



STATE OF MONTANA REQUEST FOR PROPOSAL

(THIS IS NOT AN ORDER)

RFP Number:
RFP05-1112P

RFP Title:
NEEDS ASSESSMENT AND COST ANALYSIS

RFP Response Due Date and Time:
FRIDAY, MAY 27, 2005
2 p.m., Local Time

Number of Pages: 1 - 27

ISSUING AGENCY INFORMATION

Procurement Officer:
Penny Moon

Issue Date:
May 6, 2005

State Procurement Bureau
General Services Division
Department of Administration
Room 165, Mitchell Building
125 North Roberts Street
P.O. Box 200135
Helena, MT 59620-0135

Phone: (406) 444-2575
Fax: (406) 444-2529
TTY Users, Dial 711

Website: <http://www.discoveringmontana.com/doa/gsd>

INSTRUCTIONS TO OFFERORS

Return Sealed Proposal to:

State Procurement Bureau
General Services Division
Department of Administration
Room 165, Mitchell Building
125 North Roberts Street
P.O. Box 200135
Helena, MT 59620-0135

Mark Face of Envelope/Package:

RFP Number: RFP05-1112P
RFP Response Due Date: 05/27/05

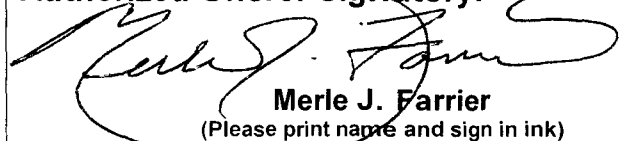
Special Instructions:

IMPORTANT: SEE STANDARD TERMS AND CONDITIONS

OFFERORS MUST COMPLETE THE FOLLOWING

Offeror Name/Address:
R.C. Wood & Associates
8711 SW 46th Lane
Gainesville, Florida 32608

Authorized Offeror Signatory:


Merle J. Farrier
(Please print name and sign in ink)

Offeror Phone Number:
352-392-2391 Ex 266
352-538-9600/01 (Mobile)

Offeror FAX Number:

352-392-0038

Offeror E-mail Address:

Rcwood@coe.ufl.edu

OFFERORS MUST RETURN THIS COVER SHEET WITH RFP RESPONSE

Table of Contents

1	SECTION 1: PROJECT OVERVIEW AND INSTRUCTIONS
2	SECTION 2: RFP STANDARD INFORMATION
3	SECTION 3: SCOPE OF PROJECT
4	SECTION 4: OFFEROR QUALIFICATIONS/INFORMATIONAL REQUIREMENTS
5	SECTION 5: EVALUATION CRITERIA APPENDIX A ADDENDUM #1 RECEIPT

SECTION 1: PROJECT OVERVIEW AND INSTRUCTIONS

1.0 PROJECT OVERVIEW

R. C. WOOD AND ASSOCIATES UNDERSTANDS AND WILL COMPLY

1.1 CONTRACT TERM

R. C. WOOD AND ASSOCIATES UNDERSTANDS AND WILL COMPLY

1.2 SINGLE POINT OF CONTACT

R. C. WOOD AND ASSOCIATES UNDERSTANDS AND WILL COMPLY

1.3 REQUIRED REVIEW

1.3.1 Review RFP.

R. C. WOOD AND ASSOCIATES UNDERSTANDS AND WILL COMPLY

1.3.2 Form of Questions.

R. C. WOOD AND ASSOCIATES UNDERSTANDS AND WILL COMPLY

1.3.3 State's Answers.

R. C. WOOD AND ASSOCIATES UNDERSTANDS AND WILL COMPLY

1.4 GENERAL REQUIREMENTS

R. C. WOOD AND ASSOCIATES UNDERSTANDS AND WILL COMPLY

1.4.2 Resulting Contract.

R. C. WOOD AND ASSOCIATES UNDERSTANDS AND WILL COMPLY

1.4.3 Mandatory Requirements.

R. C. WOOD AND ASSOCIATES UNDERSTANDS AND WILL COMPLY

1.4.4 Understanding of Specifications and Requirements.

R. C. WOOD AND ASSOCIATES UNDERSTANDS AND WILL COMPLY

1.4.5 Prime Contractor/Subcontractors.

R. C. WOOD AND ASSOCIATES UNDERSTANDS AND WILL COMPLY

1.4.6 Offeror's Signature.

R. C. WOOD AND ASSOCIATES UNDERSTANDS AND WILL COMPLY

1.4.7 Offer in Effect for 120 Days.

R. C. WOOD AND ASSOCIATES UNDERSTANDS AND WILL COMPLY

1.5 SUBMITTING A PROPOSAL

1.5.1 Organization of Proposal.

R. C. WOOD AND ASSOCIATES UNDERSTANDS AND WILL COMPLY

1.5.2 Failure to Comply with Instructions.

R. C. WOOD AND ASSOCIATES UNDERSTANDS AND WILL COMPLY

1.5.3 Multiple Proposals.

R. C. WOOD AND ASSOCIATES UNDERSTANDS AND WILL COMPLY

1.5.4 Copies Required and Deadline for Receipt of Proposals.

R. C. WOOD AND ASSOCIATES UNDERSTANDS AND WILL COMPLY

1.5.5 Late Proposals.

R. C. WOOD AND ASSOCIATES UNDERSTANDS AND WILL COMPLY

1.6 COST OF PREPARING A PROPOSAL

1.6.1 State Not Responsible for Preparation Costs.

R. C. WOOD AND ASSOCIATES UNDERSTANDS AND WILL COMPLY

1.6.2 All Timely Submitted Materials Become State Property.

R. C. WOOD AND ASSOCIATES UNDERSTANDS AND WILL COMPLY

SECTION 2: RFP STANDARD INFORMATION

2.0 AUTHORITY

R. C. WOOD AND ASSOCIATES UNDERSTANDS AND WILL COMPLY

2.1 OFFEROR COMPETITION

R. C. WOOD AND ASSOCIATES UNDERSTANDS AND WILL COMPLY

2.2 RECEIPT OF PROPOSALS AND PUBLIC INSPECTION

2.2.1 Public Information.

R. C. WOOD AND ASSOCIATES UNDERSTANDS AND WILL COMPLY

2.2.2 Procurement Officer Review of Proposals.

R. C. WOOD AND ASSOCIATES UNDERSTANDS AND WILL COMPLY

2.3 CLASSIFICATION AND EVALUATION OF PROPOSALS

2.3.1 Initial Classification of Proposals as Responsive or Nonresponsive.

R. C. WOOD AND ASSOCIATES UNDERSTANDS AND WILL COMPLY

2.3.2 Determination of Responsibility.

R. C. WOOD AND ASSOCIATES UNDERSTANDS AND WILL COMPLY

2.3.3 Evaluation of Proposals.

R. C. WOOD AND ASSOCIATES UNDERSTANDS AND WILL COMPLY

2.3.4 Completeness of Proposals.

R. C. WOOD AND ASSOCIATES UNDERSTANDS AND WILL COMPLY

2.3.5 Opportunity for Discussion/Negotiation and/or Oral Presentation/Product Demonstration.

R. C. WOOD AND ASSOCIATES UNDERSTANDS AND WILL COMPLY

2.3.6 Best and Final Offer.

R. C. WOOD AND ASSOCIATES UNDERSTANDS AND WILL COMPLY

2.3.7 Evaluator/Evaluation Committee Recommendation for Contract Award.

R. C. WOOD AND ASSOCIATES UNDERSTANDS AND WILL COMPLY

2.3.8 Request for Documents Notice.

R. C. WOOD AND ASSOCIATES UNDERSTANDS AND WILL COMPLY

2.3.9 Contract Negotiation.

R. C. WOOD AND ASSOCIATES UNDERSTANDS AND WILL COMPLY

2.3.10 Contract Award.

R. C. WOOD AND ASSOCIATES UNDERSTANDS AND WILL COMPLY

2.4 STATE'S RIGHTS RESERVED

R. C. WOOD AND ASSOCIATES UNDERSTANDS AND WILL COMPLY

SECTION 3: SCOPE OF PROJECT

3.0 OVERVIEW

R. C. WOOD AND ASSOCIATES UNDERSTANDS AND WILL COMPLY

3.1 SCOPE OF SERVICES

The Montana Legislature is seeking the services of a professional school finance consultant to:

- Provide recommendations and assistance to staff in the design of a study, the collection of data, and in the analysis and evaluation of information necessary to assess the educational needs of Montana's public schools based on the definition of a basic system of free quality public elementary and secondary schools, as provided by the Montana Legislature in Senate Bill No. 152;
- Provide guidance in the determination of the costs of a basic system of free quality public elementary and secondary schools;
- Provide recommendations on the level of funding needed to support the educationally relevant factors outlined in Senate Bill No. 152; and
- Provide recommendations and assistance in the development of a funding mechanism that is based on the costs analysis and that ensures the equitable distribution of the State's share of the costs of a basic system of free quality elementary and secondary schools, as defined in Senate Bill No. 152.

Professional consulting services must include the following tasks:

Task 1: Provide recommendations and assistance to staff in the design of a study, the preparation and collection of data, the evaluation of data, and reporting requirements necessary to conduct the study and in the development of a funding mechanism. Staff, at a minimum, will include:

- 1) Two attorneys and two research policy analysts from the Legislative Services Division;
- 2) One senior fiscal analyst from the Legislative Fiscal Division;
- 3) The finance manager from the Governor's Office of Budget Program and Planning;
- 4) The chief of staff and the school finance administrator from the Office of Public Instruction; and
- 5) Additional fiscal and budget analysts from the Governor's Office of Budget Program and Planning and the Department of Revenue.

Staff will also consult with and receive input from two Montana professional educators appointed by the education community.

Task 2: Meet with the Quality Schools Interim Committee in Helena, Montana, on June 6, 2005, and with staff for one to three days by June 15, and at other times as needed during the course of the study, to provide technical assistance in the analysis of data and its application to accepted school finance methodologies

and evaluation of the alternatives to implement the provisions of Senate Bill No. 152. Anticipated analysis includes:

- 1) Updating or completing current school funding studies using the successful schools and professional judgment approaches, or other accepted methodologies to determine the costs of a basic system of free quality public elementary and secondary schools;
- 2) Provide assistance in the analysis of evidence-based methodology;
- 3) Analysis of effective and efficient small schools cost structure and programs; and
- 4) Analysis of effective and efficient American Indian education programs and costs.

Task 3: Present a final written report before the Quality Schools Interim Committee in Helena, Montana, at a time prescribed by the Committee, including an executive summary that:

- 1) Creates an inventory of the assessment of educational needs for Montana's public schools based on the definition of a basic system of free quality public elementary and secondary schools as provided in Senate Bill No. 152;
- 2) Articulates the findings regarding the costs of providing a basic system of quality schools;
- 3) Makes recommendations for development of a funding formula that is based on the costs analysis and that ensures the equitable distribution of the State's share of the costs of a basic system of quality schools; and
- 4) Provides recommendations regarding the costs of adjusting the funding formula based on the educationally relevant factors identified by the Montana Legislature in Senate Bill No. 152.

Additional services: Prepare additional analysis and reports as directed by the Quality Schools Interim Committee.

R. C. WOOD AND ASSOCIATES UNDERSTAND THE SCOPE OF SERVICES AND HAVE ADDRESSED THEIR SCOPE OF SERVICES IN SECTION 4.1.3 "METHOD OF PROVIDING SERVICES"

SECTION 4: OFFEROR QUALIFICATIONS/INFORMATIONAL REQUIREMENTS

4.0 STATE'S RIGHT TO INVESTIGATE AND REJECT

R. C. WOOD AND ASSOCIATES UNDERSTANDS AND WILL COMPLY

4.1 OFFEROR INFORMATIONAL REQUIREMENTS

In order for the State to determine the capabilities of an offeror to perform the services specified in Section 3 above, the offeror must respond to the following requests for information regarding its ability to meet the State's requirements. **THE RESPONSE “(OFFEROR'S NAME) UNDERSTANDS AND WILL COMPLY” IS NOT APPROPRIATE FOR THIS SECTION.**

NOTE: Each item must be thoroughly addressed. Offerors taking exception to any requirements listed in this section may be found non-responsive or be subject to point deductions.

4.1.1 References.

State Senator Charlie Shields – Missouri
State Capitol Building Room 320
Jefferson City, Missouri 65101
(573) 751-9476
charlie_shields@senate.state.mo.us
(Reference for Dr. Wood)

Link Jarrett
Director of K-20 Budget, Florida Department of Education
325 W. Gaines Street
1214 Turlington Building
Tallahassee, Florida 32399-0400
(850) 245-0458
Link.Jarrett@fldoe.org
(Reference for Dr. Wood)

Nancy Coopersmith, Deputy Superintendent of Schools
Montana Office of Public Instruction
PO Box 202501
Helena, MT 59620-2501
(406)444-5541
ncoopersmith@mt.gov
(Reference for Dr. Robson)

4.1.2 Resumes/Company Profile and Experience.

Key personnel for this project include: Co-Director, **Dr. Don Robson**, University of Montana; Co-Director, **Dr. R. Craig Wood**, University of Florida and R.C.Wood and Associates, which provides consulting services to state and local education finance policymakers; **Dr. Merle Farrier**, University of Montana; and **Stephen Smith**, private education finance, law and policy consultant, Denver Colorado.

In addition to the core study team, the project will utilize the services of at least two additional experts in specific portions of the needs assessment and cost analysis elements of the study: Mr. **Michael Griffith**, policy analyst with the Education Commission of the States and **Joyce Silverthorne**, Education Director, Salish and Kootenai Confederated Tribes, Pablo, Montana.

Resumes of Key Personnel:

DONALD L. ROBSON

2750 Meriwether St.
Missoula, MT. 59803
(406) 251-5309 home
Email: don.robson@mso.umt.edu

EDUCATION

B.S. 1964	Speech Pathology Wayne State University Detroit, Michigan
M.S. 1968	Special Education Administration Wayne State University Detroit, Michigan
Ph.D. 1976	K-12 and Higher Education Administration Michigan State University, East Lansing, Mi.

PROFESSIONAL EXPERIENCE

2003-present	Professor, Educational Leadership, School of Education, The University of Montana, Missoula, MT. <i>Teaching Educational Leadership courses in K-12 and Higher Education administration, serve as project evaluator for the Division of Educational Research and Services</i>
2001 – 2003	Associate Provost, Office of Academic Affairs, The University of Montana, Missoula, MT. <i>Served as chief negotiator representing the Administration and Commissioner of Higher Education with the University Faculty Association; Conducted faculty personnel administrative functions – grievance response for Provost, recruitment/hiring process; managed faculty development process including sabbatical leaves, faculty professional development grants</i>

- 1991 - 2001** Dean and Professor of Educational Leadership, School of Education, University of Montana, Missoula, MT. *While Dean, served as the chief academic officer for the School of Education; elected by Montana School Administrators to serve as a Montana representative to the Board of Directors of the Northwest Regional Educational Laboratory (1995), Elected to chair the Board of Director at NWREL (1999 and 2000); Served as a member of the Board of Examiners for the National Council for Accreditation of Teacher Education – acting as member of visiting teams and as chairperson of numerous teams (1993-2001). Appointed by the Montana State Board of Public Education to serve as a member of the Certification Standards and Practices Advisory Council(1995), served as chairperson of CSPAC from 1999-2000. Appointed by Gov. Mark Rocicot to Montana Educational Study Commission (1999).*
- 1987 - 1991** Department Head, Department of Education, College of Education, Health and Human Development, Montana State University.
Administrative appointment to the newly reorganized department of education (incorporating former departments of elementary education, secondary education, and educational services).
- 1984 - 1986** Department Head, Department of Educational Services, College of Education, Montana State University. *Administrative appointment to the department offering programs in school administration, adult and higher education, community education, and counselor education*
- 1982 - 1984** Director, Bureau of Educational Research and Field Services, College of Education, Montana State University, Bozeman, Montana. *Directed more than \$500,000 in school service contracts and grants in Montana schools and communities, including demographic (population and enrollment) studies, school facilities studies, feasibility studies, school service delivery projects, and other contract work (see selected grants and contracts) .*
- 1982 - 1991** Associate Professor, Educational Administration, Departments of Education and Educational Services, College of Education, Montana State University, Bozeman, Montana. *Teach courses in educational administration, work with doctoral students, engage in scholarship and service activities.*
- 1976 - 1982** Assistant Professor in Education, joint appointment: Educational Administration-Special Education, Department of Education, Purdue University, West Lafayette, Indiana. *While at Purdue, worked as a consultant with N. Nelson in school facility and educational specifications studies, enrollment projections, and other*

school services. Served as an Administrative Hearing Officer in Special Education administrative appeals for the State of Indiana.

