



Augenblick, Palaich
and Associates, Inc.

September 21, 2010

Roberta Wagner
West Virginia Purchasing Division
2019 Washington St, East
PO Box 50130
Charleston, WV 25305-0130

Dear Ms. Wagner,

Enclosed is the response of Augenblick, Palaich and Associates, Inc. (APA) to the Request for Quotation No. GOV20110, "Education Efficiency Audit." APA is a nationally recognized education policy consulting firm with over 25 years of experience in the field. While the firm is based in Denver, Colorado, we have conducted education policy studies in nearly every state in the country for a broad range of clients including state legislatures, states Governor's Offices, state Board of Education, state Departments of Education, school districts, and nonprofit organizations. Our projects often involve analyzing aid distribution systems; advising policymakers on the most efficient and effective ways of allocating aid; and working with policymakers so that they understand the new system and how it might be modified to meet emerging policy concerns. In response to this RFQ, we propose conducted a comprehensive examination of state spending on elementary and secondary education to promote increased efficiency in West Virginia's education provision.

Additionally, we have included the signed Expression of Interest form and the signed Addendum No. 1 Which acknowledges that we received the revisions. If selected as the willing bid we also agree to register as a vendor for the state and complete the Purchasing Affidavit.

Please let us know if there is anything else you need from us and we look forward to hearing your response to our proposal.

Sincerely,

Amanda Brown, Associate
Augenblick, Palaich and Associates
1120 Lincoln St, Suite 1101 Denver, CO 80205
720-227-0088 (office); 303-293-2178 (fax)
arb@apaconsulting.net

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2010 SEP 22 A 10: 02

PURCHASING DIVISION
STATE OF WV

GENERAL TERMS & CONDITIONS
REQUEST FOR QUOTATION (RFQ) AND REQUEST FOR PROPOSAL (RFP)

1. Awards will be made in the best interest of the State of West Virginia.
2. The State may accept or reject in part, or in whole, any bid.
3. Prior to any award, the apparent successful vendor must be properly registered with the Purchasing Division and have paid the required \$125 fee.
4. All services performed or goods delivered under State Purchase Order/Contracts are to be continued for the term of the Purchase Order/Contracts, contingent upon funds being appropriated by the Legislature or otherwise being made available. In the event funds are not appropriated or otherwise available for these services or goods this Purchase Order/Contract becomes void and of no effect after June 30.
5. Payment may only be made after the delivery and acceptance of goods or services.
6. Interest may be paid for late payment in accordance with the *West Virginia Code*.
7. Vendor preference will be granted upon written request in accordance with the *West Virginia Code*.
8. The State of West Virginia is exempt from federal and state taxes and will not pay or reimburse such taxes.
9. The Director of Purchasing may cancel any Purchase Order/Contract upon 30 days written notice to the seller.
10. The laws of the State of West Virginia and the *Legislative Rules* of the Purchasing Division shall govern the purchasing process.
11. Any reference to automatic renewal is hereby deleted. The Contract may be renewed only upon mutual written agreement of the parties.
12. **BANKRUPTCY:** In the event the vendor/contractor files for bankruptcy protection, the State may deem this contract null and void, and terminate such contract without further order.
13. **HIPAA BUSINESS ASSOCIATE ADDENDUM:** The West Virginia State Government HIPAA Business Associate Addendum (BAA), approved by the Attorney General, is available online at www.state.wv.us/admin/purchase/vrc/hipaa.htm and is hereby made part of the agreement. Provided that the Agency meets the definition of a Cover Entity (45 CFR §160.103) and will be disclosing Protected Health Information (45 CFR §160.103) to the vendor.
14. **CONFIDENTIALITY:** The vendor agrees that he or she will not disclose to anyone, directly or indirectly, any such personally identifiable information or other confidential information gained from the agency, unless the individual who is the subject of the information consents to the disclosure in writing or the disclosure is made pursuant to the agency's policies, procedures, and rules. Vendor further agrees to comply with the Confidentiality Policies and Information Security Accountability Requirements, set forth in <http://www.state.wv.us/admin/purchase/privacy/noticeConfidentiality.pdf>.
15. **LICENSING:** Vendors must be licensed and in good standing in accordance with any and all state and local laws and requirements by any state or local agency of West Virginia, including, but not limited to, the West Virginia Secretary of State's Office, the West Virginia Tax Department, and the West Virginia Insurance Commission. The vendor must provide all necessary releases to obtain information to enable the director or spending unit to verify that the vendor is licensed and in good standing with the above entities.
16. **ANTITRUST:** In submitting a bid to any agency for the State of West Virginia, the bidder offers and agrees that if the bid is accepted the bidder will convey, sell, assign or transfer to the State of West Virginia all rights, title and interest in and to all causes of action it may now or hereafter acquire under the antitrust laws of the United States and the State of West Virginia for price fixing and/or unreasonable restraints of trade relating to the particular commodities or services purchased or acquired by the State of West Virginia. Such assignment shall be made and become effective at the time the purchasing agency tenders the initial payment to the bidder.

I certify that this bid is made without prior understanding, agreement, or connection with any corporation, firm, limited liability company, partnership, or person or entity submitting a bid for the same material, supplies, equipment or services and is in all respects fair and without collusion or fraud. I further certify that I am authorized to sign the certification on behalf of the bidder or this bid.

INSTRUCTIONS TO BIDDERS

1. Use the quotation forms provided by the Purchasing Division. Complete all sections of the quotation form.
2. Items offered must be in compliance with the specifications. Any deviation from the specifications must be clearly indicated by the bidder. Alternates offered by the bidder as **EQUAL** to the specifications must be clearly defined. A bidder offering an alternate should attach complete specifications and literature to the bid. The Purchasing Division may waive minor deviations to specifications.
3. Unit prices shall prevail in case of discrepancy. All quotations are considered F.O.B. destination unless alternate shipping terms are clearly identified in the quotation.
4. All quotations must be delivered by the bidder to the office listed below prior to the date and time of the bid opening. Failure of the bidder to deliver the quotations on time will result in bid disqualifications: Department of Administration, Purchasing Division, 2019 Washington Street East, P.O. Box 50130, Charleston, WV 25305-0130
5. Communication during the solicitation, bid, evaluation or award periods, except through the Purchasing Division, is strictly prohibited (W.Va. C.S.R. §148-1-6.6).



State of West Virginia
 Department of Administration
 Purchasing Division
 2019 Washington Street East
 Post Office Box 50130
 Charleston, WV 25305-0130

Request for Quotation

RFQ NUMBER
 GOV20110

PAGE
 2

ADDRESS CORRESPONDENCE TO ATTENTION OF:
 BUYER 41
 B04-558-0492

VENDOR

RFQ COPY
 TYPE NAME/ADDRESS HERE

SHIP TO

OFFICE OF THE GOVERNOR
 1900 KANAWHA BOULEVARD, EAST
 CHARLESTON, WV
 25305-0370 304-558-2000

DATE PRINTED	TERMS OF SALE	SHIP VIA	F.O.B.	FREIGHT TERMS
08/25/2010				

BID OPENING DATE: 09/23/2010 BID OPENING TIME 01:30PM

LINE	QUANTITY	UOP	CAT. NO.	ITEM NUMBER	UNIT PRICE	AMOUNT
***** THIS IS THE END OF RFQ GOV20110 ***** TOTAL: _____						

SEE REVERSE SIDE FOR TERMS AND CONDITIONS

SIGNATURE <i>Kale Deleme</i>	TELEPHONE 720-227-0088	DATE 9/20/10
TITLE <i>Board Member</i>	FEIN 84-0922858	ADDRESS CHANGES TO BE NOTED ABOVE

WHEN RESPONDING TO RFQ, INSERT NAME AND ADDRESS IN SPACE ABOVE LABELED 'VENDOR'



State of West Virginia
 Department of Administration
 Purchasing Division
 2019 Washington Street East
 Post Office Box 50130
 Charleston, WV 25305-0130

Request for Quotation

RFQ NUMBER
GOV20110

PAGE
1

ADDRESS CORRESPONDENCE TO ATTENTION OF
BUYER 41 304-558-0492

VENDOR

Robert Palaich
 1120 Lincoln St., Suite 1101
 Denver, CO 80203
 Augenblick, Palaich & Associates

SHIP TO

OFFICE OF THE GOVERNOR
 1900 KANAWHA BOULEVARD, EAST
 CHARLESTON, WV
 25305-0370 304-558-2000

DATE PRINTED	TERMS OF SALE	SHIP VIA	F.O.B.	FREIGHT TERMS
09/09/2010				

BID OPENING DATE: 09/23/2010 BID OPENING TIME 01:30PM

LINE	QUANTITY	UOP	CAT. NO.	ITEM NUMBER	UNIT PRICE	AMOUNT
				ADDENDUM NO. 1		
				1. QUESTIONS AND ANSWERS ARE ATTACHED. 2. ADDENDUM ACKNOWLEDGMENT IS ATTACHED. THIS DOCUMENT SHOULD BE SIGNED AND RETURNED WITH YOUR BID. FAILURE TO SIGN AND RETURN MAY RESULT IN DISQUALIFICATION OF YOUR BID. EXHIBIT 10		
				REQUISITION NO.: GOV20110		
				ADDENDUM ACKNOWLEDGEMENT		
				I HEREBY ACKNOWLEDGE RECEIPT OF THE FOLLOWING CHECKED ADDENDUM(S) AND HAVE MADE THE NECESSARY REVISIONS TO MY PROPOSAL, PLANS AND/OR SPECIFICATION, ETC.		
				ADDENDUM NO. 'S:		
				NO. 1 .. ✓ ..		
				NO. 2 ..		
				NO. 3 ..		
				NO. 4 ..		
				NO. 5 ..		
				I UNDERSTAND THAT FAILURE TO CONFIRM THE RECEIPT OF THE ADDENDUM(S) MAY BE CAUSE FOR REJECTION OF BIDS.		
				VENDOR MUST CLEARLY UNDERSTAND THAT ANY VERBAL REPRESENTATION MADE OR ASSUMED TO BE MADE DURING ANY ORAL DISCUSSION HELD BETWEEN VENDOR'S REPRESENTATIVES		

SEE REVERSE SIDE FOR TERMS AND CONDITIONS

SIGNATURE <i>John DeLano</i>	TELEPHONE 720-227-0088	DATE 9/20/10
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TITLE APA Board Member	FEIN 84-0922858	ADDRESS CHANGES TO BE NOTED ABOVE
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BID OPENING DATE: 09/23/2010 BID OPENING TIME 01:30PM

LINE	QUANTITY	UCP	CAT NO.	ITEM NUMBER	UNIT PRICE	AMOUNT
<p>AND ANY STATE PERSONNEL IS NOT BINDING. ONLY THE INFORMATION ISSUED IN WRITING AND ADDED TO THE SPECIFICATIONS BY AN OFFICIAL ADDENDUM IS BINDING.</p> <p style="text-align: center;"> <i>Kate DeLeon</i> SIGNATURE <i>Argenbick, Palovich and Associates</i> COMPANY <i>9/20/10</i> DATE </p> <p>NOTE: THIS ADDENDUM ACKNOWLEDGEMENT SHOULD BE SUBMITTED WITH THE BID.</p> <p>REV. 09/21/2009</p>						

SEE REVERSE SIDE FOR TERMS AND CONDITIONS

SIGNATURE <i>Kate DeLeon</i>	TELEPHONE 720-227-0088	DATE 9/20/10
TITLE <i>ATA Board Member</i>	FEIN 84-0922858	ADDRESS CHANGES TO BE NOTED ABOVE

WHEN RESPONDING TO RFQ, INSERT NAME AND ADDRESS IN SPACE ABOVE LABELED 'VENDOR'



State of West Virginia
 Department of Administration
 Purchasing Division
 2019 Washington Street East
 Post Office Box 50130
 Charleston, WV 25305-0130

Request for Quotation

RFQ NUMBER
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 304-558-0492

VENDOR

RFQ COPY
 TYPE NAME/ADDRESS HERE

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 1900 KANAWHA BOULEVARD, EAST
 CHARLESTON, WV
 25305-0370 304-558-2000

DATE PRINTED	TERMS OF SALE	SHIP VIA	F.O.B.	FREIGHT TERMS
09/09/2010				

BID OPENING DATE: 09/23/2010 BID OPENING TIME 01:30PM

LINE	QUANTITY	UOP	CAT. NO.	ITEM NUMBER	UNIT PRICE	AMOUNT
0001	1	JB		946-30		
EDUCATION AUDITING						
***** THIS IS THE END OF RFQ GOV20110 ***** TOTAL:						

SEE REVERSE SIDE FOR TERMS AND CONDITIONS

SIGNATURE <i>Hal Dibone</i>	TELEPHONE 720-227-0088	DATE 9-20-10
TITLE APA Board Member	FEIN 84-0922858	ADDRESS CHANGES TO BE NOTED ABOVE

WHEN RESPONDING TO RFQ, INSERT NAME AND ADDRESS IN SPACE ABOVE LABELED 'VENDOR'

Education Efficiency Audit, GOV 20110
Addendum

- 1. Can you please provide the names of the eight (or more) referenced groups as well as contact information if available?**

The names of the selected vendors will be released after the opening date of the EOI.

- 2. As the project is entitled an audit, does the state envision that the project will be completed according to Yellow Book standards?**

No, the vendor that is selected to perform the audit will not be required to abide by Government Auditing Standards, often referred to as "Yellow Book standards".

