AMERICAN INSTITUTES FOR RESEARCH®

Response to RFP No. 3489

Nevada School Funding Consultant

PART IA – TECHNICAL PROPOSAL

September 29, 2017

Submitted to: Gail Burchett
Purchasing Officer II
State of Nevada, Purchasing Division
515 E. Musser Street, Suite 300
Carson City, Nevada 89701
E-Mail: gburchett@admin.nv.gov

Submitted by: American Institutes for Research

American Institutes for Research
1000 Thomas Jefferson Street NW, Washington, DC 20007-3835 | 202.403.5000 | TTY 877.334.3499 | www.air.org

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September 29, 2017

Gail Burchett
Purchasing Officer II
State of Nevada, Purchasing Division
515 E. Musser Street, Suite 300
Carson City, NV 89701

RE: ***RFP No. 3489*** **Nevada School Funding Consultant**

Dear Ms. Burchett:

American Institutes for Research (AIR) is pleased to submit its proposal, Nevada School Funding Consultant, to the State of Nevada.

AIR has considerable expertise and a long-standing track record for conducting school finance studies such as the one proposed for Nevada. The proposed research team is comprised of the same nationally recognized school finance experts who authored the 2012 Study of a New Method of Funding for Public Schools in Nevada: Jesse Levin (AIR), Bruce Baker (Rutgers University), Deborah Verstegen (University of Nevada, Reno), Teresa Jordan (University of Nevada, Las Vegas, retired), and Jay Chambers (AIR). Collectively, these scholars have decades of experience conducting high-profile evaluations of state education funding systems.

Together, the AIR team has crafted a technical approach for the proposed work that is efficient in its design and responds to the nuances of the Nevada state context. In addition to providing a thorough update of the 2012 AIR study, we also propose to explore functional definitions of various types of student populations (e.g., at-risk, gifted and talented) through both a careful review of those definitions used in other states and the mainstream education finance literature, as well as engaging local practitioners across Nevada school districts. Finally, the proposed study will, through in-depth district-level simulations, explore the use of various weighted funding structures that might be applied in the state and provide practical considerations for implementation, as well as scenarios that show how such as system could be phased in over time.

We have enclosed one USB drive that contains all proposal volumes as requested. Please direct contractual questions about this proposal to Nilva da Silva, contracts officer, at 202-403-5086 or airproposals@air.org. For technical questions, please contact Jesse Levin at 650-376-6270 or jlevin@air.org.

Thank you for your consideration.

Sincerely,

Lawrence B. Friedman, PhD.
Vice President
Research and Evaluation

Section I – Title Page

Nevada School Funding Consultant

September 29, 2017

Part I A – Technical Proposal	
RFP Title:	Nevada School Funding Consultant
RFP:	3489
Vendor Name:	American Institutes for Research
Address:	1000 Thomas Jefferson Street, NW, Washington, DC 20007
Opening Date:	September 29, 2017
Opening Time:	2:00 PM

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1000 Thomas Jefferson Street NW
Washington, DC 20007-3835
202.403.5000
www.air.org

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Section III – Vendor Information Sheet

VENDOR INFORMATION SHEET FOR RFP 3489

Vendor Shall:

A) Provide all requested information in the space provided next to each numbered question. The information provided in Sections V1 through V6 shall be used for development of the contract;

B) Type or print responses; and

C) Include this Vendor Information Sheet in Section III of the Technical Proposal.

V1	Company Name	***American Institutes for Research***

V2	Street Address	***1000 Thomas Jefferson Street, NW***

V3	City, State, ZIP	***Washington, DC 20007***

V4	Telephone Number		
	Area Code: ***202***	Number: ***403-5086***	Extension:

V5	Facsimile Number		
	Area Code: ***855***	Number: ***459-6213***	Extension:

V6	Toll Free Number		
	Area Code: ***877***	Number: ***334-3499***	Extension:

V7	***Contact Person for Questions / Contract Negotiations, including address if different than above***
	Name:***Nilva da Silva***
	Title:***Senior Contract Officer***
	Address:***1000 Thomas Jefferson Street, NW Washington, DC 20007***
	Email Address:***ndasilva@air.org***

V8	Telephone Number for Contact Person		
	Area Code: ***202***	Number: ***403-5086***	Extension:

V9	Facsimile Number for Contact Person		
	Area Code: ***855***	Number: ***459-6213***	Extension:

V10	***Name of Individual Authorized to Bind the Organization***	
	Name: ***Nilva da Silva***	Title: ***Senior Contract Officer***

V11	Signature (***Individual shall be legally authorized to bind the vendor per NRS 333.337***)	
	Signature:	Date:***9/19/2017***

Nevada School Funding Consultant *RFP 3489* *Page 2 of 35*

Section IV – State Documents

A. The signature page from all amendments signed by an individual authorized to bind the organization.

B. Attachment A – Confidentiality and Certification of Indemnification signed by an individual authorized to bind the organization.

C. Attachment B – Vendor Certifications signed by an individual authorized to bind the organization.

D. Copies of any vendor licensing agreements and/or hardware and software maintenance agreements.

E. Copies of applicable certifications and/or licenses.

ATTACHMENT A – CONFIDENTIALITY AND CERTIFICATION OF INDEMNIFICATION

Submitted proposals, which are marked "confidential" in their entirety, or those in which a significant portion of the submitted proposal is marked "confidential" **shall not** be accepted by the State of Nevada. Pursuant to NRS 333.333, only specific parts of the proposal may be labeled a "trade secret" as defined in NRS 600A.030(5). All proposals are confidential until the contract is awarded; at which time, both successful and unsuccessful vendors' technical and cost proposals become public information.

In accordance with the submittal instructions of this RFP, vendors are requested to submit confidential information in separate files marked "**Part IB Confidential Technical**" and "**Part III Confidential Financial**".