- 1971 - 1974** Principal, Clawson Senior High School, Clawson Public Schools, Clawson, Michigan. *Grade 10-12, 1650 students, 75 teachers/professionals. Conducted a major facilities renovation and addition.*
- 1967 - 1971** Director of Special Education, K-12, Clawson Public Schools, Clawson, Michigan. *Directed the creation, staffing and operation of a complete array of special education services for the school district, including: classroom programs for "educable mentally retarded," "trainable mentally retarded," "learning disabled," "seriously emotionally disturbed," as well as itinerant programs in speech and language disorders, remedial reading, school social work services, school psychological services.*
- 1964 - 1967** Speech and Language Therapist, K-12, Clawson Public Schools, Clawson, Michigan.

SELECTED GRANTS, CONTRACTS AND STUDIES: FUNDED AT M.S.U.

Conducted nearly \$500,000 worth of school service contracts (evaluation studies) while director of the Bureau of Educational Research and Field Services such as the following:

"Community Assessment of Programs: A School Report Card." Resources component consultant. Roundup School District, Roundup Mt., \$14,000. September-March, 1991.

"Program Evaluation: Montana Academy for Leadership Development." A three year assessment of the effects of project L.E.A.D. in Montana. (With Dr. A. Clarke). Contract with the School Administrators of Montana, 1988-90. \$21,000.

"An Enrollment and Facilities Study," Bozeman Public Schools. (Robson, D. Chapter II, Enrollment Projection, pp. 9-38). Bureau of Educational Research and Field Services, 1986. \$25,000.

"The Future of Education in Roundup, Montana": A comprehensive analysis of facility, program, and financial needs for long-range planning in the Roundup School District. \$3,200. Project Director, D. Robson. January, 1984-March, 1984.

"The Future of Education in Butte, Montana:" A comprehensive community study of educational needs, enrollments and projections, school facilities, educational programs and budget analysis for the Butte-Silverbow Schools in the wake of the closing of the Berkley Pit and the sale of Atlantic Richfield Co. operations (ARCO). \$35,000. 1983.

**SELECTED PUBLICATIONS:
BOOK CHAPTER**

Robson, D. L. "The Personnel Function: Practitioners, Practices, and Participants." Contemporary School Business Management. R. C. Wood, (ed.), National Association of School Business Officials (NASBO), 1987, pp 289-310.

SELECTED ARTICLES IN REFEREED JOURNALS

Robson, D. L. and Creekmore, W. N. "Legalizing the Educational Decision Making Process." Action in Teacher Education, Vol. 14, No. 2, Fall 1982, pp. 7-16. (Selected for reprint in Tenth-Year Anniversary Issue, Commemorative Edition of Action in Teacher Education, John Sikula, Editor.

Gallagher, R. P., Gallagher, K. S. and Robson, D. L. "The Effects of Product Development on Educational Change for the Handicapped," Evaluation and Program Planning, Summer, 1986.

Robson, D. L. "Administering Deregulation of Special Education." The Middle School Journal, Vol. 6, No. 1, Winter, 1983.

Gallagher, K. S. and Robson, D. L. "Fact finding in Indiana: A Study of Fact finding Frequency and Acceptance as an Impasse Resolution Procedure in Public School Negotiations." The Journal of Collective Negotiations in the Public Sector, 22 (3), 1983.

Robson, D. L. and Davis, M. E. "Administrative Authority, Leadership Style and the Master Contract." Journal of Educational Administration, Winter, 1983, XXI, No. 1. 5-13.

Robson, D. L. and Creekmore, W. N. "Legalizing the Educational Decision Making Process." Action in Teacher Education, Vol. 14, No. 2, Fall 1982, pp. 7-16.

Robson, D. L. and Creekmore, W. N. "Deprofessionalizing Education: From the Medical to the Legal Model." Exceptional People's Quarterly, Vol.2, 1981.

Robson, D. L. and Creekmore, W. N. "Deprofessionalizing Education: From the Medical to the Legal Model." Readings in Special Education, Special Learning Corporation, November, 1981. (Reprinted with permission of Exceptional People's Quarterly after second referee process).

R. Craig Wood

Professor

**Co-Director, UCEA Center for the Study of Education Finance
258 Norman, Box 117049**

College of Education

**University of Florida, Gainesville, Florida 32611-7049
Univ. Ph: 352-392-2391 ext. 266, Univ. Fax: 352-392-0038
E Mail RCWOOD@ COE.UFL.EDU**

Education

Post Doctoral Study Harvard University, School of Education, (part time) 1994-1995.

Ed. D. Virginia Polytechnic Institute and State University Major: Educational Administration (concentration in finance and law).

M. A. ED. Virginia Polytechnic Institute and State University, Major: Curriculum and Instruction.

B. S. Campbell College, (Cum Laude, member Epsilon Pi Eta Honor Society), Major: History, (Liberal Arts), Minor: Education (Teaching License).

PROFESSIONAL EXPERIENCE

Professor, Graduate School

Member of the Doctoral Research Faculty of the University, Department of Educational Leadership, College of Education, University of Florida (1989 to present). B. O. Smith Research Professor, Appointed to this named endowed chair, which is the first in the history of the College of Education at the University of Florida. This named endowed chair reflects the highest national research visibility within the College of Education. This position is an appointment with financial research assistance with an expectation of significant national research. (1997 to 2003). (Six year Term Appointment)

Co-Director

University Council for Educational Administration
Leadership Center for Education Finance.

UCEA is a national consortium of exclusive doctoral degree granting institutions throughout the nation. Membership is voluntary and subject to rigorous review on standards of excellence. The UCEA Center for Education Finance was founded in 1989 on a competitive basis and jointly awarded to the University of Florida and Kansas State University for the chartered purpose of studying the funding of Education in the nation in such a manner as would advance the profession. The Center follows its founding directors to any UCEA member institution. Awarding of the Center was based on national prominence and expertise of the two directors at the University of Florida and Kansas State University. Since the Center's inception, it has received widespread acclaim throughout the nation and with the American Education Finance Ass'n and related organizations. The Center is jointly sponsored with Kansas State University and is responsible for research and dissemination of education finance related issues, (1989 to present).

Chair

Department of Educational Leadership, College of Education, University of Florida, consisting of the areas of public Educational administration, higher educational

administration, and public education curriculum. The programs within the Department are the M.A., Ed.S. Ed.D, and the Ph.D. NCATE approved degrees programs as well as appropriate certification in all the areas encompassed within the Department, 1989-1993.

Associate Professor & Chair

Purdue University, Chair of Administration, Curriculum, and Foundations (1987-1988), an area consisting of nine faculty members who devoted full and part-time duties to the division. The programs within the division lead to M.A., Ed.S., and Ph.D. degrees and certification programs for all administrative and supervisory positions in the state of Indiana. All programs within the division were NCATE approved. The programs encompassed building level, central office, and superintendent's level, curricular supervision programs, as well as degree work in the area of Educational foundations. Responsibilities included program development as well as the short and long-range course and program scheduling for all on and off-campus programs. All budget decisions, promotion and tenure evaluations, evaluation of faculty for all pay raises, and supervision of clerical and all non-faculty staff were included in these duties. A major off-campus Ed.S. program was designed and implemented without the faculty in Gary at Purdue University-Calumet during this period of time. } ?

Associate Professor & Assistant Professor

Purdue University, Administration and Curriculum, Department of Education (1985 to 1987), Assistant Professor (1980 to 1985). Responsibilities including teaching graduate courses in the areas of public school finance, public school law, school business management, and collective negotiations. Further responsibilities were the administration of the Educational Administration's internship program, advising Ph.D., Ed.S., and M.A. candidates, conducting research, and engaging in the service activities for the training of educational administrators.

Assistant Superintendent

Darien Public Schools (Connecticut). Duties and responsibility for all financial and plant management functions, negotiating all of the support staff contracts, negotiator for the Board of Education for the teacher and middle management contracts, developing a comprehensive energy conservation federally reimbursable program serving as leader of the budget development team while coordinating the business manager and plant manager roles with the school district. (1979-1980).

Assistant Superintendent

School District of River Falls (Wisconsin) Duties included total responsibility for all financial dealings of the district as outlined in the previous position as well as being involved with negotiating the master contract with the professional staff; developing long range planning; initiating single and multi-year staff contracts; and, serving as the general assistant superintendent in all matters from business services to curriculum (1978-1979).

Business Manager

School District of River Falls (Wisconsin) Responsibilities included total responsibility for all financial dealings of the district; administering all budgets, overall responsibility for pupil transportation, food service, maintenance, professional negotiations, all bidding and purchasing, administering all fiscal projections, state aids, and tax collections (1977-1978).

Research Associate

Virginia Polytechnic Institute and State University, Coursework in the area of Education finance and participated in numerous research and field projects. Research Associate, Office of Student Teaching: Responsibilities included performing as an administrative assistant to the coordinator in placing student teachers in their clinical experience, processing teacher certification credentials for the graduates of the teacher Education program, maintaining records for the College of Education, and administering the operating budget for the Office of Student Teaching (1975-1977).

Social Studies Teacher

Fayetteville City Public Schools. (North Carolina) Responsibilities included teaching high school social studies courses, serving as mentor teacher and supervising student teachers, (American History, World History, Geography, and Anthropology) to approximately 150 students per year and serving as club advisor/sponsor (1970-1975).

State Committees

Appointed by the Governor, Indiana State Advisory Committee on Performance Based Accreditation. (1988 to 1989). ✓

Indiana State Department of Education Cost of Education Index Committee, (1987 to 1989).

Grants Received Over \$5,000)

UCEA Center for Education Finance, 1993 to present, \$5,000 total.

David Honeyman and R. Craig Wood, "The Florida Education Finance Project," Co director, 1993-2000, \$275,000.

Herbert Marlowe and R. Craig Wood, "Design Implementation and Evaluation of an Organizational Learning System," Palm Beach County, Florida, 1992-93, \$65,000.

R. Craig Wood, "Education Finance and Productivity," the Gatorade Foundation, 1990, \$10,526.

R. Craig Wood, "Financing Rural Schools in Florida," University of Florida, Division of Sponsored Research, 1990, \$5,267.

David Honeyman and R. Craig Wood, "Dependent v. Independent School Districts-Implications for Revisions of the Tennessee School Finance Formula," Public Schools for Cooperative Research, University of Tennessee, Knoxville, Tennessee, Summer, 1988.

David Honeyman, David Thompson, and R. Craig Wood, "Equity in Funding Rural Schools," a contract with the ERIC Clearinghouse on Rural Education and Small Schools, Appalachia Educational Laboratory, Charleston, W.Va., September 1988
Funded.

David Honeyman, R. Craig Wood, and David Thompson, Center for Rural and Small Schools, "Capital Outlay and the Condition of Small and Rural Schools."

R. Craig Wood, "A Fiscal Metapolicy Analysis of School Districts in Selected States Exhibiting Low and High Local Control of Education," Department of Education, Purdue University, \$5,000, Spring, 1981.

R. Craig Wood, Office of Planning and Management, Hartford, for the technical analysis of the Darien Public Schools for energy conservation, Amount: \$15,000, Summer, 1980.

R. Craig Wood, Connecticut Winter Energy Action Plan, state grant administered by the Office of Planning and Management, Hartford, for the technical analysis of the Darien Public Schools for energy conservation. Amount: \$7,000 Spring, 1980.

R. Craig Wood, federal grant administered by the state of Wisconsin, Office of Energy Management, Madison, for the design and implementation of energy saving measures in the School District of River Falls, Amount: \$400,000, Summer 1979.

CURRENT PROFESSIONAL AFFILIATIONS

American Education Finance Association
Education Law Association (formerly National Organization on Legal Problems of Education)

CERTIFICATE ELIGIBILITY

Currently hold/eligible for public school district superintendent's certificate in; AL, AK, AZ, CAL, CO, CT, DE, FL, GA, HI, ID, IN, IA, KS, KY, MD, MI, MN, MS, NE, NV, NH, NJ, NY, NC, OH, OK, OR, PA, RI, SC, SD, TN, TX, UT, VT, WV, WI, and WY.

Offices/Committee Appointments

Appointed, Chair, Program Committee, Education Law Association annual meeting, Atlanta, 2000.

Appointed, Co-Chair, Education Law Association Publications Committee, 1998.

Appointed, Member, Education Law Association Program Planning Committee annual meeting, Charleston SC, 1998.

Appointed Chair, Constitutional Bylaws Revision Committee, Education Law Association, 1996-97.

Appointed Program Chair, American Education Finance Association annual meeting, Mobile, 1998.

Appointed, Chair The Outstanding Dissertation of the Year Award, American Education Finance Association 1997.

Appointed, Member The National Task Force on Professional Standards and Certification, Association of School Business Officials, 1996.

Appointed Chair, Subcommittee for Long-Range Planning, National Organization on Legal Problems of Education, 1994-95.

Appointed Chair, Subcommittee for Data Analysis, Long-Range Planning Committee, of the National Organization on Legal Problems of Education 1994.

Appointed to the Long-Range Planning Committee, of the National Organization on Legal Problems of Education, 1994.

Co-Chair, Editorial Advisory Committee, of the National Research and Publications Task Force for the Association of School Business Officials, 1993 to present.

Member, Investment Advisory Committee, UCEA, 1993.

Chair, 1993 Outstanding Dissertation of the Year Award Committee, National Organization on Legal Problems of Education

Chair, 1992 Outstanding Dissertation of the Year Award Committee, National Organization on Legal Problems of Education

Chair, 1992 Outstanding Dissertation of the Year Award Committee, National Organization on Legal Problems of Education

University Council for Educational Administration, Appointed to the Investment Review Committee for the UCEA Endowment Fund, 1992.

University Council for Educational Administration, Member of three person nominating committee for the Executive Committee, 1991.

Plenary Session Representative, University Council for Educational Administration, 1991 to 1994.

Southern Regional Consortium of College of Education, Appointed to the Subcommittee of Chairs of Educational Administration, 1989-1990.

Florida state membership chair for the National Organization on Legal Problems of Education 1989-1990.

Law and Education Special Interest Group of the American Educational Research Association, appointed to the Program Committee and Reader for the 1987 meeting in Washington DC.

Appointed National Chair for the School Finance Research Committee Association of School Business Officials, 1986-1989.

Indiana State Membership Chair for the National Organization on Legal Problems of Education 1985 to 1988.

Education Finance Special Interest Group of the American Educational Research Association -Appointed Program Co-Chair for the 1986 AERA Meeting in San Francisco.

Law and Education Special Interest Group of the American Educational Research Association-Elected Secretary-Treasurer, elected in 1985, 1986.

Reappointed for a second 3-year term-National Vice Chair for Research of the School Finance Research Committee, Association of School Business Officials, 1983-1985.

