

## Report of the Proposal Review Committee to the Commission to Study School funding

May 11, 2020

Review Committee Members: Dave Luneau, Jay Kahn, Mel Myler, Chris Dwyer (abstained from voting), Dick Ames, Rick Ladd

The Request for Proposals (RFP) was released on March 19, 2020. Proposals were received on April 24, 2020. The RFP yielded two applications from nationally recognized research firms--American Institutes for Research (AIR) and Augenblick, Palaich and Associates with WestEd (APA/WestEd). Interviews were conducted with principal teams from both firms on May 1, 2020. Reference checks were conducted on May 5 and 6 via zoom by Rep. Luneau and Dr. Mallory with three clients identified by each firm. The review committee met via zoom on May 8 to discuss the two proposals and develop its recommendation to the full Commission.

Both proposals were strong and comparable in terms of costs and qualifications. Both firms demonstrated the ability to conduct the requested work in the time allotted. Following review of the proposals, interviews, and reference checks, the review team determined that AIR would be the best choice for carrying out the work as described in the RFP.

AIR has a strong, tight team that has demonstrated deep understanding of school funding in states with challenges similar to those in New Hampshire. AIR is committed to getting the work done in a compressed time frame; it demonstrates a rigorous approach to research of high integrity; and it has a strong track record of demonstrated ability to produce materials useful to legislators and other stakeholders and interact effectively with the legislative process. AIR's strengths align well with where our emphasis needs to be relative to our constrained time frame. Their work plan shows the ability to complete tasks with available resources in the time allotted and a willingness to work closely with the Commission after the submission of its report at the end of August.

For these reasons, the review team recommends the Commission enter into contract negotiations with AIR.

### Bios of the AIR principal investigators



**Jesse Levin**, proposed principal investigator and principal research economist at AIR, has directed projects investigating school finance equity and adequacy, resource allocation, and educational effectiveness. Dr. Levin recently conducted studies of the cost of providing an adequate education to students attending K–12 public schools in both Vermont and California, respectively, and a study comparing spending in California charter and traditional schools. In addition, he previously directed a study comparing charter and traditional school funding in Maryland, as well as other high-profile educational adequacy studies in New Mexico and New York; investigations of educator supply and demand in Oklahoma and Massachusetts; evaluations of state school finance systems in Hawaii, Nevada, and Pennsylvania; and studies of educational resource allocation and effectiveness, both within and across school districts. His work at AIR over the past 18 years has drawn upon his expertise in applied econometrics and quantitative methods. Prior to his work at AIR, Dr. Levin served as an economics researcher for the Institute for Research of Schooling, Labor Market and Economic Development (SCHOLAR) in the Netherlands, where he conducted research on the economics of education and labor economics, and performed major countrywide studies of the efficacy of class-size reduction, the differences in the effectiveness of private versus public schooling, and the measurement of the rate of return to educational investment. Dr. Levin earned his Ph.D. from the University of Amsterdam and Tinbergen Institute in the Netherlands in 2002.

Dr. Levin is an appointed member of the California Practitioners Advisory Group, which advises the California State Board of Education, and currently serves as school board president in his local school district in Pacifica, California. His articles on the economics of education and school finance have appeared in *Economics of Education Review*, *Empirical Economics*, *Labour Economics*, *Oxford Bulletin of Economics and Statistics*, and *Peabody Journal of Education*. He also regularly serves as a referee for several peer-reviewed journals (*Economics of Education Review*, *Education Finance and Policy*, *Educational Policy*, *Empirical Economics*, and *Journal of Research on Educational Effectiveness*).

**Drew Atchison**, proposed project director and state cost function model lead, is a senior researcher at AIR where he regularly leads high-profile quantitative projects examining topics such as education finance, educational equity, and accountability. Dr. Atchison has led the quantitative analysis examining state education funding policies and practices in Vermont, California, and Maryland. He also has led the quantitative analysis for several national studies examining issues of education finance, including a study of district weighted student funding policies. In his role as lead quantitative analyst, Dr. Atchison has conducted analyses examining the adequacy and equity of education funding. These analyses have involved collecting and compiling detailed school- and district-level fiscal data, modeling the equity and adequacy of spending across schools and districts, and recommending policy changes intended to reduce disparities in educational opportunity. For his dissertation research examining educational equity of inputs- and outcomes-related accountability and school finance reform policies, Dr. Atchison was awarded the Jean Flanigan Outstanding Dissertation Award from the Association of Education Finance and Policy. Dr. Atchison has published articles in top education research journals, including the *Journal of Research on*

*Educational Effectiveness, Education Finance and Policy, and Education Policy Analysis Archives*. Dr. Atchison completed his doctoral degree in education policy from the George Washington University in 2017.