The State shall not be responsible for any information contained within the proposal. If vendors do not comply with the labeling and packing requirements, proposals shall be released as submitted. In the event a governing board acts as the final authority, there may be public discussion regarding the submitted proposals that shall be in an open meeting format, the proposals shall remain confidential.

By signing below, I understand it is my responsibility as the vendor to act in protection of the labeled information and agree to defend and indemnify the State of Nevada for honoring such designation. I duly realize failure to so act shall constitute a complete waiver and all submitted information shall become public information; additionally, failure to label any information that is released by the State shall constitute a complete waiver of any and all claims for damages caused by the release of the information.

This proposal contains Confidential Information, Trade Secrets and/or Proprietary information.

Please initial the appropriate response in the boxes below and provide the justification for confidential status.

Part IB – Confidential Technical Information			
YES		NO *X*	NPS
Justification for Confidential Status			

Part III – Confidential Financial Information			
YES *X*	NPS	NO	
Justification for Confidential Status			
Our audited Financial Reports are confidential.			

American Institutes for Research
Company Name

Signature

Nilva da Silva
Print Name

09/22/2017
Date

This document shall be submitted in Section IV of vendor's technical proposal

ATTACHMENT B – VENDOR CERTIFICATIONS

Vendor agrees and shall comply with the following:

(1) Any and all prices that may be charged under the terms of the contract do not and shall not violate any existing federal, State or municipal laws or regulations concerning discrimination and/or price fixing. The vendor agrees to indemnify, exonerate and hold the State harmless from liability for any such violation now and throughout the term of the contract.

(2) All proposed capabilities can be demonstrated by the vendor.

(3) The price(s) and amount of this proposal have been arrived at independently and without consultation, communication, agreement or disclosure with or to any other contractor, vendor or potential vendor.

(4) All proposal terms, including prices, shall remain in effect for a minimum of 180 days after the proposal due date. In the case of the awarded vendor, all proposal terms, including prices, shall remain in effect throughout the contract negotiation process.

(5) No attempt has been made at any time to induce any firm or person to refrain from proposing or to submit a proposal higher than this proposal, or to submit any intentionally high or noncompetitive proposal. All proposals shall be made in good faith and without collusion.

(6) All conditions and provisions of this RFP are deemed to be accepted by the vendor and incorporated by reference in the proposal, except such conditions and provisions that the vendor expressly excludes in the proposal. Any exclusion shall be in writing and included in the proposal at the time of submission.

(7) Each vendor shall disclose any existing or potential conflict of interest relative to the performance of the contractual services resulting from this RFP. Any such relationship that might be perceived or represented as a conflict shall be disclosed. By submitting a proposal in response to this RFP, vendors affirm that they have not given, nor intend to give at any time hereafter, any economic opportunity, future employment, gift, loan, gratuity, special discount, trip, favor, or service to a public servant or any employee or representative of same, in connection with this procurement. Any attempt to intentionally or unintentionally conceal or obfuscate a conflict of interest shall automatically result in the disqualification of a vendor's proposal. An award shall not be made where a conflict of interest exists. The State shall determine whether a conflict of interest exists and whether it may reflect negatively on the State's selection of a vendor. The State reserves the right to disqualify any vendor on the grounds of actual or apparent conflict of interest.

(8) All employees assigned to the project are authorized to work in this country.

(9) The company has a written equal opportunity policy that does not discriminate in employment practices with regard to race, color, national origin, physical condition, creed, religion, age, sex, marital status, sexual orientation, developmental disability or handicap.

(10) The company has a written policy regarding compliance for maintaining a drug-free workplace.

(11) Vendor understands and acknowledges that the representations within their proposal are material and important, and shall be relied on by the State in evaluation of the proposal. Any vendor misrepresentations shall be treated as fraudulent concealment from the State of the true facts relating to the proposal.

(12) Vendor shall certify that any and all subcontractors comply with Sections 7, 8, 9, and 10, above.

(13) The proposal shall be signed by the individual(s) legally authorized to bind the vendor per NRS 333.337.

American Institutes for Research

Vendor Company Name

Vendor Signature

Nilva da Silva — Print Name

09/19/2017 — Date

This document shall be submitted in Section IV of vendor's technical proposal

ROSS MILLER
Secretary of State
204 North Carson Street, Suite 4
Carson City, Nevada 89701-4520
(775) 684 5708
Website: www.nvsos.gov

Filed in the office of	Document Number
Ross Miller Secretary of State State of Nevada	20120154106-92
	Filing Date and Time 02/29/2012 8:28 AM
	Entity Number E0122972012-0

Qualification to do Business in Nevada

(PURSUANT TO NRS CHAPTER 80)

USE BLACK INK ONLY - DO NOT HIGHLIGHT

ABOVE SPACE IS FOR OFFICE USE ONLY

1. Name of Corporation: (must be the same as shown on the certificate of existence)	American Institutes for Research in the Behavioral Sciences
2. State of Incorporation:	Pennsylvania
3. Registered Agent for Service of Process: (check only one box)	☒ Commercial Registered Agent: CSC Services of Nevada, Inc. (Name) ☐ Noncommercial Registered Agent (name and address below) *OR* ☐ Office or Position with Entity (name and address below) Name of Noncommercial Registered Agent OR Name of Title of Office or Other Position with Entity Street Address City Nevada Zip Code Mailing Address (if different from street address) City Nevada Zip Code
4. Authorized Stock: (set forth the total authorized stock indicating number of par shares, par value per share and/or number of no par shares; mark appropriate box if entity is a nonprofit corporation with or without stock; submit required documentation to support statement; stock statement must match documentation exactly)	Total Authorized Stock: (a) Number of shares *with* par value: (b) Par value per share: $ (c) Number of shares *without* par value: If a Nonprofit Entity: ☐ This is a nonprofit entity *with* authorized stock, as listed above. ☒ This entity is a nonprofit, non-stock corporation.
5. Purpose: (required; continue on additional page if necessary)	*The purpose of the corporation shall be:* To conduct and apply behavioral and social science research to improve people's lives and well being, with a special emphasis on the disadvantaged.
6. Name, Title and Signature of Officer Making Statement:	Marijo Ahlgrimm (Name) Treasurer & Chief Financial Officer (Title of Officer) X Marijo Ahlgrimm (Officer Signature)
7. Certificate of Acceptance of Appointment of Registered Agent:	*I hereby accept appointment as Registered Agent for the above named Entity.* CSC Services of Nevada, Inc. X By: JOHN H. PELLETIER, ASST. VICE PRESIDENT Authorized Signature of Registered Agent or On Behalf of Registered Agent Entity — Date 2/29/12

This form must be accompanied by appropriate fees.

