



AUGENBLICK,
PALAICH AND
ASSOCIATES



Response to RFP BLR-190003 for Education Adequacy Consulting Services

Amanda Brown (APA)
Jason Willis (WestEd)

Presentation to the Senate Committee on Education
and the House Committee on Education
Little Rock, Arkansas
October 8, 2019

Today's Presentation



- Study Team's Experience and Qualifications
- Study Overview
 - Key Changes to Approach
 - Research Activities
- Study Tasks by RFP Section
- Question & Answer

Augenblick, Palaich and Associates (APA)

- **APA** is a Denver-based education finance and policy consulting firm, established in 1983.
 - APA has worked in all 50 states and has a long history of providing assistance to legislatures and Departments/Boards of Education, including working with policymakers to implement the results of school finance studies and develop school finance funding systems.
 - Designed school finance systems that were enacted in several states, many of which are still in place today.
 - APA will be the primary vendor for the study.

APA Key Staff



Justin Silverstein



Amanda Brown



Mark Fermanich



Jennifer Piscatelli

WestEd

The logo graphic consists of several overlapping geometric shapes. On the left, there are two dark green triangles pointing towards each other. In the center, there is a dark grey triangle pointing downwards. To the right, there is a large, light green triangle pointing downwards. The overall shape is abstract and modern.

- **WestEd** is a nonprofit, nonpartisan research, development, and service agency that works with education and other communities to promote excellence, achieve equity, and improve learning for children, youth, and adults.
 - The staff from WestEd included in the study team specialize in state/school district finance and resource allocation.
 - WestEd will lead fiscal and performance data analysis.

WestEd Key Staff



Jason Willis



Raifu Durodoeye



Lauren Outlaw



Mari Shikuzawa



Darius Taylor

Additional Subcontractors

- **Michael Griffith**, independent consultant. Griffith's policy expertise is in K-12 and postsecondary school finance. Over the past 20 years, he has worked with policymakers in all fifty states to improve their school funding systems.
 - Griffith will support a number of the literature reviews in the study.
- **Dr. William Hartman**, President of Education Finance Decisions and Professor of Education, Emeritus, at Pennsylvania State University, and **Robert Schoch**, the founder and President of School Business Intelligence LLC.
 - Hartman and Schoch will support the studies related to school and district size.
- The study team has also asked the **University of Arkansas Pine Bluff, School of Education** to provide support for stakeholder engagement.

Study Team Experience

Past Ten Years

State	Year	Client
Utah	2019	Utah State Board of Education
Pennsylvania	2019	Pennsylvania State Legislature
Maryland	2019	Maryland Department of Education
Hawaii	2019	Hawaii Department of Education
Maryland	2019	General Assembly of Maryland
North Carolina	2019	North Carolina Superior Court
Arizona	2018	Arizona Department of Education
Kansas	2018	Kansas State Legislature
Arkansas	2018	Arkansas Department of Education/ South Central Comprehensive Center
Nevada	2018	Nevada Department of Education
Wyoming	2018	Wyoming State Legislature
California	2017	California State Board of Education
Maryland	2016	Maryland Department of Education
Alaska	2015	Alaska State Legislature
Alabama	2015	Alabama Department of Education
District of Columbia	2014	Deputy Mayor of Education
District of Columbia	2013	Deputy Mayor of Education
Colorado	2011	State Council for Educator Effectiveness
New Jersey	2011	New Jersey Department of Education
North Carolina	2010	North Carolina General Assembly

Study Team Experience

- Additional state agency clients not already noted include:
 - Connecticut, Delaware, Georgia, Idaho, Illinois, Indiana, Kentucky, Louisiana, Maine, Minnesota, Mississippi, Montana, Nebraska, New Hampshire, New Mexico, New York, North Dakota, Ohio, Oklahoma, Pennsylvania, South Carolina, South Dakota, Tennessee, Texas, Virginia and West Virginia
- The study team's decades of experience conducting large scale studies for state policymakers makes it the most qualified vendor for this work

