had a stakeholder group that met regularly and received progress reports and information on the progress of APA's work including MD specific components they may not be aware of. She said the group included an array of members including a superintendent, local school finance staff person, bargaining unit representative, principal, legislative representative, special education representative, and representatives from various educational advocacy groups from across the state. APA was responsive to and worked well with this group.</p> <p>She also said that APA held bi-weekly calls with the Department on the progress of the study that were very helpful. She also indicated that there were a number of times when APA arrived a day or two early to brief and make sure everyone was prepared for meetings of the Commission that was created by law to create a world class education system.</p>
<p><b>3. Are you satisfied with the work performed?</b></p>	Yes.

## Reference Call Summary for Augenblick, Palaich and Associates

<p><b>4. What are APA's strengths and conversely what are APA's weaknesses?</b></p>	<p><b>Strengths:</b>          APA has a very knowledgeable team with the ability to analyze and use data to drive the recommendations and intersect research and the data. She said they were really, really helpful and responsive.</p> <p><b>Weaknesses:</b>          They need to hire an editor. One of the only frustrations the Department had was that APA needed better edited work. She said the Department would need to pass along the reports to the legislature, and they did not want to send reports with errors. She said in MD, their legislature does not issue contracts, so the contract had to be issued by the Department of Education. She said when they passed along APA reports with typographical errors, the Department felt it was a reflection on them as well as APA. She said because of this issue, it required more staff time to review APA's work before they released it. She added that they have had this issue with other vendors as well. She said she did not want to overstate this weakness, but that because they are the Department of Education, they wanted the information as accurate and free of errors as possible. She said APA did prepare a lot of reports as part of their contract with MD so there were a lot of reports to review in a tight timeframe. She said if she was about to enter into a new contract with them, she would ask them to hire an editor. She reiterated that she did not want to overstate this weakness, and that APA was technically on point. The lack of editing was more grammatical and a quality control issue than a lack of clarity.</p>
<p><b>5. Have you encountered any problems with APA, or had any contract or billing issues with APA?</b></p>	<p>Absolutely not.</p>
<p><b>6. Would you recommend APA to other entities for similar work? If you need additional services in the future, how likely are you to choose APA again?</b></p>	<p><b>Would you recommend APA:</b>          She said she would absolutely recommend them.</p> <p><b>Would you choose APA again:</b>          She said if they needed this kind of work completed again in the future, they would have to issue a RFP and follow a specific process. She said that she would expect APA to respond to the RFP and that it would be a well-done proposal.</p>
<p><b>7. Are there any important questions I should have asked but didn't?</b></p>	<p>She said she did not think so. She added that each of the APA staff have strengths and weaknesses and they are pretty aware of what their strengths and weaknesses are, and that APA is really, really good at this work.</p>

## Reference Call Summary for Augenblick, Palaich and Associates

<b>Education Adequacy Consulting Services Proposal References:</b>	<b>Wyoming Legislature</b>
<b>Date of Contact</b>	4/17/2019
<b>Person Spoken To (including Title)</b>	<p>Matthew Willmarth, Senior School Finance Analyst  Wyoming Legislative Service Office</p> <p>Mr. Willmarth is a non-partisan legislative staff member in the area of K-12 school finance.</p>
<p><b>1. Can you describe the project or work that APA has completed for you? Please describe the level of detail APA has provided in completing its work/project.</b></p>	<p>Wyoming is required to recalibrate their school funding every 5 years by law. He indicated that they had major recalibrations completed by Picus and Odden (P &amp; O) in 2005, 2010, and 2015. Due to unforeseen funding issues, the Wyoming legislature decided to complete an additional recalibration in 2017, and they chose APA to complete the recalibration. APA was charged with looking at both actual K-12 education costs such as supplies and utilities, and also K-12 programs and subject areas. He indicated that P &amp; O used a different approach to the recalibration work than did APA. P &amp; O used an evidence based (EB) approach and APA used both the Professional Judgement (PJ) and Successful School District (SSD) approach. He said that some expected APA to recommend a lower cost model than did P &amp; O, but APA's recommendations actually turned out to be higher. APA worked from June 2017 through January 2018. They held various meetings with staff members from School Districts (SD), the State Board of Education, the Department of Education (DOE), and the Wyoming Legislature. They prepared a comprehensive report and a Special Select Legislative Committee comprised of members from their Appropriations and Education Committees, directed their work.</p> <p><b>Data</b> - He said APA used achievement data to identify successful SDs and visited those districts, and used actual expenditure data and salary data provided by the DOE and the School Facilities Agency to complete their analysis. The DOE set up a FTP (File Transfer Site) to provide DOE data to APA.</p>
<p><b>2. Was APA responsive, accessible and available to you throughout the term of the project/work?</b></p>	<p>Most definitely. He said Amanda Brown and Justin Silverstein were the primary APA staff working on their recalibration.</p>
<p><b>3. Are you satisfied with the work performed?</b></p>	<p>He said he thought so, and they did what they were asked to do. He said that P &amp; O had a different "personality" than did APA. He said the difference was not bad, just different. He said they had a good relationship with APA and that APA was responsive to requests. He said it was hard to "pin down" APA on exact recommendations, or specific costs amounts. He said this may be due in part to the small number of students in WY, 93,000 students. APA's use of different modeling techniques such as "inverse exponential lines" did not work well for WY and for WY's small SDs.</p> <p>P &amp; O provided more precise recommendations than did APA, for example, P &amp; O provided specific recommendations regarding cost categories such as supplies and materials.</p>