Nevada Secretary of State NRS 80 Qualification
Revised: 10-16-09

SECRETARY OF STATE

STATE OF NEVADA

FOREIGN CORPORATE QUALIFICATION

I, ROSS MILLER, the duly elected and qualified Nevada Secretary of State, do hereby certify that **AMERICAN INSTITUTES FOR RESEARCH IN THE BEHAVIORAL SCIENCES** did on February 29, 2012 file in this office a Foreign Qualification in this State and is now on file and of record in the office of the Nevada Secretary of State, and that further, that said Corporation is at the date of this Certificate duly qualified to exercise therein all the powers recited in its Foreign Qualification and to transact business in the State of Nevada in accordance with the laws governing Corporations in said State.

IN WITNESS WHEREOF, I have hereunto set my hand and affixed the Great Seal of State, at my office on March 5, 2012.

ROSS MILLER
Secretary of State

Certified By: GJ Jaillet
Certificate Number: C20120302-2202
You may verify this certificate online at **http://www.nvsos.gov/**

Section V – Scope of Work

2.1 The scope of work shall include the following tasks:

2.1.1 Conduct a review of the report entitled "***Study of a New Method of Funding for Public Schools in Nevada," published by the American Institutes for Research on September 22, 2012, Attachment I*** and ***LCB Bulletin No. 15-5, "Interim Study Report of the Task Force on K-12 Public Education Funding", Attachment H.***

The initial objective of the research team will be to conduct thorough reviews of both the 2012 AIR report "Study of a New Method of Funding for Public Schools in Nevada" (henceforth, referred to as AIR report) as well as the Legislative Counsel Bureau (LCB) Bulletin No. 15-5 (henceforth, referred to as the Bulletin). The culmination of this objective will serve as a foundation for the remainder of the study, providing a starting point from which to continue the work put forth by the research team and the Nevada Task Force on K–12 Public Education Funding in the original AIR report and Bulletin, respectively.[1]

As part of these reviews, we will highlight the methods, key findings, and recommendations of the AIR report, as well as the key takeaways from the testimonies described in the Bulletin. In particular, we will focus on summarizing the existence of explicit and implicit mechanisms included in Nevada's school finance system that provide funding for the additional costs associated with educating at-risk students (e.g., students from low-income families), English learners (ELs), and students with disabilities (SWDs) at the times the AIR report and the Bulletin were published. The research team also will provide a recap of the various approaches used at that time by other states to provide additional funding for particular student needs populations.

We will next summarize the recommendations provided within the AIR report and Bulletin and document the policy discussion that emerged from these works. Finally, we will document those changes to the state's school finance system that were intended to address the recommendations found within the AIR report and the Bulletin.

2.1.2 Update the report and bulletin identified in paragraph (1) with more current information, focusing on the determination and implementation of the appropriate funding adjustments for the additional costs associated with serving low-income pupils and English learners, as defined in 20 U.S.C. § 7801(20).

Building upon the review of the AIR study and Bulletin, we will perform a thorough update of both publications that includes three components. First, as she did for the original 2012 AIR report, Professor Teresa Jordan will lead the effort for the present project to update the documented evolution of the Nevada funding system included in Chapter 1 of the AIR report (Overview and Analysis of Nevada Plan). As part of this section, we will describe in detail the current system of funding K–12 education in Nevada that includes any changes that have

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[1] ***Note that given the proposed research team authored the original 2012 report and two of its members (Dr. Chambers and Dr. Levin) served on the Technical Advisory Committee of the Nevada Task Force on K–12 Public Education Funding (authors of the Bulletin), the materials at the center of this task will be quite familiar.***

occurred since the publication of the 2012 AIR report—in particular the "New Nevada Education Funding Plan." These updates will include additional funding for EL students as described in the Bulletin, as well as additional funding as part of the "New Nevada Education Funding Plan" as described in Senate Bill 178 (SB178).[2] We will pay particular attention to how Nevada's current public school funding system provides additional allocations to districts for students identified as low-income, EL, or disabled. As part of this section, we will evaluate any strengths and weaknesses in Nevada's current system.

The second component led by Professor Deborah Verstegen will update Chapter 2 of the AIR report (Inventory of State Finance Systems) using the most up-to-date information available.[3] As part of this inventory, we will highlight any major shifts in how states are funding K–12 education since the release of the AIR report. We also will use the inventory to place Nevada's funding system in the broader context of various funding systems used across the United States. The inventory will identify the states that use various types of funding formulas (e.g., foundation, district power equalizing) and the states that provide foundation per-pupil funding bases in conjunction with explicit weight allocations to support the additional costs associated with students labelled as at-risk, EL, SWD, and gifted and talented (G&T). Furthermore, we will describe the ranges of the base per-pupil funding and allocation weights reported by states to better help policymakers in Nevada understand the landscape of funding approaches undertaken across the country.

