

University of Wisconsin-Madison
Department of Educational Leadership and Policy Analysis
ELPA 830: Financing Elementary and Secondary Education

Fall 2008
Wednesdays, 7:15 PM - 9:45 PM
212 Education Sciences Building
1025 West Johnson Street, Madison, Wisconsin 53706

Instructor:

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Office Hours:

4:00-7:00 PM Wednesdays and by appointment

Course Objectives:

1. To understand equity and adequacy issues related to education finance and how to design school finance policies to improve equity and adequacy.
2. To examine alternative state school finance structures, their costs, impacts on different types of local school districts, and relationship to education reform.
3. To understand current resource use patterns in education and how to reallocate resources to better uses – and in ways that produce higher levels of student achievement.
4. To understand how to begin improving the productivity of the education dollar.
5. To become familiar with the school finance system in Wisconsin.
6. To become familiar with the research literature on school finance, and further develop conceptualization, data acquisition and data analysis skills for education policy analysis.

Course Requirements (More information to follow on these assignments):

Requirements

1. Classroom participation: You are expected to complete the assigned readings each week and visit Learn@UW to either post a question or respond to a question that I have posted for that week. When you are posting a question, it should be posted by Monday prior to class to ensure time for you to also respond to a classmate's question by Wednesday prior to class. When I post a question, you need to respond by Wednesday. During class, you will be expected to demonstrate that you have done the readings. If you need to miss class for some reason, you need to contact me in advance and post a one page (~300 words) reflection on the readings for the class you miss to Learn at UW by one week from that class to receive credit. Illness or family emergencies will not count as absences.

----**Due weekly** via Learn@UW (<https://learnuw.wisc.edu/>) (14% of grade – 7% for Learn@UW posts and 7% for attendance/in-class participation). Grading begins the second week of class.

2. Paper #1: Complete Problems 4, 5, 6 and summary table in Chapter 9 of Odden and Picus (2008).
---**Due November 19** via email or dropbox on the 11th floor or my office (20% of grade).

3. Paper #2: 15-page paper analyzing the equity and/or adequacy of the school finance system in two states, identifying the main school finance problem(s), and suggesting a school finance reform to “fix” the issue(s) chosen. Include appropriate simulation summary tables and research citations for equity and/or adequacy numbers. **OR** a 15-page paper describing resource use in a local school, together with a proposal on resource reallocation. Identify at least 3 problems or goals in which members of an educational organization might be interested. In the past, students have found this assignment to be more relevant if they write about problems or goals that people in their current organization are actually concerned about. Examples of problems of interest to K-12 schools include closing achievement gaps, student absenteeism, and dealing with special needs students (for example special education students and English language learners). Understandably, some students do not currently work in an educational organization so will be provided data and context of a choice of schools. **OR** a 15-page paper of your choosing on a topic related to school finance. (This last choice requires you to submit a 1-page synopsis of your topic and speak with me by November 20 to discuss the topic and its relevance to school finance.)

---**Due December 15** via email (66% of grade)

Grading Scale 92-100 A, 88-91.44 AB, 82-87.44 B, 78-81.44 BC, etc...

Full Inclusion:

Students needing special accommodations to enable full participation in this course should contact me as early as possible. All information will remain confidential. You also may contact the McBurney Disability Resource Center, 905 University Ave., 263-2741 regarding questions about campus policies and services. More information can be found at: <http://www.mcburney.wisc.edu/>.

Writing Support:

Student may wish to seek assistance in their writing. Since its start as the Writing Laboratory in 1969, the Writing Center at Madison has helped literally tens of thousands of University of Wisconsin students learn more about writing and has helped them successfully complete course papers, theses, dissertations, and articles for publication — in all sorts of academic disciplines. To provide this help, they offer an extensive range of individual instruction, non-credit classes, curricular-based writing tutors and instructional materials. More information can be found at: <http://www.wisc.edu/writing/index.html>.

Required Texts/Reading

Allan Odden and Lawrence O. Picus. (2008). School Finance: A Policy Perspective (4th 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 (My UW) in the syllabus, meaning the item is a CIMC electronic reserve.

Optional Texts

Helen Ladd and Janet Hansen. (1999). Making Money Matter: Financing America's Schools. Washington, DC: National Academy Press.