- 3. As part of this project, does the state envision that the selected contractor will visit multiple school districts in order to gather data or will the work focus more on data that are already centralized?**

It is expected that a comprehensive audit will include analysis of centralized data as well as on-site data collection.

- 4. Does the state have a budget in mind for this project?**

We do not disclose budgeting information as it is not in the best interest of the State to do so.

- 5. What is the anticipated timeline of the project?**

Our preference is for the audit to be completed by December 31st, 2010. All plans should have a timeline where the results of the audited are submitted to the West Virginia Office of the Governor no later than January 31st, 2011.

- 6. When are oral presentations expected to be held? Will these need to be in person?**

Oral presentations are expected to be held in mid-October. Presentations may be in person in Charleston, WV or by video conference.

- 7. Is there an existing source for information regarding the historical record of all agencies involved (i.e. details of their creation, expansion over the years, etc.)?**

An examination of statute, legislation, and state budget information will likely provide the best information about the history of the education agencies involved in the audit. Reports produced by the Performance Evaluation and Research Division of the West Virginia Legislative Auditor may also be a useful source of information.

- 8. Is there a preferred format for the proposal? If not, can we include information that we feel is pertinent to this audit other than what is identified as necessary in the evaluation criteria?**

We do not have a preferred format for the proposal. Please feel free to include information that you believe illustrates the strength of your proposal and your firm.

- 9. Must the Request for Quotation forms be submitted in a separate envelope from the proposal?**

All materials may be submitted in the same envelope.

10. Clarification to section 3.1

Education specific audit and evaluation experience will also be taken into consideration when evaluating vendors.

11. Clarifications to section 3.2

West Virginia Department of Education Program/Function Expenditure Codes should be used as a resource for the identification of ratios between different types of education spending.

Number 8 should be changed to read "Identify the cost benefit ratios of education programs in the state" and understood to encompass all relevant education agencies, not just the West Virginia Department of Education.

It is expected that the audit will be guided by a clear definition of the services we expect schools to provide.



Augenblick, Palaich
and Associates, Inc.

Response to Request for Quotation #GOV20110

Education Efficiency Audit for West Virginia

Prepared for

West Virginia Office of the Governor

By

Augenblick, Palaich and Associates

A handwritten signature in black ink, appearing to read 'John Augenblick', written in a cursive style.

Dr. John Augenblick, President

9/21/10

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Appendix A- Letters of Recommendations

Appendix B- Project Team Resumes

Introduction

The following proposal is offered by Augenblick, Palaich and Associates, Inc. (APA) in response to Request for Quotation (RFQ) GOV20110 to conduct an efficiency audit of K-12 education spending in West Virginia. APA is a nationally recognized education policy consulting firm with over 25 years of experience in the field. During that time APA staff has worked in every state in the country to advise policymakers in how to effectively and efficiently fund K-12 education.

It is our understanding that the Office of the Governor is seeking a comprehensive efficiency audit of the state's K-12 education system in order to gain improvements in educational outcomes for students with the same or decreased levels of expenditure. In order to do so, APA will:

1. Identify redundancies and duplications of effort in the state's educational system;
2. Identify areas with potential economies of scale;
3. Identify and provide recommendations for ideal ratios between educational, administrative, and other types of spending at the state and county level;
4. Identify the cost benefit ratios associated with key educational programs in the state; and
5. Identify and provide recommendations for policy, regulatory, structural and programmatic changes that can improve the efficiency of educational provision in the state.

APA proposes a number of activities and tasks that will thoroughly examine the efforts and spending of the major educational agencies in the state including the West Virginia Department of Education, the West Virginia Department of Education and the Arts, the West Virginia Center for Professional Development, the West Virginia Board of Education, the eight Regional Education Service Agencies, and the fifty-five county Boards of Education (school districts).

APA's Experience

APA is a nationally recognized education policy consulting firm with over 25 years of experience in the field. While the firm is based in Denver, Colorado, we have conducted education policy studies in nearly every state in the county for a broad range of clients including state legislatures, states Governor's Offices, state Board of Education, state Departments of Education, school districts, and nonprofit organizations. APA builds strong working relationships with our clients as evidenced by multiple instances of repeat business. Our projects often involve the following processes: analyzing aid distribution systems; advising policymakers on the most efficient and effective ways of allocating aid; and working with policymakers so that they understand the new system and how it might be modified to meet emerging policy concerns.

Areas of Skill and Expertise

We believe our clients benefit from our organization working as a team and our long history of working effectively together in collaboration. Taken together, we have the following areas of skill and expertise:

We have strong policy analysis skills. Our staff uses a variety of data collection and analysis approaches to assess policy options, including education data analysis, literature reviews, interviews, surveys, focus group discussions, and statistical analyses. These analyses require an in-depth understanding of the education policy or program being analyzed, an understanding of the economics and cost structure of education, as well as command of a range of advanced statistical techniques (descriptive statistics, data reduction techniques, linear modeling, multiple types of regression analysis, and time series analysis). We understand that a variety of approaches are often appropriate to meet our customers' objectives. We also realize that incentives and unintended consequences need to be considered in crafting or evaluating any effective policy or program.

We have experience analyzing and improving complex multi-level funding systems and training agency staff to use those systems. APA has spent many years examining the relationships between investments and outcomes and formulating appropriate solutions. Our staff has designed and developed complex systems and trained organizations and agencies to operate the systems on their own.

We have substantial experience working with and advising policymakers and program operators. We have worked with state legislators, school district administrators, and a wide variety of other stakeholders. We help our clients understand the fiscal, legal, and policy implications of implementing education reforms, including both short and long-term impacts, and advise them on their options for improvement.

We routinely evaluate educational programs. APA has evaluated a wide array of education programs, ranging from the Denver Preschool Program to Denver University's Ritchie Program for School Leaders. To conduct evaluations, APA works in partnership with the client organizations to identify the theory of change that guides them, identify the activities, resources, and desired outcomes of their programs, and create a logic model. APA then develops a detailed list of evaluation questions and a plan to gather necessary information to answer the questions.

We have many years of project management experience. Over the years, we have managed projects with a wide range of sizes and scopes. Many of these projects required an ability to coordinate distinct activities over long periods of time and then assimilate them into an integrated set of policy recommendations. We have a reputation for fulfilling the commitments we make to clients in terms of time and cost.

We are highly knowledgeable about education policy and programs across the country. As a firm that has been strictly focused on education policy and finance for over 25 years, we have a deep understanding of how education resources are provided across the country, including historical

shifts and recent reforms. Further, APA's work for states regularly involves comparing policies and programs of one state to different approaches and strategies being using in similar states.

We are well versed in existing information resources that will be beneficial. APA is very familiar with numerous resources that can provide useful information, from the Education Commission of the States (ECS), to the Southern Region Education Board (SREB), and to the National Center for Education Statistics (NCES).

Recent Projects

Examples of recent projects the APA team has conducted in a number of states include:

North Carolina (2010)

APA conducted this study for the North Carolina General Assembly. APA was selected to review the effectiveness and efficiency of the state's school funding system. Work was completed between March and September 2010, which included: 1) Conducting interviews with state policymakers, school district organizations, and public policy groups; 2) Reviewing literature on the relationship between education resources and student performance; 3) Analyzing the equity of the revenues obtained by school districts; 4) Analyzing the relationships between education resources and student performance in North Carolina in 2003-04 and in 2008-09; 5) Conducting interviews with school district administrators to identifying resources districts believe can impact student performance; 6) Developing indices designed to reflect geographic price differences across counties and the attractiveness of counties to teachers; and 7) Comparing different funding allocation strategies and components used in other states, with particular focus on states that are members of the Southern Region Education Board (SREB).

West Virginia (2007)

In 2001, Congress passed the No Child Left Behind Act (NCLB) which required that each state ensure that 100 percent of its students attain proficiency in reading/language arts and mathematics by the 2013-2014 school year. Additional federal funds were provided to help states make the transition to an educational environment that includes rigorous, annual student achievement tests. APA staff worked with the Council of Chief State School Officers (CCSSO) and the members of its NCLB Cost Consortium to refine a set of the state and local data collection templates used in West Virginia. The study was completed for the NCLB Interim Sub-Committee of the West Virginia Legislature.

Mississippi (1996, 2004)

In August 1993, APA (then known as Augenblick, Van de Water & Myers), entered into a contract with the Task Force on Restructuring the Minimum Education Program (the Task Force) and staff of the Mississippi Department of Education (the Department) to discuss the effectiveness and efficiency of the state funding mechanism. This work resulted in the passage in 1996 of the state's new funding formula. In 2004, APA was asked by the Department and the legislature to update the funding structure to take into consideration the results of the state's new assessment system.

Maryland (2001)

APA (then known as Augenblick and Myers, or A&M) worked for the Thornton Commission, a study group formed by the Governor of Maryland. APA was asked to evaluate effectiveness and efficiency of the state's existing school finance system and to help legislative staff integrate the results of the estimation process into a new school finance system. The recommendations of the Thornton Commission were forwarded to the state legislature, where they were enacted into law in 2002. During the course of the project, APA worked closely with a staff group that included people from the state legislative service agency, staff of individual legislators, and staff of the state department of education.

Colorado (2007-2010)

The Denver Preschool Program (DPP) was created to encourage the families of children in the year before kindergarten to voluntarily participate in quality preschool programs and thus increase the likelihood that children will be successful in kindergarten and beyond. Denver voters approved the Preschool Matters initiative in November 2006. Under this ballot initiative, the city collects a .12 cent sales tax which is earmarked for DPP. Beginning in January 2007, Denver expected to collect about \$11 million annually. Actual collections totaled \$10.2 million in 2009 and are expected to reach \$10.7 million in 2010. The third-year evaluation of DPP was performed by APA in partnership with the Clayton Early Learning Institute. The goal of this annual evaluation is to provide DPP with information about how well the program is achieving its objectives. During the 2009-2010 school year, APA worked with DPP's staff, board and partners to collect the needed data. Throughout the year, this data was used to identify ways to make mid-course adjustments and ensure that the program's systems were as effective and efficient as possible.

Washington (2009)

The Washington Department of Early Learning (DEL) asked APA to develop an interactive model that could estimate the cost associated with changing the State's continuous eligibility policy for children enrolled in public child care programs. Washington's child care policy currently allows families to be authorized for up to 6 months in the Working Connections Child Care Program (WCCC), but in practice, authorizations are often made for shorter periods of time based on the discretion of authorizing workers. Depending on a parent's work history or family needs, the authorizations can vary from several weeks to 6 months. Families may become un-enrolled in child care for a variety of reasons, including using less than 32 hours of care, changes in income eligibility, loss of employment, and failure to make required co-payments.

Frequent changes in authorization status have been associated with a number of undesirable outcomes. They can disrupt continuity of care for children, deter families from using subsidies, increase the administrative burdens on workers, and create problems for providers who must rely on varying payments. In addition, families enrolled in subsidized care for shorter spans of time (often with frequent recertification requirements) are associated with unstable child care arrangements. Finally, longer authorization periods may reduce State administrative costs. APA's analysis helped the state change its authorization policy.

Ohio (2008)

APA has studied the cost and benefits of Early College High Schools (ECHS) since early 2005. These analyses have included examining the long-term return on investment of ECHS as well as the cost to degree completion, an analysis targeted at a particular degree or credit milestone. In a recent project, APA was hired to place the Ohio ECHS investment into a cost/benefit analysis context. In addition, APA was asked to conduct a cost to completion (CTC) analysis of selected Ohio ECHS sites to inform policymakers of the overall costs and benefits of ECHS. Through its analysis and data gathering efforts, APA was able to draw several overall conclusions about the ECHS initiative which were useful to policymakers in Ohio. In particular, APA was able to document that the theory of change upon which the ECHS programs are built can work. APA was also able to explain to policymakers that ECHS participation can generate a long-term cost savings for the state and for families as students move into and complete their postsecondary education.

Colorado (2008)

APA recently evaluated the Ritchie Program for School Leaders and the Denver Public Schools' (DPS) Administrator Induction Mentor (AIM) program provide case studies for how performance reviews would be conducted within the functional area of Governance, Leadership, Organization, Management and Planning. The Ritchie program provides training to prepare aspiring new school leaders to become effective principals in the Denver area. The DPS mentoring and induction program provides mentoring and professional development to enhance the effectiveness of the district's newly hired principals and assistant principals. These two evaluation projects conducted by APA have been grounded in research with the knowledge that expectations for school leaders have changed dramatically with the advent of stringent state accountability systems that hold schools responsible for the achievement of *all* students. In recent years, the *No Child Left Behind Act* has required states to sharpen the technical requirements for leaders in steering school improvement, analyzing assessment data, using research to inform instructional decisions and improvement strategies, crafting staff development, and providing specific feedback to teachers on improving instructional practice to increase student achievement.

Proposed Personnel and Their Experience

Our firm consists of nine full-time professionals who each bring substantial experience in multiple levels of education and government (see Appendix B for complete staff resumes):

John Augenblick, Ed.D (Overall Project Manager)

Dr. Augenblick has been APA President since 1983. Since that time, he has pioneered use of several approaches to cost out the resources needed to meet state education goals, including the Successful School District approach, has been the team lead on education resource studies in more than 15 states and has analyzed school finance and funding systems in more than 20 states. Further, Dr. Augenblick has significant experience advising policymakers on research findings and providing recommendations to promote equity, efficiency and/or effectiveness of school funding. Prior to APA, John served as an elementary school teacher in Connecticut, and as director of the Education Commission of the States'

Education Finance Center. He holds a B.S. from MIT, an M.A. from Teachers College at Columbia University, and an Ed.D. from the University of Rochester. John will be the overall manager of the proposed study.