Professor Bruce Baker (Rutgers University) will lead the third component of this objective, which involves updating AIR report Chapter 3 (Identifying Adjustments Used to Address Cost Factors). Through empirical analysis of district-level data, this chapter derives (1) the effective (implicit) base per-pupil funding levels and (2) the funding weight adjustments that describe for every state how funding varies according to various cost factors including student needs and scale of operation. We will first recreate the adjustments described in the AIR report for students from low-income families and for scale of operations (district size and student density) using the most recent data available. In addition, we will identify the most up-to-date explicit adjustments available for EL students and SWDs. Furthermore, we will examine any new developments in geographic cost adjustments and use the most up-to-date information for the Comparable Wage Index (CWI) developed by Professor Lori Taylor (Texas A&M University), with whom the study team has worked closely in the past.[4]

Using this information, the research team will develop an updated version of the Funding Adjustment Simulator (FAS) to examine the impact of various funding choices on the distribution of funding across Nevada's school districts. Within this component, we also will examine the impact of Nevada's funding adjustments for low-income and EL students described in the "New Nevada Education Funding Plan" and compare these adjustments to those in other states that are shown to be relatively large. In addition, the "New Nevada

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[2] The text for (SB178), introduced by State Senator Moises Denis and signed into law on June 8, 2017, can be found at https://www.leg.state.nv.us/App/NELIS/REL/79th2017/Bill/5029/Text.
[3] We plan to draw upon the ongoing work of Professor Verstegen to administer the 50-State Survey of School Finance Policies (see https://schoolfinancesday.wordpress.com/).
[4] Professor Taylor maintains updates of the CWI here: http://bush.tamu.edu/research/faculty/Taylor_CWI/.

Education Funding Plan" provides contingencies by which only certain schools will receive additional funding for low-income and EL students in the case that there are not enough dollars to fully fund all schools.[5] In turn, our plan is to examine how funding for districts will change depending on the level of funding available for the "New Nevada Education Funding Plan."

Based on these updates to the original AIR report and Bulletin, we will examine the extent to which Nevada has made progress to fulfill the recommendations found within the AIR report and Bulletin. In addition, we will evaluate Nevada's current education funding system using the optimal funding criteria found in the original AIR report (see AIR report, pages 19–24). The dimensions upon which the funding system will be evaluated are as follows:

- *Is funding sufficient and equitable?*
- *Is the system transparent, understandable, and accessible?*
- *Is the system of allocating dollars based on the costs of providing education services?*
- *Does the system minimize possible incentives for over-identifying or misreporting students in categories that might receive more funding?*
- *Is the system reasonable in terms of the cost of administration?*
- *Is the funding provided through the system predictable, stable, and timely?*
- *Are there mechanisms in place to hold districts accountable for using resources effectively and ways to make progress toward their educational goals?*
- *Is the implementation of the system politically acceptable?*

As an extension of the AIR report, we will put forth a weighted student funding (WSF) model that the state could use to determine the appropriate distribution of funding across districts. As the proposed work does not constitute an adequacy study, the model will focus primarily on the distributive effects of various weight adjustments used for various types of students rather than on the overall level of funding necessary to produce a given level of educational opportunity to the state's students. Nevertheless, the updated FAS, in line with the original version delivered in 2012, will allow the user to simulate funding scenarios under various assumptions concerning the base per-pupil funding level.[6,7]

In addition, we will examine the potential impact of funding formula changes to how districts operate, highlighting the challenges that districts may experience in the face of changes to the funding formula as well as examining the potential benefits to districts. To do so, we will draw upon experiences seen by districts in other states such as California that have recently

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[5] Details on determining which schools will be fully funded in the event that funding is not sufficient to cover all schools can be found in SB178, Sec 8.3.

[6] Moreover, multiple members of the research team (Drs. Baker, Chambers, Levin, and Verstegen) have extensive experience with educational adequacy studies and are more than willing to discuss with the client the possibility of developing simulations that make use of adequate base per-pupil funding levels calculated in these studies.

[7] Note, the base per-pupil funding level entered into the FAS is analogous to the per-pupil basic support guarantee (e.g., see the "InputOutput" worksheet of the 2011 Distributive School Account (DSA) Module 2 used in the original AIR report analysis).

overhauled their system of funding education (Education Trust-West, 2014, 2016; Hill & Ugo, 2015; Warren & Carrillo, 2015; Lee & Fuller, 2017). Finally, we will make recommendations for how Nevada might implement a WSF formula, including how Nevada can transition from the current funding model to the WSF model. These recommendations will include a tentative phase-in plan defining the period over which a weighted formula might be implemented, as well as the development of hold-harmless provisions that would smooth out potential reductions in resource levels in certain districts.[8]

2.1.3 Review the meaning of the term "pupils who are at-risk," as defined in NRS 387.121, to establish an appropriate definition of the term and recommend appropriate funding adjustments for the additional costs associated with serving such pupils.

NRS 387.121 states the Legislature's intentions to move to a school finance system by which additional funding is provided on a weighted basis to districts for students with additional needs:

> ***It is the intent of the Legislature, commencing with Fiscal Year 2016–2017, to provide additional resources to the Nevada Plan expressed as a multiplier of the basic support guarantee to meet the unique needs of certain categories of pupils, including, without limitation, pupils with disabilities, pupils who are limited English proficient, pupils who are at risk and gifted and talented pupils. As used in this subsection, "pupils who are at risk" means pupils who are eligible for free or reduced-price lunch pursuant to 42 U.S.C. §§ 1751 et seq., or an alternative measure prescribed by the State Board of Education. (Sec. 4, NRS 387.121)***

To this end, along with performing the three components to update the AIR report and Bulletin, Jason Willis (WestEd) will lead the research team in conducting a dedicated investigation of the meaning of the term "pupils who are at-risk".[9] The investigation will take a two-pronged approach.

First, we will examine how the definition included in NRS 387.121 compares to other states. This process will include an examination of the various definitions states use for identifying at-risk students and how these comport with the at-risk definition currently used by Nevada. Particular emphasis will be placed on comparing the treatment of funding for at-risk students in those states that share the current Nevada definition (based on eligibility for free or reduced-price lunch) to that of states making use of alternative measures. We will draw upon both primary and secondary information sources to perform this comparative analysis. We will first make use of the information gathered in developing the updated inventory of state funding systems (see Objective 2.1.2) and provide examples of how different states fund at-risk students. We will then perform a scan of mainstream education finance literature and of school funding legislation from various states.

