

SHULS & ASSOCIATES



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**PROPOSAL IN REGARDS TO RFP NUMBER:  
BLR - 190003  
EDUCATION ADEQUACY CONSULTING SERVICES**

[ October 8<sup>th</sup>, 2019 ]

Presenters:

James V. Shuls, Ph.D.

&

Joshua B. McGee, Ph.D.

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# Overview

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01

Discuss Our Team And Experience

02

Provide An Overview Of Our Analysis Plan

03

Answer Any Questions You May Have

# WHO WE ARE

## Field Experts



Recently formed LLC to bid on education policy related contracts. The goal is to assemble the best team possible on a contract-by-contract basis.



The group I have put together for this project has deep experience working on school funding and knows Arkansas very well. We have served as expert witnesses or consulted on school finance cases in 9 states, have written more than 80 peer-reviewed publications, and have extensive research experience.



# JAMES V. SHULS, PH.D.



Ph.D. In Education Policy From The University of Arkansas



B.S.E and M.S.E. in Elementary Education



Former Public-school Teacher in Southwest Missouri



# JAMES V. SHULS, PH.D. *(CONTINUED)*



**UMSL** | College of Education



## Roles at the University of Missouri – St. Louis

- Assistant Professor of Education Leadership and Policy Studies
- Assistant Professor of Public Policy Administration
- Associate Department Chair, Educator Preparation and Leadership
- Program Director for Education Leadership
- Teach courses in School Finance, Education Policy Analysis, and Program Evaluation
- 2017 Junior Investigator of the Year

# JAMES V. SHULS, PH.D. *(CONTINUED)*



## Expert Witness

- Martinez, et al./Yazzie, et al. v. The State of New Mexico
- Hired by state's attorneys to review the Professional Judgement adequacy study



## Directly Related Experience

- Written a primer on Missouri's funding formula
- Evaluated fiscal impact of school choice programs
- Analyzed impact of changes to Missouri's foundation formula

# OFFICE FOR EDUCATION POLICY (OEP)



UNIVERSITY OF  
ARKANSAS

- Applied research center at the University of Arkansas
- Focused on Arkansas education policy
- Helps the state's education leaders bridge the gap between research and practice by providing them with timely, actionable information and advice on education policy issues
- Primarily funded by local and national philanthropy, contracts with non-profits and research firms, and contracts with school districts and state agencies
- For more info and examples of our work please visit [www.OfficeforEducationPolicy.org](http://www.OfficeforEducationPolicy.org)

# JOSHUA B. MCGEE, PH.D.



- Chief economist for the project
- Associate Director of OEP
- Ph.D. in Economics and M.S. and B.S. in Engineering, University of Arkansas
- Board member at EdBuild, a non-profit working nationally on school finance
- Extensive experience writing about school finance and advising state governments





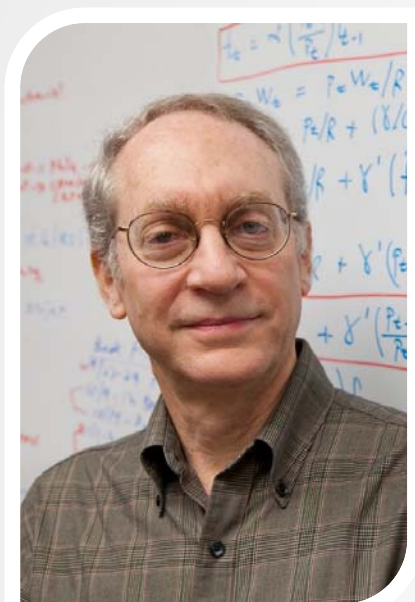
# SARAH MCKENZIE, PH.D.



- Project Advisor
- Executive Director of OEP
- Ph.D. in Educational Statistics and Research Methods, University of Arkansas
- M.A. in Early Childhood Education, Mills College
- Teaching experience in pre school through post secondary (certified PreK-8)
- Over 15 years experience working on Arkansas education policy (NORMES, Fayetteville Public Schools, OEP)
- Governing Board Member for the Southwest Regional Education Laboratory (REL)



# ROBERT M. COSTRELL, PH.D.



- Project Advisor
- Ph.D. in Economics, Harvard University
- Professor of Education Reform and Economics
- Served under three governors of Massachusetts as Director of Research and Development, Chief Economist, and Education Advisor
- Retained as an expert witness or consulted on school finance cases in school finance cases in: Tennessee, New York, Connecticut, Washington, Montana, New Hampshire, Missouri, Massachusetts





# PROJECT CONSULTANTS

# SHAUN M. SIMMS, PMP, SA, CSSGB



- Serving as Program Director
- Director, Supply Chain Management Project Management at a Fortune 20 Company
- 10 years of Experience In Portfolio, Program, and Project Management
- Managed projects totaling over \$250 million
- St. Louis Project Leader of the Year (2018), PMI Metro St. Louis

