

Reference Call Summary for Shuls and Associates

Education Adequacy Consulting Services Proposal References:	Schindler Law Firm
Date of Contact	9/24/2019
Person Spoken To (including Title)	Mr. Joshua M. Schindler, Principal
1. Can you describe the project or work that Shuls and Associates has completed for you? Please describe the level of detail Shuls and Associates has provided in completing its work/project.	Mr. Schindler said he has some attorney client privilege issues that limit what he can say. He said he can generally say that in Missouri they have an educational foundation formula that uses 2004 as its base tax year, and he asked Shuls and Associates/Dr. Shuls to analyze this practice. He said to him the formula looks "stale". He said he further asked Dr. Shuls to assess the impact over time and the future impact of this practice. Mr. Schindler added that he himself is very familiar with educational adequacy because he has been involved with an educational adequacy issue in Missouri and generally throughout the United States.
2. Was Shuls and Associates responsive, accessible and available to you throughout the term of the project/work?	Mr. Schindler responded yes. He said he has been very impressed with Dr. Shuls's work. He added that he can't think of a time that he has called Dr. Shuls when he did not get a return phone call, which he said he has found to be difficult in the past with other experts with which he has worked.
3. Are you satisfied with the work performed?	Mr. Schindler responded that he is very satisfied. He said Dr. Shuls is in the middle of a project for him, and he is very pleased with the results so far. He said he actually has received the report, but may have supplemental/follow-up work that he would like for Dr. Shuls to do.
4. What are Shuls and Associates's strengths and conversely what are Shuls and Associates's weaknesses?	Mr. Schindler said he hires experts often, and the strength he would mention is that Dr. Shuls met all of his deadlines. He also said that Dr. Shuls is an affable sort. He said for anyone in this field, Dr. Shuls seems to be a nice guy. He said he hasn't really seen any weaknesses. He said he was looking at the report provided by Dr. Shuls as he responded to this question, and he said the report was readable. He said sometimes he has the problem with experts that sometimes he does not understand reports they provide. As he reads Dr. Shuls's report, he said he can't see any flaws yet. He said he is a stickler for grammar, and he does not see any glaring errors. He said he just does not see any flaws. Frankly, he said Dr. Shuls came in under budget, which he said frankly never happens. He said he is very pleased so far.
5. Have you encountered any problems with Shuls and Associates, or had any contract or billing issues with Shuls and Associates?	Mr. Schindler responded no, just the opposite. He came in under budget. He said in private practice, invariably experts go over budget, and this is the first time in recent memory where someone came in under budget. He said it is common in private practice for experts to bill for the entire project budget and, in addition, later require a budget increase after determining they did not think of everything. He said he was pleasantly surprised with this not being an issue with Dr. Shuls.

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<p>6. Would you recommend Shuls and Associates to other entities for similar work? If you need additional services in the future, how likely are you to choose Shuls and Associates again?</p>	<p>Mr. Schindler said he would use Dr. Shuls again, and he would highly recommend Dr. Shuls. He said he was just solid.</p>
<p>7. Are there any important questions I should have asked but didn't?</p>	<p>Mr. Schindler responded no. He added that he thinks that Dr. Shuls had been a teacher at the elementary level before he got his PhD, and he thinks that adds something to it. He said adequacy is numbers . . . what are we doing, what are we accomplishing and what are the results? But he added he does think you need a human element to it. Mr. Schindler said it is hard to quantify if having someone who has been on the front lines helps, but it adds the human element to it. He said he was sorry that he had nothing negative to say about Dr. Shuls. He said he was happy with the work, and Dr. Shuls delivered the work on time and under budget. He said he would share negative thoughts if he had them. He said Dr. Shuls seems to be rock solid. He said he had heard about Dr. Shuls over the years that he has been working in school finance, but this is the first time he hired Dr. Shuls to do a report for him. He said he is happy to report he made the right call by having Dr. Shuls complete a report for him. He said Arkansas would be well-served by hiring him. He said he knows the people who are doing this type of work, and they keep coming to the trough over and over again. He said there are those entities that typically do adequacy work and provide the same product over and over again. He said that Dr. Shuls will look at the project and do a good job.</p>