**Bruce Baker**, proposed national and regional cost function analysis lead, is a professor in the Graduate School of Education at Rutgers University in New Brunswick, New Jersey. He was previously (1997–2008) a professor at the University of Kansas in Lawrence. His work focuses on school finance, the economics of education, and teacher labor markets. He is the lead researcher, in collaboration with Mark Weber and Matt Di Carlo, on the School Finance Indicators Database ([www.schoolfinancedata.org](http://www.schoolfinancedata.org)) and author of *Educational Inequality and School Finance: Why Money Matters for America's Students*. He has consulted for state governments, most recently in Vermont and Maryland, and served as an expert witness in litigation over the equity and adequacy of financing for public schools in Arizona, Colorado, Connecticut, Kansas, Missouri, New Jersey, New York, and Texas.

**Tammy Kolbe**, proposed comparative funding systems analysis lead, is an associate professor of educational leadership and policy studies at the University of Vermont. Her research and consulting work focus on how state and local education agencies allocate resources to improve student learning, and the cost-effectiveness of PK–16 education policies and programs. She frequently works with states on issues related to general and special education funding and policy, and has been an expert witness in state-level school finance court cases. She was project lead for the *Study of Vermont State Funding for Special Education*, and, more recently, the *Study of Pupil Weights in Vermont's Education Funding Formula*. Dr. Kolbe's interests also include strategic finance in higher education and state-level policy reform for community college funding. Her book, *From Mission to Market: Strategic Finance in Higher Education* (with R. Staisloff & M. Anguiano, Johns Hopkins Press), will be in print in fall 2020. Previously, Dr. Kolbe worked as a professional evaluator at two large research consulting firms, and was a fiscal policy analyst in state budget offices. She received her master's degree in policy analysis and evaluation from the Pennsylvania State University, earned her doctoral degree in educational leadership and policy from the University of Vermont, and was a U.S. Department of Education/Institute of Education Sciences postdoctoral research fellow (at the University of Maryland). She currently serves on the editorial board for the *Journal of Education Finance*, and is the immediate past chair of the AERA's Finance, Economics, and Policy Group. In 2018, she received AERA's award for the best education policy report in the United States for her work on Vermont's special education funding reform.

**Caitlin Kearns**, proposed quantitative analyst, is a researcher at AIR with 10 years of experience in quantitative data analysis and 4 years of experience evaluating K–12 education policies. At AIR, Ms. Kearns has conducted quantitative analysis of survey data for a study of weighted student funding. Her current research uses quasi-experimental methods to examine the effects of school finance and school-choice policies on low-income populations. These include estimates of the home price and neighborhood income effects of school finance reforms, as well as evaluations of pilot high schools and localized school choice in Los Angeles Unified School

District. Previously, Ms. Kearns worked as a graduate student researcher at the UC Berkeley Institute of Human Development, the Petris Center for Health Care Markets and Consumer Welfare, and the Haas School of Business. Prior to beginning her doctoral studies, Ms. Kearns worked as a senior associate economist at the Federal Reserve Bank of Chicago, conducting quantitative evaluations of consumer finance and mortgage programs.

**Jay Chambers**, proposed quality assurance officer, is a senior research fellow and nationally recognized expert in school finance and education cost analysis. Dr. Chambers has conducted numerous resource allocation and cost studies for the U.S. Department of Education, performed analyses of school finance adequacy and equity for state education agencies and legislatures, and worked on studies of resource allocation for and with local school districts. Dr. Chambers also served in 2002 on the President's Commission on Excellence in Special Education (under President Bush), has testified before Congress and state legislatures on issues related to school funding, and has served as the president of the American Education Finance Association (now known as the Association of Education Finance and Policy). His most recent work was directed toward developing tools and processes for improving school finance and governance in local education agencies.