Helen Ladd and Rosemary Chalk, Eds. (1999). Equity and Adequacy in School Finance. Washington, DC: National Academy Press.

Allan Odden and Carolyn Busch. (1998). Financing Schools for High Performance: Improving the Use of Educational Resources. San Francisco: Jossey Bass.

David Monk and Brian Brent. (1997). Raising Money for Education: A Guide to the Property Tax. Thousand Oaks, Ca. Corwin Press.

Gary Burtless, Ed. (1996). Does Money Matter: The Effect of School Resources on Student Achievement and Adult Success. Washington, DC: The Brookings Institution.

Jonathan Kozol. (1991). Savage Inequalities. New York: Crown Publishers.

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/>

Consortium for Policy Research in Education: Web site: www.wcer.wisc.edu/cpre/

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

1. September 3 - School Finance Overview: Introduction of Major School Finance Concepts

Odden and Picus (2008), Chapter 1.

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 of actual document, which is pages 21-32 of pdf, can be downloaded from CPRE web site:

<http://cpre.wceruw.org/finance/WI%20March%201%202007%20Adequacy%20Report1.pdf>

II. SCHOOL FINANCE EQUITY AND ADEQUACY

2. September 10 – School Finance Litigation: From Equity to Adequacy

Odden and Picus (2008), Ch. 2 **OR** Koski & Hahnel, 2008. The Past, Present, and Possible Future of Educational Finance Reform Litigation (My UW) (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.

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

Lindseth, Alfred. (2004). Adequacy Lawsuits: The Wrong Answer for our kids. Education Week, June 9 UW)

Guthrie, James and Matthew Springer (2004). Courtroom Alchemy. Education Next Vol. 7, no 1, see: <http://www.hoover.org/publications/ednext/4611792.html>

3. September 17 – A Framework for School Finance: From Equity to Adequacy

Odden and Picus (2008), Chapter 3.

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

III. IDENTIFYING ADEQUATE RESOURCES AND REALLOCATING SCHOOL FUNDS TO THOSE RESOURCES

4. September 24 – What is an Adequate Level of Resources?

Allan Odden, Lawrence O. Picus, Sarah Archibald, Michael Goetz, Anabel Aportela and Michelle Turner. (2007). *Moving From Good to Great in Wisconsin: Funding Schools Adequately and Doubling Student Performance*. Report prepared for the Wisconsin School Finance Adequacy Policy Advisory Task Force. <http://www.wcer.wisc.edu/cpre> and follow the Task Force links to the January 2007 report. (Full Report.)

And, **ONE** of the following three:

Mark Fermanich, Michelle Turner Mangan, Allan Odden, Lawrence O. Picus, Betheny Gross & Zena Rudo. (2006). Washington Learns: Successful Districts Study. Report prepared for the K12 Advisory Committee of Washington Learns.

<http://www.washingtonlearns.wa.gov/materials/SuccessfulDistReport9-11-06Final.pdf>

Jennifer Imazeki & Andrew Reshovsky. (July 2004). Estimating the costs of meeting the Texas educational accountability Standards. Report for the plaintiffs in West Orange-Cove v. Neeley.

James Guthrie, et al. (1997). A Proposed Cost-Based Block Grant Model for Wyoming School Finance. Davis, CA: Management Analysis and Planning Associates, LLC. Available online at: <http://legisweb.state.wy.us/school/cost/apr7/apr7.htm>

5. October 1 – Resource Allocation: How Are Education Dollars Currently Spent?

Odden and Picus (2008), Chapter 6.

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

Karen Hawley Miles. (1995). Freeing Resources for Improving Schools: A Case Study of Teacher Allocation in Boston Public Schools. Educational Evaluation and Policy Analysis, 17(4), 476-493.

Amy Schwartz. (1999). School Districts and Spending in the Schools. In William Fowler, Jr., Ed. Selected Papers in School Finance 1997-1999. Washington, DC: National Center for Education Statistics. Available online at: <http://nces.ed.gov/pubs99/1999334/text3.html>

David Monk and S. Hussain. (2000). Structural Influences on the Internal Allocation of School District Resources: Evidence from New York State. Educational Evaluation and Policy Analysis, 22(1), 1-26.

6. October 8 – Resource Reallocation: How Dollars Could Be Spent More Effectively

Odden and Archibald (2001), entire book

Odden and Picus (2008), 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). Online journal: <http://epaa.asu.edu/epaa/v9n30.html>.