Second, we plan to perform on-the-ground qualitative research to investigate the perceived definitions of at-risk students among district-level practitioners throughout the state.

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[8] For an example of a phase-in plan developed by the proposed research team, see the AIR study An Independent Comprehensive Study of the New Mexico Public School Funding Formula (pages 62–66): http://www.nmschoolfunding.org/pdf/AIR_Vol_I_FINAL_Report_-_NM_Public_School_Funding_Formula.pdf.

[9] Given the approach we are taking in this task also lends itself to investigating alternative definitions of EL, we would be happy to discuss with the client conducting similar analyses for this student need category.

Specifically, the research team will engage cabinet-level staff such as Chief Academic Officers and/or Chief Finance Officers at each of the state's 17 districts with whom interviews will be conducted.[10] The interviews will follow a semi-structured protocol and contain questions designed to gather responses that speak to perceptions related to the current definition of at-risk students, the degree to which this is an appropriate measure of the true need associated with at-risk student populations, and whether there may be better metrics that might be considered for use in place of or in addition to the current definition.

Using both the analysis of at-risk definitions in other states and the perceptions and recommendations of district administrators within Nevada, we will identify the various strengths and weaknesses of Nevada's current definition of at-risk students. Furthermore, we will examine how changes to the definition of at-risk might alter the number of identified students—or number of students potentially eligible for additional funding—in each district. Based upon the analyses conducted under this and the previous objective (2.1.3 and 2.1.2), we will develop recommendations pertaining to developing (1) a functional definition for identifying at-risk students and (2) appropriate funding adjustments to properly support at-risk students. The recommendations put forth for improving funding for at-risk students will be developed with the criteria for evaluating education funding policies found in Section 2.1.2 in mind.

2.1.4 Review the multiplier to the basic support guarantee per pupil for pupils with disabilities pursuant to NRS 387.122.

In several parts of the proposed study update, we will examine the current mechanisms used by Nevada for funding SWDs and review potential alternative approaches. This work will be co-led by Dr. Drew Atchison (AIR) and Professor Bruce Baker (Rutgers University) and draw upon the expertise of special education finance expert Jay Chambers (AIR). In updating the evolution of Nevada's funding, we will describe any changes made to the funding of SWDs in years since the AIR report was published and more recently since the Bulletin was released. Furthermore, when describing Nevada's current funding formula, we will thoroughly explain the mechanism(s) by which Nevada currently provides school districts with resources to account for the increased costs of educating SWDs.

Within the study component involving the inventory of state education funding systems, we will examine whether and how other states provide additional funding to support the provision of special education services. Using this inventory, we also will be able to describe the range of adjustments used by other states to provide additional dollars for SWDs. This approach will enable us to situate Nevada's policy within the range of policies for providing additional dollars for special education across states.

We also will update the results of the Analysis of Alternative Special Education Cost Adjustments provided in Chapter 4 of the AIR report. In addition, we will explore further alternative methods for providing additional dollars for special education in Nevada and perform calculations to simulate the amount of dollars for SWDs that would be provided to Nevada's school districts under each alternative method.

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[10] The research team will work with districts to determine how many and which types of staff will be interviewed. We expect the number of interviews to vary based on district size, but to rarely exceed one to two interviewees.

Using these analyses, we will describe the strengths and weaknesses of the current and alternative methods for funding the cost of SWDs and will develop recommendations for improving the allocation of dollars for SWDs. The strengths and weaknesses as well as the development of recommendations for improving the basic support guarantee for SWDs will be made with the criteria for evaluating education funding policies from Section 2.1.2 in mind.

2.1.5 Review the meaning of the term "gifted and talented pupils," as defined in NRS 388.5231, to establish an appropriate definition for the term and recommend a consistent statewide standard to identify such pupils.

With Jason Willis (WestEd) taking the lead, we will examine and establish the term "gifted and talented pupils" in a similar manner as that described previously for "at-risk pupils" (Objective 2.1.3). At the time of the original AIR report, Nevada treated gifted and talented students as special education students. We will describe any changes to how Nevada defines and funds this student category since the prior report. In addition, we will use both the inventory of school finance systems (Objective 2.1.2) and a scan of the relevant education finance literature to describe the extent to which other states fund gifted and talented students. Furthermore, in the qualitative investigation described (Objective 2.1.3), we will include district interview protocol items designed to gather information on (1) how Nevada district administrators currently perceive and identify gifted and talented students and (2) suggestions they have to improve how gifted and talented students are defined and identified. Finally, we will use simulation models to examine any impacts to the funding of Nevada's districts that would result from changing the definition or funding of gifted and talented students.

Based on the results of these analyses, we will develop recommendations for defining and identifying gifted and talented students and will describe the implications of such changes on education funding. Again, in developing these recommendations, the study team will keep in mind the criteria for evaluating education funding policies mentioned in Objective 2.1.2.

2.1.6 Make recommendations for the implementation of the findings of the independent consultant pursuant to Objectives (2.1.1) to (2.1.5), inclusive.

Upon completion of the analyses and objectives described in 2.1.1 to 2.1.5, we will be in a good position to evaluate the system of funding schools in Nevada holistically. In developing recommendations pertaining to implementation of funding formula changes, we will take into account the outcomes of the various analyses, Nevada's progress in implementing the prior recommendations made in both the AIR report and Bulletin, and the current strengths and weaknesses of Nevada's education funding system. In addition, we will explain why we believe each of our recommendations will improve Nevada's school finance system, linking our recommendations back to the criteria for evaluating education funding policies.