Robert Palaich, Ph.D

Dr. Palaich has been a Senior Partner and Vice President of APA since 2003. Throughout Dr. Palaich's years with APA he has conducted a variety of education policy research studies including work around school finance adequacy, the costs of No Child Left Behind legislation, and Return on Investment and Cost Benefit analyses of education programs. He holds a B.S. from the University of Notre Dame and a Ph.D. from Columbia University. Prior to joining APA, Palaich served as vice president of the Policy Studies and Programs division at the Education Commission of the States (ECS) where he regularly advised statewide elected officials on a variety of education policy issues.

John Myers, M.S.

Mr. Myers is a Vice President at APA and has been with the firm much of the past 13 years, including 8 years as senior partner, and has extensive school finance experience. Prior to APA, he served as program director at the National Conference of State Legislatures, as director of policy for the governor of Kansas, and as a Kansas state legislator. With his government background, Mr. Myers has significant experience serving as both an advisor to elected officials and serving as an official himself implementing legal, structural and regulatory improvements. He also has experience in that capacity communicating with external and internal stakeholders. He holds an M.S. in Educational Administration from Kansas State University and a B.A. from Buena Vista College.

Justin Silverstein

Mr. Silverstein is a Vice President at APA and has been part of the firm since 1997. He has worked across the country developing and implementing education resource studies using multiple analytic approaches- all involving the acquisition of large quantities of data, complex analyses of data, and translation of analytic results into easy to understand recommendations. Further, he has experience in analyzing district budgets and making recommendations for cost savings including facility closures and consolidations. Recently, Mr. Silverstein developed recommendations to the state of Mississippi to consolidate school districts in order to improve efficiency. He received his B.S. in Accounting from the University of Colorado.

Dale DeCesare, J.D.

Mr. DeCesare is an APA Senior Associate. He helps analyze and translate complex public policy information into products that are useful and understandable to state policymakers and the public. DeCesare has authored numerous policy publications and served as speechwriter for several state governors while working for the Education Commission of the States. While at APA, he has conducted and led a variety of policy studies and projects involving: urban education; schools that close the achievement gaps for at-risk students; hard-to-staff schools; low spending, high performing schools;

teacher quality; and equity in school funding. He has a B.A. from Trinity University and a J.D. from the University of Denver's College of Law.

Jennifer Kramer-Wine, MPA

Ms. Kramer-Wine is a Senior Associate at the firm. Her immediate past experience was as a consultant partnering with ten organizations including Emerging Practitioners in Philanthropy, Grantmakers for Education, Third Mile Group, Education Commission of the States, and Colorado's Traumatic Brain Injury Trust Fund. Prior to her life as a consultant, she was a member of the Schott Foundation for Public Education's team. Jennifer is also a former high school social studies teacher. She holds a B.A. in History and a B.S. in Secondary Education from the University of Cincinnati, and a Master of Public Administration from Baruch College, which is part of the City University of New York.

Andrew Brodsky, Ph.D

Dr. Brodsky is a Senior Associate at APA. His work focuses on using data and statistical models to understand how education programs evolve, how they are accessed by the public, and associated costs. In his roles at APA and, previously, the Colorado Children's Campaign, Andrew has been involved in a range of financial and student assessment analysis projects for clients including the Denver Scholarship Program, the New Commission on the Skills of the American Workforce, and Denver Public Schools. He holds a B.S. degree from the University of Massachusetts at Amherst and recently completed a Ph.D. at the University of Colorado at Boulder in educational research methods and policy.

Kathryn Rooney, MPA

Ms. Rooney is a Senior Associate at APA. She has more than six years of experience in education research and evaluation. Prior to her work at APA, Ms. Rooney worked as a lead researcher at the Educational Policy Improvement Center (EPIC) in Eugene, Oregon. At EPIC, she led several large projects including a multi-method study to determine adequate school funding in the state of Washington. She also has experience conducting statistical analysis through previous employment with MPR Associates Inc., where she was responsible for performing and interpreting a variety of statistical tests. Ms. Rooney earned a Master of Public Administration from the University of North Carolina- Chapel Hill and a bachelor's degree in public policy from Pomona College in Claremont, California.

Amanda Brown, MPA

Ms. Brown joined APA in January 2005. While with the firm, she has worked in over fifteen states focusing on issues of school funding resource needs and the cost implications of No Child Left Behind. Recent work has included: comparing funding allocations systems across states with a particular focus on SREB states; conducting equity analyses of personnel levels and spending across school districts; examining the resources needed to comply with recent education policy legislation changes in Colorado; comparing resources in low spending, high performing school districts; conducting a program evaluation for Reach Out and Read Colorado; and assisting in the development of recommendations to improve the effectiveness and efficiency of education funding in North Carolina. Amanda holds a B.S. in Advertising

and a B.A. in Sociology from the University of Colorado at Boulder, as well as a Master of Public Administration from the University of Colorado Denver.

External Team Members and Consultants

Additionally, we have three external team members for this project who we have worked with in the past and who each have extensive expertise that will be invaluable to our proposed work in West Virginia. These team members are:

Robert Feir, Ph.D

Dr. Feir is an independent consultant who has served in several important positions in Pennsylvania, including the Executive Director of the Department of Education, Executive Director of the Senate Education Committee in Pennsylvania , and a number of administrative positions in local school districts. Dr. Feir brings to our team extensive experience evaluating and developing education policy, advising elected officials, communicating with stakeholders, and implementing education programs and policies. Dr. Feir was the project manager for our work redesigning the funding system in Pennsylvania.

Jo Lynn DeMary, Ed.D

Dr. DeMary is the current Director of Center for School Improvement at Virginia Commonwealth University and former Superintendent of Public Instruction at the Virginia Department of Instruction, in addition to several prior teaching and administrative positions in school districts. Dr. DeMary brings to our team decades of experience as a leader at all levels of the education system as well as significant knowledge of education program and policy development and implementation, analysis of education budgets and data systems, and communication strategies. Dr. DeMary has served as an advisor to APA in previous projects.

Mark Fermanich, Ph.D

Dr. Fermanich is currently a Research Associate at the Center for Education Policy at the University of Colorado Denver and has formerly in numerous other research and academic positions, including as an Associate Professor at Sonoma State University, a Legislative Analyst for the Minnesota State Senate Education Committee, and a Research Analyst in the Minnesota Department of Revenue. Dr. Fermanich brings to our team a broad background in data and research analysis, as well a wealth of experience in advising elected officials on education policy and finance matters. Dr. Fermanich has assisted us most recently in our efficiency analysis of North Carolina's K-12 funding system.

We also plan to contract with a public relations firm to provide consultation in our development of our communications plan for this work:

Widmeyer Communications

Widmeyer Communications is a multi-purpose communications firm that specializes in education issues. In key areas such as assessment, teaching quality, standards, transparency,

STEM and scalability, Widmeyer has helped clients influence or transform the dialogue. For more than 20 years Widmeyer has helped education reform organizations, corporations, government agencies and officials develop, coordinate and implement communications plans. We will use their expertise to create an appropriate communications plan to inform both internal and external stakeholders.

Project Plan

APA believes in close collaboration with its clients, both at the inception and throughout the research process. We view every project as being unique and while some of the methodologies we employ are ones that we have used in other circumstances, nothing is “canned” – from the analyses to the recommendations- and we pride ourselves on being responsive to our clients and designing a study that best meets their needs. Further, over the more than 25 year history of our firm, we have prided ourselves in providing recommendations and analyses that provide comprehensive, thorough advice to policymakers to help them make decisions that can have lasting and significant fiscal and policy impacts. As such, APA proposes an efficiency study to be completed by April 2011.

While this later than the preferred deadline of January 31, 2011 (according to Addendum No. 1 to the RFQ) we believe that any earlier deadline would make it impossible to deliver the level of analysis needed to provide the Governor and State of West Virginia with reliable, well-informed data and analysis. In particular, the extremely short preferred timeframe would require the vendor to develop recommendations and analyses without the benefit of having taken time to understand at a necessary level of detail the background and framework of the agencies to be studied.

As such, we have developed a timeframe and list of proposed activities that will allow us to conduct a meaningful analysis of the education system in West Virginia and develop recommendations that will allow the state to improve the efficiency of its educational provision.

APA’s proposed activities are:

- 1. Becoming familiar with how K-12 education is organized and funded in West Virginia.**
 - a. We need to understand the governance structure but our interest is primarily in how decisions are made at the statewide level, the school district level, and the school level about the way that education services will be delivered.
 - b. We need to understand how all providers of education services are held accountable for student performance, from teachers, to schools, to districts, to regional education service agencies, to state agencies.
 - c. We need to understand how funds flow into state agencies, regional education service agencies, school districts, and schools, including where funds come from (state, local,

federal), what taxes are used to pay for K-12 education, what tax/revenue constraints exist, whether matching is required (by the state to obtain federal funds and by districts to obtain state funds), and what kind of reporting is required (including financial audits).

- d. We would like to understand the history of education governance and funding, including changes in structures (when and why).

2. Conducting initial interviews with state education agencies. APA will conduct two sets of initial interviews in order to better understand how various education entities operate, how the leadership of various organizations perceive that other organizations operate, what are considered to be organizational strengths and weaknesses, what changes might be needed to alleviate weaknesses, and identify any redundancies of effort between organizations.

- a. A two-person team will focus its attention on organizations statewide organizations located in Charleston, which will spend 1-2 hours visiting with people in:
 - i. Governor's office
 - ii. State agencies (3)
 - iii. State Board of Education
 - iv. Statewide education organizations (school boards, school administrators, teachers, etc.)
- b. Following the completion of the interviews in Charleston, two two-person teams will conduct interviews in a sample of school districts and regional education services agencies around the state, with each team dealing with organizations distributed in different geographic areas of the state.
 - i. Each team will visit 2-3 school districts, spending 2-3 hours in each one
 - ii. Each team will visit 1-2 regional education services agencies, spending 2-3 hours in each one.
- c. We will develop interview protocols to guide the interviews and allow us to collect information in a systematic way.
- d. We will prepare an internal summary of all interviews, which we will use to help guide our other work.

3. Analyzing the budgets for the three state-level K-12 agencies and the State Board of Education.

- a. We will examine sources of revenue: (1) how much money comes from different sources and (2) how have the amounts changed over time.
- b. We will examine how funds are spent: (1) what programs and services are supported and (2) how the programs and services have changed over time.
- c. We will examine the numbers of personnel that work in the agencies, their characteristics, and their salaries.
- d. We will review any financial/performance audits that have been conducted.

4. Analyzing school district spending by function and personnel usage by type. We will analyze school district spending by function and personnel usage by type in order to understand the differences that might exist between districts and how such differences are related to student-based characteristics (such as participation in special education programs, being eligible for free or reduced-price lunch, and being an English-language learner) and district-based characteristics (such as district enrollment level or regional price differences).

- a. We will develop a county price differential based on housing costs and other costs that will allow us to determine whether expenditure differences across districts reflect price differences that are beyond the control of districts.
- b. We will develop a district student-based need index that will allow us to determine whether expenditure differences across districts reflect differences in needs.
- c. We will examine the extent to which differences in personnel usage (numbers of personnel per 1,000 students) are related to uncontrollable cost pressures.
- d. We will compare West Virginia data (per student spending by function, personnel usage by type, and teacher salaries) to other states (nearby states or SREB states) to

5. Conducting a variety of focused analyses. We believe that it is important to conduct a variety of focused analyses in order to address specific questions about the operation of education entities, the use of state funds, and targeting resources on those programs, services, and activities most likely to have an impact on student performance. These analyses are organized by the type of agency being studied.

- a. Statewide
 - i. Conduct an analysis of state and local taxes for education and how tax burdens (relative to personal income) have changed over time.

- ii. Conduct an analysis of the school finance formula and the procedures used to allocate state aid to school districts with an emphasis on the incentives the various procedures provide to school districts to behave in particular ways in terms of employing and paying staff.

b. State agencies

- i. Compare West Virginia's state agencies to those in other states in terms of governance, organization structure, funding, and personnel to the extent that comparable information is available.
- ii. Conduct a more in-depth site visit to state agencies in West Virginia to examine how they are organized, the programs they operate, how they evaluate the services they provide, and staffing levels. We expect the focus of these visits to be on professional development, data collection and analysis, accountability, and support for low performing school districts.
- iii. Conduct site-visits to state agencies in 2-3 other states selected on the basis of being similar to West Virginia in terms of demographic characteristics but with higher student performance (based on the National Center of Education Progress) in order to examine how they are organized, how revenues are obtained, what programs and services are supported, and how they relate to other education agencies.
- iv. Examine the programs operated by state agencies to determine the relationships between their costs and their benefits where quantifiable links can be drawn; where such links do not exist, examine the relationships between costs and perceived benefits, based on interviews/surveys.

c. Regional education service agencies

- i. Compare West Virginia's regional service agencies to those in other states in terms of governance, organization structure, funding, and personnel to the extent that comparable information is available.
- ii. Conduct a more in-depth site visit to several regional service agencies in West Virginia to examine how they are organized, the programs they operate, how they evaluate the services they provide, and staffing levels. We expect the focus of these visits to be on special education, professional development, technology, and non-instructional support services.

d. School districts

- i. Examine the research that has examined the relationships between education resources and student performance. While we have an up-to-date in-house summary of this literature, we think it would be valuable to compile information on the magnitude of the effects of different treatments (such as class size reduction) in order to determine the most efficient, research-based uses of education resources.
- ii. Conduct an analysis of spending levels and student performance with a particular interest in identifying districts that are spending less than what would be expected (based on statistical analysis of all districts, controlling for cost pressures beyond the control of districts, such as size) and with student performance that is higher than what would be expected (based on statistical analysis of all districts, controlling for student demographics). We would conduct site visits to a sample of districts in order to determine whether resource use is consistent with research, whether they use resources in other ways, and whether they choose use resources in particular ways.
- iii. Based on 5.c.ii., conduct an analysis of districts with lower-than-expected student performance and higher-than-expected spending to determine whether district reorganization would reduce spending and be practical.
- iv. Conduct a web-based survey of school district administrators to determine: (1) the extent to which they utilize research-based approaches in providing services; (2) their perceptions of services provided by state agencies and regional education service agencies; (3) their perceptions of reporting requirements associated with revenues and services they receive from state agencies; and (4) their views of the school finance system.