National Vice Chair for Research of the School Finance Research Committee Association of School Business Officials, 1980-1982.

Invited national referee for the American Association of School Administrators for the research paper of the year, AASA National Convention, Atlanta, February 1981.

Phi Delta Kappa, President of the University of Wisconsin-River Falls Chapter 1978.

Phi Delta Kappa, First Vice President of the University of Wisconsin-River Falls, Chapter 1978.

HONORS AND AWARDS

Appointed to the Board of Directors, The Education Law Consortium of the University of Georgia.

Received Award for Outstanding Research, Service, and Contributions to the University Council of Educational Administration, UCEA Annual Meeting, Albuquerque, October 2000.

Received SPPP Performance Award within the College of Education for outstanding teaching, service, and research for a seven-year period.

Chaired the dissertation that received the 1999-2000 Outstanding Dissertation Award presented by the Education Law Association for "Educational Due Process and Adjudicated Youth: A Legal Analysis of School District Policies, Procedures, and Practices in Florida," Theresa Harrison, (Ph.D. Univ. of Florida).

Received an Outstanding Service Award, Education Law Association at the Annual Meeting, Charleston, SC, November 1998.

Recipient of one of eleven superior performance bonus awards within the College of Education for outstanding teaching, service, and research for the year 1996-97.

President-American Education Finance Association, 1998.

Chaired the dissertation that received, "New Scholars Award," American Education Finance Association 1998, "a Statistical Analysis of the Relationship Between Finance Litigation and increased Per-Student Spending Per State."

Member, national reviewer for the University Research Professorship, Kansas State University, 1997.

Elected to the Board of Directors, National Organization on Problems of Education, 1995-1998.

Elected to the Board of Directors, American Education Finance Association, 1994-1997.

Member, national reviewer for the Lee Iacocca Professorship at Lehigh University.

Chaired the dissertation that received the 1992-93 Outstanding Dissertation Award presented by the American Education Finance Association for "The Effects of Additional Revenues for Sparsity on the Equity of a State School Finance System," JOURNAL M. O'Loughlin, (Ph.D. Univ. of Florida).

Nominee and Dissertation Chair of C. Arab, who received the S.D. Shankland Scholarship from the American Association of School Administrators as the 1993 most promising doctoral student in the nation.

Recipient, Service Award for serving as Committee Chair of the National Organization on Legal Problems of Education, Outstanding Dissertation Committee for the year 1992.

Chaired the dissertation that was judged to be the most outstanding dissertation in the Department of Educational Leadership for the 1992 Kimball Wiles Award as the Outstanding Dissertation of the College of Education, University of Florida, "The Florida

Education Lottery: Its Use as a Substitute for Existing Funds and its Effects on the Equity of Public School Funding,” S. D. Stark, (Ed.D. Univ. of Florida).

Chaired the dissertation that received the 1988-89 Outstanding Dissertation Award presented by the Purdue University Educational Administration Alumni Association to V. R. Bryers, “A Fiscal Equity Assessment of Indiana’s Public Elementary and Secondary School Operating Expenditures since the Implementation of the Local Levy Freeze.”

D. Honeyman, R. Craig Wood, and K. Stewart, The National Report on the Conditions of School Buildings in Rural and Small School Districts, Finalist for the Researcher of the Year, Center of Rural and Small Schools, Kansas State University, 1988.

Chaired the dissertation that received the 1986-87 Outstanding Dissertation Award presented by the American Education Finance Association to R. W. Ruch, “A Model for the Distribution of Capital Outlay Funds for Financing Public School Facilities in Indiana.”

Recipient of the 1985 E. C. Bolmeier Award for outstanding service by the National Organization on Legal Problems of Education.

DIRECTORSHIPS

Co-Director, University Council of Educational Administration Center for Education Finance, a joint national project by the University of Florida and Kansas State University, and UCEA, 1989-to present. The Center is designed to:

- Establish a supportive environment in which the study of education finance may be conducted at national, state, and local levels;
- Conduct significant and meaningful research in the broad arena of education finance;
- Promote the effective dissemination of knowledge and research on education finance; and
- Assist in the synthesis and translation of research in public policy and educational practice.

Dissertation

“An Analysis of Selected Legal Issues Pertaining to Student Teacher, Undergraduate Aide, and Graduate Intern Clinical Experiences in the Public Schools of the United States,” Virginia Polytechnic Institute and State University, 1977. Co-chairs David Alexander and Richard Salmon. (313 pages)

Reviewer/Committees

Member, Advisory Board, National Center on Education Finance, National Conference of State Legislatures, Denver Colorado, 2001 to present.

Reviewer, University Council for Educational Administration Annual Meeting, 2001.

Reviewer, University Council for Educational Administration Annual Meeting, Albuquerque, 2000.

Chair, American Education Finance Association Outstanding Service Award Committee for the year 2000.

Reviewer for Proposals, University Council for Educational Administration, annual meeting, Minneapolis, November 1999.

Chair, Program Committee, Education Law Association, annual meeting, Atlanta, 2000.

Chair, Site Review Team for Florida Council for Educational Management, National-Louis University, Tampa, April 1998.

Chair, Long Range Planning Committee, American Education Finance Association, 1998.

Chair, Program Committee, American Education Finance Association annual meeting, Mobile, 1998.

Member, Education Law Association Finance and Operations Committee, and Chair, Investment Committee.

Reviewer for Proposals, University Council for Educational Administration, Annual meeting, Orlando, November 1997.

Chair, Outstanding Dissertation Award Committee, American Education Finance Association, 1997.

Chair, Editorial Advisory Committee, Association of School Business Officials, 1994-97.

Chair, Site Review Committee for Florida Council for Educational Management, University of West Florida, Pensacola, August 1996.

Member, Research Initiative Committee, American Education Finance Association, 1994, 1995.

Member, Membership and Recruiting Committee, American Education Finance Association 1994, 1995.

Textbook review, public educational administration, Association of School Business Officials, 1994 to 1999.

Author of the 1994 UCEA Sabbatical Review Report for Continued Membership Department of Educational Leadership, University of Florida, 350 pgs.

Chair, Site Review Team for Florida Council for Educational Management, Nova University, Ft. Lauderdale, January 1993.

Jurist, American Educational Research Association Annual meeting, Division A, Houston, 1993.

University Council for Educational Administration, Annual meeting, Referee, Minneapolis, November 1992.

Florida Council for Educational Management site review team member for state of Florida school principalship programs, 1992 to present.

Jurist, American Educational Research Association annual meeting, Division A, San Francisco, 1992.

Educational Finance Special Interest Group of the American Educational Research Association annual meeting, Referee, San Francisco, 1991.

University Council for Educational Administration, annual meeting, Referee, Baltimore, November 1991

Reviewer, University of Southern California Center for Research in Education Finance (CREF).

School Improvement and Leadership Section of Division A, American Educational Research Association Annual meeting, Referee, Chicago, 1991.

Law and Education Special Interest Group of the American Educational Research Association annual meeting, Referee, Chicago, 1991.

Education Finance Special Interest Group of the American Educational Research Association annual meeting, Referee, Chicago, 1991.

Writing committee, "SRCCE Policy Statement on School Leadership Preparation Programs," Southern Regional Consortium of Colleges of Education, 16 pgs.

Education Finance Special Interest Group of the American Educational Research Association Annual meeting, Referee, Boston, 1990.

National external evaluator to the State University of New York-Brockport, for the Education fiscal officer training program, April 1989.

Consultant to the Florida Educational Leadership Examination, Finance Component, (1989 to Present).

Jurist for the American Educational Research Association, Division A, 1989 annual meeting, San Francisco, California.

Jurist for the American Educational Research Association, Division A, 1988 annual meeting, New Orleans, Louisiana.

Jurist for the American Education Research Association Division A, 1987 annual meeting, Washington, DC.

Peer reviewer and advisor, Office of Educational Research and Improvement, U.S. Department of Education, appointed 1987.

Member of the Editorial Advisory Board for the School Administrator's Law Report, (Aspens System, Rockville, MD) 1985-86.

Jurist for the Fiscal Issues, Policy, and Educational Finance Papers for the American Educational Research Association, 1984 annual meeting, New Orleans and the 1985 annual meeting Chicago.

Reviewer for Financial and Managerial Accounting for Elementary and Secondary School systems 3d ed., (Reston VA, Association of School Business Officials, 1984).

RECENT PRESENTATIONS

R. Craig Wood and Sarah Mendonca, "Florida," round table presentation, American Education Finance Association, annual meeting, Austin, March, 2000.

R. Craig Wood, Presentation of the Annual Service Award, general session, American Education Finance Association, annual meeting, Austin, March, 2000.

R. Craig Wood, Convener and Director, American Education Finance Association, Annual Education Finance Litigation Workshop, Austin, March, 2000.

R. Craig Wood, Presider, General Session, "Making Money Matter; Financing America's Schools," American Education Finance Association, Annual Meeting, Austin, March 2000. >

R. Craig Wood, Keynote General Session Address, "National Trends in Education Finance," Investing in Education: Meeting the Funding Challenges, University of Oklahoma, Norman Oklahoma, June, 2000. >

R. Craig Wood, "The Use of Statistics in Discrimination Cases in Education," Presider, Education Law Association, Annual Meeting, Atlanta, November 2000.

R. Craig Wood, Presider, Keynote address for the Honorable JOURNAL Nixon, Attorney General State of Missouri, Education Law Association, Annual Meeting, Atlanta, November 2000.

R. Craig Wood, Presider, Keynote address for the Undersecretary of Education, Kent McGwire, Education Law Association, Annual Meeting, Atlanta, November 2000.

R. Craig Wood, Convener and Director, American Education Finance Association, Annual Education Finance Litigation Workshop, Cincinnati, March 2001

R. Craig Wood, Presider, Credit Rating and Financial Reporting in School Districts, American Education Finance Association, Annual Meeting, Cincinnati, March 2001.

R. Craig Wood, Recognition of the Outgoing President, General Session, American Education Finance Association American Education, Annual Meeting, Cincinnati, March 2001.

R. Craig Wood, Education Finance Litigation and the Future of Financing Public Education, Learning Communities Network National Conference, San Diego, April 2001.

R. Craig Wood, The Florida Opportunity Scholarship Program: An Analysis of the Florida School Voucher Plan as Compared to the Federal Plan, Hawaii Conference on Business, Honolulu, June, 2001.

R. Craig Wood, "Recent Developments in Education Finance," National Conference of State Legislatures Senior Fiscal Analysts Seminar, New Orleans, September 2001.

R. Craig Wood, "The Status of Education Finance 2001 With Missouri Implications, presentation to the Missouri Joint Committee on Education Funding, Jefferson City, November 2001.

Steven Smith and R. Craig Wood, "School Finance Litigation in the Fifty States: Trends, Strategies, and Outcomes, National Conference of State legislatures, Education Finance Conference, Palm Springs, California, February 2002.

R. Craig Wood, Convener and Director, American Education Finance Association, Annual Education Finance Litigation Workshop, Albuquerque, March 2002.

R. Craig Wood and John Dayton, paper presentation, "Education Finance Litigation: An Examination of Emerging Trends and Future Directions," Education Law Association, annual meeting, New Orleans, November 2002.

R. Craig Wood, "Models of Determining the Adequacy of Educational Facilities," Maryland State Task Force to Study Educational Facilities, December 2002.

R. Craig Wood, Convener and Director, American Education Finance Association, Annual Education Finance Litigation Workshop, Orlando, March 2003.

R. Craig Wood, Alvin Schilling, and Luke Cornelius, "An Examination of Affirmative Action in Higher Education: *Bakke* Revisited-*Hopwood* to *Grutter* and *Gratz*," paper presentation, Education Law Association, annual meeting, Savannah November 2003.

R. Craig Wood, Convener and Director, American Education Finance Association, Annual Education Finance Litigation Workshop, Salt Lake City, March 2004.

R. Craig Wood and Steven Smith, "Invited Presentation before the Special Legislative Committee on Funding Public Education, "Education Finance: Issues, Options, and Perspectives," Springfield, Missouri November 2003.

R. Craig Wood and Steven Smith, "Equity and Adequacy Issues in Missouri Schools," Invited Presentation before the Special Legislative Committee on Funding Public Education, Jefferson City, Missouri December 2003.

R. Craig Wood, "Financing Public Education in the State of Missouri, Preliminary Report," presentation before the Special Legislative Committee on Funding Public Education," Jefferson City, Missouri January, 2004.

R. Craig Wood, "Financing Public Education in the State of Missouri, Final Report," presentation before the Special Legislative Committee on Funding Public Education, Jefferson City, Missouri February, 2004.

R. Craig Wood, "Introduction to Education Finance Policy," National Conference of State Legislatures National Education Finance Conference, Sante Fe, New Mexico, February 2004.

R. Craig Wood, "Advanced Education Finance Policy," National Conference of State Legislatures National Education Finance Conference, Sante, Fe, New Mexico, February 2004.

R. Craig Wood, Education Finance Litigation," National Conference of State Legislatures National Education Finance Conference, Sante Fe, New Mexico, February 2004.

R. Craig Wood, Steven Smith, and William Mathis, "Determining the Costs of an Adequate Education for the State of Vermont," American Education Finance Association, Annual Education Finance Litigation Workshop, Salt Lake City, March, 2004.

R. Craig Wood, Convener and Presider, Education Finance Special Interest Group, American Education Finance Association, Annual Meeting, Salt Lake City, March, 2004.

R. Craig Wood, "An Examination and Analysis of the Equity and Adequacy Concepts of Constitutional Challenges to State Education Finance Distribution Formulas, Keynote Speaker, *Education Funding at the Crossroads Conference*, William Bowen School of Law, University of Arkansas at Little Rock, March, 2004.

R. Craig Wood, "The Financial Feasibility regarding the creation of a separate school district within the Baldwin County Alabama Public Schools," Presentation before the Baldwin County Board of Education, Gulf Shores, Alabama, August, 2004.

R. Craig Wood, Convener and Director, American Education Finance Association, Annual Education Finance Litigation Workshop, Louisville, March 2005.

R. Craig Wood, Panel Discussion Member, Education Finance Litigation Strategies in Missouri and Texas," Education Law Association Annual Conference, Memphis, November, 2005. Accepted for Presentation.

CONTRIBUTING EDITOR

Contributing Editor, School Business Affairs, the Journal of the Association of School Business Officials, (1983-86).

EDITOR OF JOURNAL ISSUES

School Business Affairs, This non-refereed journal is the flagship publication of the Association of School Business Officials, Reston, Virginia with a circulation of approximately 7,000.

- January, 1997-Support Services Issue

Educational Considerations

- Education Finance Issue, v. 21, N. 2, spring, 1994.
- State of the State Issue, v. 25, n. 1, fall, 1997.
- State of the State Issues, v. 26, no 1 & 2, 1998

Journal of Education Finance

- Co-editor, v. 13, n. 3, spring 1989.
- Co-Editor, v. 13, n. 4, winter, 1988.

JOURNAL APPOINTMENTS

Editorial Advisory Board Member, *University of Florida Journal of Law and Public Policy*, (2002 to present).

Appointed ad hoc reviewer to *Educational Evaluation and Policy Analysis* (2002).

Appointed, special consulting reviewer, Education Law Into Practice, (1996 to present) this publication is published by the Education Law Association and is written for educational practitioners.

Appointed, member of the Board of Editors, Educational Considerations, (1995 to present) this journal is a scholarly-refereed journal for the past twenty-five years. In 1990, the journal began to take special interest in issues affecting educational administration with particular interest to the financing of education and education law. Previously, served on the editorial advisory board of the journal.

Appointed, Chair, Editorial Advisory Committee, Association of School Business Officials, 1994-1997. The Chair of the committee is charge with recommending the publications agenda of the Association as well as recommending, after reviewing, the articles that appear in all ASBO publications and specifically its monthly journal School Business Affairs.