## Reference Call Summary for Augenblick, Palaich and Associates

<p><b>4. What are APA's strengths and conversely what are APA's weaknesses?</b></p>	<p><b>Strengths:</b></p> <ul style="list-style-type: none"> <li>- APA conduct themselves very professionally. They present well to Committees and SDs, and interact well with those involved in the study.</li> <li>- APA was willing to get assistance from other consultants if they didn't have the necessary expertise to address something their Committee was interested in exploring. He said APA found a consultant from Denver, RMC, to address an issue in which APA did not have sufficient expertise.</li> </ul> <p><b>Weaknesses:</b></p> <p>He cautioned that Arkansas should make sure that APA does not provided "canned" recommendations from reports prepared for other states. He said Arkansas should make sure APA fully explores all the possibilities to make sure they are meeting the State's needs.</p>
<p><b>5. Have you encountered any problems with APA, or had any contract or billing issues with APA?</b></p>	<p>No problems. Everything was fine. They attended the meetings and met the obligations of the contract with no problems.</p>
<p><b>6. Would you recommend APA to other entities for similar work? If you need additional services in the future, how likely are you to choose APA again?</b></p>	<p><b>Would you recommend APA:</b> He said "sure, yes".</p> <p><b>Would you choose APA again:</b> He said there are only a few entities that do this type of work, and that this would not be his decision to make. WY legislators would make the decision of who to contract with in the future for recalibration. He is not sure if the WY legislators would pick APA again or not. He did think that people enjoyed working with APA.</p>
<p><b>7. Are there any important questions I should have asked but didn't?</b></p>	<p>He asked for clarification about the type of work that Arkansas is seeking to have completed by APA. He then observed that with his experience with the WY recalibration studies prepared in 2005, 2010, 2015, and 2017 that we should not be surprised if APA recommends a higher funding amount than what is currently being provided. He was taken aback that APA's funding recommendation was higher than P &amp; O's. He acknowledged that APA was using recent expenditure data upon which to base their recommendations. He encouraged in-depth conversations with APA, and recommended we not look only at Arkansas's SD expenditures, but rather that we consider expenditures of other states and high performing states, such as Massachusetts, as well. He said we should not let only Arkansas data drive the study.</p> <p>He further stated that salaries are the largest piece of school funding, and that WY looked at regional states (their competitive market) as they considered funding for salaries. He encouraged Arkansas to have an economist as part of the study to look at salaries and compensation, and look at the other states from which Arkansas is hiring its teachers.</p>

## Reference Call Summary for WestEd

<b>Education Adequacy Consulting Services Proposal References:</b>	<b>Legislative Coordinating Council of the Kansas State Legislature</b>
<b>Date of Contact</b>	4/18/2019
<b>Person Spoken To (including Title)</b>	Mr. Tom Day, Director Legislative Administrative Services
<b>1. Can you describe the project or work that WestEd has completed for you? Please describe the level of detail WestEd has provided in completing its work/project.</b>	<p>Mr. Day said that the Kansas Legislature had a contract with APA's predecessor, Augenblick and Myer in the early 2000s. Beginning in December 2017, the Kansas Legislative Coordinating Council contracted with WestEd [one of APA's partners responding to the Arkansas RFP] and work on the contract concluded March 15, 2018. Interview focused on WestEd. He said it was a 2-part study with one part prepared by Dr. Lori Taylor from Texas A &amp; M, who was a subcontractor of WestEd, and the second part was a peer-review by another professor working for the American Institutes for Research. He said that they were pleased with the contractual work done by WestEd, but that some legislators were displeased with the work of Lori Taylor. He said that the reason for the displeasure with the work by Lori Taylor was due to politics. He said that his experience with WestEd was good and they kept them well-informed of their progress. He said the Department of Education was supposed to provide comprehensive data, and contract deliverables included: provision of student, teacher, school, and district files, WestEd to conduct analysis and focus on the structure of the KS school finance formula for overall K-12 spending, econometric work to produce an education system to achieve the <i>Rose</i> Standards, which he said were educational standards used in KS that date back to the late 90s early 2000s. He said the KS legislature wanted to know how much was needed to adequately fund K-12 education in KS. The final recommendation prepared by WestEd was to increase funding by \$2B over a 10-year period.</p>
<b>2. Was WestEd responsive, accessible and available to you throughout the term of the project/work?</b>	<p>He said they had an excellent experience with WestEd. WestEd communicated almost on a weekly basis to keep them posted on the status of the project. WestEd provided a draft report, initial-final report, and a final-final report. He said when they received the final report, there were a lot of errors in the final report. He said the errors were mainly in the backup/supporting materials. Legislators found that there were school districts that were not included in the backup/supporting materials. He could not remember how many districts were omitted, but he said it was a significant enough number to make some legislators very doubtful about the report. He said they reported the errors to WestEd and within about a week, WestEd had Dr. Lori Taylor make all the needed changes and submit new data to back up the information in the narrative of the report. He said the omission of the data and the spreadsheets that were missing did not alter the figures in her analysis or the final product, but when legislators recognized that SDs from their legislative districts were omitted they were concerned the report was flawed.</p>