6. Preparing a preliminary set of recommendations.

- a. Based on the completion of the analytic work, APA will develop a list of preliminary recommendations about how to better organize the K-12 education enterprise and how to allot state support to school districts.
- b. A two person team will conduct interviews in Charleston to discuss our preliminary recommendations with state agency personnel and with statewide education organizations.

7. Preparing a report.

- a. We will prepare a draft report, which will be reviewed by the contracting agency.

- b. We will prepare a final report based on reviewer comments.
- 8. Developing a communication plan.** We will develop a communication plan to inform affected parties, the state legislature, and citizens about recommended plans to improve the organization and funding of K-12 education in West Virginia.
- a. We will prepare an executive summary of the report and develop additional materials for the media consistent with the communication plan.
- 9. Presenting.** We will make presentations consistent with the communication plan.
- a. We assume that, at a minimum, a two-person team will travel to Charleston to present the final report.

Appendix A- Letters of Recommendations

Reference letters from the following past clients:

Johnny Franklin, Education Policy Advisor
Office of the Governor, State of Mississippi

Mark Collins, Principal Fiscal and Policy Analyst
Office of Policy Analysis at the Maryland General Assembly

Dale Dennis, Deputy Commissioner of Education
Kansas Department of Education

Additional references available upon request.



STATE OF MISSISSIPPI
OFFICE OF THE GOVERNOR

HALEY BARBOUR
GOVERNOR

To Whom It May Concern:

I am writing on behalf of Augenblick, Palaich and Associates (APA), which is responding to an RFP issued by West Virginia to conduct an efficiency review of the state's public education system. APA is a Denver-based education consulting firm that has worked in Mississippi on several occasions over the past few years addressing both efficiency and finance issues. One of the firm's hallmarks is its ability to provide analysis and recommendations that translate into positive action from policymakers.

For example, our state legislature adopted a new school finance formula based on APA's work that focused on setting state aid levels efficiently. This was based on the spending of school districts whose student performance exceeded a specified level and whose per student spending was within a statistically set range of the average (thereby excluding high spending districts).

Last year, APA helped the Governor's office conduct an analysis of school district reorganization for a special commission the Governor established. After a detailed data analysis, APA recommended a set of districts that were ripe for reorganization on the basis of both student performance and spending. The APA data was utilized by the commission in formulating a Report to the Governor.

We enjoyed working with APA. Their analytic skills helped us to defuse a highly political issue, supporting the Governor's desire to make tough decisions on the basis of data. They were straightforward in making presentations, explaining what data they used and how they went about the work in ways that commission members could understand. I am sure they will bring the same professionalism to whatever work they do for West Virginia.

Please let me know if I can provide further assistance.

Sincerely,

Johnny Franklin
Johnny Franklin

Education Policy Advisor



DEPARTMENT OF LEGISLATIVE SERVICES
OFFICE OF POLICY ANALYSIS
MARYLAND GENERAL ASSEMBLY

Karl S. Aro
Executive Director

Warren G. Deschenaux
Director

September 17, 2010

To Whom It May Concern:

This is a letter of support for the proposal being submitted by Augenblick, Palaich and Associates (APA) in response to a Request for Proposal (RFP) issued by West Virginia to conduct an efficiency review of the state's public education system. From 2000 to 2002, the State of Maryland worked closely with APA in the development of a new school finance system. APA reviewed the overall structure of our existing system, including the equity it provided, and worked with a large State commission (the Commission on Education Finance, Equity, and Excellence or "Thornton Commission") to produce an estimate of adequate funding for local school systems and to develop an enhanced State aid framework to support the identified need. APA's work ultimately resulted in the enactment of legislation that changed Maryland's funding system and addressed litigation concerns raised in Baltimore City.

My colleagues and I were very satisfied with APA's work and professionalism. APA staff worked well with all members of the commission including legislators, representatives of statewide organizations, and representatives of local school districts. The final APA report and all presentations were thorough, clear, and well explained.

With the firm's experience and proven analytic skills, we believe APA has the ability to effectively examine almost any school finance issue and can provide policymakers with the tools they need to understand education equity, adequacy, and efficiency in their states. In addition, the work in Maryland demonstrated APA's ability to work directly with state agencies and school district personnel in gathering information, analyzing data, and developing recommendations.

Please contact me at 410-946-5510 if I can provide further input or assistance.

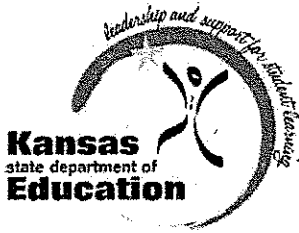
Sincerely,

A handwritten signature in black ink, appearing to read "Mark W. Collins".

Mark W. Collins
Principal Fiscal and Policy Analyst

MWC/mpc

Legislative Services Building • 90 State Circle • Annapolis, Maryland 21401-1991
410-946-5510 • FAX 410-946-5529 • TDD 410-946-5401
301-970-5510 • FAX 301-970-5529 • TDD 301-970-5401
Other areas in Maryland 1-800-492-7122



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785-296-3871
785-296-0459 (fax)

120 SE 10th Avenue • Topeka, KS 66612-1182 • 785-296-6338 (TTY) • www.ksde.org

September 17, 2010

To Whom It May Concern:

I am writing to support Augenblick, Palaich and Associates (APA) in their response to an RFP issued by the Governor's Office in West Virginia. APA is well known in Kansas for the work they have done over a long period of time to help us evaluate our school finance system and to design and implement a new approach to distributing state support to school districts.

APA has also conducted work in our state to examine the efficiency with which Kansas school districts deliver education services. While Kansas is not a large state in terms of population, its education system is highly diverse and with some relatively large school districts, some relatively small districts, and some very small districts that serve sparsely populated areas of the state. APA not only helped our state make the state aid system more sensitive to existing district diversity, but the firm's work also effectively identified those school districts that need to be reconfigured in light of factors such as student achievement, per pupil spending, and changing demographics.

I have worked with APA over many years and have always found the organization to be professional both in terms of how they go about their work and how they deal with policymakers and state employees. I am sure you will find that APA's analytic skills are first rate but, perhaps more important, they care about what they do and whether people understand how they reached their conclusions.

Sincerely,

A handwritten signature in black ink, appearing to read "Dale M. Dennis". The signature is written in a cursive, flowing style.

Dale M. Dennis, Deputy
Commissioner of Education

DMD:tjm

Appendix B- Project Team Resumes

John Gilbert Augenblick. Ed.D

EDUCATION

Ed.D.	University of Rochester	1981
M.A.	Columbia University (Teachers College)	1974
B.S.	Massachusetts Institute of Technology	1969

EXPERIENCE

President: Augenblick, Palaich & Associates, Inc., Denver, CO (1983 - Present)

Director: Education Finance Center, Education Commission of the States;
Denver, CO (1980-83)

Staff Member: Education Commission of the States; Denver, CO (1976-80)

Director of Research: New Jersey Commission on Financing Postsecondary

Education; Princeton, NJ (1975-76)

Elementary School Teacher: Wilton Public Schools; Wilton, CT (1969-72)

PROJECT EXPERIENCE (Since 1994)

Team Leader for school finance studies:

Colorado Coalition of education groups: annual evaluations of school finance adequacy (led to passage of Amendment 23)

Illinois State Board of Education: evaluation of school finance adequacy

Kansas State Board of Education: evaluation of school district organization

Legislature: evaluation of state aid system

Kentucky Legislature: review of finance system enacted in 1990 based on recommendations made at that time

Louisiana State Board of Education: creation of new school finance system and follow-up (led to adoption of new system)

Maryland	Legislative Committee: evaluation of adequacy and use of results in new system (led to adoption of new system)
Minnesota	Department of Children, Families, and Learning: cost impact of new high school graduation standards
Missouri	Coalition of education and civic groups: evaluation of adequate funding
New Jersey	Department of Education: assistance in evaluating adequate funding
North Carolina	Legislature: evaluation of state aid system
Ohio	Governor's commission: assistance in developing a procedure to measure adequate funding
Oklahoma	Legislative Committee: evaluation of adequate funding
Penn.	Legislature: evaluation of state/local tax system
S. Carolina	School Boards Association: evaluation of adequate funding

RECENT PROFESSIONAL PAPERS AND REPORTS

"Recommendations To Strengthen North Carolina's School Funding System" with APA staff. Prepared for the North Carolina General Assembly, September 2010.

"Mississippi Consolidation Study," Prepared for the Mississippi Office of the Governor, April 2010.

"Costing Out the Resources Needed to Meet Pennsylvania's Public Education Goals," with APA staff. Prepared for the Pennsylvania State Board of Education, November 2007.

"Estimating the Cost of an Adequate Education in Nevada," with APA staff. Prepared for the Nevada State Legislature, August 2006.

Andrew Lawrence Brodsky, Ph.D

EDUCATION

Ph.D.	University of Colorado , Boulder, Colorado	2008
	University of Southern Maine , Gorham, Maine <i>Extended Teacher Education Program</i>	1996-1997
B.S.	University of Massachusetts , Amherst, Massachusetts Psychology	1992

EXPERIENCE

Augenblick, Palaich and Associates , Denver, Colorado	2007-present
<i>Senior Associate</i>	
Colorado Children's Campaign , Denver, Colorado	2005-2007
<i>Director of Research and Evaluation</i>	
Colorado League of Charter Schools , Denver, Colorado	2004 - 2005
<i>Educational Consultant</i>	
University of Colorado at Denver , Denver, Colorado	2004
<i>Adjunct Faculty, School of Education</i>	
Aurora Public School District , Aurora, Colorado	2002 -2004
<i>Evaluation Consultant</i>	
Boulder Valley School District , Boulder, Colorado	2002 -2003
<i>Evaluation Consultant</i>	

RECENT PROFESSIONAL PAPERS AND REPORTS

Brodsky, A. (2006). Denver Scholarship Fund Needs Analysis: Technical Report. Colorado Children's Campaign, Denver.

Brodsky, A. (2006). Early Childhood Education in Denver: A Needs Analysis. Technical Report. Colorado Children's Campaign, Denver.

Brodsky, A. and Medler, A. (2006). "Glass Ceilings, Missed Connections: Promoting Minority Excellence to Foster Diversity in College." Headfirst, Spring 2006.

Brodsky, A. (2006). "Latino Students Lag Behind Their White Peers in Academic Proficiency." Latino Suave, July/August 2006.

Teske, P., Brodsky, A. and Medler, A. (2006). "Fix Achievement Gap In Colorado." Denver Post, August 6, 2006.

Schoales, V. and Brodsky, A. (2005). "Closing Colorado's Achievement Gap". Denver Post, November 20, 2005.

Brodsky, A. (2005). *390,343 Children Left Behind: Who's Closing The Achievement Gap in Colorado's Schools?* Colorado Children's Campaign, Denver.

Brodsky, A. (2004). "Review of Breaking Free". Education Review, August 10, 2004.

Brodsky, A. (2003). *Project LEADS Evaluation Report*. Report presented to the Boulder Valley School District.

Kinner, F. and Brodsky, A. (2002, April). "Student Reactions to High Stakes Testing: Comparing Teacher and Student Responses". Paper presented at the annual meeting of the American Educational Research Association, New Orleans.

Brodsky, A. and Kinner, F. (2001). *Effects of CSAP Testing in Boulder Valley School District*. Report presented to the Boulder Valley District Accountability Committee.

Brodsky, A. (2001). *School Climate Issues Associated With Implementation of a Dual Immersion Bilingual Program*. Report presented to the Boulder Valley School District.

Brodsky, A. and Kissen, R. (2001, April). "The Six Steps of Not Becoming A Teacher: A Dialogue in Three Voices." Paper presented at the annual meeting of the American Educational Research Association, Seattle.

Amanda Ryanne Brown, M.P.A.

EDUCATION

M.P.A.	University of Colorado- Denver	2009
B.A.	University of Colorado- Boulder Sociology	2005
B.S.	University of Colorado- Boulder Advertising	2005

EXPERIENCE

Augenblick, Palaich & Associates, Inc., Denver, CO (Intern: 01/05-06/05; Associate: 06/05 – Present)

RECENT PROFESSIONAL PAPERS AND REPORTS

“Recommendations To Strengthen North Carolina’s School Funding System” with APA staff. Prepared for the North Carolina General Assembly, September 2010.

“An Evaluation of the Denver Preschool Program 2008-09;” “2009-10” with APA staff. Prepared for the Denver Preschool Program, June 2009 and September 2010.