Member, Author's Committee and Referee for West's Education Law Reporter, Appointed 1992 to present. This appointment is in recognition of national stature in the arena of education law and by innovation only and subject to annual review.

Appointed Regional Reporter, Primary and Secondary-Federal, School Law Reporter, Education Law Association, 1992 to 1999. This appointment, subject to annual review, is in recognition of national research stature in the arena of Education law and is by invitation only.

Appointed Finance Law Editor, Journal of Education Finance, 1990 to present, Reston, VA, This respected refereed journal has been published for over twenty-five years. Editorial offices are at the University of Illinois. Membership on the masthead is in recognition of national achievement in the discipline of Education finance. For many years, it has published only the finest research in the discipline.

Appointed Book Review Editor, Journal of Education Finance, 1989 to 1990.

Appointed, Board of Advisors, *No Child Left Behind Financial Compliance Insider*, 2003 to present.

PUBLISHED INTERVIEWS AND RESEARCH REVIEWS (most recent)

"Adequacy New Focus of School Finance Litigation," Sacramento Bee, April 30, 2001.

"Schools to Challenge Funding," Springfield Missouri News-Leader, November 13, 2003, 2b.

"Lawmakers Lining Up Facts, Ideas on Aid to Public Schools," Jefferson City, Missouri News Tribune, November 23, 2003.

“Putting the Financial Squeeze on Schools,” State Legislatures, Sept 2003.

“Paying for Schools,” Sacramento Bee, December 14, 2003.

“2 Finance Experts: Adequate Education Subjective.” Little Rock, Arkansas, Arkansas Democrat Gazette, March 6, 2004.


“The Creation of a Separate School District in Baldwin County,” Interview Channel 15 NBC evening news, Mobile Alabama, August 2004.

“New School Standards May Spell Lawsuits,” Salt Lake Tribune, January 6, 2005, front page.

“Schools May Sue State For Funds,” Sacramento Bee, January 8, 2005, front page.

CITATIONS OF MY WORK FOUND IN THE FOLLOWING LAW JOURNALS

“The State Judiciary’s Role in Fulfilling Brown’s Promise,” Michigan Journal of Race and Law, Q. Palfrey, vol. 8, no. 1.

“Is Adequacy a More Political Question Than Equality? The Effect of Standards-Based Education on Judicial Standards for Education Finance,” A. Cover, Cornell Journal of Law and Public Policy, Spring, 2002. Vol. 11, 403. 

“*Mitchell, v. Helms*: Does Government Aid to Religious Schools Violate the First Amendment? An Extensive Analysis of the Decision and its Repercussions,” P. Swift, Catholic Lawyer, (Catholic University). 41, 169.

“The Final Report: A Centrist Vision of School Choice,” B. Marron, Georgetown Journal on Poverty Law and Policy, vol. 8, 321.

“Focus: What’s Wrong with Education in America? The Final Reform: A Centrist Vision of School Choice,” B. Marron, Georgetown. Journal on Poverty Law & Policy, vol. 8, 321.

“Comment: Campaign for Fiscal Equity v. State: A Template for Education Transformation in New York,” A. Washburn, Buffalo. Law Review, vol. 49, 489, (2001)

Comments: “The Question of a Fundamental Right to a Minimally Adequate Education,” K. Safier, University of Cincinnati. Law Review, vol 69, 993 (2001).

“State Courts and School Funding: A Fifty State Analysis,” P.. Lundberg, Albany Law Review, vol. 63, 2000.

“School Finance Reform Litigation: Why Are Some State Supreme Courts Activists and Others Restrained?” K. Swenson, Albany Law Review, vol 63, 2000.

“Core Societal Values Deserve Federal Aid: Schools, Tax Credits, and the Establishment Clause,” N. Crimm, Georgia Law Review, fall, 1999.

“The New Judicial Federalism: Deference Masquerading as Disclosure and The Tyranny of the Locality in State Review of Education Finance,” M.D. Blanchard, University of Pittsburgh Law Review, fall 1998.

“Equity v. Autonomy: The Problems of Private Donations to Public Schools,” J. Schomberg, Annual Survey of American Law, 1998

“The Fate of Women’s Colleges: An Anti-Subordinate Analysis,” L. Gladke, Boston College Third World Law Journal, spring, 1998.

“Still on the Sidelines: Developing the Non-Discrimination Paradigm under Title IX,” B. A. Snow, Duke Journal of Gender Law and Policy, Spring, 1996.

“School Finance Litigation Comes to North Carolina,” M. R. Westbrook, North Carolina Law Review, September, 1995.

“School-Based Decision Making in Kentucky: Dawn of a New Era or Nothing New Under the Sun,” C. Russo, Kentucky Law Journal, 1995.

“The Good, the Bad, and the Ugly: An Empirical Analysis of Litigation Projected School Finance Reform,” B. N. Joondeph, Santa Clara Law Review, 1995.

“Rethinking Statewide Taxation of Non Residential Property for Public Schools,” K. J. Stark, Yale Law Journal, December 1992.

Publications (most recent)

R. Craig Wood, Michael Petko, and Luke Cornelius, “*Gibson v. Lee County School Board*: The Implementation of a Bible Curriculum,” ELA Notes, January 1999, vol. 34, no. 1, 3-6.

R. Craig Wood, “An Examination and Analysis of Hiring Patterns in Palm Beach County Public Schools: Expert Analysis in *Williams v. School Board of Palm Beach County* Case No: CL 96-3091 AF.”

R. Craig Wood and Michael Petko, “Assessing *Agostini v. Felton* in Light of *Lemon v. Kurtzman*: The Coming of Age in the Debate Between Religious Affiliated Schools and State Aid,” Brigham Young University Education and Law Journal, Vol. 2000, No. 1.

R. Craig Wood and Alvin Schilling, "The Judicial Dilemma Created by Mandatory Student Activity Fees: The Supreme Court Offers a Resolution in Ruling in *Wisconsin v. Southworth*," Education Law Reporter, vol. 147, 413-428.

R. Craig Wood and Hernan Castro, "The Florida Opportunity Scholarship: An Analysis of the Florida School Voucher Plan," Education Law Reporter, vol. 156, [739-758], 2001.

R. Craig Wood, Luke Cornelius, and Sarah Mendonca, "Teacher Dismissal," Principals Handbook, 2nd ed. W. Camp et. al., Chap. 20, 267-278, Dayton: Education Law Association, 2001.

R. Craig Wood, "Business Management in Colleges and Universities," *A Treatise on Higher Education Law*, ed. David Dagley, Education Law Association, Dayton Ohio, forthcoming.

Alvin Schilling and R. Craig Wood, "The Internet and Academic Freedom: The Implications
Of *Urofsky v. Gilmore* Standing as a Constitutional Concern: A Required Threshold Issue,"

Education Law Reporter, vol. 179, 9-27.

R. Craig Wood and David Thompson, "Politics of Plaintiffs and Defendants," Chap. Three in, *Money, Politics and Law Intersections and Conflicts in the Provision of Educational Opportunity*, *American Education Finance Association Annual Yearbook*, Kenneth Wong and Karen DeMoss ed.s, Eye on Education, 2004, 37-44.

Richard Fossey and R. Craig Wood, "Academic Freedom and Tenure," Chapter. Five, in *Legal Issues in the Community College*. New Directions for Community Colleges, Robert C. Cloud, editor, Jossey-Bass, 2004, 51-63.

R. Craig Wood, "Constitutional Challenges to State Education Finance Distribution Formulas: Moving from Equity to Adequacy," St Louis University Public Law Review, Vol. 23, no. 2, 2004, 531-564.

R. Craig Wood and Bruce Baker "An Examination and Analysis of the Equity and Adequacy Concepts of Constitutional Challenges to State Education Finance Distribution Formulas," Invited article to the University of Arkansas-Little Rock Law Review, vol. 27, no 1, 2004, 125-168.

R. Craig Wood and George Lange, "The Financial Implications of the No Child Left Behind Act and Its Impact on Building Principals," Principals Handbook, Chapter 31, 3rd ed. William Camp et. al., Dayton: Education Law Association, 2004, 473-489.

Steven Smith and R. Craig Wood, *Determining the Costs of an Adequate Education in the State of Vermont*, National Conference of State Legislatures, 2004.

R. Craig Wood, Bruce Baker, and Steven Smith, *Financing Public Education in the State of Missouri, Preliminary Report and Final Report*, to the Joint Committee on Funding Public Elementary and Secondary Education, 2004, 177 pages each.

R. Craig Wood, *An Examination and Analysis of the Issues and Costs Associated with Developing New School Districts Within the Baldwin County School District, Bay Minette, Alabama*, August 2004, 55 pages.

R. Craig Wood and Robert McClure, "The Florida Special Education Voucher Plan," Journal of Education Finance, vol. 29, no. 4, 359-366.

S. Bauries and R. Craig Wood, "Rights Without Remedies: The Consequences of *Tennessee v. Lane* For Disabled State University Students," West's Education Law Reporter, vol. 197, no. 3, 697-714.

R. Craig Wood, "An Analysis and Evaluation of the Texas Foundation School Program," Report to the Attorney General, of the State of Texas, August, 2004, 41 pages,

"Arizona English Language Learner Cost Study," Report to the Arizona State Legislature, J. Wilde, J. Finkelstein, M. Fermanich, and R. Craig Wood, National Conference of State legislatures, February, 2005. ISBN 1-58024-360-6. 163 pages.

R. Craig Wood, "An Analysis and Evaluation of the Florida Education Finance Program." Report to the Defendant State Legislature of Florida, in the matter of *School Board of Miami Dade v. King*, June, 2005, 45 pages.

BOOKS

R. Craig Wood, Editor of Principles of School Business Management, (Reston, VA: Association of School Business Officials,) 1987, 675 pages, ISBN N. 0-910170-46-0/

R. Craig Wood and David Thompson, Education Finance Law: Constitutional Challenges to State Aid Plans, An Analysis of Strategy, (Topeka, KS: National Organization on Legal Problems of Education), 1993, ISBN N. 1-56534-058-2.

David Thompson, R. Craig Wood, and David Honeyman, Fiscal Leadership for Schools: Concepts and Practices, (White Plains: NYL Longman Pub. Co.), 1994, 648 pages, ISBN N. 0-8013-0809-7.

R. Craig Wood, David Thompson, Lawrence Picus, and Don Tharpe, Principles of School Business Management, 2d Ed, (Reston, VA: Association of School Business Officials), 1995, 908 pages, ISBN N. 0-910170-70-3.

R. Craig Wood and David Thompson, Education Finance Law: Constitutional Challenges to State Aid Plans, An Analysis of Strategy, 2d Ed, (Dayton Ohio, Education Law Association), 1996, ISBN N. 1-56534-069-8

David Thompson and R. Craig Wood, Money and Schools: (Larchmont, NY: Eye on Education, 1998, ISBN 1-883001-45-5

Charles Russo, Harvey Polansky, and R. Craig Wood, editors, Primer on Legal Affairs for the School Business Official, (Reston VA: Association of School Business Officials, 2000, 0-910170-82-7.

David Thompson and R. Craig Wood, Money and Schools, 2nd Edition, (Larchmont, NY: Eye on Educ, 2001.

R. Craig Wood and David Thompson, *Financing Public Education*, (New York: Prentice-Hall) Under Contract, scheduled for publication 2005.

R. Craig Wood and David Thompson, Education Finance Law: Constitutional Challenges to State Aid Plans, An Analysis of Strategy, 3rd Ed, (Dayton Ohio, Education Law Association), (Under Contract).

R. Craig Wood, Lawrence Picus, and David Thompson, Principles of School Business Management, 3rd Ed, (Reston, VA: Association of School Business Officials), (under contract).

Dr. Merle Farrier

Merle J. Farrier

October 2004
446 Camas Creek Road
Plains, MT 59859
406-243-5623 (UM)
406-741-3970 (home)
merle.farrier@mso.umt.edu

EDUCATION

Ed.D. Leadership	1998	The University of Montana, Educational Dissertation Title: <i>The Relationship of SAT/ACT Scores to the Superintendency</i>
M.Ed. Leadership	1992	The University of Montana, Educational
B.A. Mathematics/Physics	1969	The University of Montana,

EXPERIENCE

2002 to Present	Tenure Track Assistant Professor in Educational Leadership, UM-M
1999 to 2002	Adjunct Assistant Professor in Educational Leadership, UM-M
1992 to 1999	Faculty Affiliate, taught 65 Graduate Credits for School of Education, UM-Missoula.
1996 to 1999	K-12 Superintendent/High School Principal, Hot Springs School District, Hot Springs, Montana
1992 to 1996	K-12 Superintendent, Hot Springs School District, Hot Springs, Montana
1969 to 1992	7-12 Mathematics/Science/Computer Science Teacher, Hot Springs School District, Hot Springs, Montana
Other	Served as a school clerk and also as a school trustee

PROFESSIONAL EXPERIENCE

Administrative Experience Hot Springs Public Schools

As superintendent and superintendent/high school principal, duties included staff development, curriculum development, technology planning and implementation, negotiations, staff evaluation, personnel, grant writing, budgeting, maintenance and construction of facilities, and administration of special education services. I also had a superintendent intern work with me to gain her superintendent credentials.

Supervised an informal partnership with The University of Montana whereby Hot Springs students were brought on-campus to utilize available research facilities and technology as well as meet and work with university staff.

Conducted action research to determine and address on-going school needs. Decisions regarding needs ranging from a breakfast program to block scheduling were made in concert with action research.

Relevant Courses Taught in Educational Leadership and Curriculum The University of Montana-Missoula

- EDLD 697 – Advanced Educational Research
Total Credits Taught: 3
- EDLD 694 – Dissertation Statistics
Total Credits Taught: 3
- EDLD 694 – Multivariate Statistics
Total Credits Taught: 3
- EDLD 659 – Advanced School Administration
Total Credits Taught: 3
- EDLD 656 – Economics of Public Education
Total Credits Taught: 25
- C&I 618 – Advanced Statistical Procedures in Education
Total Credits Taught: 39
- EDLD 595 – Technology for Administrators
Total Credits Taught: 9
- C&I 565 – High School Curriculum
Total Credits Taught: 3
- EDLD 556 – Montana School Finance
Total Credits Taught: 33
- EDLD 520 – Research Methods
Total Credits Taught: 3
- EDLD 519 – Measurement and Analysis of Educational Data
Total Credits Taught: 18
- C&I 486 – Statistical Procedures in Education

Total Credits Taught: 57
C&I 455 – Curriculum Development for At Risk Students
Total Credits Taught: 2
Total Higher Education Credits Taught: 224.

K-12 Teaching Experience

Hot Springs Public School – Twenty-three years of teaching experience in mathematics, science, and technology in grades 7-12.