## Reference Call Summary for WestEd

<p><b>3. Are you satisfied with the work performed?</b></p>	<p>He said from a contractual side they were satisfied with the work performed by WestEd. He said from the political side, there were numerous people who were very upset with the report. He said in an aside, if it came down to the dollar figures, people were not expecting to see a \$2 billion figure come out of the report. He said those anti or less pro-education were not happy to see a need for an additional \$2 billion to fund K-12 education in KS. He concluded by re-stating that they were very pleased from a contractual standpoint with WestEd. Regarding the WestEd subcontractor, Dr. Lori Taylor, he said that she was recommended to subcontract on this contract by someone within KS because of work she had done in other states. Those individuals in KS who were less pro-education were upset that a former state senator who was at that time the legal counsel for the KS Senate recommended Dr. Taylor as a sub-contractor. He said that the KS Senate was part of the contracting entity, the Legislative Coordinating Council.</p>
<p><b>4. What are WestEd's strengths and conversely what are WestEd's weaknesses?</b></p>	<p><b>Strengths:</b> He said that WestEd's communication abilities regarding their progress in completing the study was a strength. The technical contract person was Jason Willis, who was located in San Francisco and was the main contact person who kept them informed on the process of the study.</p> <p><b>Weaknesses:</b> The use of sub-contractors was a weakness. He said there were different opinions in KS about the use of sub-contractors. He did say they were pleased with the Peer-Review portion of the study, and it was never an issue, but regarding the work on the K-12 adequacy issues, there were differing opinions on whether Dr. Taylor was the best fit for the work. He said that the Peer Review was always intended to be a part of the study and he believed WestEd suggested that KS include Peer Review. Dr. Taylor made specific recommendations regarding K-12 Adequacy Funding using data provided by the KS Department of Education for all of their school districts and their special needs.</p>
<p><b>5. Have you encountered any problems with WestEd, or had any contract or billing issues with WestEd?</b></p>	<p>He said there were no billing or specific contractor problems with WestEd.</p>
<p><b>6. Would you recommend WestEd to other entities for similar work? If you need additional services in the future, how likely are you to choose WestEd again?</b></p>	<p><b>Would you recommend WestEd:</b> Yes.</p> <p><b>Would you choose WestEd again:</b> As far as WestEd is concerned he would choose them again. He said based on their work with WestEd they might have put more into the contract on the choices of sub-contractors.</p>

## Reference Call Summary for WestEd

<p><b>7. Are there any important questions I should have asked but didn't?</b></p>	<p>He at first said he did not think so, but then added that they provided very detailed work. He said they really were pleased with WestEd. He said when contracting for something like this, there are going to be pro- and anti-individuals when the final report comes out. He said they asked Dr. Taylor through WestEd to be available when the Education Committees wanted to hear a presentation from Dr. Taylor and/or WestEd, and WestEd always accommodated the Committees' schedules to be available by phone or in person. KS did require at least two in-person visits by Dr. Taylor and WestEd to make initial and final reports. Mr. Day first estimated that Dr. Taylor did the majority of the work, approximately 75%, and WestEd did approximately 25% of the work. WestEd provided a lot of the information to Dr. Taylor to be included in the report. He then followed up and said he did not know the allocation of effort for sure and it could have also been 60% of the work performed by Dr. Taylor, and 40% by WestEd. Last, he mentioned there was one occasion when the Committees wanted Dr. Taylor to be available in person and she had to do a phone call with the Committees instead because of a scheduling conflict with another project she was working on.</p>
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