“Participant Perspectives on Reach Out and Read Colorado.” Prepared for Reach Out and Read Colorado, August 2010.

“Assessment of Denver Public Schools Student-Based Budgeting System,” with APA staff. Prepared for Metro Organizations for People, December 2008.

“Facilities Usage Analysis.” Prepared for Facility Use Task Force, Littleton Public Schools, October 2008.

“Costing Out the Resources Needed to Meet Pennsylvania’s Public Education Goals,” with APA staff. Prepared for the Pennsylvania State Board of Education, November 2007.

“Estimating the Cost of an Adequate Education in Nevada,” with APA staff. Prepared for the Nevada State Legislature, August 2006.

“The Cost of Fulfilling the Requirements of the No Child Left Behind Act for School Divisions in Virginia,” with John Augenblick, Bob Palaich, and Justin Silverstein. Prepared for the Virginia Department of Education, September 2005.

Dale Marino DeCesare, J.D.

EDUCATION

J.D.	University of Denver College of Law Co-Editor, <i>Denver Journal of International Law</i> American Jurisprudence Award Colorado Bar passed - July 1994	1994
B.A.	Trinity University International Studies	1990

EXPERIENCE

Augenblick, Palaich and Associates – Denver, CO

Senior Associate (January 2005 – present)

- Conduct a variety of education policy studies and research projects including studies of urban school district viability and state school finance reform.
- Co-authored 2008 report on schools that successfully close achievement gaps.
- Led 2007 county-wide study of 16 school districts in Pennsylvania to determine new potential areas for cooperation and improved efficiency.
- Led 2006 study of current economic, performance, and policy challenges facing Pennsylvania's third largest urban school district.
- Write, edit, and produce final reports, essays, and memoranda for clients.
- Serve as analyst on legal issues impacting state education policy.
- Serve as member of project marketing and development team.
- Strategize on the content, message and style of reports and publications to make them as useful as possible for state and district-level policymakers.

Education Commission of the States – Denver, CO

Writer, Policy Analyst (March 2001 – October 2004)

- Wrote and provided analysis of a broad array of education policy topics such as No Child Left Behind, citizenship education, teaching quality, higher education, leadership, early learning, urban schools, and population demographics.
- Monitored legal developments and court decisions impacting education policy.
- Researched and wrote speeches, articles and op-ed pieces for high-ranking officials including state governors and other policy leaders.
- Translated complex education policy information into reports and other written products useful and understandable to state education policymakers.

RECENT PROFESSIONAL PAPERS AND REPORTS

"Profiles of Success: Eight Colorado Schools that are Closing the Achievement Gap," with Amy Berk Anderson. Prepared for the Donnell-Kay and Piton Foundations, February 2008.

"Examining Resource Use and Areas for Enhanced Cooperation in York County's School Districts."
Prepared for the Center for Community Engagement at York College, Pennsylvania, March 2008

"Costing Out the Resources Needed to Meet Pennsylvania's Public Education Goals," with John Augenblick, Justin Silverstein, Bob Palaich, and Amanda Brown. Prepared for Pennsylvania's State Board of Education, November 2007.

"Identifying and Meeting the Economic Challenges facing the Allentown School District." Prepared for Education 2010!, February 2006.

Jennifer Marie Kramer-Wine, M.P.A.

EDUCATION

M.P.A.	Baruch College, School of Public Affairs	2005
B.S.	University of Cincinnati Secondary Education	1997
B.A.	University of Cincinnati History	1995

EXPERIENCE

1/2008 – present **Augenblick, Palaich and Associates (APA)**
Senior Associate

APA partners with a wide range of clients to answer key questions associated with improving our nation's education system. Some highlights from my role in this work include:

- Assisting in facilitating meetings for Austin Independent School District's Strategic Compensation Initiative. Simultaneously wrote a policy document outlining the initiative for the public, district staff and policymakers.
- Coordinating the evaluation process for the Denver Preschool Program, which gathered information from disparate sources to understand if DPP is meeting its goals.
- Interviewing school leaders to identify if their practices matched identified best practices of leaders and writing a subsequent report.
- Interviewing leaders and gathering information from teachers to identify the characteristics of working conditions in high performing schools and editing a subsequent report.

9/2004 – 12/2007 **Independent Contractor**
Consultant

9/2005 – 6/2006 **Education Commission of the States**
Grant Writer

7/2000 – 12/2004 **Schott Foundation for Public Education**
Program Assistant

8/1998 – 6/2000 **Valley Stream Central High School**
Classroom Teacher

RECENT PROFESSIONAL PAPERS AND REPORTS

"Methods to Attract and Retain Teachers in Hard-to-Staff Schools: A Report to Aurora, Denver, and Jefferson County Public Schools," with Dale DeCesare and John Augenblick. Prepared for the Rose Community Foundation. May 2008.

"Profiles of Four Denver Middle Schools," with Dale DeCesare. Prepared for the Donnell-Kay Foundation. June 2008.

"What Research has to Say About the Relationship Between Education Resources and Student Performance in K-12 Schools," with John Augenblick. June 2008.

"An Evaluation of the Denver Preschool Program 2007-08," with Dale DeCesare, John Augenblick, Robert Palaich Andrew Brodsky and Amanda Brown. Prepared for the Denver Preschool Program. August 2008.

"Evaluation of the Ritchie Program for School Leaders," with Robert Palaich, Katy Anthes and Catherine Walker. Prepared for the Donnell-Kay Foundation. August 2008.

"An Overview of AISD's REACH, a Strategic Compensation Pilot." Prepared for Austin Independent School District. August 2008.

John Leslie Myers, M.S.

EDUCATION

M.S.	Kansas State University Educational Administration	1980
B.A.	Buena Vista College, Storm Lake, IA	1972

EXPERIENCE

Director of Development: APA Consulting; Denver, CO (January 2005-present)

Lead Consultant: JL Myers Group; Denver, CO (2003-2004)

Partner: Augenblick & Myers; Denver, CO (1995-2003)
Augenblick, Van de Water & Myers; Denver, CO (1993-1995)

Education Program Director: National Conference of State Legislatures; Denver, CO (1987-1993)

Executive Assistant, Director of Policy: Kansas Governor's Office; Topeka, KS (1984-1987)

Community Education Coordinator: Hutchinson Public Schools, Hutchinson, KS (1979-1981)

LEGISLATIVE EXPERIENCE

Kansas House of Representatives: Member – July 1977-November 1983.

Governor appointed:

Task Force on State PLAN for Deaf/Blind 1979-82.

Commission on Interstate Cooperation 1985-87.

Advisory Committee to the State Board of Education on Chapter 2 1983-87.

OTHER PROFESSIONAL ACTIVITIES

Consultant to the Denver Public Schools and Denver Classroom Teachers Association Task Force on Teacher Compensation; Denver, CO (2002-2004).

Consultant to the National Board for Professional Teaching Standards (1995-present).

Director: Colorado School Finance Project; Denver, CO (1999-2000).

Robert Michael Palaich, Ph.D

EDUCATION

Ph.D.	Columbia University (Political Science)	1981
M.A.	Teachers College, Columbia University (Ed. Admin.)	1974
B.S.	University of Notre Dame (Chemistry)	1973

EXPERIENCE

Vice-President: Augenblick, Palaich & Associates, Inc., Denver, CO (2003 - Present)

Vice-President: Education Commission of the States, Denver, CO (1998-2003)

Staff Member: Education Commission of the States; Denver, CO (1978-1998)

PROJECT EXPERIENCE (Since 1994)

Team Leader for education policy related studies:

Hawaii	Hawaii Educational Policy Center: Developed cost estimates for Hawaii's compliance with federal No Child Left Behind legislation
New Mexico	Legislative Education Study Committee: Developed and simulated alternatives to the Training and Experience adjustment in New Mexico's school aid formula that aligned with the state's new licensure system
Tennessee	Coalition of education groups: Evaluation of adequate funding Legislature: evaluation of state aid system
Grand Rapids, MI	Coalition of local Foundations: Developed community-wide indicators of successful youth services

Education Commission of the States (ECS):

Prior to joining APA, Palaich was Vice President of the Policy Studies and Programs Division at ECS. This division developed and executed projects on policy issues (accountability, teacher quality, governance, finance, early learning and higher education) of significant interest to state education policymakers. At its peak, the division was an \$8 million enterprise. Prior to serving as vice president, Palaich directed ECS' Constituent Services Division.

RECENT PROFESSIONAL PAPERS AND REPORTS

"An Evaluation of the Denver Preschool Program, 2007-08; 2008-2009; 2009-10" with Andrew Brodsky, Jennifer Kramer-Wine, Amanda Brown, Mary Maguire Klute and Joni Zisman, prepared for the Denver Preschool Program, Denver, Colorado, September, 2008, 2009, and 2010.

"Evaluation of the Ritchie Program for School Leaders," with Jennifer Kramer-Wine, Katy Anthes and Catherine Walker, prepared for the Donnell Kay Foundation, Denver, Colorado, September, 2008.

"A Cost / Benefit Analysis of Early College High Schools in Ohio," with Andrew Brodsky, Amanda Brown and Jennifer Kramer-Wine, prepared for the KnowledgeWorks Foundation, Columbus, Ohio, September, 2008.

"Investing in Rhode Island's Youth: Afterschool Programs and the Proposed Education Aid Foundation Formula," with Justin Silverstein and Amanda Brown, prepared for the Rhode Island Afterschool Plus Alliance, Providence, Rhode Island, January, 2008.

"A Cost to Completion Analysis of a Selected Early College High School in California," with Sarah Glover and Jennifer Kramer-Wine, prepared for Jobs for the Future, Boston, Massachusetts, March, 2007.

"Financing Accelerated Learning Options: Understanding Who Benefits and Who Pays," with Cheryl Blanco, Amy Berk Anderson and Jennifer Sharp Silverstein with John L. Myers in Accelerated Learning Options: Moving the Needle on Access and Success, Western Interstate Commission for Higher Education, Boulder, Colorado, June, 2006.

"Return on Investment in Early College High Schools," with John Augenblick, Samara Foster, Amy Berk Anderson, and Douglas Rose, Jobs for the Future, Boston, Massachusetts, June, 2006.

"The Cost of Fulfilling the Requirements of the No Child Left Behind Act for School Divisions in Virginia," with John Augenblick, Justin Silverstein, and Amanda R. Brown, Augenblick, Palaich and Associates, Inc., Denver, Colorado, September, 2005.

"The Cost of an Adequate Education in Connecticut," with John Augenblick, Justin Silverstein, Dale DeCesare and Amanda R. Brown, Connecticut Coalition for Justice in Education Funding, Hartford, Connecticut, June, 2005.

Kathryn Colleen Rooney, M.P.A.

EDUCATION

M.P.A.	University of North Carolina- Chapel Hill	2005
B.A.	Pomona College Public Policy/Psychology	1997

EXPERIENCE

- 10/2008 – present **Augenblick, Palaich and Associates (APA)**
Senior Associate
- Coordinating and analyzing the parent and preschool surveys for the Denver Preschool Program evaluation.
 - Managing the school-level performance and demographic data for the Louisiana school resource project.
- 7/2005 – 9/2008 **Educational Policy Improvement Center**
Lead Researcher
- Led a multifaceted process to collect and analyze data from 38 exemplary high schools nationwide, for the purpose of learning how these schools prepare their students to be ready for college upon graduation. Conducted dozens of interviews, focus groups, and classroom observations as part of these site visits.
 - Managed multiple data collection processes to determine adequate school funding in the state of Washington.
- 5/2004 – 8/2004 **Government Accountability Office**
Graduate Intern
- Conducted an in-depth case study of an Arkansas Head Start grantee to determine gaps in the Head Start oversight process. This involved interviews with the grantee and analysis of grantee files.
 - Constructed and field-tested a nationwide survey to be administered to Head Start grantees.
- 9/2000 – 4/2003 **MPR Associates**
Research Assistant
- Analyzed large education data sets using SPSS and MPR's Data Analysis System (DAS).
 - Co-authored several published reports on postsecondary educational topics.
 - Performed extensive background research and literature reviews.

RECENT PROFESSIONAL PAPERS AND REPORTS

"Rhode Island Cost Calculator," with Robert Palaich. Prepared for the Rhode Island Afterschool Plus Alliance. December 2008.

"Improving Adequacy Funding Methodology through a Mixed-Method Approach," with David Conley. Presented at the annual meeting of the American Educational Research Association. March 2008.

"Washington Adequacy Funding Study," with David Conley. Prepared for the Washington Education Association. January 2007.

"Survey of Teacher Evaluation Models." Prepared for the Chalkboard Project. October 2006.

"Survey of Pay-for-Performance Teacher Evaluation Systems." Prepared for the Chalkboard Project. October 2006.

Justin Ryan Silverstein

EDUCATION

B.S. University of Colorado at Boulder 1998

EXPERIENCE

Senior Associate: Augenblick, Palaich and Associates, Denver, CO (Formerly Augenblick & Myers - January 2003- Present)

Associate: Augenblick & Myers, Denver, CO (1998 - 2002)

RECENT PROFESSIONAL PAPERS AND REPORTS

"Recommendations To Strengthen North Carolina's School Funding System" with APA staff. Prepared for the North Carolina General Assembly, September 2010.

"Mississippi Consolidation Study," Prepared for the Mississippi Office of the Governor, April 2010.

"Costing Out the Resources Needed to Meet Pennsylvania's Public Education Goals," with APA staff. Prepared for the Pennsylvania State Board of Education, November 2007.