Professional Presentations

2004 – American Educational Research Association (AERA) annual meeting, San Diego, CA. *Montana School Finance.*

2004 – AEFA annual meeting, Salt Lake, UT. *Montana School Finance.*

2003 – AERA annual meeting, Chicago, IL. *Montana School Finance.*

2002 – AERA annual meeting, New Orleans, LA. *Montana School Finance.*

2002 -- AERA annual meeting, New Orleans, LA. *Superintendents use of Site-Based Councils: Role Ambiguity and Accountability.*

2000 – MEA/AFT Conference, Billings, MT. *Top Ten Reasons to be an Educator.*

1999 – Leadership Missoula, MT. Education in Transition. *Teacher Education.*

1999 – UCEA, Minneapolis, MN. *Administrative Control and Shared Decision Making.*

1999 – MCEL, Bozeman, MT. *Reality and Standardized Tests*

1999 – Breaking Ranks Workshop. Polson, MT. *Evaluating Research.*

1996 – Montana Education Association Convention. Billings, MT. *College Entrance Exams and the K-12 Curricula.*

Professional Publications

- 2004 Farrier, M. J. (2004). Accountability and fiscal crisis – state of the states and providences, 2003. AERA-FIPEF, January 2004.
- 2004 Paulson, Kelly, Jepson, van den Pol, Farrier, and Guilford (2004). The effects of an early reading curriculum on language and literacy development of head start children. Journal of Research in Childhood Education. Spring 2004. V18, Number 3.
- 2003 Farrier, M. J. (2003). The state of the states and providences: Montana school finance. AERA-FIPEF
- 2003 Ashmore, Farrier, Paulson, and Chu (2003). The effects of phonemic awareness drills on phonological awareness and word reading performance in a later learned alphabetic script. Reading Improvement.
- 2002 Farrier, M. J. (2002). In search of a more equitable and efficient education system: Montana. AERA-FIPEF
- 2002 Sorenson, L. D., Evans, R. E., and Farrier, M. J. (1999). Superintendents use of site-based councils: Role ambiguity and accountability. Paper accepted for presentation at AERA annual meeting, April 2002.
- 1999 Sorenson, L. D., Moore A, and Farrier, M. J. (1999). Superintendents use of site-based councils: Role ambiguity and accountability. Paper accepted for presentation at UCEA, Minneapolis, MN.
- 1993 Farrier, M. J. (1993). Relationship of ACT/SAT scores to the superintendency. Dissertation Abstracts, International.

Certification

Montana	Class 1	Level 2	Endorsements: Mathematics and Physics
	Class 3	Level 3	Endorsements: 7-12 Principal, K-12 Superintendent
	Class 3	Level 3	Endorsements: School Psychologist

Professional Affiliations

Western Montana Association of Administrators
 Montana Association of School Superintendents
 American Educational Research Association
 American Education Finance Association

Stephen Smith

2471 Perry St.
Denver, CO 80211
(303) 246-7631 home
Email: Tillard@hotmail.com

Education

2005: Receiving **Education Doctorate** in August

University of Florida

Department of Educational Leadership, Policy and Foundations

Dissertation: *Analysis of Expenditures for School Districts Meeting and Not Meeting Adequate Yearly Progress (AYP) Under the No Child Left Behind Act of 2001 (NCLB).*

Adviser: R.C. Wood

1996: **Master of Arts**

University of Florida

Department of Social Foundations of Education

1994: **Bachelor of Arts**

University of Central Florida

Liberal Studies

Work Experience

- February 2005 – Present: **Private Education Consultant**, working with R.C Wood and Associates, and independent projects.
 - August 2004 – January 2005: **Director of Research and Evaluation** for the Colorado Small Schools Initiative at the Colorado Children's Campaign.
 - October 2000 – August 2004: **Senior Education Policy Specialist**, National Conference of State Legislatures (NCSL). Managed NCSL's National Center on Education Finance (NCEF).
 - August 1998 – October 2000: **Management Consultant**, North Carolina's Office of State Budget and Management.
 - January 1997 – August 1998: **Policy Analyst**, Florida Legislature's Office of Program Policy Analysis and Government Accountability (OPPAGA).
 - May 1996 – December 1996: **Graduate Research Assistant**: Department of Educational Leadership, University of Florida.
 - January 1995 – May 1995: **Teacher**, Alachua Country Public Schools.
-

Rsearch Focus

Public Education Finance, Law, Policy, Leadership and Evaluation

Publications

- S. Smith, "Education Adequacy & Litigation: History, Trends and Research," Arkansas Law Review, vol. 27, no. 1, 2005.
- S. Smith, "Education Finance: What Does the Future Hold?" Head First Colorado, Fall, 2004.
- S. Smith and G. Durr, "Education Finance Litigation: How Much is Enough?" State Legislatures Magazine, September, 2004.
- K. Conklin and S. Smith, "Stronger Fiscal Incentives Can Improve High School and Postsecondary Outcomes," Issue Brief, National Governors Association, June, 2004.
- S. Smith, "Debunking the Myths of Special Education," State Legislatures Magazine, June, 2003.
- S. Smith and J. Myers, "Blowing in the Wind," American School Boards Journal, May, 2003.
- S. Smith and J. Pettersen, "State Efforts to Define Education Adequacy," State Legislatures Magazine, October, 2002.
- S. Smith and R.C. Wood, "Critical Components of Charter Schools: An Analysis and Overview," School Business Affairs, December 1996.

Funded Grants and Projects

- Successful school analysis and survey work for Montana Taxpayers Association. \$6,000 (2005)
- Created "Public Education Tool-Kit" for the National Association of Realtors in collaboration with R.C. Wood. Served as lead writer and obtained \$22,000 of the \$32,000 project (2005).
- Obtained \$10,000 subcontract from Fiscal Analytics for a study funded by Virginia First Cities that analyzed expenditure information on school districts meeting specified student performance measures with varying levels of low-income students (2004). | *
- Obtained \$8,000 sub contract for "Evaluation of Missouri School Finance Formula" in collaboration with R.C. Wood and B. Baker (2003).
- Served as lead writer inn collaboration with J. Bell for "State Legislative Policy and High School Reform: Bridging the Gap" proposal that was awarded \$467,000 by the

Gates Foundation (2003).

- Obtained \$50,000 contract from the state of Vermont to perform an adequacy study (2003).
- Obtained \$19,000 from the state of Idaho for a series of papers on education administration (2003).
- Obtained \$237,000 contract from the state of Arizona to identify appropriate funding levels for English Language Learners (2002).
- Awarded \$2,500 sub contract from Augenblick & Myers to produce a Montana School Boards Association-funded education adequacy study with J. Pettersen (2002).
- Obtained \$9,000 sub contract from Augenblick & Myers for an Adequacy Study funded by state of Kansas with J. Pettersen (2002).

Technical Assistance and Professional Presentations

Legislative Testimony and Technical Assistance

- ***Education Equity and Adequacy: History, Research and Trends***
March 2004: South Dakota Joint Committee on Education.
- ***Education Finance in the Age of No Child Left Behind***
December 2003: National Conference of State Legislature's Fall Forum, Washington DC
- ***Education Finance Formulas: History, Trends and Legal Implications***
December 2003: Missouri Joint Committee on Education Finance.
- ***Revenue Options for Funding K-12 Education***
November 2003: Special Legislative Forum on Education Finance, Oregon.
- ***Policy Options for Financing School Facilities and Legal Implications.***
September 2003: Arkansas Joint Committee on School Facilities.
- ***State Efforts to Link Education Finance and Standards***
August 2003: South Dakota Joint Committee on Education.
- ***Education Finance Litigation: Trends, Implications and Policy Options***
May 2003: Arkansas Select Joint Committee on Education Finance.
- ***State Efforts to Link Education Finance and Standards***

April 2003: Wisconsin Joint Education Committee.

- **Education Finance: What Does the Future Hold?**
February 2003: Connecticut Intergovernmental Commission on Education.
- **State Efforts to Align Education Funding and Student Outcomes**
January 2003: West Virginia Special Joint Committee on K-12 Education.
- **Education Adequacy: History, Research and Trends**
December 2002: Washington Joint Committee on Education Finance.
- **Education Finance: History, Trends and Policy Options**
December 2002: Small Group Meeting with South Carolina Legislative Leadership.
- **State Efforts to Define Education Adequacy**
November 2002: Small Group Meeting of Legislators and Staff, Florida.
- **State Efforts to Define and Finance Education Adequacy**
October 2002: Connecticut Select Committee on Education Finance.
- **State Efforts to Define Education Adequacy**
September 2002: Oklahoma Special Legislative Meeting on Education Finance.
- **Defining Education Adequacy: The Need to Link Education Finance and Student Outcomes**
August 2002: Virginia Legislature Special Small Group Meeting.
- **State Policy Options for Financing K-12 Education**
April 2002: Regional Legislative Meeting on Education Finance, Pennsylvania.
- **School Finance 101**
December 2001: North Dakota Joint Committee on Education.
- **Equity and Adequacy in Education: History, Trends and Policy Options**
September 2001: Texas Special Joint Committee on Education Finance.
- **Education Finance: What Does the Future Hold?**
August 2001: Small Group Meeting for Legislators, Texas.
- **Education Finance: History, Trends and Research**
August 2001: Small Group Legislative Meeting, Louisiana.

Expert Legal Testimony

- **Court Witness for state of West Virginia**
December 2002: *Tomblin vs. State Board of Education*, West Virginia.

Presentations to Other Government Organizations

- ***Current Status of Education Finance and State Efforts to Turn Around Low-Performing Schools*** October 2003: Presentation at National Governors Association's Meeting for Governors' Education Advisers, Louisiana.
- ***State Efforts to Link Education Finance and Standards*** May 2003: Presentation at National Governors Association Meeting, California.
- ***Education Adequacy: History, Trends and Policy Implications*** July 2001: Presentation to Missouri Consortium on School Improvement.
- ***Education Finance: History, Trends and Research*** January 2001: Pennsylvania State Board of Education Meeting.

Conference Presentations

- ***Education Adequacy: History, Research and Trends*** March 2004: Symposium held by the University of Arkansas at Little Rock Law Review, Arkansas.
- ***Vermont Adequacy Study Findings.*** February 2004: Annual Meeting of the American Education Finance Association, Utah.
- ***Education Finance: Current Status of Education Finance and What the Future May Hold*** July 2003: Annual Meeting of American Education Publishers Association, Colorado.
- ***Current Status of Education Finance and What Does the Future Hold?*** December 2002: Annual Meeting of Public Education Network, Washington D.C.
- ***Presentation of On-line Database for 50-State Education Finance Formulas (with J. Pettersen)*** July 2002: Annual Meeting of Education Commission of the States, California.
- ***Education Finance: Current Status of Education Finance and What the Future May Hold*** July 2002: Annual Meeting of the American Education Publishers Association, NY.
- ***Overview of Financial Incentive Systems from Across the Country*** February 2002: Annual Meeting of the American Education Finance Association, New Mexico.
- ***Presentation of On-line Database for 50-State Education Finance Formulas*** February 2002: Annual Meeting of the American Education Finance Association, New Mexico.
- ***Financial Incentives in K-12 Education: What Do You Reward and to What Degree?***

February 2000: Annual Meeting of American Education Finance Association, Alabama.

- ***Using the Internet as a Research Tool, and Marketing your Web Page***
March 1998: Annual Meeting of National Legislative Program Evaluation Society, Mississippi.

Meeting Facilitation and Coordination

- ***Special Education Finance Meeting***
With sponsorship from the National Association of State Directors of Special Education (NASDSE), NCSL held a meeting on special education finance in May 2002. The meeting was attended by legislators, legislative staff, state department special education employees and local special education administrators. Planned all facets of the meeting, including identification of participants, speakers, budget, hotel reservations and reimbursements.
- ***NCSL Education Finance Seminars***
In February, NCSL holds its annual Education Finance Seminar, which is attended by approximately 100-120 legislators, legislative staff and others. While at NCSL, I was responsible for creating the seminar agenda, identifying speakers, and seminar logistics such as session seating arrangements, hotel reservations, and audio-visual needs. I also facilitated and presented sessions on "School Finance 101," "School Finance Litigation," "Data Reporting Systems" and "Special Education Finance".
- ***NCSL Senior Fiscal Analyst Seminars***
In September, NCSL conducts its annual Senior Fiscal Analyst Seminar. While at NCSL I coordinated and moderated the education track for the meetings in 2002-2004.
- ***NCSL Annual Meetings***
Each summer NCSL holds its annual meeting, generally attended by approximately 6,000 legislators, legislative staff and others. While at NCSL, I coordinated the sessions on education finance.

Media Relations

- ***Print and Electronic Media***
While at NCSL, I responded to approximately 300 interview and information requests from reporters across the country, and I have been quoted in the *New York Times*, *Washington Post*, *Christian Science Monitor*, *Education Week's Quality Counts*, and many other newspapers.
- ***Broadcast Media***
I have been interviewed on National Public Radio (NPR) on several occasions, most recently on *Morning Edition* on February 3, 2005.
<http://www.npr.org/templates/story/story.php?storyId=4476500>.

Also, I provided an extended, live interview for an NPR exclusive on "The Price of Education" for *Talk of the Nation* on August 16, 2004.

<http://www.npr.org/templates/story/story.php?storyId=3853587>

Constituent Relations

Along with responding to media requests while at NCSL, I also answered approximately 700 information requests from legislators, legislative staff, and others interested in education finance policy, and education technology.

Research Product, Web Site and Database Development

- ***Expenditures of School Districts Meeting and Not Meeting Adequate Yearly Progress (AYP) Requirements under the No Child Left Behind Act of 2001 (NCLB)***

Currently, I am creating a database that provides expenditure levels of school districts meeting and not meeting AYP requirements under NCLB. Along with total expenditures, the database will allow users to examine expenditures on all sub-categories tracked by the United States Census Bureau such as instruction and support services. At this time, two organizations have offered funding for the rights to the database, but I will continue to market the product until its completion, which is scheduled for July 2005. I also own the rights to www.school-finance.org and www.education-finance.org and currently creating content, which should be viewable by August 2005.

- ***50-State Education Finance Formula Database***

I created the first of its kind on-line searchable database that allows users to query various aspects of state education finance systems. Along with collecting information from every state, I also designed the Access database that powers the site, and worked closely with web designers on the final product.

http://www.ncsl.org/programs/educ/ed_finance/intro.htm

Professional Memberships

- American Education Finance Association
- American Education Law Association

Professional References

- R. Craig Wood: **Professor, University of Florida**
Gainesville FL. (352) 392-2391. rcwood@ufl.coe.edu
- Michael Petko: Senior **Research Analyst, National Association of Education (NEA)**
Washington D.C. (202) 833-4000. mpetko@nea.org
- John Felmann: **Partner, Fiscal Analytics**
Richmond, VA. (916) 274-8738. jdfeldmann@optonline.net

- Senator Charles Shields: **Missouri Senate**
Jefferson City, MO. (573) 751-9476. charlie_shields@senate.state.mo.us
- Mark W. McOwen: **Chief Counsel, Committee on Finance – West Virginia House of Delegates.** Charleston, WV. (304) 340-3230.
mmcowen@mail.wvnet.edu

Additional References and Letters of Recommendation Available Upon Request

Additional personnel involved with specific project elements:

Michael Griffith

Professional Preparation

B.A. (Political Philosophy) - James Madison College at Michigan State University
 M.P.A (Government Finance) - The Ohio State University
 Candidate – M.Ed. (Education Management) - Trinity College, University of Dublin

Projected graduation Fall, 2005.

Relevant Experience:

Education Commission of the States

Policy Analyst (2000 – Present)

Program Director – Education Finance Initiative (2002 – Present)

- Provided technical assistance to fourteen different states on key education issues including: adequate school funding, educating at-risk and special education student populations, equity in education opportunities, state budget/tax issues and teacher pay-for-performance.
- Produced research studies and policy papers on such issues as school finance litigation, state education funding formulas and state taxation policies.
- Quoted over 200 times in media outlets including: The Chicago Tribune, Cable News Network, Education Week, The London Times, MSNBC, NBC Nightly News, National Public Radio, The New York Times and USA Today.
- Testified on education funding issues to state legislatures, or governor's commissions, in Connecticut, Maryland, Minnesota, Montana, Ohio, New Mexico, New Jersey, Pennsylvania and Texas.
- Made presentations on school funding to such diverse groups as: The Education Writers Association, The National Conference of State Legislatures, The National School Boards Association and the New Democratic Party in Alberta, Canada.

