



UNIVERSITY OF WISCONSIN-MADISON
DEPARTMENT OF EDUCATIONAL ADMINISTRATION
CONSORTIUM FOR POLICY RESEARCH IN EDUCATION

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ELPA 830 - Financing Elementary and Secondary Education Fall Semester 2007

Monday, 7:15-9:45 p.m., 1161 Ed Sciences

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Office Hours: Monday 6:00-7:00 p.m or by appointment; 653B Ed Sciences

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Required Texts

Allan Odden and Lawrence O. Picus. (2008). School Finance: A Policy Perspective, Fourth Edition, New York: McGraw Hill.

Allan Odden and Sarah Archibald. (2001). Reallocating Resources: How to Boost Student Achievement Without Asking For More. Thousand Oaks, CA: Corwin Press.

Other course materials are available on the course page at Learn at UW unless otherwise marked as available online or with (MyUW) in the syllabus, meaning the item is a CIMC electronic reserve. Class Listserve: elpa830-1-f07@lists.wisc.edu

Other information sources on school finance:

Education Commission of the States Web site: www.ecs.org

National Center for Educational Statistics: Web Site: <http://nces.ed.gov/edfin/>

CPRE Web site: www.wcer.wisc.edu/cpre/

Requirements (More information to follow on all these assignments.)

1. Classroom participation: Co-lead a classroom exercise (once during the semester) based on a reading or readings in a week of your choosing (15% of grade).
2. Complete Problems 4, 5 and 6 in Chapter 9 in Odden and Picus. For each problem, include a summary table for the simulations that you analyze. Problems due **October 22** (20% of grade).
3. Short assignment using a district resource allocation modeler to familiarize you with the district budgeting process. Assignment due **November 19** (20% of grade).
4. One 15-20 page paper describing resource use in a local school together with a proposal on resource reallocation to fund the Odden-Picus adequacy model. Address obstacles and other implementation problems. Paper due **December 17** (45% of grade).

Course Objectives

1. To become familiar with the school finance system in Wisconsin.
2. To understand equity and adequacy issues related to education finance and how to design school finance policies to improve equity and adequacy at the state and district level.
3. To understand current resource use patterns in education and how to reallocate resources to better uses at the school level – and in ways that produce higher levels of student achievement.
4. To become more comfortable using data to examine alternative state school finance structures, their costs, impacts on different types of local school districts, and relationship to education reform.

COURSE OUTLINE: ELPA 830 - Financing Elementary and Secondary Education

I. INTRODUCTION: THE SCOPE OF PUBLIC EDUCATION, THE PROBLEM OF SCHOOL FINANCE, AND SCHOOL FINANCE ADEQUACY

1. September 10 - School Finance Overview

Purpose: To introduce the major school finance concepts we will be working with this semester, especially school finance adequacy.

Odden and Picus, Chapter 1.

Allan Odden. (2001). The New School Finance. *Phi Delta Kappan*, 83(1), 85-91.

Allan Odden, Lawrence Picus, Sarah Archibald, Michael Goetz, Michelle Turner Mangan and Anabel Aportela (2007). *Moving From Good to Great in Wisconsin: Funding Schools Adequately and Doubling Student Performance*, pp. 1-11.

II. SCHOOL FINANCE EQUITY AND ADEQUACY

2. September 17 – School Finance Litigation: From Equity to Adequacy

Purpose: To provide the context for school finance equity and adequacy by learning about school finance court cases.

Odden and Picus, Chapter 2. For updates of school finance court cases, see http://highered.mcgraw-hill.com/sites/0073525928/student_view0/.

Access. (Fall 2004). *Adequacy Lawsuits: A Mounting Debate, Pro and Con*. A Project of the Campaign for Fiscal Equity. New York. (MyUW).

Vincent v. Voight, 1997 -- Wisconsin Supreme Court school finance court decision. (MyUW).

San Antonio Independent School District vs. Rodriguez decision. Available online <http://www.brownat50.org/brownCases/PostBrownCases/SanAntoniovRogrigez1973.html>.

3. September 24 -- A Framework for School Finance: From Equity to Adequacy

Group presentation #1

Purpose: Establish a working vocabulary of equity and adequacy terms to use throughout the semester.

Odden and Picus, Chapter 3.

Allan Odden. (2003). Equity and Adequacy in School Finance. *Phi Delta Kappan*, 85(2).

Sarah Archibald and Allan Odden. (2005). *A Summary of Previous Research in Wisconsin on School Finance Adequacy*. Madison: University of Wisconsin,

Wisconsin Center for Education Research, Consortium for Policy Research in Education.

4. October 1 – What is an Adequate Level of Resources?

Group presentation #2

Purpose: Present the Evidence-Based Adequacy Model applied to Wisconsin.

Guest lecturer: Anabel Aportela

Odden and Picus, Chapter 4, especially pp. 131-149, which is not duplicated in the task force report.

Hanushek, Eric. Check the Facts: The Confidence Men. *Education Next*, Summer 2007. Available online:

<http://www.hoover.org/publications/ednext/7560457.html>

Odden and Picus (2007). School Finance Adequacy at a Crossroads. *Education Week*, 8/15/07. (MyUW).

Allan Odden, Lawrence Picus, Sarah Archibald, Michael Goetz, Michelle Turner Mangan and Anabel Aportela (2007). *Moving From Good to Great in Wisconsin: Funding Schools Adequately and Doubling Student Performance*, p. 47-134.

5. October 8 – Establishing a Vision of Good Instruction and Allocating Resources to that Vision

Group presentation #3

Purpose: Equip students with the knowledge that having a vision of good instruction is essential to the task of any school improvement effort, including the implementation of evidence-based adequacy.