As part of our recommendations, we will put forth a model WSF system to show how funding across the state's 17 districts would look if Nevada adopted such a model. It is important that recommendations not be made in a vacuum, blind to the potential unintended consequences or impacts of enacted changes. Therefore, we propose to examine the potential impact of funding formula changes to how districts operate, paying attention to the challenges that districts may experience in the face of changes to the funding formula as well as examining the potential

benefits to districts. To do so, we will draw upon experiences seen by districts in other states that have recently overhauled their system of funding education. Specifically, this objective component will draw upon the expertise of Jason Willis (WestEd), who has been involved in supporting state and local education agencies in California to implement policies and practices under that state's Local Control Funding Formula (LCFF), to provide recommendations as to how a statewide weighted student funding formula could practicably be carried out.[11]

The recommendations will build upon lessons learned in California and other states about the key considerations that must be addressed when developing the various governance structures that must accompany the transition over to a weighted student formula and rollout of the new system. At the top of the list is how to create the structures that strike the right balance between providing local control (autonomy) to districts while holding them accountable for inputs (i.e., how funding is spent) and student outcomes. The recommendations also will touch on best practices at the local (district and school) levels concerning needs assessment, goal setting, planning and budgeting, and the linking of available revenue sources to budgets. Further, we will touch on the need for effective capacity building at the state, district, and school levels to ensure that all staff understand and successfully navigate the new system. Finally, the recommendation also will touch on how the implementation of a comprehensive communication plan can facilitate smooth and effective initial roll out and implementation of the new system.

By performing this extra step, we will ensure that our recommendations are not only focused on improving the education funding system but are also practical and feasible. Furthermore, by examining the challenges faced by other states, it is our intention to provide Nevada with information that will help state policymakers and practitioners mitigate unforeseen challenges and reduce any unnecessary burden to state and district officials who must administer the system of funding education in Nevada. We will share our recommendations with the Department of Education prior to the preliminary report with the intent of getting feedback. We also will explore the possibility of gathering feedback on our recommendations from a broader set of state and district stakeholders.

2.2 **Deliverables**

2.2.1 Deliverable 1: Preliminary Report on or before August 1, 2018

The contractor selected by the Department of Education shall complete the work identified in the Scope of Work and, on or before August 1, 2018, submit a preliminary report containing the information described in the Scope of Work to the Department of Education. Upon receipt of the preliminary report, the Department of Education shall immediately forward the preliminary report to the Legislative Committee on Education.

The AIR study team will complete all analyses described in Section 2.1 and will submit a preliminary report to the Department of Education on or before August 1, 2018. With previous projects we have found it helpful to have periodic check-ins with the client to gain insight on

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[11] Note that Mr. Willis also has provided extensive consultative support to states and school districts to analyze, model, and propose improvement to their funding formulas, including the construction and execution of weighted student funding systems.

the project topic and any contextual factors that we should consider. We also have regularly shared proposed research designs as well as preliminary findings to allow the client to provide ongoing feedback. In turn, we will work with client to develop regularly occurring check-ins throughout the course of the project as is convenient for the client.

2.2.2 Deliverable 2: Final Report on or before October 15, 2018

Upon receipt of the preliminary report, the Legislative Committee on Education shall review the preliminary report and provide recommendations to the contractor. After receiving such recommendations from the Legislative Committee on Education and any recommendations which may be provided by the State Board of Education and Department of Education, the contractor shall prepare a final report which includes such recommendations and, on or before October 15, 2018, submit the final report to the Governor and the Director of the Legislative Counsel Bureau for transmission to the next regular session of the Legislature.

Using any feedback and recommendations provided by the Legislative Committee on Education, State Board of Education, and Department of Education, we will update the report and prepare a final version that addresses such feedback. The final report shall be submitted on or before October 15, 2018. For many projects, along with the delivery of a final report, we also engage in the presentation of findings. For example, for a recent report provided to the Maryland State Department of Education, Dr. Levin and Dr. Atchison presented key findings in person to the Maryland State Board of Education as well as Maryland's State General Assembly in early 2017. Moreover, Dr. Levin and Professor Baker presented the results of a study they authored to the Pennsylvania Legislature Basic Education Funding Commission in late 2014. Finally, Dr. Chambers, Professor Jordan, and Professor Verstegen presented the findings of the original AIR report to stakeholders in 2012.

The research team will engage the clients to determine whether there are any steps they would like us to take in helping with the dissemination of the report such as presenting the findings. Further, we will strive to meet all requests for helping with the dissemination of the report as the budget for the project allows.

Section VI – Company Background and References

3.1 Vendor Information

3.1.1 Vendors shall provide a company profile in the table format below.

Question	**Response**
Company name:	***American Institutes for Research***
Ownership (sole proprietor, partnership, etc.):	***Nonprofit corporation***
State of incorporation:	***Pennsylvania***
Date of incorporation:	***December 31, 1946***

Question	Response
# of years in business:	***71 years***
List of top officers:	***David Myers, President and CEO*** ***Marijo Ahlgrimm, Executive Vice President and CFO*** ***Dona Kilpatrick, General Counsel, Legal***
Location of company headquarters, to include City and State:	***1000 Thomas Jefferson St. NW*** ***Washington, DC 20007-3835***
Location(s) of the office that will provide the services described in this RFP:	***AIR's San Mateo office will be the main point of operation. In addition, staff form AIR's Washington, D.C., office will be providing services.***
Number of employees locally with the expertise to support the requirements identified in this RFP:	***Although we do not have any AIR staff within the State of Nevada, staff in California are a short trip away from Nevada and will be available for in-person meetings if requested by the Nevada Department of Education. In addition, we will be partnering with two consultants, Professor Teresa Jordan and Professor Deborah Verstegen who are long-time residents of Nevada and who worked at the University of Nevada-Las Vegas and the University of Nevada-Reno, respectively.***
Number of employees nationally with the expertise to support the requirements in this RFP:	***The primary AIR employees who will be working on this project are Dr. Jesse Levin (Principal Investigator), Dr. Jay Chambers (Expert Internal Consultant), and Dr. Drew Atchison (Lead Analyst). Dr. Levin and Dr. Chambers both participated on the 2012 AIR report. All three have extensive experience in research on education finance. In addition, AIR has a vast network of employees that can be called upon to support this work as needed.***
Location(s) from which employees will be assigned for this project:	***Dr. Levin and Dr. Chambers are based out of AIR's San Mateo, California office, and Dr. Atchison is based in AIR's Washington, DC, office. We also have the ability to call upon staff throughout the country to support this project as needed.***

3.1.2 A Nevada-based business may apply for a five percent (5%) preference on its proposal. This preference may apply if a business has its principal place of business within Nevada. This preference cannot be combined with any other preference, granted for the award of a contract using federal funds, or granted for the award of a contract procured on a multi-state basis. To claim this preference a business must submit a letter with its proposal showing that it qualifies for the preference.