Augenblick & Myers (1999 – 2000)

Policy Analyst

- Worked on projects designed to assist policymakers in three states: Kansas, Minnesota and South Carolina
- Focus of work included the following topic areas: adequacy in school funding, school district consolidation and special education funding reform.
- Each project conducted at A&M was undertaken with the intention that the final report would be used to help shape state policy.

Michigan State Senate – Minority Staff (1995 – 1999):

Finance/Tax Policy Analyst

- Responsible for monitoring the Senate Finance and Education Committees.
- Drafted legislation dealing with taxation, education finance, bonding, capital construction, charter schools and vouchers.
- Worked with state and national groups including: AFL-CIO, American Association of School Administrators, Chamber of Commerce, National Association of State Boards of Education and the National Education Association.

- **Selected Papers/Studies:**

“Full-Day Kindergarten: At the Crossroads of Early Learning and Early Elementary Education - An Exploratory Study of Full-Day Kindergarten Policies in the United States” with Kristie Kauerz and Michelle Galvan. Education Commission of the States. Projected publication date: June 2005. *

“School Finance Litigation and Beyond”. Published by the Education Commission of the State – funded with a grant from the Wallace foundation. April 2005.

“State Funding Formulas and Grade Weighting – An Overview of Each State’s Funding Formula”. Published by the Education Commission of the States. March 2005 *

“The Funding of Public Schools in South Carolina: An Overview of How Schools are funded and a Comparison of the State to Others in terms of Funding Levels and Changes Over Time” with John Augenblick. Report prepared for the South Carolina School Boards Association, February 2000.

Other:

- Member, American Education Finance Association
 - Post Graduate Internship, United Auto Workers – 1993 to 1995
 - Congressional Internship, Washington, D.C. - 1988
 - Treasurer, Parkhouse Foundation For The Victims of Brain Injury
-
-

Joyce Silverthorne

Vita unavailable at printing time due to network/server problems – see end of Proposal for vita.

4.1.2 Continued

A. Years of Experience and Previous Professional Experience of Project Team:

1. Dr. Donald Robson has been in the public education business since 1964 (41 years) with service as a teacher, Director of Special Education, High School Principal, university professor of educational leadership at Purdue University, Montana State University, and The University of Montana, Director of Educational Research and Service at Montana State University, department head at Montana State University, 10 years as dean of the School of Education at The University of Montana, and Associate Provost at The University of Montana.
2. Dr. R. Craig Wood has 35 years of experience in education, with service as a teacher, assistant superintendent for two school districts, business manager for a school district, associate professor and chair of educational leadership at Purdue University, and as B. O. Smith Research Professor at the University of Florida.
3. Dr. Merle Farrier has 36 years in Montana education. He taught for 23 years in Montana's rural schools (Class C) and served for 7 years a superintendent (all 30 years in a small rural school on a MT Indian reservation. He served for 3 years as school clerk and school board

member for an additional 3 years. He was the first "teacher of record" for the Salish Kootenai College (2 math courses during their first year of existence). While serving as school superintendent he also taught as an adjunct faculty member for The University of Montana in the area of school finance. He served for 7 years as an adjunct instructor and for the past 6 years as Assistant Professor of Educational Leadership, teaching courses in school finance and educational statistics.

4. Mr. Stephen Smith has served 9 years as a policy and educational consultant since receiving his Masters degree in 1996, and will complete his PhD. in Educational Leadership at the University of Florida this year. Over the past nine years he has worked as a policy analyst for the Florida Legislature's Office of Program Policy Analysis and Government Accountability (OPPAGA), a management consultant for North Carolina's Office of State Budget and Management, a senior education policy specialist for the National Conference of State Legislatures (National Center for Educational Finance), Director of research and evaluation for the Colorado Small Schools Initiative, and as a private education finance, law and policy consultant.

5. Mr. Griffith has worked in the realm of school finance for the past eleven years with the Michigan legislature, the consulting firm of Augenblick & Meyers and he is currently the director of ECS's School Finance Initiative. While at ECS Mr. Griffith has provided assistance to states on such key finance issues as: adequacy, financing at-risk student populations, equity, special education financing, state budget/tax issues and teacher pay-for-performance. He has produced research studies and policy papers on such issues as: school-funding litigation, state education funding formulas and state taxation policies.

B. Knowledge of Montana school finance laws and the composition and needs of Montana's rural and isolated public schools and public schools with high populations of American Indian students:

1. Dr. Craig Wood is a nationally known school finance expert with recognized expertise in state systems of finance and numerous experiences in directing state level finance studies as well as in providing consultant services to numerous state legislatures and other educational entities across the U.S. Dr. Wood has written technical reports such as "The Condition of School Buildings in Rural and Small School Districts" for the Center for Extended Services and Studies, and "Financing Rural and Small Schools: Issues of Adequacy and Equity" for the Clearinghouse on Rural Education and Small Schools. In

addition, Dr. Wood wrote two technical reports for Montana's Attorney General in *Rural Education Association v. State*, Final Report. Specifically, "The Study of Resource Accessibility, Fiscal Neutrality, and Tax Yield in Montana" and "Funding Public Education in Montana Based on the Concept of Cost of Living Indices in Montana"

2. Dr. Merle Farrier has known Montana finance first hand as a teacher, principal and superintendent of a Montana small school (Class C) with a high population of American Indian students. Dr. Farrier's finance classes at The University of Montana are required to study and synthesize the strengths and weaknesses of both sides of the recent litigation that culminated in the Supreme Court decision that led to this project. He has served as a school finance consultant to Montana school districts to assist with teacher/board labor relations and with school districts located on Montana Indian reservations.
3. Dr. Don Robson has taught educational leaders for Montana's schools since 1982 and has worked with Montana's school districts and communities (rural and isolated as well as schools serving American Indian students) at both the local level and the state level.
4. Mr. Smith has presented on state policy options for addressing the needs of small and isolated schools to several state legislative committees while working for NCSL, along with presentations at NCSL conferences and seminars.
5. Joyce Silverthorn has served as a member of the State Board of Public Education as well as Director of Education for the Consolidated Salish and Kootenai Tribes in Pablo, Montana. Joyce will work as a consultant to the study team to help design the needs assessment portions with reference to the Indian Education for All act as well as assisting in the cost analysis section with the team.

C. Knowledge of school funding litigation, including the history of litigation concerning school finance in Montana.

1. Dr. Farrier is a Montana native who graduated from high school in a rural, Indian reservation school and has all of his higher education from the Montana university system. He has operated as an educator for 36 years in Montana and will graduate his 10th child from a rural school located on a Montana Indian reservation in 2009. His school finance classes study the history of Montana school finance from the Organic Act of 1864 and the first mill levy established in 1866 by the 2nd Territorial Legislature along with the ensuing battle between the Supreme Court of Montana Territory and the governor and legislature.

He has presented nationally on Montana school finance in New Orleans, Chicago, Salt Lake City, San Diego, Louisville, and Montreal.

2. Dr. Wood is one of the leading authorities and authors on school funding litigation and has served as the Finance Law Editor for the Journal of Education Finance, on the Author's Committee and Referee for West's Education Law Reporter, on the Board of Editors, Educational Considerations, and as a Regional Reporter for the Education Law Association's School Law Reporter. Dr. Wood has also conducted education litigation workshops for the American Education Finance Association (AEFA), the National Association of Attorney Generals, and the National Conference for State Legislatures. In addition, Dr. Wood has worked on school funding cases in a number of states. Specifically, Dr. Wood has worked for plaintiff groups in Arizona, Indiana, Kansas, Oklahoma, and Pennsylvania, and worked on behalf of the states of Florida, Montana, South Dakota and Texas. The court overseeing a case in New Jersey also solicited the help of Dr. Wood.

3. Mr. Smith has extensive experience with school funding litigation, and while managing NCSL's National Center of Education Finance Mr. Smith was responsible for tracking school funding litigation across the country, which he summarized in an annual school finance litigation report. Along with tracking school funding litigation, Mr. Smith gave presentations to legislative committees in 15 states on education adequacy and litigation, presented at meeting of the National Governors Association and NCSL, and has been interviewed by dozens of newspapers across the country over issues of litigation. Mr. Smith has also written on issues of adequacy for the National Conference of State Legislatures, and more recently published an article for the University of Arkansas at Little Rock Law Review. In addition, Mr. Smith served as an expert witness for the state of West Virginia in their school funding case.

D. Demonstrated previous successful professional experience working with and developing a school finance system of the magnitude required by this request for proposals, including experience related to:

1. Issues of Equity in funding:

Dr. Wood most recently served as the leader of a study that analyzed equity issues in Missouri and provided a variety of policy options and models of new funding formulas. Mr. Smith was also heavily involved with the work in Missouri. Dr. Wood has also conducted reports and

analyzes on equity for the states of Maryland, Delaware, Florida and Texas.

2. Funding Adequacy:

Dr. Wood has been involved in adequacy studies in Florida and Vermont, and has also examined the issue extensively through his litigation work previously outlined. Stephan Smith has been involved with adequacy studies in Kansas, Vermont, Arizona and more recently conducted analyzes on successful schools in Montana. While at NCSL Mr. Smith was also responsible for providing detailed information to state legislatures across the country on the different methods used in adequacy studies and their corresponding strengths and weaknesses. Mr. Griffith has been involved in school finance adequacy studies in Connecticut, Kansas, Missouri and South Carolina. In addition, Mr. Griffith has worked with policymakers in Ohio and New York to assist in crafting solutions after the state's highest courts ruled that the current system violated the state's constitution.

3. Regional Cost Differences:

Dr. Wood is currently working on behalf of the state of Florida on their litigation concerning Regional cost differences.

4. Legal aspects of educational finance reform:

As previously outlined, both Dr. Wood and Mr. Smith have extensive knowledge and experience with the legal aspects of education finance reform.

5. Issues related to preserving the cultural integrity of Montana's American Indians through implementation of "Indian Education for All" for all public schools students and programs to address the specific achievement needs of American Indian students including curriculum design and implementation.

Dr. Robson has served as a member and chair of the Certification Standards and Practice Advisory Council for the State of Montana and as Dean of the School of Education for 10 years at The University of Montana. As mentioned previously, Merle Farrier is a product of, was a teacher and administrator in, and has children who graduated from small, rural, isolated and reservation schools in Montana.

6. Issues related to isolated, rural, and urban schools; and

Dr. Wood and Mr. Smith examined issues of isolated, rural and urban schools in their work in Missouri. As mentioned previously, Merle Farrier is a product of, was a teacher and administrator in, and has children who graduated from small, rural, isolated and reservation schools in Montana.

7. Issues related to the attraction and retention of qualified educators and other personnel.

Dr. Robson has worked for the past 23 years with Montana schools and Montana educators at all levels. As Dean of the School of Education at The University of Montana, he worked with school districts throughout the state in response to the needs and concerns of small, isolated and rural schools for which the institution prepares teachers and administrators.

E. Effective oral and written communication skills and a demonstrated ability to provide structure with regard to input received from the school community on the operation of local schools and to facilitate the needs assessment process with education professionals and local schools.

Dr. Robson has worked for the past 23 years with Montana schools and Montana educators at all levels from local to state to regional to national. All members of the team have made professional presentations at state and national conferences and before state legislatures, school boards, professional, and community groups. All members of the core study team have completed all academic requirements for the terminal degree in their respective fields.

Robson and Woods have written many reports and made literally hundreds of presentations in community, governance, and political venues, while Farrier has made numerous written and oral presentations. Mr. Smith while working for the Governor's budget office in North Carolina was responsible for performing school district operational studies which required obtaining various types of inputs from school district and school personnel. In addition, Mr. Smith has given over twenty legislative presentations to states across the country in addition to a number of other presentations to education organizations and groups, and has strong writing credentials. Dr. Wood has well over 100 publications and a wide range of technical reports and oral presentations. Although too extensive

to list here, a brief look at Dr. Wood's resume will show his written and oral expertise. Mr. Griffith has Testified on education funding issues to state legislatures, or governor's commissions, in Connecticut, Maryland, Minnesota, Montana, Ohio, New Mexico, New Jersey, Pennsylvania and Texas. Mr. Griffith has been quoted over 200 times in media outlets including: The Chicago Tribune, Cable News Network, Education Week, The London Times, MSNBC, NBC Nightly News, National Public Radio, The New York Times and USA Today.

All members of the team have wide experience in data collection and analysis as well as in consultation with educational agencies, leaders, and communities.

F. Demonstrated expertise in working with legislative bodies, executive agencies, and other stakeholders.

In his 23 years in Montana education, Dr. Robson has worked closely with: the Office of Public Instruction, the School Administrators of Montana, the State Board of Public Instruction, the office of the Commissioner of Higher Education, the State Board of Regents, the office of the Governor. He has served as chairperson of the Certification Standards and Practices Advisory Council and as Chairperson of the Board of Directors of the Northwest Regional Educational Laboratory. As previously mentioned Dr. Wood has served as a teacher, assistant superintendent, district business manager and professor, and has worked with school boards, teacher unions and with several states legislatures and attorney generals. Mr. Smith has worked for the Florida Legislature, the Governor's Budget Office in North Carolina, and for the National Conference of State Legislatures, and has worked with a wide variety of educational entities. Mr. Griffith's work experience includes working in the Michigan Senate and with the Education Commission of the States. While at ECS Mr. Griffith has provided assistance to policy makers in all fifty states as well as providing fourteen different states with in-depth assistance on school funding issues.

G. Disclose conflicts of interest that would impede the offeror's ability to testify in support of the formula developed and implemented as a result of the study.

Offerors undertake to conduct the project as specified in the RFP and to stand by both the methods and outcomes of the study. As described herein, the information to be collected and analyzed and reported to the Committee will be complete and accurate insofar as it is made available to the team. When provided to the Committee, either in written form or in testimony, the team will have no conflict in representing the data or its analysis. The data will show what the needs and costs of education are. The formula to be developed and implemented as a result of the study is, as yet, however, unknown and cannot thus be either supported or refuted.

The team stands ready to assist the Committee and its staff with interpretation and analysis of the data.

4.1.3 Method of Providing Services. Offeror should provide a description of the work plan and the methods to be used to meet the contract requirements as more specifically detailed above in Section 3.

Task 1: Provide recommendations and assistance to staff in the design of a study, the preparation and collection of data, the evaluation of data, and reporting requirements necessary to conduct the study and in the development of a funding mechanism.

Method:

The adequacy team will work closely with staff from the Legislative Services and Fiscal Divisions, Office of Budget Program and Planning, and the chief of staff and the school finance administrator from the Office of Public Instruction on all aspects of the study.

The design of the analyses the adequacy team proposes is outlined under "Task 2", but modifications can be made after consultations with staff and members of the interim committee. Furthermore, the adequacy team fully recognizes the importance of staff and the interim committee having control and significant influence on how the study is designed and modifications that may be required as the study progresses.

Furthermore, given the tight time constraints of the study, the adequacy team will utilize the expertise of staff in the collection and evaluation of pertinent data, and will work collaboratively with staff on reporting requirements and the development of funding mechanisms. Overall, the adequacy team views staff as an extension of the team.

Task 2: Meet with the Quality Schools Interim Committee in Helena, Montana, on June 6, 2005, and with staff for one to three days by June 15, and at other times as needed during the course of the study, to provide technical assistance in the analysis of data and its application to accepted school finance methodologies and evaluation of the alternatives to implement the provisions of Senate Bill No. 152. Anticipated analysis includes:

- 1) Updating or completing current school funding studies using the successful schools and professional judgment approaches, or other accepted methodologies to determine the costs of a basic system of free quality public elementary and secondary schools;
- 2) Provide assistance in the analysis of evidence-based methodology;

- 3) Analysis of effective and efficient small schools cost structure and programs; and
- 4) Analysis of effective and efficient American Indian education programs and costs.