# MICHAEL R. FORD, PH.D.

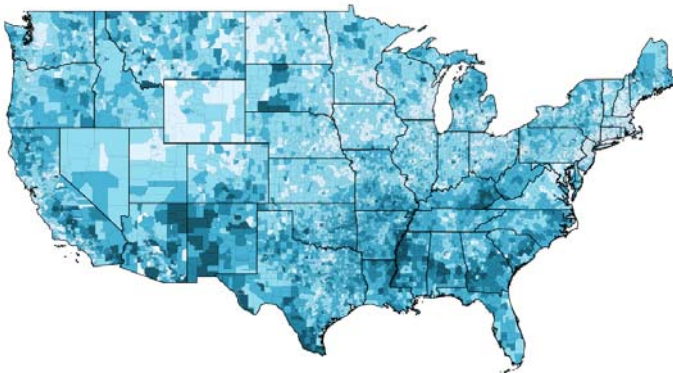


- Leading analysis of Project 12 – Analysis of Waivers
- Associate professor of public administration, University of Wisconsin Oshkosh
- Ph.D. in Urban Studies, University of Wisconsin – Milwaukee
- 36 peer-reviewed publications
- Teaches courses in public administration, state and local government, public budgeting and financial management, among others

# SARA HODGES



- Will provide general research support and conduct data visualizations
- Director of Data and Visualizations at EdBuild, EdBuild's mission is to bring common sense and fairness to the way states fund public schools.
- Prior to EdBuild, she had an environmental mapping consultancy and worked on projects with the United Nations Environment Programme, New York Hall of Science, Carnegie Museum of Natural History, and others
- Master's degree in Geography from CUNY Hunter College and a bachelor's degree in Mathematics from Colorado College



# MATT RICHMOND



EDUCATION WEEK



- Will provide general research support
- Chief program officer at EdBuild
- Author of “The Hidden Half: School Employees Who Don’t Teach” and co-author of “Financing the Education of High-Need Students”
- His work has been featured on NPR: Marketplace, The Huffington Post, RealClear Politics, Education Week, and other media outlets

## ANALYSIS PLAN

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- We organized the scope of work into 14 projects
- P. 5 – 7 of the proposal matches the projects to the RFP scope of work
- On P. 8 we identify which research methodologies will be used to analyze each point in the scope of work (Also in appendices)





# RESEARCH STRATEGIES



- Literature Reviews
- Quantitative Analysis
- Interviews
- Focus Groups
- Surveys
- Review of Agency Records
- Geospatial Mapping or Data Visualization



# Conclusion

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01

Our goal is to serve the state of Arkansas. We believe that school funding matters and that good funding formula design can help schools better meet the needs of all students.

02

We have put together a dream team to do this work. We are excited to work together with the committee to make sure that every student in Arkansas gets the resources they need to succeed.

Q&A

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# **APPENDICES**

## Project 1: Funding Formula Analysis & Recommendations

- Project Lead: Shuls and McGee
- Expected Completion: November 1, 2020
- Scope of Work: 3.0 A.1; A.6
- Summary: We view this project as the culmination of the analysis plan. Ultimately, this project will offer suggestions about how the state should fund public schools.
- Analysis Plan:
  - A survey of administrators
  - Literature reviews
  - An analysis of budget documents (agency records).

## Project 2: Analysis of the relationship between funding & performance

- Project Lead: Josh McGee
- Expected Completion: June 1, 2020
- Scope of Work: 3.0 A.3; A.4
- Summary: The RFP calls for an examination of gaps in growth and achievement among student groups, disaggregated by race and income. Additionally, the RFP asks for an analysis of the correlation between student performance and funding.
- Analysis Plan:
  - A quantitative analysis of student performance
  - Data visualization

## Project 3: Review of Adequacy Cost Studies

- Project Lead: James Shuls
- Expected Completion: February 15, 2020
- Scope of Work: 3.0 A.5
- Summary: The RFP calls for a review of adequacy cost studies completed in other states and asks for the vendor to provide a report based on best practices in those states.
- Analysis Plan:
  - A literature review and analysis of adequacy cost studies



## Project 4: Defining College and Career-Readiness

- Project Lead: James Shuls
- Expected Completion: May 1, 2020
- Scope of Work: 3.0 A.7
- Summary: The RFP asks for the vendor to recommend a definition of college-readiness and/or career readiness. With this definition in mind, the vendor is to develop standards to determining whether school districts are preparing students for college- and/or career readiness. Additionally, the vendor is to identify what career and technical education programs are currently available to students.
- Analysis Plan:
  - A literature review regarding definitions of college- and career-readiness
  - A quantitative analysis of student success metrics
  - A survey of administrators
  - Geospatial mapping of programs
  - This project will also be informed by the focus groups and survey conducted in Project 14.