3.1.3 Please be advised, pursuant to NRS 80.010, a corporation organized pursuant to the laws of another state shall register with the State of Nevada, Secretary of State's Office as a foreign corporation before a contract can be executed between the State of Nevada and the awarded vendor, unless specifically exempted by NRS 80.015.

3.1.4 The selected vendor, prior to doing business in the State of Nevada, shall be appropriately licensed by the State of Nevada, Secretary of State's Office

pursuant to NRS76. Information regarding the Nevada Business License can be located at http://sos.state.nv.us.

Question	Response
Nevada Business License Number:	***20120154106-92***
Legal Entity Name:	***American Institutes for Research in the Behavioral Sciences***

Is "Legal Entity Name" the same name as vendor is doing business as?

Yes		No	***X***

If "No", provide explanation.

Doing business as (DBA) American Institutes for Research.

3.1.5 Has the vendor ever been engaged under contract by any State of Nevada agency?

Yes	***X***	No	

If "Yes", complete the following table for each State agency for whom the work was performed. Table can be duplicated for each contract being identified.

Question	Response
Name of State agency:	***Nevada State Purchasing Division***
State agency contact name:	***Nancy Feser***
Dates when services were performed:	***04/13/2016 – 04/12/2019***
Type of duties performed:	***Grant Project Evaluator Services***
Total dollar value of the contract:	***$200,000***

Question	Response
Name of State agency:	***Nevada Department of Education***
State agency contact name:	***Victoria Blakeny***
Dates when services were performed:	***10/13/2015 – 9/30/2019***
Type of duties performed:	***School Climate and SEL Survey***
Total dollar value of the contract:	***$992,000***

Question	Response
Name of State agency:	***Nevada Department of Education***
State agency contact name:	***TeQuia Barrett***
Dates when services were performed:	***12/01/2016 – 09/12/2019***

Question	Response
Type of duties performed:	***21st Century Community Learning Center***
Total dollar value of the contract:	***$295,297***

3.1.6 Are you now or have you been within the last two (2) years an employee of the State of Nevada, or any of its agencies, departments, or divisions?

Yes		No	***X***

If "Yes", please explain when the employee is planning to render services, while on annual leave, compensatory time, or on their own time?

If you employ (a) any person who is a current employee of an agency of the State of Nevada, or (b) any person who has been an employee of an agency of the State of Nevada within the past two (2) years, and if such person will be performing or producing the services which you will be contracted to provide under this contract, you must disclose the identity of each such person in your response to this RFP, and specify the services that each person will be expected to perform.

3.1.7 Disclosure of any significant prior or ongoing contract failures, contract breaches, civil or criminal litigation in which the vendor has been alleged to be liable or held liable in a matter involving a contract with the State of Nevada or any other governmental entity. Any pending claim or litigation occurring within the past six (6) years which may adversely affect the vendor's ability to perform or fulfill its obligations if a contract is awarded as a result of this RFP must also be disclosed.

Does any of the above apply to your company?

Yes		No	***X***

If "Yes", please provide the following information. Table can be duplicated for each issue being identified.

Question	Response	
Date of alleged contract failure or breach:		
Parties involved:		
Description of the contract failure, contract breach, or litigation, including the products or services involved:		
Amount in controversy:		
Resolution or current status of the dispute:		
If the matter has resulted in a court case:	Court	Case Number

Question	Response
Status of the litigation:	

3.1.8 Vendors shall review and provide if awarded a contract the insurance requirements as specified in Attachment D, Insurance Schedule for RFP 3489.

3.1.9 Company background/history and why vendor is qualified to provide the services described in this RFP. Limit response to no more than five (5) pages.

Founded in 1946, AIR is an independent, nonpartisan, not-for-profit organization that conducts behavioral and social science research and delivers technical assistance both domestically and internationally. As one of the largest behavioral and social science research organizations in the world, AIR is committed to empowering communities and institutions with innovative solutions to the most critical challenges in education, health, workforce, and international development.

Our organization has considerable expertise and a long-standing track record for conducting school finance studies such as the one proposed for Nevada. Since 2004, AIR has conducted studies that have investigated issues of educational finance in Alaska, Arizona, California, Florida, Kentucky, Hawaii, Maryland, Nevada, New Mexico, New York, Massachusetts, Pennsylvania, Rhode Island, Texas, and Utah. For this effort, we have assembled a team of seasoned researchers to provide consulting on Nevada's public school finance system.

Dr. Jesse Levin (proposed Principal Investigator) has previously worked with all key members of the proposed research team on high-profile investigations of issues in school finance for federal, state, and philanthropic organizations. Most recently, he and Dr. Drew Atchison (proposed Project Director), along with Professor Baker (proposed Task Lead) and Dr. Chambers (proposed Expert Consultant) have collaborated on three national studies for the U.S. Department of Education investigating the quality of educational finance systems that track spending to individual schools, Title I resource allocation, and weighted student formulas. Prior to this work, Dr. Levin and Professor Baker performed an evaluation of Pennsylvania's school finance system (Baker & Levin, 2014). In addition, Dr. Levin has previously directed several evaluations of state school finance systems including the Nevada report of 2012 (Levin et al., 2016; Levin et al., 2013; Chambers et al., 2012) and educational adequacy studies for California, New Mexico, and New York (Chambers et al., 2004; Chambers et al., 2006; Chambers et al., 2008).