Method:

Dr. Wood, Dr. Robson, Dr. Farrier and Mr. Smith will meet with the Interim Committee in Helena, Montana on June 6th to discuss the design of the study we have proposed along with other options and alternatives and their corresponding strengths and weaknesses. The adequacy team believes the overarching design of the study can be finalized through this meeting. Then at least four members of the adequacy team will meet with staff for one to three days by June 15th to discuss next steps for data collection and other tasks and activities to finalize the specifics of the study design. As the study progresses, a member of the adequacy team will attend each meeting of the interim committee to provide an update on the study, and will also be available to discuss the study with members of the committee as needed.

Proposed Study Design:

There are several requirements listed in the RFP, and the following provides overviews on how we would address each of these requirements.

1. Updating or completing current school funding studies using the successful schools and professional judgment approaches, or other accepted methodologies to determine the costs of a basic system of free quality public elementary and secondary schools;

The adequacy team proposes four approaches to identify the costs of a basic system of free and quality public elementary and secondary schools (i.e. adequate education). Specifically, we will use the successful school/school district (SS), professional judgment (PJ), evidence-based (EB), and advanced statistical (AS) approaches in our study. The strong need to examine adequacy through "multiple lenses" is due to the limitations of each of the four methods that currently exist to identify adequate funding levels, and the significant variations that can result from each approach.

Multiple Approaches

It must be noted that of the 32 states that have had adequacy studies, only a handful have used multiple approaches, which again have produced drastically different results. For example, the state of Kansas used the successful schools and professional judgment approach to define adequacy, but there was over a 25% variation in results. Therefore, examining adequacy through "multiple lenses" is the most valid means of investigating education adequacy. Using multiple approaches will also serve two other important needs. First, the multiple approaches will produce a range of funding levels for the Montana Legislature, who can then decide the final funding levels. Second, examining adequacy broadly is the best way of addressing the current court order. Specifically, if only one approach was used, the court may ask why another approach was not used? Again, no state has examined adequacy through all four approaches, and Montana would be well served from an educational, methodological, and legal perspective by doing so. The following provides more detailed information on each of the four approaches.

}

Successful School/School District Approach (SS)

Under the SS model, schools and/or school districts that meet specified education standards are classified as successful. For example, school districts that perform at a given rate on state assessment tests, have good graduation rates, produce graduates that do not require remedial education when entering higher education could be classified as successful. The basic expenditures (current operating expenditures minus the spending or revenues associated with transportation, capital outlay and potentially other areas) for these districts is then calculated and provides a base cost figure.

Determining which outcome measures to use and setting criteria for success are the most important aspects of the successful school model. Therefore, the adequacy team will work in consultation with the interim committee when finalizing outcome measures and criteria. The following are outcome options for consideration:

- Performance on MontCAS (both absolute performance and improved performance)
- Performance on norm-referenced tests (both absolute performance and improved performance)
- Graduation and attendance rates.
- Need for remediation upon entering postsecondary education.
- AYP performance under NCLB

*measures
for
successful
schools*

Along with these measures the adequacy team also believes that other measures of success as identified by school district and school personnel could also be used. For example, increased participation and parent-teacher nights, respect and participation in community events such as tribal celebrations.

The adequacy team will also use the SS approach to identify cost adjustments that should be made for geographic and student population differences. For example, expenditure levels for successful small schools could be compared to larger successful schools, with the difference providing useful information on cost adjustments that should be made for small schools. Similar analyses could be performed for schools with various percentages of at-risk students, special education students etc.

*large v.
small*

Again, the interim committee will play a vital role in determining final measures and criteria, and will be provided with numerous funding levels for a base cost figure corresponding to each measure.

Professional Judgment Approach (PJ)

Most studies that have used the Professional Judgment approach create prototype schools take into account school size and location. For example, prototypes for of a large urban school, and a small rural school and other combinations are typically developed. However, for the purpose of this study, the adequacy team proposes creating a survey that will be sent to all schools and school districts in the state, asking what they determine to be the required inputs for an adequate base cost and additional inputs required for special need students (cost adjustments). The data obtained will be matched to school and district size, student demographics, and geographic data. The

*survey
of schools*

results of these analyses will be categorized into types of schools rather than prototype schools. For example, schools with less than 60 students in isolated areas.

These results will then be provided to a panel of "expert educators" from across the state that will determine the appropriateness of the findings and make required adjustments. It should be noted that the panel of expert educators will consist of personnel from various types of schools, and will have approximately 15-20 members. The interim committee will be provided funding levels for each school category along with the cost adjustments for specific student populations.

Panel of experts

Evidence Based Approach (EB)

Under this model, best practices and/or programs or even whole school reform models that have been shown to produce high student performance are identified and the costs associated with the programs/practices are calculated. In order to identify best practices and/or programs in Montana the adequacy team will survey 50-60 schools that have met a variety of performance measures, and will visit school and school district personnel for 15-20 schools. Once effective programs and practices have been identified, the adequacy team in collaboration with interim committee staff will cost-out the programs and practices to arrive at base cost and cost adjustment funding levels. In addition, the adequacy team will look at national research and other evidence-based studies to provide additional information on funding levels.

Advanced Statistics Approach (AS)

The underlying philosophy of the advanced statistical model is that with enough data on education expenditures and student characteristics, statistical techniques should be able to isolate the effects of different types of inputs (independent from each other), and arrive at a base cost of adequacy in an ideal school setting. This model can be adjusted to account for student characteristics, environmental factors, and other variables of a locality that affect the cost. These variables are then reintroduced to arrive at the cost of an adequate education in a particular school.

The data gathered by the adequacy team will be consistent with the requirements set forth by the Montana judicial system and the 2005 Legislative Session, particularly SB152 and SB525. The factors associated with the definition of quality education, particularly the accreditation standards, will be identified and their costs determined.

The analysis of these factor costs will be critical to an objective, bias free, and valid determination of the final costs, both individually by factor, and in total for all factors. For this portion of the research, the Statistical Approach will be modified to fit this research design in such a way that the analysis of the data would result in the same findings by any other party.

The first level of analysis will be to recognize that the costs of some factors, by their inherent nature, will be identified to a greater degree of precision than the costs of other factors. The precision to which individual factor costs have been determined will be expressed using measures of central tendency including mean, median, and mode as well as measures of variability to include range values, variance, and standard deviation as and when appropriate. All statistics used herein will be interpreted and reported in a manner that allows for public understanding of the purpose and applicability of the statistical findings.

The second level of analysis will be based upon the recognition that Montana has its own unique characteristics relevant to adequacy costs for any given population, particularly geographical considerations. This consideration will be equally critical to an accurate and cost-efficient determination of adequacy costs. The identification of specific and total costs of adequate education will allow the Legislature to replace the present model of school funding with a rational cost method.

While it is important to identify average adequacy factor costs and their ranges of variability, an important result of this research will be to identify the costs of all adequacy factors as they correlate to school demographics. In this way, the possibility is provided for schools to tend toward statistically identifiable clusters in which adequacy factors are funded at a higher or lower level than schools in a different cluster. The Quality Schools Interim Committee may want to consider these categories of funding when determining the final funding formula so that schools receive the amount of funding necessary for utilities, for example, based upon their needs rather than the average amount statewide, which would over compensate half of the districts and under compensate the other half. Multiple regression, factor analysis, cluster analysis, and other appropriate correlative forms of statistical analysis will be used to reduce, if possible, the total number of school districts to clusters of school districts having common funding needs to meet the legislative level of adequacy.

The results of the above analysis will allow for the calculation of an education-cost-index for every district in the state taking into account the variables associated with their districts. The need to develop an education-cost-index is of great importance to the state of Montana since funding all districts with an equal amount of funding is inherently unequal. The result of an education-cost-index would assign a value to each district in the state with 1.0 representing the level needed to meet the state's definition of adequacy for a set of common economic factors and in the absence of special considerations such as special populations, and/or geographic variations. For example, one district may have an education-cost index of 1.0 and another 1.02. A district having an index of 1.02 based upon special needs costs would have their base cost figure multiplied by the education-cost-index. Education-cost-indices can be developed that utilize economic variables as well as taking into account student populations if desired. Depending upon the funding model favored by the Interim Committee after the submission of the needs assessment and cost determination, additional analysis and spreadsheets can be developed to assist final determination.

These methods will allow for an identification of funding adequacy based upon school enrollment, isolated schools/urban schools, special needs, transportation, Native Americans, professional development, ability to attract and maintain qualified teachers, regional differences, and other appropriate variables.

2. Provide assistance in the analysis of evidence-based methodology

The adequacy team will provide assistance in the analysis of evidence-based methodology as described in the previous section for base costs and cost adjustments, and will also provide additional information on efficient business practices. For example, many school districts and schools across the country increase their purchasing power through multi-district collaborations or buying materials through statewide contract. In addition, districts may provide certain administrative services through multi-district collaboratives. For example, districts may pool their resources in order to provide professional development, special education services, data collection, pay role, or

employee benefits. We will provide an overview of best practices from across Montana and the country on multi-district collaboratives.

In addition, the adequacy team will provide useful information on effective programs and strategies that help turn around under performing schools. Given the costly requirements of corrective actions under No Child Left Behind, it is important for the state of Montana to identify and implement effective technical assistance strategies and supplemental services. Again, through the surveying of schools and districts in Montana who have improved student performance and summarizing national research, the adequacy team will provide a variety of policy options for the interim committee to consider and their corresponding costs.

3. Analysis of effective and efficient small schools cost structure and programs.

The adequacy team will provide information on efficient small school cost structures and programs through the creation of a cost of education index previously discussed in the advanced statistical approach. In addition, the adequacy team will provide the interim committee with overviews on how other states address small schools, and will also summarize national research on effective programs for small schools.

4. Analysis of effective and efficient American Indian education programs and costs.

Joyce Silverthorn has served as a member of the Montana State Board of Public Education and is currently the Director of Education for the Consolidated Salish and Kootenai Tribes in Pablo, Montana. Ms. Silverthorn will lead the work of the adequacy team in designing the needs assessment analyses for American Indian students, with reference to the Indian Education for All act, as well as assisting in the cost analysis of effective and efficient American Indian programs.

Increasing Public Input on the Educational Needs of Montana Students

The adequacy team believes that all citizens and groups in Montana should be provided with the opportunity to provide input on educational needs. Therefore, the adequacy team proposes the creation of a website that will provide information on SB152 and have a set of approximately 20 core questions for respondents to answer concerning educational needs, and will also allow respondents to provide additional information they deem appropriate. Survey respondents will be asked to identify themselves if they so choose, but will be assured that their responses will not be directly attributed to them. The website will be open to the public and will allow any individual or group to in Montana to provide input on educational needs.

We propose that a "Public Input Council" be formed to help plan, conduct, and analyze broadly representative input from all Montana stakeholders. Members of the Council could include:

- The Interim Legislative Committee
- School Administrators of Montana
- Rural Schools Association
- Quality Schools Association

- Montana Taxpayers Association
- Parent Groups
- Public Citizen Groups
- Montana Education Association
- Montana School Boards Association
- Native American groups
- Regional and state level special education groups
- Office of Public Instruction personnel
- Certification Standards and Practices Advisory Council (CSPAC/State Board of Education)
- Other group(s)

The finding from this research will be summarized and presented to the Quality Schools Interim Committee by the end of June, and will help set the context for what the Montana Public as a whole deems the educational needs for the state.

by end of June

Task 3: Present a final written report before the Quality Schools Interim Committee in Helena, Montana at a time prescribed by the Committee, including an executive summary that:

- 1) Creates an inventory of the assessment of educational needs for Montana's public schools based on the definition of a basic system of free quality public elementary and secondary schools as provided in Senate Bill No. 152;
- 2) Articulates the findings regarding the costs of providing a basic system of quality schools;
- 3) Makes recommendations for development of a funding formula that is based on the costs analysis and that ensures the equitable distribution of the State's share of the costs of a basic system of quality schools; and
- 4) Provides recommendations regarding the costs of adjusting the funding formula based on the educationally relevant factors identified by the Montana Legislature in Senate Bill No. 152.

Method:

1. The creation of an inventory of educational needs in Montana will include information the adequacy team obtains from the "Public Input Council" and data from the public input website, along with results from the professional judgment data, and surveying of schools through the evidence-based approach.
2. The interim committee will be provided with numerous funding levels for providing an adequate education from the results of the successful school, professional judgment, evidence-based and advanced statistical approaches to defining adequacy. The funding levels will provide information on base costs along with cost adjustments needed for student populations and geographic consideration. In addition, the adequacy team will report on total funding levels required for Montana's elementary and secondary education system.
3. The adequacy team will work closely with interim committee staff in providing recommendations and policy options for funding formulas. Specifically, the adequacy team will provide information on per-student formulas, classroom-

based formulas and formulas that combine both elements. The interim committee will be provided with spreadsheets on how each funding formula would affect districts across the state. In addition, the team will collaborate with staff to run several equity analyses on all policy options, including Mcloone Indexes, Gini Coefficients, Federal Range Ratios and others. Findings from these analyses and legal implications will be provided to the interim committee. The adequacy team also believes that soliciting input from school business managers and other personnel would be beneficial.

4. The adequacy team will provide detailed information on the total cost adjustments required under Senate Bill 152; and will also provide detailed information on each educationally relevant factor within Senate Bill 152 from the perspective of our advanced statistical analysis. Dr. Robson will also provide a separate report on the costs associated with attraction and retention of qualified educators and other personnel that examines the issue in a broader context than the advanced statistical method. The report will include information from national studies, data collected from surveys sent to Montana school systems, and interviews with school personnel from across the state.

4.1.4 Budget. A budget for the services based upon the proposed work plan, hours required by the work plan tasks, hourly rates for consultation duties, and expenses.

The following table provides the overall budget for the proposal, more detailed information on hours required for each task and consultation duties will be provided on the following page

Total Budget for Proposal					
	Rate per day	# Days	Unit costs	Sub-totals	Totals
Personnel costs:					\$149,250
Key personnel (study team)				\$120,000	
	\$600				
Merle Farrier	(\$75 hr.)	50	\$30,000		
	\$600				
Don Robson	(\$75 hr.)	50	\$30,000		
	\$750				
R. Craig Wood	(\$93.75 hr.)	40	\$30,000		
	\$500				
Stephen Smith	(\$62.50 hr.)	60	\$30,000		
Other consultants				\$22,000	
	\$ 600		\$		
Michael Griffith	(\$75 hr.)	20	12,000		
	\$ 400		\$		
Joyce Silverthorn	(\$50 hr.)	25	10,000		
Other personnel				\$ 7,250	
	\$250				
support personnel	(\$21.25 hr.)	20	\$5,000		
		150			
student hourly	\$15 hour	hours	\$2,250		
Operating costs:				\$13,500	\$13,500
			\$10,000		
travel support			\$1,000		
web page creation			\$1,500		
web page support			\$1,000		
miscellaneous					
copying, printing,					
mailing			\$1,000		
Total direct funding requested:					\$162,750

Task requirements, timelines and consultants primarily responsible for work:

There are 2,270 total hours budgeted for the study

Meeting with interim committee and staff: As previously outlined, members of the adequacy team will meet with interim committee on June 6th, and with committee staff for one to three days by June 15th. In addition, members of the team will attend every interim committee meeting and provide a status update and also meet with staff to collaborate on all aspects of the study:

Total hours: 200: All members of the team will work with staff and committee members

Successful Schools Analysis: Results from the successful school analysis will be completed by July 8th and results will be provided to staff and committee members via email, and presented at first committee meeting after July 8th.

Total hours: 140: Mr. Smith and Dr. Farrier will perform most of the analysis, with help from Mike Griffith and Dr. Wood.