"Estimating the Cost of an Adequate Education in Montana," with Douglas Rose, Robert Palaich John Myers, and Amanda Brown. Prepared by APA for the Montana Quality Education Coalition, January 2007.

"Estimating the Cost of an Adequate Education in Nevada," with APA staff. Prepared for the Nevada State Legislature, August 2006.

"Estimating the Cost of an Adequate Education in South Dakota," with John Augenblick, Amanda Brown, Dale DeCesare, and John Myers. Prepared for the South Dakota Alliance for Education, January 2006.

"Estimating the Cost of an Adequate Education in Connecticut," with John Augenblick, Robert Palaich, Douglas Rose, and Dale DeCesare. Prepared for the Connecticut Coalition for Justice in Education Finance, June 2005.

"Calculation of the Cost of an Adequate Education in North Dakota in 2002-2003 Using the Professional Judgment Approach," with John Augenblick, Bob Palaich, and Jennifer Sharp. Prepared for the North Dakota Department of Public Instruction (Bismarck, ND), September 2003.

Jo Lynne S. DeMary, Ed.D

EDUCATION

Ed.D. College of William and Mary 1982

Educational Planning and Administration

DISSERTATION

A Study of the Relationship between Chronological Age at the Time of Entrance to Kindergarten and Academic Achievement

M.Ed. Virginia Commonwealth University 1972

Special Education

Externship: Woodville Elementary School, Richmond, Virginia

B.A. College of William and Mary 1968

Elementary Education/Psychology

PROFESSIONAL EXPERIENCE

Director of Center for School Improvement, Virginia Commonwealth University 2006 - present

Work at the national, state and local levels to bring best practices to low performing schools and districts. Specialize in capacity building and organizational improvement.

Professor, Department of Educational Leadership 2006 - present

Superintendent of Public Instruction, Virginia Department of Education 2000-2006

Served as the first female chief executive officer of the Virginia Department of Education, the administrative agency for Virginia's public school system. Designed and implemented educational initiatives, regulations and laws for the Governor, Board of Education and General Assembly of Virginia. Facilitated policy development for the Commonwealth's public education system to comply with NCLB, IDEA, and other federal laws and programs.

Acting Superintendent of Public Instruction, Virginia Department of Education 1999-2000

Assumed leadership of the Department of Education upon the sudden resignation of the Superintendent of Public Instruction. Worked closely with the Governor and the State Board president to glean legislative support for Virginia's standards based educational reforms and listened to concerns of professional organizations regarding the changes they were seeking.

Assistant Superintendent of Instruction, Virginia Department of Education **1994-1999**

Provided instructional leadership in the development and implementation of Virginia's standards-based accountability and support system, including the Standards of Learning, Standards of Accreditation and supporting initiatives in career and technical education, compensatory programs, gifted, and special education programs.

Assistant Superintendent of Instruction, Henrico County Public Schools **1988-1994**

Provided leadership to the day-to-day operations of the Department of Instruction in a large suburban school district of 45,000 students and 52 schools. Served as the superintendent's designee when he was away from the district.

Director of Special Education, Henrico County Public Schools **1981-1988**

Provided leadership to the Office of Special Education Services. Streamlined the eligibility and IEP processes and improved the quality of instruction provided to 3,000 students with disabilities. Provided opportunities for parents to be more actively engaged in their young person's education.

Elementary Supervisor, Henrico County Public Schools **1978-1981**

Worked with the leadership of five Title I elementary schools to observe teachers, provide feedback and conduct needed professional development. Monitored classroom performance and student achievement on a 9 weeks basis.

Teacher of the Gifted, Henrico County Public Schools **1975-1977**

Worked with the district leadership to establish a center-based gifted program in the county. Worked with approximately 250 children and their home-based teachers.

Principal, Henrico County Public Schools **1972-1974**

Served as the instructional leader of a new and innovative elementary school that was implementing kindergarten and housing school based special education classes for the first time. School served as a show place for district visitors to see innovative instructional strategies at work.

Assistant Principal, Henrico County Public Schools **1971-1972**

Served as the on-site assistant principal, instructional leader, and teacher evaluator for a school annex housed away from the main school. I was assistant principal at the primary school and worked closely with teachers to implement a continuous primary program K-2.

Teacher, Henrico County Public Schools **1969-1971**

Teacher, Fairfax County Public Schools **1968-1969**

Teacher , Richmond City Public Schools

Summer '68

PUBLICATIONS

Virginia Tech, *Virginia Issues & Answers*, Fall 2003

"Colleges and K-12 Schools Working Together: A Winning Combination"

School Administrator, November, 2005

"Aspiring to Level 5 Leadership"

Opening chapter in book entitled *Be a Teacher: Make a Difference*. Published July, 2007.

PRESENTATIONS

Keynote address: CTE Institute, August 24, 2010, Richmond Public Schools, Richmond, VA.

Keynote address: Next Generation Leadership Academy, October, 2009, University of Richmond, Richmond, VA.

Keynote address: Southampton County Public Schools Opening Day Convocation, August 31, 2009, Courtland, VA

Keynote address: Department of Correctional Education Fall Convocation, August 26, 2009, Glen Allen, Virginia.

Panelist: Advancing Virginia's Leadership Agenda: March 31, 2009, Virginia Department of Education, Richmond, VA.

Keynote address: Tenth Annual Conference Women Education Leaders in Virginia, March 27, 2010, Charlottesville, VA.

Respondent: Fifth Annual John S. Oehler Lecture for Educational Leadership: Cities and the Educational Imperative, February 16, 2009, Virginia Commonwealth University, Richmond, VA.

Keynote address: Next Generation Leadership Academy, October 8, 2008, University of Richmond, Richmond, VA.

Keynote address: RARC's Fall Conference, Clark Springs School, Richmond, VA.

Keynote address: Teachers Changing the World, 2008 Teachers of Promise Institute, February 29, 2008, James Madison University, Harrisonburg, VA.

Panel discussion and presentation to Chesterfield County Committee on the Future, Global Picture 2030 and Education, January 14, 2008, Chesterfield County, Virginia.

Keynote address: Essential Practices for Leading the Expedition, Principals Institute of the NativityMiguel Network of Schools, June 25, 2006, Notre Dame University, South Bend, IN

Keynote Address, LEAP into Teaching, J. Sargeant Reynolds Community College Center for Teacher Education, 4th Annual Education Conference, October 30, 2007, Science Museum of Virginia.

Plenary Panelist at the 2007 Wallace Foundation's National Conference, What Does It take to create high-quality leadership? October 23, 2007, New York City, NY

Panelist for breakout session, 2007 Wallace Foundation's National Conference: Turnaround Specialist for Failing Schools: Are they working? October 23, 2007, New York, New York.

Keynote Address: *Maximizing Student Achievement Through the Power of Data*, Metropolitan Educational Research Consortium Conference, School of Education, VCU, March 15, 2007, Richmond, VA,

Presentation to the Governor's Commission on High School Redesign, December 15, 2006, Baton Rouge, LA.

Keynote address, *Commitment to Collaboration: Maximizing Student Learning*, " 17th Annual Symposium on Professional Collaboration and Inclusive Education, November 6, 2006, Williamsburg, VA.

As state superintendent, I spoke on over 700 occasions including presentations to the Education Commission of the States, the National Governor's Association, and the Council of Chief State School Officers. I also presented at the International Forum of Educational Leaders in Beijing.

BOARDS/TASK FORCES/COMMITTEES

Co-Director of EduLead 2007, 2008, 2009, 2010

Project Coordinator for Bridging Richmond, 2009, 2010

Co-chairman of Chesterfield County Growth Task Force, 2008, 2009

National Dropout Advisory Committee, NGA Center for Best Practices, 2008, 2009

Advancing Virginia's Leadership Agenda Task Force, Virginia Department of Education, 2008

Contingency and Restructuring Work Group, Virginia Department of Education, 2007

Superintendent Search Committee for the Richmond Public Schools, 2008

The Broad Prize Review Board, 2006, 2007, 2008, 2009, 2010

K-12, Inc. External Advisory Board, 2008, 2009, 2010

National Comprehensive Center for Teacher Quality Advisory Board 2008, 2009, 2010

National Council on Teacher Quality Advisory Board 2008, 2009, 2010

Board of Trustees, Bluefield College, 2010

GRANTS/AWARDS

Breaking the Glass Ceiling Award, Virginia Women Educators, 2000

Pathfinders Award, Va. Association of Elementary School Principals, 2000

Outstanding Educational Leadership Alumni Award, W&M School of Education, 2001

2001 Alumni Star Award, Virginia Commonwealth University, 2001

State Leadership Award, National Assn of Federal Education Program Administrators, 2002

Distinguished Service Award, Virginia Art Education Association, 2003

Excellence in Assessment Award, Virginia Association of Test Directors, 2003

Elwood R. Pace Humanitarian Award, National Assn of State Directors of Special Edu, 2004

Distinguished Alumnus Award, Henrico Educational Foundation, 2005

Alumni Achievement Award, Virginia Commonwealth University Alumni Assn, 2005

Jo Lynne DeMary Day, Governor of Virginia, 2005

Outstanding Woman Award in Education, YWCA, 2006

Outstanding Service to Children Award, Virginia Association of Early Childhood Educators, 2006

Friend of Literacy Award, Virginia State Reading Association, 2006

Policy Maker Award, Virginia Association of Colleges for Teacher Education, 2006

Distinguished Service Award, Virginia School Counselors Association, 2006

Leadership Award, Virginia Division of Career Development and Transition, 2006

Established Jo Lynne DeMary Leadership Award, William & Mary School of Education, 2006

Virginia Congress of Parents and Teachers Lifetime Membership Award, 2006

UNCF Flame Bearer of Education Award, 2007

Robert E. Feir, Ph.D

EDUCATION

Pennsylvania State University, University Park, Pennsylvania: Ph.D. in political science (1994)

Doctoral Dissertation: "The Politics of Education Reform in the States: 1983-1987"

Danforth Foundation, Saint Louis, Missouri: Policymakers' Institute (1993)

University of Pennsylvania, Philadelphia, Pennsylvania: graduate work in governmental administration (1982)

Bucknell University, Lewisburg, Pennsylvania: M.S. in Education Administration (1978):

Masters Thesis: "The Impact of State Funding on Equal Educational Opportunity: Some Public Policy Considerations"

University of Rhode Island, Kingston, Rhode Island: graduate work in education administration (1974)

Rhode Island College, Providence, Rhode Island: graduate work in education administration (1973-74)

State University of New York at Albany, Albany, New York: M.A. in Political Science (1971):

Masters Thesis: "Balkanization and Regionalization: Implications for Democracy"

Bucknell University, Lewisburg, Pennsylvania: B.A. in Political Science (1969)

RECENT EXPERIENCE:

President, EdStrat21, Harrisburg, Pennsylvania (since July 1997)

Provide education consulting and project management to various public and private sector clients

Project Manager, Pennsylvania State Board of Education Costing-Out Study (2006-08)

Served as the State Board's manager of a legislatively-required study of the state's school finance system and as intermediary between the Board and the study consultants

Executive Director, Pennsylvania Governor's Commission on Training America's Teachers (2005-06)

Served 40-member Commission appointed by the Governor and charged with recommending reforms of the state's teacher education system; organized the Commission's research and work schedule; and prepared final report.

Interim Chief Executive Officer & General Manager, Pennsylvania Public Television Network (2004-05)

Served 24-member Commission that directs state public television policy and funding during a national search for a permanent agency head and coordinated efforts of eight independent public broadcasting companies.

CEO and Managing Partner, The Learning Resources Group, Inc., Harrisburg, Pennsylvania (1997-2000)

Provided consultation, training, and technical assistance to support employer leadership of education transformation efforts in local communities in 10 states

Executive Director, Pennsylvania Business-Education Partnership (formerly Pennsylvania 2000), Harrisburg, Pennsylvania (1994-97)

Developed and maintained network of local and regional business-education coalitions to support education reform; developed state education improvement plan under federal Goals 2000 program; served diverse Board of Directors (ranging from 45-63 members), comprised of statewide leaders of business, education, and government; and managed the affairs of a private nonprofit corporation.

STATE GOVERNMENT EXPERIENCE:

Special Assistant to the Majority Leader and Executive Director of the Education Committee, Pennsylvania State Senate, Harrisburg, Pennsylvania (1993-94)

Led research and legislative drafting efforts in education, local taxation, health care reform, and pension reform for Senate leaders and advised 26 Senators on education reform and school finance issues.

Executive Director, Pennsylvania State Board of Education, Harrisburg, Pennsylvania (1989-93)

Revised state curriculum requirements to focus on accountability for student achievement; revised state special education regulations to focus on earlier, more appropriate, more cost effective interventions for students with learning problems; and built the State Board into a strong, cohesive policymaking body of 17 Gubernatorial appointees and four legislators.

Director of Policy and Government Relations, Pennsylvania Department of Education, Harrisburg, Pennsylvania (1987-88)

Developed legislative initiative establishing teacher leadership centers and developed Department policies increasing school accountability.

Executive Director (Minority), Education Committee, Pennsylvania State Senate, Harrisburg, Pennsylvania (1985-87)

Negotiated legislation increasing the professional development requirements for teachers and proposed simplified, more equitable school finance formula for legislative consideration.

Coordinator of State Legislative Relations, Pennsylvania Department of Education, Harrisburg, Pennsylvania (1981-85)

Assisted members of the General Assembly in responding to education issues and represented the Department of Education before the General Assembly.