Video Clips of Doubling Performance conference (Elmont & Kennewick).

Read the cases in Appendix C of the Washington Successful Districts study (http://www.washingtonlearns.wa.gov/materials/SuccessfulDistReport9-11-06Final_000.pdf) and at the beginning of the Wisconsin adequacy report (p. 12-46).

Newmann, Smith, Allensworth & Bryk (2001). *School Instructional Program Coherence: Benefits and Challenges*. Consortium on Chicago School Research.

Karen Miles and Stephen Frank. (Forthcoming). *Strategic Designs*. (Not Available yet.)

III. ADEQUATE RESOURCES FROM THE STATE PERSPECTIVE: CHALLENGES INVOLVED IN FUNDING EDUCATION TODAY.

6. October 15 – State School Finance Simulations – Bring your laptop

Purpose: Introduce students to the state school finance simulations and illustrate their value in learning about equity and adequacy tradeoffs.

Guest Lecturer: Michael Goetz

Odden & Picus, Chapter 9.

Please bring your laptop computer to class, with the 20 district simulation downloaded on it. We will show you how to use or download the 20 district and state simulations from the McGraw Hill Web site:

http://highered.mcgraw-hill.com/sites/0073525928/student_view0/.

7. October 22 – The Wisconsin School Finance System Today

PROBLEMS DUE

Purpose: Expose students to a Wisconsin school finance expert and enable them to learn about current school finance issues in this state.

Guest Lecturer: Brian Pahnke, Assistant State Superintendent, DPI

Odden and Picus, Chapter 5.

Three-part WI State Journal Article by Andy Hall: 1) Schools Feel Pain, 2) A New System? And 3) Squeezing schools. (MyUW).

Kava and Olin. (2003). Local Government Expenditure and Revenue Limits. Wisconsin Legislative Fiscal Bureau. (MyUW).

Reschovsky. School Finance in Wisconsin – A Policy Primer. (MyUW).

8. October 29 – State School Finance Systems

Group presentation #4

Purpose: Continue to learn about how different school finance systems can alleviate inequities in state school finance.

Odden and Picus, Chapter 11.

Picus, Odden and Fermanich. (2004). Assessing the Equity of Kentucky's SEEK Formula: A Ten-Year Analysis. Journal of Education Finance. 29(4), 315-336. (My UW).

You can also visit www.ecs.org for information on other states.

IV. THE DISTRICT PERSPECTIVE: PROVIDING ADEQUATE DOLLARS TO SCHOOLS

9. November 5 – District Budgeting

Purpose: Learn how districts allocate resources to schools.

Guest Lecturers: Jason Olson and Chris Murphy, Verona School District, 7:15-8:30 pm

Odden and Picus, Chapter 8.

Background Information on Verona School District.

Fund the Child. 2006. Report from the Fordham Foundation. Available online: <http://www.100percentsolution.org/fundthechild/FundtheChild062706.pdf>.

10. November 12 -- Resource Allocation: How Are Education Dollars Currently Spent? – Bring your laptop

Purpose: Discuss the allocation of resources for education and introduce students to District REsource Allocation Modeler (<http://www.erstools.org/mydream/>).

Odden and Picus, Chapter 6.

Tim Schell. (2006). Use of Resources in a Sample of Wisconsin Districts.

Miles and Frank. (2007). District Resource Allocation Modeler (DREAM): A Web-Based Tool Supporting the Strategic Use of Resources.

11. November 19 –Resource Reallocation at the District Level: How Dollars Could Be Spent More Effectively

DREAM Assignment Due

Group presentation #5

Purpose: Learn how districts can reallocate their resources to fund

strategies that improve the quality of instruction in schools.

Odden and Picus, Chapter 7.

Allan Odden and Sarah Archibald. (2001). Committing to Class-Size Reduction and Finding the Resources to Implement It: A Case Study of Resource Reallocation in Kenosha, Wisconsin. Education Policy Analysis Archives. 9(30). (MyUW).

V. THE SCHOOL PERSPECTIVE: USING ADEQUATE DOLLARS EFFECTIVELY

12. November 26 – Resource Reallocation at the school level – Bring Your Laptop

Purpose: Learn how schools can reallocate resources to implement strategies that improve the quality of the instruction they provide.

Odden and Archibald, entire book

Familiarize yourself with the school finance redesign report on the CPRE website: <http://cpre.wceruw.org/finance/reports.php>.

Allan Odden, Sarah Archibald and Anita Tychsen. (1999). Farnham Elementary School: A Case Study of Resource Reallocation. Madison: University of Wisconsin, Wisconsin Center for Education Research, Consortium for Policy Research in Education. (MyUW).

13. December 3 – Recruiting, Retaining and Training Schools' Most Essential Ingredient: High-Quality Teachers

Group presentation #6

Purpose: Equip students with tools for the recruitment, retention and training of high quality teachers, as well as the costs associated with that effort.

Odden and Picus, Chapter 12.

Odden, Archibald, Fermanich and Gallagher. (2002). A Cost Framework for Professional Development. *Journal of Education Finance*, 28, 1, pp. 51-74.

Archibald and Gallagher. Elm Street School: A Case Study of Professional Development Expenditures. Available online:

<http://epaa.asu.edu/epaa/v10n28.html>.

VI. COURSE CONCLUSION

14. December 10 – Summary Discussion of School Finance Issues

Purpose: Engage the whole class in a substantive discussion of important school finance issues at the state, district and school level and answer any questions related to the final paper.

Liu. (2006). Interstate Inequality in Educational Opportunity. Available Online: <http://www3.law.nyu.edu/journals/lawreview/issues/vol81/no6/NYU603.pdf>.

15. December 17 – NO CLASS – Final Paper Due by 7pm