Professional Judgment Analysis: Surveys will be sent out to school districts and schools by June 20th, and the expert panel will convene on the week of July 18th. With final results available by August 1st, which will be provided to staff and committee members via email, and presented at the first committee meeting after August 1st.

Survey sent on June 20

Total hours: 360: Dr. Robson will take the lead on this part of the study, and will be helped by all members of the adequacy team.

Evidence Based Analysis: Surveys will be sent out to school districts and schools by June 20th and school personnel will be visited in early July, with results available by July 22nd, which will be provided to staff and committee members via email, and presented at the first committee meeting after July 22nd.

Total hours: 280 Dr. Robson and Dr. Wood will take the lead on this part of the study, and with be helped by Mr. Griffith, Mr. Smith, and Ms. Silverthorne.

Advanced Statistical Analysis: Results will be available by August 1st, which will be provided to staff and committee members via email, and presented at the first committee meeting after August 1st.

Total hours: 360: Dr. Farrier will take the lead on this part of the study, and with be helped by Mr. Smith.

Other Evidence Based Analyses: Results will be available by July 15th, which will be provided to staff and committee members via email, and presented at the first committee meeting after July 15th.

Total hours: 80: Mr. Griffith will take the lead on this part of the study, and with be helped by other members of the adequacy team.

Overview of Small School Structures and Effective Programs: Results will be available by July 22nd, which will be provided to staff and committee members via email, and presented at the first committee meeting after July 22nd.

Total hours: 80: Mr. Griffith will take the lead on this part of the study, and with be helped by other members of the adequacy team.

Educational Needs of American Indians: Results will be available by August 1st, which will be provided to staff and committee members via email, and presented at the first committee meeting after August 1st.

Total hours: 200: Ms. Silverthorne will take the lead on this part of the study, and will be helped by other members of the adequacy team.

Creation of Public Input Website and Monitoring of Results: Results will be available by June 27th and provided to the Public Input Council.

Total hours: 50: Students at the University of Montana will compile information, and summary report will be completed by members of the adequacy team. >

Creation of Public Input Report: Report will be completed by July 8th, and will be provided to staff and committee members via email, and presented at the first committee meeting after July 8th.

Total hours: 100: Dr. Robson and Wood will take the lead on this part of the study, and with be helped by other members of the adequacy team.

Creation of Funding Formula Options: Results will be available by August 8th, which will be provided to staff and committee members via email, and presented at the first committee meeting after August 8th.

Total Hours: 120: Dr. Wood and Mr. Smith will take the lead on this part of the study, and with be helped by other members of the adequacy team.

Equity Analysis: Results will be available by August 15th, which will be provided to staff and committee members via email, and presented at the first committee meeting after August 15th.

Total Hours: 120: Dr. Wood and Dr. Farrier will take the lead on this part of the study, and with be helped by Mr. Smith.

Creation of Final Report: Will be provided to the interim committee by August 30th.

Total Hours: 180: All members of the team will help with the creation of the final report, and as different parts of the study are completed, corresponding sections will be written.

SECTION 5: EVALUATION CRITERIA

5.0 EVALUATION CRITERIA

R. C. WOOD AND ASSOCIATES UNDERSTANDS AND WILL COMPLY

SCORING GUIDE

R. C. WOOD AND ASSOCIATES UNDERSTANDS AND WILL COMPLY

APPENDIX A: STANDARD TERMS AND CONDITIONS

By submitting a response to this invitation for bid, request for proposal, limited solicitation, or acceptance of a contract, the vendor agrees to acceptance of the following Standard Terms and Conditions and any other provisions that are specific to this solicitation or contract.

ACCEPTANCE/REJECTION OF BIDS, PROPOSALS, OR LIMITED SOLICITATION RESPONSES:

R. C. WOOD AND ASSOCIATES UNDERSTANDS AND WILL COMPLY

ACCESS AND RETENTION OF RECORDS:

R. C. WOOD AND ASSOCIATES UNDERSTANDS AND WILL COMPLY

ALTERATION OF SOLICITATION DOCUMENT:

R. C. WOOD AND ASSOCIATES UNDERSTANDS AND WILL COMPLY

ASSIGNMENT, TRANSFER AND SUBCONTRACTING:

R. C. WOOD AND ASSOCIATES UNDERSTANDS AND WILL COMPLY

AUTHORITY:

R. C. WOOD AND ASSOCIATES UNDERSTANDS AND WILL COMPLY

COMPLIANCE WITH LAWS:

R. C. WOOD AND ASSOCIATES UNDERSTANDS AND WILL COMPLY

CONFORMANCE WITH CONTRACT:

R. C. WOOD AND ASSOCIATES UNDERSTANDS AND WILL COMPLY

DEBARMENT:

R. C. WOOD AND ASSOCIATES UNDERSTANDS AND WILL COMPLY

DISABILITY ACCOMMODATIONS:

R. C. WOOD AND ASSOCIATES UNDERSTANDS AND WILL COMPLY

FACSIMILE RESPONSES:

R. C. WOOD AND ASSOCIATES UNDERSTANDS AND WILL COMPLY

FAILURE TO HONOR BID/PROPOSAL:

R. C. WOOD AND ASSOCIATES UNDERSTANDS AND WILL COMPLY

FORCE MAJEURE:

R. C. WOOD AND ASSOCIATES UNDERSTANDS AND WILL COMPLY

HOLD HARMLESS/INDEMNIFICATION:

R. C. WOOD AND ASSOCIATES UNDERSTANDS AND WILL COMPLY

LATE BIDS AND PROPOSALS:

R. C. WOOD AND ASSOCIATES UNDERSTANDS AND WILL COMPLY

PAYMENT TERM:

R. C. WOOD AND ASSOCIATES UNDERSTANDS AND WILL COMPLY

RECIPROCAL PREFERENCE:

R. C. WOOD AND ASSOCIATES UNDERSTANDS AND WILL COMPLY

REFERENCE TO CONTRACT:

R. C. WOOD AND ASSOCIATES UNDERSTANDS AND WILL COMPLY

REGISTRATION WITH THE SECRETARY OF STATE:

R. C. WOOD AND ASSOCIATES UNDERSTANDS AND WILL COMPLY

SEPARABILITY CLAUSE:

R. C. WOOD AND ASSOCIATES UNDERSTANDS AND WILL COMPLY

SHIPPING:

R. C. WOOD AND ASSOCIATES UNDERSTANDS AND WILL COMPLY

SOLICITATION DOCUMENT EXAMINATION:

R. C. WOOD AND ASSOCIATES UNDERSTANDS AND WILL COMPLY

TAX EXEMPTION:

R. C. WOOD AND ASSOCIATES UNDERSTANDS AND WILL COMPLY

TECHNOLOGY ACCESS FOR BLIND OR VISUALLY IMPAIRED:

R. C. WOOD AND ASSOCIATES UNDERSTANDS AND WILL COMPLY

TERMINATION OF CONTRACT:

R. C. WOOD AND ASSOCIATES UNDERSTANDS AND WILL COMPLY

UNAVAILABILITY OF FUNDING:

R. C. WOOD AND ASSOCIATES UNDERSTANDS AND WILL COMPLY

U.S. FUNDS:

R. C. WOOD AND ASSOCIATES UNDERSTANDS AND WILL COMPLY

VENUE:

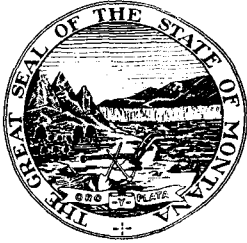
R. C. WOOD AND ASSOCIATES UNDERSTANDS AND WILL COMPLY

WARRANTIES:

R. C. WOOD AND ASSOCIATES UNDERSTANDS AND WILL COMPLY

DEPARTMENT OF ADMINISTRATION
GENERAL SERVICES DIVISION
STATE PROCUREMENT BUREAU

www.discoveringmontana.com/da/gsd



BRIAN SCHWEITZER
GOVERNOR

STATE OF MONTANA

MITCHELL BUILDING, ROOM 165
PO BOX 200135

(406) 444-2575
(406) 444-2529 FAX
TTY Users-Dial 711

HELENA, MONTANA 59620-0135

MAY 18, 2005

STATE OF MONTANA
REQUEST FOR PROPOSAL ADDENDUM
RFP NO.: 05-1112P
TO BE OPENED: FRIDAY, MAY 27, 2005
TITLE: NEEDS ASSESSMENT AND COST ANALYSIS

ADDENDUM NO. 1

To All Offerors:

Attached are written questions received in response to this RFP. These questions, along with the State's response, become an official amendment to this RFP.

All other terms of the subject "Request for Proposal" are to remain as previously stated.

Acknowledgment of Addendum:

The offeror for this solicitation must acknowledge receipt of this addendum. This page must be submitted at the time set for the proposal opening or the proposal may be disqualified from further consideration.

I acknowledge receipt of Addendum # 1.

Signed: _____

Company Name: R. C. Wood & Associates

Date: May 26, 2005

Sincerely,

PENNY MOON, Contracts Officer

Joyce A. Silverthorne

P. O. Box 149
Dixon, MT 59831
(406) 246-3224 phone/fax
dxn3224@montana.com

EDUCATION:

B. A., Univ. of MT, '77, Major: Business Ed., Minor: Native American Studies
M. Ed., Univ. of MT, '90, Ed. Admin.--Secondary Principal
Certification: MT Class 2, comprehensive business education,
MT Class 3, secondary education administration
Ph. D. student Gonzaga University, Spokane, WA, (ABD)

PERSONAL INFORMATION:

Member Confederated Salish and Kootenai Tribes
Student of Salish language
Expertise in proposal design, grant writing, proposal evaluation, oral
communication, written communication, and organizational skills
Lifelong educator, mother, and grandmother
Able to communicate across gaps in education, gender, and contemporary/elder

PROFESSIONAL EXPERIENCE:

Tribal Education Director—Department head for Confederated Salish & Kootenai Tribes, Pablo, MT—1999 to present. Coordination and development of methods to improve the educational experience of Indian children in the 25 reservation public schools, and to promote lifelong learning. Administration of tribal funding for education and compacted BIA funding for higher education and JOM.

Director: Bilingual Education--Salish Kootenai College (SKC), Pablo, MT--1991-1996. Duties include development, coordination, and management of a reservation-wide bilingual personnel development program. The components include: undergraduate program for teachers, a contracted Master's program, language curriculum development, community education, and seeking certification. Worked with: Salish, Kootenai, Cree, Blackfeet, Assiniboine, N. Cheyenne languages. Liaison work with Montana State University-Billings, Gonzaga University, Montana Association of Bilingual Education, and the Office of Public Instruction were critical to this program.

Director: Title III, Strengthening Institutions--SKC, Pablo, MT--2 years. Duties include management of the college-wide Title III, Higher Education Act program. Components included campus-wide management information system; developing health career degrees in nursing, dental assisting, and medical records. Also coordinated a Kellogg Foundation grant for health degree program support. Grant and report writing.

Director: Drug Free Schools Teacher Training and TEAM Project--SKC, Pablo, MT--3 years. Management of a community based education program funded to address issues of prevention and intervention for youth. Supervision of instructional staff, grant writing, federal reports, financial management, and instructional leadership. The program was coordinated with the Tribal Health Department.

Upward Bound Coordinator/Counselor--SKC, Pablo, MT--1 year. Recruitment of first-generation college bound youth from the seven reservation school districts, public relations, supervision of the tutoring staff, coordinating a six-week summer program, monitoring progress and student records, grant reports, liaison between college and schools, counseling tutors and participants, and processing student stipends.

Secretarial Science Instr./Satellite Center Director--SKC, Pablo, MT--3 years. Instruction in vocational classes in secretarial science, coordination of classes, advising of adult students, responsibility for the efficient operation of two satellite centers in St. Ignatius and Arlee, supervision of work-study help, and cooperation with the community in utilization of the centers. Included training with the 4-MAT System, learning styles, and the ANISA wholistic education model.

Curriculum Development Specialist--Two Eagle River School (TERS), Dixon, MT--1.5 years. Coordination of the credit contract system and educational content, development of a Salish history unit, wrote proposals for Title IV, JOM, BIA, prepared administrative reports, and prepared the initial Northwest Association of Schools and Colleges accreditation application.

Administrative Officer/Accountant—TERS, Dixon, MT--3 years. Accounting, budget preparation, monitoring, purchasing, bookkeeping reports, proposal writing, and financial and grant reporting.

Business Teacher—TERS, Dixon, MT--2 years. Classroom instruction, individualized contract system, competency based education, and program development.

In addition to the previous administrative and educational positions, I have worked with various youth groups, independent sales, and business positions. I have assisted with accreditation reviews for Two Eagle River High School (initial), Salish Kootenai College (3 reviews), University of Montana, Western at Dillon, Ronan High School.

COMMUNITY SERVICE:

- Tribal Education Department National Assembly (TEDNA)—2001-present—
founding member and Board of Director
- Lake County Flathead Reservation Coalition for Kids—2000-present—community
youth organization founding member and Board of Directors, Chair.
- Montana Board of Public Education--1994-2001--gubernatorial appointment. The K-12
policy board for Montana. Highlights: role in development of Class 7 American Indian
Language and Culture Specialist certification, background and development of state standards
with Office of Public Instruction, development and implementation of Performance Based
Accreditation option for K-12 schools in conjunction with Northwest Association of Schools
and Colleges.
- Montana Advisory Council on Indian Education—tribal and state board representative
- Northwest Regional Lab--advisory committee for Math and Science--1998-9
- Northwest Regional Lab--advisory board for technical assistant center--1995-7
- Montana 'Tracks' Program--advisory board for K-16+ statewide educational tracking for
Montana Native American students
- Carl Perkins State Vocational Equity Advisory Council--1987-1989
- Tribal Education Committee, Dixon representative—Confederated Salish & Kootenai
Tribes, Flathead Reservation--1987-1990
- Two Eagle River School Board of Trustees--1983-1987. Vice-chair 2 years
-
- Johnson O'Malley Indian Education Parent Committee (4 grown children)
- Mission Valley Leaders in Action, 1988-1989
- Lake County Teen Task Force--community organization, advisory board

MEMBERSHIPS AND ORGANIZATIONS:

- SKC Foundation, V. Chair
- Montana Indian Education Association—1977-present, Board Member
- Montana Association of Bilingual Education—1990-present
- National Indian Education Association
- Association for Supervision and Curriculum Development (ASCD)
- SKC Professional Advisory Committee 2 years

PUBLICATIONS:

- Language Preservation and Human Resource Development, Teaching Indigenous
Languages, Northern Arizona University, 1997.
- Dissertation in progress: "Identification and Analyses of Newly Fluent Native
American Language Speakers in the Northwest, a Heuristic Study", Gonzaga
University, Spokane, WA, intended publication spring 2000.

AWARDS & PRESENTATIONS:

2004 National Indian Education Association (NIEA)—Educator of the Year

2001 Montana Indian Education Association (MIEA)—Educator of the Year

I have made presentations at conferences and meetings on a variety of topics related to education, Native American issues, Native American Language, and equity. Some of the entities include: MIEA, MABE, MACIE, Salish Kootenai College, Montana Human Rights, National Association of Bilingual Education, Northwest Regional Lab.

GRANT SKILLS:

- 1979 Flathead Indian Reservation history project funded
- 1981 Two Eagle River Title IV Enrichment discretionary grant funded
- 1988 DOE--Drug Free Schools & Communities grant funded
- 1991 & 4 OBEMLA/DOE--Bilingual Education Personnel Training grant funded
- 1994 Lannan Foundation Language Preservation grant funded
- Federal Program Reader--OBEMLA Bilingual Fellowship 1990, 93, 97, 98
- “ “ “ --Admin. For Native Amer.--Language Preservation 1994,
97, 98, 99
- “ “ “ --Admin. For Native Amer.—SEDS Program 1998 & 99