Study Team Qualifications

The study team understands the complexity and breadth of topics to be addressed:

- Deeply knowledgeable about all aspects of school finance
- Has conducted a wide variety of studies for state finance systems
 - Structural reviews, equity analyses, cost/adequacy studies, and studies addressing specific finance system components

Study Team Qualifications

The study team understands the amount of time and staffing necessary to complete a study of this scale:

- The study team has the personnel and hours allocated to fulfill both the study design and support the Committees through the project
- APA and WestEd: Nine key staff members and five additional support staff members (with the organizational capacity to provide additional staff as needed) will provide 3,856 hours of support
- Three additional subcontractors and our local university partner will provide an additional 650 hours of support to the project

Study Team Qualifications

The study team is responsive and collaborative:

- Has the capacity and ability to respond to additional research needs or questions that arise
- Produces actionable, digestible work products
- Provides ongoing technical assistance to states following studies, including additional analysis and modeling for implementation

The study team is non-partisan

Study Overview



- We will first identify the key changes to our approach since the last RFP
- We will then review the key research activities we propose to address the 31 required study areas:
 - Fiscal and Performance Data Analysis
 - Case Studies
 - Literature/Data Reviews
 - Educator Panels/Stakeholder Engagement
 - District Survey
 - Additional Quantitative and Qualitative Work

Key Changes to Approach

The study team has adjusted its previous response to meet the requirements of the current RFP. The study team **will not:**

- Implement the professional judgment, cost function or successful school district approach, or develop adequacy cost estimates
- Examine cost-of-living differences
- Examine school boundaries/ attendance areas

Key Changes to Approach

The study team **will:**

- Conduct case studies and educator panels
- Help the state identify a process for routinely reviewing adequacy
- Review the current funding matrix, including identifying resources that are not currently addressed
- Compare current legislation to recommendations of the prior study
- Look at the impact of vouchers, policies for remoteness/isolation, examine teacher salaries in relationship to class sizes and other factors, and address a number of areas in more depth

Fiscal and Performance Data Analysis

Implement time series analysis using multivariate regression analyses that:

- Identify growth and achievement among student groups, including their progress and remaining gaps
- Analyze the impact of concentrations of poverty on student outcomes
- Estimate relationship between spending and variables:
 - Graduation rates, ELA/math assessment results, student demographics, school/district size, location and other relevant characteristics
- Fundamentally different and methodologically more sound than other approaches

Literature/Document Review

- First research step in most RFP areas
- Each literature/ document review will examine the academic and policy research available on the topic
- Policy reviews will examine all 50 states, with special attention paid to the Southern Regional Education Board (SREB) and a set of leading national states to be determined with input from the Committees
 - All reporting will include a separate table for each group of states

Case Studies

- The study team will conduct case studies in 12-16 successful schools from across the state:
 - Schools will be selected based upon performance analysis in Section 3.0.A, with emphasis on schools with high concentrations of ELL or economically disadvantaged students
- Using a case study interview protocol developed and vetted through the study team's experience in other states, the interviews will gather data on:
 - Staffing and non-personnel resource use
 - Curriculum, interventions and strategies
 - Professional development and instructional time
 - Use of data and decision making
 - School culture

Educator Panels/Stakeholder Engagement

- The study team proposes three avenues for engaging stakeholders in the process:
 - At least 4 in-person listening sessions across the state
 - Open to all educators
 - 16 targeted educator panels
 - 4 panels for each staff group: teachers, school leaders, superintendents and CFOs/business managers
 - Up to 20 Arkansas educators per panel
 - Online survey
 - Open to both educators and the public, including parents, students, business leaders and community members

School District Survey

- When needed data is not already available, the study team will survey districts directly through a single district survey:
 - Will be sent to each district's superintendent
 - Will gather information in multiple study areas including school/district size issues (existing policies, best practices, and impact), best uses of funding for economically disadvantaged students, and capital needs