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Education Adequacy Consulting Services Proposal References:	Maryland Public Policy Institute
Date of Contact	9/25/2019
Person Spoken To (including Title)	Mr. Christopher Summers, President and Chief Executive Officer
1. Can you describe the project or work that Shuls and Associates has completed for you? Please describe the level of detail Shuls and Associates has provided in completing its work/project.	<p>Mr. Summers said the State of Maryland has put together a large commission [Kirwan Commission], a little over 3 years ago, to look at the funding adequacy of K-12 public education. Following the commission's report, the Institute contracted with Dr. Shuls to analyze the work of the commission. The Institute contracted with Dr. Shuls to do a very extensive analysis of the current commission's interim report which includes recommendations to the Maryland General Assembly. Mr. Summers said the Institute is the only organization that completed a deep dive historical analysis of K-12 finance in MD and an extensive analysis of the commission's recommendations from their interim report.</p>
2. Was Shuls and Associates responsive, accessible and available to you throughout the term of the project/work?	<p>Mr. Summers responded absolutely. He said Dr. Shuls's work has turned the momentum in the state. K-12 public education funding will be a major policy battle in 2020, and Dr. Shuls's work and research has been advantageous to the Institute. It will help them make the case that this commission's work is not needed.</p>
3. Are you satisfied with the work performed?	<p>Mr. Summers said satisfied is an understatement. It has been a year since they released Dr. Shuls's analysis of the Kirwan Commission's report. The commission is in phase two of their work and has been working for months. The commission is looking at how to change the funding formula and how the state's taxpayers are going to afford close to \$4 billion in new state education spending. Dr. Shuls's work has been instrumental in making the case that the work of the Kirwan Commission is not needed. Dr. Shuls' work has been very, very helpful.</p>
4. What are Shuls and Associates's strengths and conversely what are Shuls and Associates's weaknesses?	<p>Mr. Summers said he can only comment on strengths. He said this is not bias because this was the Institute's first time working with Dr. Shuls. Every deadline was met, there were great conversations, he was always accessible, and the detail he provided was not leaning to one side. Dr. Shuls's work was very non-partisan as one would expect of the Institute, because all of the work that the Institute does is peer-reviewed by others in academia. He is very pleased with Dr. Shuls's work. Dr. Shuls's work laid out to the public, media and state legislators that the state went through a similar exercise of this type of review in the late 1990's through the Thornton Commission. Mr. Summers said it is great that Dr. Shuls was able to show Maryland's history of investing in education, and the information showed that Maryland is one of the top states in the country. He said Dr. Shuls's work has been so helpful to what the Institute is doing.</p>

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5. Have you encountered any problems with Shuls and Associates, or had any contract or billing issues with Shuls and Associates?	Mr. Summers responded, no, none. He said Dr. Shuls has been very open and very clear.
6. Would you recommend Shuls and Associates to other entities for similar work? If you need additional services in the future, how likely are you to choose Shuls and Associates again?	Mr. Summers responded absolutely to both questions. He said the Institute may be considering having someone analyze the Kirwan Commission's next report, which is to be released close to the time the Maryland state legislature convenes in early January. Mr. Summers said that what the Institute found when they began to look at the K-12 education finance issue, is that Dr. Shuls is one of a few in the academia/think-tank world who has a specialty niche in this area. He indicated the Institute initially was going to contract with another gentleman from Stanford, Dr. Hanushek, but he was booked. Mr. Summers said it is a very small eco-system of people who specialize in this area. He said if Arkansas can grab Dr. Shuls, he highly recommends it.
7. Are there any important questions I should have asked but didn't?	Mr. Summers responded no. He thinks it is pretty straightforward and that the questions covered everything he wanted to say.

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Education Adequacy Consulting Services Proposal References:	Show-Me Institute
Date of Contact	9/24/2019
Person Spoken To (including Title)	Ms. Brenda Talent, CEO
1. Can you describe the project or work that Shuls and Associates has completed for you? Please describe the level of detail Shuls and Associates has provided in completing its work/project.	Ms. Talent said she has not worked directly with Shuls and Associates, but she said that she has worked directly with Dr. Shuls, who served as the Education Policy Director for the Show-Me Institute. She said he was an excellent Director. She said this position researches and publishes research on education in the State of Missouri. His publications are posted on https://showmeinstitute.org/ . She said he was such an excellent policy director, that when he said he was leaving to pursue teaching, she asked him to stay on as a Fellow and continue to work on various research projects regarding education and education reform. He has continued to serve in this capacity. The Institute has had subsequent Directors of Education Policy and these directors have worked with Dr. Shuls on identifying projects and highlighting what is going on in the Missouri educational system and looking at ways to improve the system and create greater opportunity for students. She said Dr. Shuls has done a lot of work on the Missouri foundation formula, which is a rather complicated system. He makes it something people can easily understand and follow how the money moves through the system. She said that projects can be searched on their website by author and that Dr. Shuls has completed both white papers or academic research papers and prepared more consumable writings such as blog posts.
2. Was Shuls and Associates responsive, accessible and available to you throughout the term of the project/work?	Ms. Talent said absolutely. He is really a very enjoyable person to work with, a person of high integrity, and he keeps his commitments.
3. Are you satisfied with the work performed?	Ms. Talent responded absolutely.
4. What are Shuls and Associates's strengths and conversely what are Shuls and Associates's weaknesses?	Ms. Talent said Dr. Shuls's strengths are: <ul style="list-style-type: none"> - He is very thorough and careful; - He is an excellent writer and communicator; and - He is a person of integrity and follows through on his commitments. She said she would not hesitate to work with him and said she obviously appreciated his work and respected him enough that she wanted to keep him affiliated with their organization even after he left. She said she always says that a person's strengths are their weaknesses, but she would not really call them weaknesses. She said he was an incredible employee and a very wonderful person to be around and work with.
5. Have you encountered any problems with Shuls and Associates, or had any contract or billing issues with Shuls and Associates?	Ms. Talent responded no.

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6. Would you recommend Shuls and Associates to other entities for similar work? If you need additional services in the future, how likely are you to choose Shuls and Associates again?	Ms. Talent indicated she would recommend him and said, obviously she would choose to work with him again since her organization has continued to work with him as a Fellow within their organization.
7. Are there any important questions I should have asked but didn't?	Ms. Talent responded that none that come to mind.