## Project 5: Class, School, & District Size Analysis

- Project Lead: James Shuls
- Expected Completion: August 1, 2020
- Scope of Work: 3.0 B.1 – B.8
- Summary: the RFP calls
- for an analysis of current district class size policies, an examination of best practices in other
- states, an analysis of the impact of class size on extracurricular activities, an analysis of class size
- requirements and student/teacher ratios in other states and the impact of these issues on
- teacher salaries.
- Analysis Plan:
  - A survey of central office personnel regarding district class-size policies and availability of extracurricular activities,
  - A literature review on best practices regarding class size
  - A descriptive analysis of class size policies in other states
  - A quantitative analysis of the relationship between size and salaries
  - Data visualization

## Project 6: Poverty & Proxies

- Project Lead: Josh McGee
- Expected Completion: September 1, 2020
- Scope of Work: 3.0 A.2; 3.0 C.1; 3.0 C.13
- Summary: Examining issues related to poverty and the use of poverty metrics in funding formulae.
- Analysis Plan:
  - A review of FRPM and other proxies for poverty
  - A quantitative analysis of changes to FRPM participation
  - A quantitative analysis of current funding levels

## Project 7: Evaluating Assessment & Tax Policies

- Project Lead: Josh McGee
- Expected Completion: June 15, 2020
- Scope of Work: 3.0 C.2; C.12
- Summary: School funding is significantly impacted by assessment practices and tax policy. As such, it is important to understand how current Arkansas policies are impacting the state's public schools.
- Analysis Plan:
  - A descriptive analysis of assessment practices (agency records)
  - A quantitative analysis of property assessment
  - A quantitative analysis of Uniform Rate of Tax policies
  - A quantitative analysis of debt service revenue and expenditures
  - Interviews with district personnel

## Project 8: Recruitment & Staffing Policies

- Project Lead: James Shuls
- Expected Completion: July 1, 2020
- Scope of Work: 3.0 C.4; C.5; C.6; C.14
- Summary: The RFP calls for an analysis of recruitment and staffing policies.
- Analysis Plan:
  - A quantitative analysis of certifications
  - A literature review of best practices
  - A survey of counseling, student service professionals, and/or human resources professionals
  - Interviews with education professionals

## Project 9: Enrollment & Staffing Policies

- Project Lead: James Shuls
- Expected Completion: July 15
- Scope of Work: 3.0 C.3; C.7
- Summary: The RFP calls for an evaluation of the impact of increasing and declining enrollments on school systems.
- Analysis Plan:
  - A literature review
  - A quantitative analysis
  - A review of state policies (agency records)

## Project 10: Best Practices

- Project Lead: James Shuls
- Expected Completion: September 1, 2020
- Scope of Work: 3.0 C.8; C.9
- Summary: An examination of best practices related to students with additional needs.
- Analysis Plan:
  - A Literature Review
  - Interviews

## Project 11 – Fiscal Impacts of School Choice

- Project Lead: James Shuls
- Expected Completion: January 15, 2020
- Scope of Work: 3.0 C.10
- Summary: The RFP calls for an analysis of the impact of voucher programs and tax credits on funding for public education in the state. Using student-level data, we will estimate the cost/cost-savings of the program.
- Analysis Plan:
  - A literature review
  - A quantitative analysis determining the cost and/or cost-savings of the Succeed Scholarship program,
  - A quantitative forecast of potential cost and/or cost-savings of a new or expanded voucher program with a broader pool of eligible students,
  - A quantitative forecast of potential cost and/or cost-savings of a new tax credit scholarship program, assuming various tax credit levels.



## Project 12: Analysis of Waivers

- Project Lead: Michael Ford
- Expected Completion: June 1, 2020
- Scope of Work: 3.0 C.11
- Summary: An examination of the cost and impact of waivers.
- Analysis Plan:
  - An analysis of agency records
  - A quantitative analysis
  - A descriptive analysis

## Project 13: Crosswalk of Picus & Odden Recommendations

- Project Lead: James Shuls
- Expected Completion: October 1, 2020
- Scope of Work: 3.0 C.15
- Summary: We will review the recommendations previously provided to the Committees by Allan Odden and Lawrence Picus and crosswalk those recommendations to the current funding policies of the State of Arkansas.
- Analysis Plan:
  - A review of agency records

## Project 14: Convening of Educators

- Project Lead: James Shuls and Shaun Simms
- Expected Completion:
- Scope of Work: 3.0 C.16 (and others)
- Summary: The RFP calls for the convening of panels of educators in a variety of locations throughout the state. The purpose of the convening is to seek input on the needs of schools and potential solutions.
- Analysis Plan:
  - Focus Groups
  - Surveys