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. Available online at: <http://www.wcer.wisc.edu/cpre/finance/research/reallocation.asp>

IV. PROVIDING ADEQUATE DOLLARS TO SCHOOLS AND DISTRICTS

7. October 15 – Getting Adequate Dollars to the Schools: District Budgeting

Guest Speakers: Jason Olsen, Chris Murphy, Michelle Nummerdor,

Odden and Picus (2008), Chapter 8.

Fund the Child. 2006. Report from the Fordham Foundation.

Rosalind Levacic, Kenneth Ross, Brian Caldwell & Allan Odden. (2000). Funding Schools by Formula: Comparing Practice in Five Countries. Journal of Education Finance. 25(4), 489-515.

Margaret Goertz and Allan Odden. (1999). School-Based Financing. Thousand Oaks: Corwin Press.

8. October 22 –What is an Adequate Level of Resources?

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.

Odden and Picus (2008), Chapter 4

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.

9. October 29 – Getting Adequate Dollars to Districts: State School Finance Formulas and Their Various Impacts

Odden & Picus (2008), Chapters 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 CPRE website: <http://cpre.wceruw.org/allan/>

10. November 5 – State Equity and Adequacy

Odden & Picus (2008), Chapter 11.

Please Bring Laptops to Class.

11. November 12– The Wisconsin School Finance System Today

Guest Speaker: Brian Pahnke, Assistant State Superintendent, WI DPI

Reschovsky, A, Wisconsin's School Finance: A Policy Primer (2002). The Robert M. La Follette School of Public Affairs.

<http://www.lafollette.wisc.edu/publications/otherpublications/wisconsinprimer/2002/SchoolPrimer2002.pdf>

Wisconsin Legislative Fiscal Bureau: Informational Paper #27: Elementary and Secondary School Aides, January 2007. <http://www.legis.state.wi.us/lfb/Informationalpapers/27.pdf>

Optional: Jack Norman. (2002). Funding Our Future: An Adequacy Model for Wisconsin School Finance. Milwaukee, WI: Institute for Wisconsin's Future.

<http://www.wisconsinsfuture.org/publications/education/Adequacy.pdf>

12. November 19 –

Guest Speaker: Shelley Weiss, Middle School Principal, Waunakee School District

Miller, L, Roza, M, & Swartz, C (2004). A cost allocation model for shared district resources: A means for comparing spending across schools. Center on Reinventing Public Education.
http://www.crpe.org/cs/crpe/download/csr_files/wp_sfrp_costall_sep04.pdf

Paper #1 Due to learn@uw dropbox

13. November 26 – New Approaches to Teacher Salary Structures

CLASS WILL NOT MEET: please post a one page response to these readings AND post a reaction to another posting.

Odden and Wallace. (2007). *Rewarding Teacher Excellence: A Teacher Compensation Handbook for State and Local Policymakers*. Madison: University of Wisconsin, Wisconsin Center for Education Research, Consortium for Policy Research in Education.
[http://cpre.wceruw.org/publications/TComp%20Handbook%20Feb%2028%2007%20Final%20\(3.05.07\).pdf](http://cpre.wceruw.org/publications/TComp%20Handbook%20Feb%2028%2007%20Final%20(3.05.07).pdf)

OR

Odden and Wallace. (2007). *How to Achieve World Class Teacher Compensation*. St. Paul: Freeload Press. Available for free at: www.freeloadpress.com.

OR

Odden & Picus (2008), chapter 12

14. December 3– Putting it All Together: The Cost of Education

Odden, A, Goetz, M, & Picus, L. (2008). Using Available Evidence to Determine Educational Adequacy. *Education Finance and Policy*. Summer 2008, Vol. 3, No. 3, Pages 374-397.

Odden, A. R., Picus, L. O., & Goetz, M. (under review). A 50-state strategy to school finance adequacy. *Journal of Education Policy*.

15. December 10 – Final Class

Odden and Picus (2008), Chapter 7.

Rubenstein, R., Schwartz, A., Stiefel, L (2006). Rethinking the intradistrict distribution of school inputs to disadvantaged students. Paper presented for “Rethinking Rodriguez: Education as a fundamental right. University of California—Berkeley.

December 15: Paper #2 Due VIA EMAIL