Additional Qualitative and Quantitative Work

- Additional qualitative and quantitative work includes, but is not limited to:
 - Data analysis, such as examining the equity of the current finance system
 - Interviews with Arkansas Department of Education Staff and district staff as needed
 - Geographic Information System (GIS) mapping
 - Modeling of fiscal impacts, such as vouchers, the uniform tax rate, or enrollment change

Study Tasks: Section 3.0.A

Section 3.0.A							
	Fiscal and Performance Data Analysis	Case Studies	Literature/ Document Review	Educator Panels/ Stakeholder Engagement	District Survey	Additional Quantitative Work	Additional Qualitative Work
1. Recommended Methods for Routinely Reviewing Adequacy			X				
2. Concentrations of Poverty	X		X		X		X
3. Identification of Gaps and Programs to Address	X	X				X	X
4. Correlation Between Performance and Funding	X	X					
5. Review of Adequacy Studies			X				
6. Review of Resources in Matrix	X	X		X	X	X	
7. College/Career Readiness			X	X			X

Study Tasks: Section 3.0.B

Section 3.0.B							
	Fiscal and Performance Data Analysis	Case Studies	Literature/ Document Review	Educator Panels/ Stakeholder Engagement	District Survey	Additional Quantitative Work	Additional Qualitative Work
1. Current School Size Policies					X	X	
2. School Size Best Practices			X		X		X
3. Impacts of School/District Size			X		X	X	
4. Recommendations on Ideal Size of Schools			X				
5. Public Input on School Size Standards				X	X		X
6. Addressing Small District Size and Remoteness	X		X				
7. Class Size Requirements, Student/Teacher Ratios and Salary Variations	X		X				
8. Identification and Operation Criteria for Isolated Schools and/or Districts			X				

Study Tasks: Section 3.0.C

Section 3.0.C							
	Fiscal and Performance Data Analysis	Case Studies	Literature/ Document Review	Educator Panels/ Stakeholder Engagement	District Survey	Additional Quantitative Work	Additional Qualitative Work
1. Evaluation of Economically Disadvantaged Student Proxy							
a. Community Eligibility Provision Evaluation			X			X	
b. Impact on State Aid Formulas						X	
c. Alternative Proxies			X			X	
2. Impacts on Equity						X	
3. Impacts of Enrollment Changes			X			X	
4. Attracting and Retaining Administrative and Educational Staff			X	X		X	
5. Attracting and Retaining Nurses			X	X		X	
6. Resources for Student Mental Health Issues			X	X			

Study Tasks: Section 3.0.C

Section 3.0.C (continued)							
	Fiscal and Performance Data Analysis	Case Studies	Literature/ Document Review	Educator Panels/ Stakeholder Engagement	District Survey	Additional Quantitative Work	Additional Qualitative Work
7. Capital Needs			X		X	X	
8. Best use of Poverty Funds	X	X	X	X	X		
9. Case Studies of Successful Schools		X					
10. Impact of Vouchers	X		X			X	
11. Impact of Waivers			X			X	
12. Examination of Uniform Tax Rate			X			X	
13. Funding for Concentrations of Poverty	X		X				
14. Professional Development and Extra Duty Time		X	X		X		
15. Comparison of Prior Study Recommendations and Legislation			X				
16. Educator Panels				X			

Reporting and Support (Section 3.0.D) and Education Adequacy Consulting (Section 3.1)

- Ongoing support:
 - Available for any research requests from the Committees
 - Will provide monthly updates to the Committees
 - Available to be present in person for all Committee meetings and other legislative committees of the Arkansas General Assembly, as needed
 - Will assist with draft legislation, as needed
 - Summaries in specific topic areas can be prepared in advance of final report
- Reporting:
 - Draft report in September 2020
 - Final report in November 2020



Questions?