LOCAL EDUCATION EXPERIENCE:

Harrisburg School District, Harrisburg, Pennsylvania:

Member (2001-05) and Chair (2004-05), Board of Control

Chair of Budget and Finance Committee, Board of Control (2001-05)

Education Empowerment Team Staff Director (2001)

Central Susquehanna Intermediate Unit (CSIU), Lewisburg, Pennsylvania:

Assistant Executive Director (1977-81)

Acting Assistant Executive Director (1976-77)

Director of Interagency Liaison and Special Projects (1975-76)

Special Assistant to the Executive Director (1974-75)

Supervised major programs of a regional education service agency for 17 school districts; developed comprehensive program of career education and school-to-work transition for disadvantaged students; designed and implemented school evaluation program; and brought millions of dollars of external grant funding to the region to support education programs.

Acting Superintendent, Millville Area School District, Millville, Pennsylvania (1980) (concurrent with CSIU responsibilities)

Oversaw completion of major school construction project and reduced community friction over building project.

Superintendent, Adult School for Cuban Refugees, Fort Indiantown Gap, Pennsylvania (1980) (concurrent with CSIU responsibilities)

Hired and supervised staff to teach hundreds of refugees, designed curriculum, purchased supplies and equipment, and acted as liaison with federal authorities.

Curriculum Planning and Development Coordinator, Barrington Public Schools, Barrington, Rhode Island (1973-74)

Developed secondary school curriculum in social studies, English, and foreign languages and participated in supervising the secondary school program and staff.

Central Susquehanna Intermediate Unit (CSIU), Lewisburg, Pennsylvania:

Coordinator of Migrant Education (1973)

Planning Specialist (per diem consultant, 1973)

Information Specialist (per diem consultant, 1971-73)

Supervised summer school program for children of migrant farm workers; assisted school districts with long-range and strategic planning; and assisted school districts develop publications and media relations and directed the intermediate unit's public information program.

Teacher, Project Upward Bound, Lewisburg, Pennsylvania (1971)

ACADEMIC EXPERIENCE:

Adjunct Instructor of Educational Leadership, The Pennsylvania State University, Harrisburg, Pennsylvania (since 2007)

Adjunct Assistant Professor of Political Science, Gettysburg College, Gettysburg, Pennsylvania (1998-99)

Adjunct Instructor of Public Administration, The Pennsylvania State University, Harrisburg, Pennsylvania (1994-95)

Instructor of History and Government, The Williamsport Area Community College (now Pennsylvania College of Technology), Williamsport, Pennsylvania (1971-73)

Instructor of Government, Northeastern Federal Penitentiary, Lewisburg, Pennsylvania (1972-73)

Staff Member, Chancellor's Panel on University Purposes, State University of New York, Albany, New York (1970)

Research Assistant to Professor Leon S. Cohen, State University of New York at Albany, Albany, New York (1969-70)

NEWSPAPER EXPERIENCE:

News reporter and assistant editor (part-time), Union County Journal, Lewisburg, Pennsylvania (weekly newspaper) (1970-71)

News reporter and assistant city editor, The Standard-Star, New Rochelle, New York (daily newspaper) (summers 1966-69)

Circulation department, The Standard-Star, New Rochelle, New York (summer 1965)

CONSULTANT SERVICES:**Grant writer:**

Ridgway Area School District and Pennsylvania Historical and Museum Commission (National Endowment for the Humanities Grants, \$199,601) (2005)

Ridgway Area School District and WITF-TV (Teaching American History Grant, \$985,000) (2003)

Pennsylvania Department of Education and State System of Higher Education (Teacher Quality Enhancement Grant, \$12,820,000) (2002)

Ridgway Area School District and WITF-TV (Teaching American History Grant, \$621,000) (2001)

Pennsylvania Partnership for Economic Education (Heinz Endowment Grants, \$125,000) (1999-2001)

Penn State Public Broadcasting and Ridgway Area School District (Technology Literacy Challenge Fund and Educate America Act Grants, \$351,000) (1999-2000)

Bloomsburg University (Integrating Technology into Teacher Preparation Grant, \$408,000) (1999)

Pennsylvania Partnership for Economic Education and Northern Lebanon School District (Technology Literacy Challenge Grant, \$111,000) (1998)

Bloomsburg University and multiple partners in north-central and eastern Pennsylvania (Link-to-Learn Infrastructure Investment Grant, \$505,000) (1997)

Central Pennsylvania Forum for the Future and multiple partners in central Pennsylvania (Link-to-Learn Technology Testbed Grant, \$400,000) (1996)

Special education fiscal and program policy consultant for National Association of State Boards of Education Study Group on Special Education (1992)

Curriculum policy consultant for Maryland Task Force on Outcome-Based Graduation Requirements (1992)

Trainer for principals in-service program, Central Susquehanna Intermediate Unit (1983-84)

School law consultant:

Clarion Manor Intermediate Unit (1979)

Central Intermediate Unit Administrators Organization (1977)

Susquehanna Valley Elementary Supervisors Association (1977)

School finance consultant:

Delaware County School Administrators (1980)

Susquehanna Valley Association of School Business Officials (1977)

Bucks County School Administrators (1977)

Planning consultant:

Clarion Manor Intermediate Unit (1977)

North Allegheny School District (1974)

Member of Pennsylvania Ad Hoc Study Group on Public School Finance (1976)

PUBLICATIONS AND PAPERS:

Review of *Mobilizing Citizens for Better Schools* by Robert F. Sexton, *Teachers College Record*, July 19, 2004. <http://www.tcrecord.org/Content.asp?ContentID=11345>.

"Special Education Finance in Pennsylvania," Chapter in 1998 Yearbook of the American Education Finance Association (Thomas B. Parrish, Jay G. Chambers, and Cassandra M. Guarino, editors), Thousand Oaks: Corwin Press, 1999

"Special Education Funding/Program Nexus – Initial Queries," Paper delivered at National Education Knowledge Industry Association's National R&D Summit, Chicago, June 15, 1998

"National Patterns of State Education Policy Innovation and Three Deviant Cases," Paper delivered at American Educational Research Association meeting, San Francisco, April 22, 1995

"Political and Social Roots of Education Reform: A Look at the States in the Mid-1980s," Paper delivered at American Educational Research Association meeting, San Francisco, April 19, 1995

"Pennsylvania's Special Education Formula: Early Results," Paper delivered at American Education Finance Association meeting, Savannah, March 10, 1995

"Refining Pennsylvania's Funding Mechanism and Program Rules for Special Education," Paper delivered at American Education Finance Association meeting, New Orleans, March 20, 1992

"Communication, Learning, and the Future of a Literate Society," Paper delivered at Speech Communication Association meeting, Atlanta, November 1, 1991

Keynote Address, Pennsylvania School Reform Conference, Philadelphia, October 23, 1991

"A Generational Crossroads," Presentation to Lehigh University Society of Educational Administrators, Bethlehem, Pennsylvania, September 25, 1987

"Financing Education and Education Reform: A Matter of Politics," Paper delivered at American Education Finance Association meeting, Washington, March 27, 1987

"Finance and Politics of Education Reform: (How) Does Money Matter?," Paper delivered at American Education Finance Association meeting, Phoenix, April 12, 1985

"The Structure of School: Teachers and Authority," Paper delivered at American Educational Research Association meeting, Chicago, April 2, 1985

"Curriculum Politics: Approaching 1984," Paper delivered at American Educational Research Association meeting, New Orleans, April 23, 1984

"Tax Reform and Education Finance," Presentation to Tri-State School Study Council, April 21, 1982

"Political Realities and School Subsidy: How Did We Get Into This Mess?," Presentation to Pennsylvania School Study Council, April 28, 1981

with William J. Fowler, Jr., "The Effect of School Finance Reform in Pennsylvania, 1976-80," Paper delivered at American Educational Research Association meeting, Los Angeles, April 15, 1981

"The Economic Crisis of Pennsylvania Education," Presentation to Pennsylvania School Administrators Assembly, March 26, 1981

"CETA and Career Education: New Perspectives," NASSP Bulletin, February 1981

"Tax Reform and Tax Limitation," Presentation to Pennsylvania Association of School Administrators Regional Legislative Conferences, April 24 and May 2, 1980

"School Administrators and Education Legislation," Presentation to Pennsylvania Association of School Administrators Conference, June 22, 1979

"CETA and Career Education: Linkages and Problems; Fads or Reforms?," Presentation to Pennsylvania School Counselors Association, March 16, 1979

"Raising and Spending the Public's Money: Questions of Service and Equity," Presentation to Pennsylvania Women's Legislative Exchange, March 13, 1979

"Looking for the Future," Catalyst for Change, Spring 1978

"Work--Not School--Comes First," Presentation to Occupation Research and Information Symposium, October 15, 1976; subsequently published in Research and Information on Employment and Training, edited by Stephen J. Franchack, Harrisburg: Pennsylvania Department of Education, 1977

"On Rediscovering America," Community College Frontiers, Spring 1976

"The Courts: The Great Change Agent in Education," Presentation to Pennsylvania Administrators Conference, July 1-2, 1975

With Daniel J. Doyle, "Community Colleges and Class Consciousness," Community College Frontiers, Spring 1975

"The Watergate Conspirators All Studied Civics: Implications for Honest Teaching," Presentation to Marathon '74 Conference, University of Massachusetts, January 23, 1974

"Where Are We Going? How Do We Get There?," Presentation to Pennsylvania Intermediate Unit Conference, March 1973

"Separation in Education," Community College Frontiers, Spring 1973

"Can You Call it a University if It's on Strike? Or, is It One if It's Not?: Reflections on the Disruption of 'Normal Activities,' May 1970," The Helderberg Review, Fall 1970

"The Benefits to Society of University Research," Albany: State University of New York, Chancellor's Panel on University Purposes, 1970 (monograph)

HONORS:

Mayor's Award for Distinguished Public Service (Harrisburg, Pennsylvania) (2005)

Speech Communication Association of Pennsylvania Speaker of the Year Award (1993)

Pennsylvania State Modern Language Association Merit Award (1993)

Pennsylvania Association of School Social Work Personnel Special Recognition (1993)

Elected to Phi Delta Kappa (1985)

Elected to Century Club (Pennsylvania school administrators) (1982)

State University of New York Research Foundation Fellowship (1970)

Elected to Pi Sigma Alpha (1970)

State University of New York Assistantship (1969-70)

Elected to Pi Delta Epsilon (1969)

Dean's List, Bucknell University (three semesters)

CERTIFICATION:

Pennsylvania School District Superintendent Letter of Eligibility (issued 1980)

Pennsylvania Assistant Superintendent Letter of Eligibility (issued 1978)

Pennsylvania Intermediate Unit Executive Director Letter of Eligibility (issued 1978)

AFFILIATIONS:

American Education Finance Association

American Educational Research Association

American Political Science Association

American Studies Association

Association for Supervision and Curriculum Development

Business Coalition for Education Reform

National Association of State Boards of Education

National Conference of State Legislatures

Pennsylvania Association of School Administrators

Pennsylvania School Boards Association

Policy Studies Organization

Mark L. Fermanich, Ph.D

EDUCATION

University of Wisconsin - Madison, WI August 2003

Ph.D.: Educational Leadership and Policy Analysis

University of Wisconsin - Madison, WI May 1982

Master of Arts: Public Administration

University of Wisconsin - Oshkosh, WI June 1979

Bachelor of Science: Political Science

Graduated Cum Laude

FELLOWSHIPS AND HONORS

Spencer Fellow – Doctoral Research Program 1999-2002

Phi Beta Kappa Honor Society in Social Sciences

TEACHING/RESEARCH EXPERIENCE

Research Associate, Center for Education Policy Analysis October 2009 to Present

University of Colorado- Denver, Denver, Colorado

Conduct policy research and evaluation in areas of education policy, finance and reform.

Manage and conduct small- to large-scale research and evaluation projects. Advise and provide technical assistance to state and local education policymakers. Teach core graduate classes in the School of Public Affairs.

Research Director, Colorado Children's Campaign July 2007 to April 2009

Denver, Colorado

Formulated, conducted and directed policy research and analysis on education, health care and early childhood issues for nonprofit policy research and advocacy organization. Directed the use of data and research to shape and guide the organization's policy agenda and proposals within the Colorado state context. The work involved extensive collaboration with policy actors, including foundations, higher education institutions and state and local policymakers.

Associate Professor, Sonoma State University

January 2004 to July 2007

Rohnert Park, California

Taught graduate courses in the areas of education policy, politics, finance, and leadership for the Department of Educational Leadership and Special Education and for the Capital Area North Doctorate in Educational Leadership Program at the University of California Davis. Other responsibilities included supervising educational administration interns in school placements, serving on Masters and Doctoral committees, and engaging in scholarship and service activities.

Courses: Educational Policy and Politics, Formulating and Influencing Policy (joint doctoral program at the University of California Davis), Educational Leadership and School Management, Research Paradigms in Education, Introduction to Advanced Educational Problems Seminar, Advanced Educational Problems Seminar, and Leadership with Diverse Populations.

Assistant Researcher, Consortium for Policy Research In Education

Oct. 1998 to Dec. 2003

University of Wisconsin, Madison, Wisconsin

Conducted policy research in areas of education finance and reform with particular focus on spending for school and instructional improvement, professional development, resource reallocation, school-based budgeting, decentralization, and finance equity and adequacy.

RELATED PROFESSIONAL EXPERIENCE

Compensatory Education Coordinator , St. Paul Public Schools

Oct. 1997 to Sept. 1998

St. Paul, Minnesota

Coordinated all activities pertaining to district and site-based compensatory programs for disadvantaged and at-risk students; reviewed and approved expenditures for \$40 million compensatory education program; assisted school sites with budget, administration, best practice, and program implementation issues; assumed leadership role in district site-based management initiative; and provided troubleshooting in areas of budget and state policy.

Manager, Intergovernmental Relations, Minneapolis Public Schools

Dec. 1995 to Oct. 1997

Minneapolis, Minnesota

Managed the district's intergovernmental relations in support of its policies and strategic direction; served as district liaison with the legislature, state executive branch, and other state and local government agencies; identified and analyzed key policy issues and assisted district in formulating initiatives and actions; developed and nurtured intergovernmental collaborations

with state, county and city governments; and rovided School Board and district administration with interpretation and analysis of local, state and federal legislation.

Legislative Analyst, Senate Counsel And Research

Sept. 1990 to Dec. 1995

St. Paul, Minnesota

Served as nonpartisan staff for state senate K-12 Education Committee providing analytical, technical and legal staff support; researched salient policy issues, formulated proposals and drafted legislation; performed fiscal analysis of legislative proposals and projected state and local costs; and extensive work in areas of finance, special education, early childhood education, teacher preparation, and school-social services collaboration.

Finance Manager, American International School Of Rotterdam

August 1989 to July 1990

Rotterdam, The Netherlands

Managed all business affairs for this K-8 elementary school with a budget of \$1.5 million.

Information Center Analyst, Intertechnologies Group

November 1988 to May 1989

St. Paul, Minnesota

Primary support person within state government for SAS statistical software.

Research Analyst, Minnesota Department of Revenue

Oct. 1983 to Nov. 1988

St. Paul, Minnesota

Provided analysis in the areas of state and local tax policy and finance; lead worker on large-scale research projects; programmed and maintained statewide property tax model for projecting state-paid aids and credits; and representative on Governor's Property Tax and Agricultural Taxes policy teams.

RESEARCH INTERESTS

My research focuses on school effectiveness and reform, particularly in regard to developing district and school leadership capacity for school improvement and the effective use of district and school resources.

PROFESSIONAL ACTIVITIES

Refereed Publications

Odden, A. R., Borman, G. & Fermanich, M. L. (2004). A framework for assessing teacher, classroom and school effects, including fiscal effects. *Peabody Journal of Education*, 79(4), 4-32.

Miles, K. H., Odden, A. R., Fermanich, M. L., & Archibald, S. (2004). Inside the black box of school district spending on professional development: Lessons from five urban districts. *Journal of Education Finance*, 30(1), 1-26.

Picus, L.O., Odden, A. R. & Fermanich, M. L. (2004). Assessing the equity of Kentucky's SEEK formula: A ten-year analysis. *Journal of Education Finance*, 29(4), 315-336.

Odden, A. R., Archibald, S., Fermanich, M. L., & Gross, B. (2003). Defining school-level expenditure structures that reflect educational strategies. *Journal of Education Finance*, 28(3), 323-356.

Fermanich, M. L. (2002). School spending for professional development: A cross-case analysis of seven schools in one urban district. *The Elementary School Journal*, 103(1), 27-50.

Fermanich, M. L. & Kimball, S. M. (2002). You can get there from here: How three urban schools could use existing resources to afford comprehensive school reform. *Journal of Education Finance*, 28(1), 75-96.

Odden, A. R., Archibald, S., Fermanich, M. L., & Gallagher, H. A. (2002). A cost framework for professional development. *Journal of Education Finance*, 28(1), 51-74.

Odden, A. R., Archibald, S., Fermanich, M. L., & Gallagher, H. A. (2002). How to figure the cost of professional development. *Journal of Staff Development*, 23(2), 53-58.

BOOK CHAPTERS

Odden, A. R., Archibald, S. & Fermanich, M. L. (2003). Rethinking the finance system for improved student achievement. In W. L. Boyd & D. Miretzky (Eds.), *American educational governance on trial: Change and challenge (102nd Yearbook of the National Society for the Study of Education)*. Chicago: The University of Chicago Press.

OTHER PUBLICATIONS AND TECHNICAL REPORTS

Fermanich, M. L. (2010). *Money for music: Exploring the costs and benefits of music programs in Mountain View School District*. Carlsbad, CA: NAMM Foundation.

Fermanich, M. L. & Hupfeld, K. (2009). *Student-centered funding and its implications for Colorado: A primer for policy makers*. Denver, CO: Donnell-Kay Foundation and University of Colorado Denver, Center for Education Policy Analysis.

Harris, C., Clemons, T., Williams, J., & Fermanich, M. (2009). *Greater Louisville Education Project Report*. Denver, CO: McREL.

Fermanich, M. L. (2007). *They Are All Our Kids: Examining resources for supporting CALSTAT leadership site models*. Rohnert Park, CA: California Institute on Human Services.

Fermanich, M. L. (2006). Is the 65% solution THE solution? *School Business Affairs*, 72(2), 29.

Fermanich, M., Picus, L. O. & Odden, A. (2006). *Washington Learns: Successful district study final report*. North Hollywood, CA: Lawrence O. Picus and Associates.

Odden, A., Picus, L. O., Goetz, M., & Fermanich, M. (2006). *An evidence-based approach to school finance adequacy in Washington*. North Hollywood, CA: Lawrence O. Picus and Associates.

Odden, A., Picus, L. O., Goetz, M., Fermanich, M., Seder, R. C., Glenn, W., & Nelli, R. (2006). *An evidence-based approach to recalibrating Wyoming's block grant school funding formula*. North Hollywood, CA: Lawrence O. Picus and Associates.

Odden, A., Picus, L. O., Fermanich, M., & Goetz, M. (2004). *An evidence-based approach to school finance adequacy in Arizona*. North Hollywood, CA: Lawrence O. Picus and Associates.

Odden, A., Picus, L. O. & Fermanich, M. (2003). *An evidence-based approach to school finance adequacy in Arkansas*. North Hollywood, CA: Lawrence O. Picus and Associates.

Odden, A., Fermanich, M. & Picus, L. O. (2003). *A state-of-the-art approach to school finance adequacy in Kentucky*. North Hollywood, CA: Lawrence O. Picus and Associates.

Picus, L. O., Odden, A. & Fermanich, M. (2003). *A professional judgment approach to school finance adequacy in Kentucky*. North Hollywood, CA: Lawrence O. Picus and Associates.

Miles, K. H., Hornbeck, M. & Fermanich, M. L. (2002). *Chicago Public Schools: Professional development project*. Chicago, IL: The Chicago Public Education Fund.

Picus, L. O., Odden, A. & Fermanich, M. (2001). *Assessing the equity of Kentucky's SEEK formula: A ten-year analysis*. North Hollywood, CA: Lawrence O. Picus and Associates.

PROFESSIONAL PAPERS AND PRESENTATIONS

Fermanich, M. L. (2010, March). *Tight budgets and money for music education: A district analysis*. Paper presented at the 35th Annual Conference of the American Education Finance Association, Richmond, VA.

Fermanich, M. L. (2009, March). *School finance in Colorado: State and local effects of the Gordian knot*. Paper presented at the 34th Annual Conference of the American Education Finance Association, Nashville, TN.

Fermanich, M. L. (2005, October). *Effective use of fiscal and other resources*. Presentation for the National Forum on Comprehensive School Reform, Portland, Oregon.

Fermanich, M. L. (2005, March). *Expert judgment or evidence-based approach*. Presented at the preconference workshop entitled *Alternative approaches to measuring adequacy in K-12 school finance: A comparison*, at the 30th Annual Conference of the American Education Finance Association, Louisville, KY.

Fermanich, M. L. (2005, February). *School finance 101*. Conference workshop presented at the annual school finance forum of the National Conference of State Legislatures, Napa, CA.

Fermanich, M. L. (2004, March). *Improving investments in professional development: Lessons from 5 districts*. Paper presented at the 29th Annual Conference of the American Education Finance Association, Salt Lake City, UT.

Fermanich, M. L. (2003, November). *Teacher, school and fiscal effects on student achievement in Minneapolis Public Schools*. Paper presented at the 4th Annual Teacher Compensation Conference of the Consortium for Policy Research in Education, Chicago, IL.

Fermanich, M. L. (2003, April). *An exploratory application of a multilevel model of teacher, school and fiscal effects on student achievement in Minneapolis Public Schools*. Paper presented at the 2003 Annual Meeting of the American Educational Research Association, Chicago, IL.

Fermanich, M. L. (2003, March). *Teacher, school and fiscal effects on student achievement in Minneapolis Public Schools*. Paper presented at the 28th Annual Conference of the American Education Finance Association, Orlando, FL.

Fermanich, M. L. (2003, February). *An analysis of professional development spending in the Minneapolis Public Schools*. The MacArthur Foundation, Chicago, IL.

Fermanich, M. L. (2002, November). *The effect of school resources on instructional practices and student outcomes: Does money matter redux*. Paper presented at the 3rd Annual Teacher Compensation Conference of the Consortium for Policy Research in Education, Chicago, IL.

Fermanich, M. L. (2002, July). *Defining school-level expenditure structures that reflect instructional strategies*. Paper presented at the annual National Center for Education Statistics Summer Data Conference, Washington, DC.

Fermanich, M. L. (2002, June). *School-level professional development expenditures in the Chicago Public Schools*. The Chicago Public Education Fund, Chicago, IL.

Odden, A. R., Archibald, S., Fermanich, M. L., & Gross, B. (2002, March). *Defining school-level expenditure structures that reflect educational strategies*. Paper presented at the 27th Annual Conference of the American Education Finance Association, Albuquerque, NM.

Fermanich, M. L. & Gallagher, H. A. (2001, March). *Case studies on the cost of effective professional development at the school level*. Paper presented at the 26th Annual Conference of the American Education Finance Association, Cincinnati, OH.

Fermanich, M. L., Odden, A. R. & Archibald, S. (2000, March). *A case study of district decentralization and site-based budgeting: Cordell Place School District*. Paper presented at the 25th Annual Conference of the American Education Finance Association, Austin, TX.

GRANT AWARDS

Fiscal study of CalSTAT leadership sites (2006). California Institute on Human Services. \$11,113.

A K-12 funding analysis for Washington State (2005-2006). State of Washington, Office of Financial Management and Picus and Associates. \$17,601.

Small schools in the Bay Area: An investigation of the challenges they face and strategies for improvement (2005). Sonoma State University, School of Education Seed Grant. \$2,500.

CONSULTING

Center for Education Policy Analysis, University of Colorado Denver 2009

Study of Colorado education finance reform policies

Center for Education Policy Analysis, University of Colorado Denver 2009

Study of the costs and benefits of K-12 music education programs in the
Jefferson County (CO) Public Schools

Mid-continent Research for Education and Learning (McREL) 2008-2009

& Jefferson County (KY) Public Schools

Fiscal analysis for the Greater Louisville Education Project

Napa County Office of Education/CalSTAT 2008-Present

Study of resource-use changes in schools implementing RTI

SRI International 2007

Study of the costs of standards-based arts education programs

State of Wyoming 2005-2006

Recalibration study of state school finance model with Picus & Associates

National Conference of State Legislatures 2004-2005

Provided school finance policy support

University of Texas/National Center for Educational Accountability 2004-2005

Study of the costs of effective school practices

Rodel Foundation 2003-2004

School finance adequacy study for the State of Arizona with Picus & Associates

State of Arkansas 2003

School finance adequacy study and recommendation for state school funding formula with Picus & Associates

State of Kentucky 2002-2003

School finance adequacy study with Picus & Associates

Minneapolis Public Schools 2002-2003

District- and school- level professional development expenditure study

The Chicago Public Education Fund 2002

School-level professional development study of Chicago Public Schools

State of Kentucky 2001

School finance equity study with Picus & Associates

Germantown School District 2001

Designed school-based budgeting system.

St. Paul Public Schools 1998-2001

Designed school-based budgeting system.

PROFESSIONAL ASSOCIATIONS

American Educational Research Association 2001-Present

American Education Finance Association 2000-Present

Association of School Business Officials International	2002-Present
Association for Supervision and Curriculum Development	2003-Present
National Society for the Study of Education	2003-2009

PROFESSIONAL SERVICE

Secretary, Fiscal Issues, Policy and Education Finance Special Interest Group of the American Educational Research Association (2009-Present).

Member of the Editorial Advisory Board for the *Journal of Education Finance* (2005-2008)

Manuscript reviewer: *Policy Studies Journal* (2010), *Educational Evaluation and Policy Analysis* (2004-2006), *Journal of Education Finance* (2005, 2006), *National Association of Secondary School Principals Bulletin* (2004), *Urban Education* (2003)

Conference proposal reviewer, American Educational Research Association, Division L (2005-2007)

UNIVERSITY SERVICE

Chair, Academic Advising Subcommittee (2006-2007, member since 2004)

Member, Student Affairs Committee (2004-2007, Chair-elect 2008)

Member, Vice President's Budget Advisory Committee (2004-2007)

Member, School of Education Accreditation and Assessment Committee (2006-2007)

Member, School of Education Curriculum Library Committee (2004-2007)

Member, School of Education Recruitment Task Force (2005-2006)

EXPERTISE

Experience and expertise in education policy, education reform, education finance, school budgeting, school-level resource use, costs of effective professional development, quantitative and qualitative research methods, and database and statistical analysis software (including Excel, Access, FileMaker Pro, SPSS, SAS, HLM).