The proposed AIR research team exhibits considerable professional experience related to adequacy and equity in school funding, costs of special need populations, regional cost differences related to teacher markets, cost differences related to economies of scale, labor market economics, and legal aspects of education finance reform.

- ***Adequacy and equity – Dr. Chambers, Professor Baker, Dr. Levin, and Professor Verstegen have written and published extensively on issues of adequacy and equity in school funding. Dr. Chambers is well-known for developing the original cost-based funding model directed toward addressing issues of adequacy and equity in school finance.***

- ***Costs of special need populations – Dr. Chambers and Dr. Levin have conducted numerous studies directed at understanding the patterns of expenditure and resource allocation for students with disabilities and students in poverty. For example, Dr. Chambers led the joint Special Education Expenditure Project and Center for Special Education Finance, while both Dr. Chambers and Dr. Levin have independently led federal studies of Title I resource allocation.***
- ***Expert Knowledge of Nevada School Finance – Professor Jordan and Professor Verstegen both have special expertise and knowledge of Nevada school finance and have previously authored research reports on Nevada school finance reform (see, for example, Jordan and Verstegen [2008] and Verstegen et al. [2010]). In addition, they were both co-authors of the 2012 Nevada report (Chambers et al., 2012).***
- ***50-State Finance Systems – Professor Verstegen published an early survey of the states for the Education Commission of the States (1990) and recently published the results of a comprehensive 50-state survey of school finance policies and programs, with a focus on finance components for children with special educational needs.***
- ***Scale economies in schools and districts – Dr. Chambers performed early seminal research in educational resource cost modelling in Illinois (Chambers & Parrish, 1982); Alaska (Chambers & Parrish, 1984); and later in California, New Mexico, and New York (Chambers et al., 2004; Chambers et al., 2006; Chambers et al., 2008). These cost models were specifically designed to address the adequacy needs in the context of schools and districts over a considerable range in size.***

Education Finance Project Descriptions

Project Name	*Client*	*Period of Performance*	*Leadership*	*Description*
Study of Funding Provided to Public Schools and Public Charter Schools in Maryland	*Maryland State Department of Education and Department of Legislative Services*	*2016–2017*	*Co-project directors:* *Dr. Jesse Levin and Dr. Bruce Baker*	*This study examined school-level funding levels and patterns in Maryland, distinguishing between traditional and charter public schools. The study included analysis of extant data, documentation, and interviews with school district and charter school officials. Based on this analysis, the research team compared average spending levels and patterns, unconditionally and adjusting for student needs, between traditional and charter public schools and described charter school funding formulas and service arrangements in each Maryland school district with active charter schools.* *http://marylandeducators.org/sites/default/files/marylandstudypublcschoolfunding122016.pdf*
Educational Equity, Adequacy, and Equal Opportunity in the Commonwealth: An Evaluation of Pennsylvania's School Finance System	*William Penn Foundation*	*2014*	*Co-principal investigators:* *Dr. Bruce Baker and Dr. Jesse Levin*	*This report provided an overview of the state of school funding in Pennsylvania, including analyses of extant data from both Pennsylvania and national sources; a review of current conceptions of educational equity, adequacy and equal opportunity; empirical methods for measuring education costs; current policies across states; and recent reforms.* *http://www.air.org/resource/educational-equity-adequacy-and-equal-opportunity-commonwealth-evaluation-pennsylvanias*
Evaluation of Hawaii's Weighted Student Formula	*Hawaii Department of Education*	*2013*	*Principal investigator:* *Dr. Jay Chambers* *Project director:* *Dr. Jesse Levin*	*This broad report included a quantitative analysis of the implementation of a statewide school-based funding mechanism to understand the distributive equity of funding across schools as it relates to student needs; administration of large-scale surveys to school leaders; conducting interviews of state, district, and school leader stakeholders on their perspectives about the WSF model; and school-based budgeting.* *http://www.air.org/reports-products/index.cfm?fa=viewContent&content_id=2672*

Study of a New Method of Funding for Public Schools in Nevada	*Nevada Legislative Counsel Bureau*	*2012*	*Principal investigator: Dr. Jay Chambers Project director: Dr. Jesse Levin*	*This study of Nevada's funding system included an investigation of state funding formulas, demographic characteristics, and fiscal data from all 50 U.S. states. Based on empirical analyses of these data, the researchers attempted to identify the best practices that lead to an equitable distribution of funding with respect to the incidence of students in poverty, English language learners, students enrolled in special education programs, and students attending schools in districts that have a small scale of operations. http://www.air.org/files/AIR_NV_Funding_Study_Sept2012.pdf*
Do Schools in Rural and Nonrural Districts Allocate Resources Differently? An Analysis of Spending and Staffing Patterns in the West Region States	*Regional Educational Laboratory West*	*2009–2011*	*Principal investigator: Dr. Jay Chambers Project director: Dr. Jesse Levin*	*This report presented the first detailed comparison of resource allocation between rural and nonrural districts in the West Region. Three regional characteristics often associated with rural districts were chosen for the analysis: district enrollment, student population density within a district (students per square mile), and drive time from the center of a district to the nearest urban area or cluster. Two other types of factors thought to be associated with resource allocation were also investigated: student need (incidence of poverty, English language learner students, and students receiving special education services) and geographic differences in labor costs. http://ies.ed.gov/ncee/edlabs/regions/west/pdf/REL_2011099.pdf*
Determining the Cost of Providing an Adequate Education for All Students	*National Education Association*	*2009*	*Principal investigator: Dr. Jay Chambers Project director: Dr. Jesse Levin*	*This study was a methodological overview of the techniques used to answer the two fundamental adequacy questions: "What does it cost to enable a public school system to provide students with an adequate education?" and "How can school systems allocate their resources equitably, such that all students are afforded an adequate education regardless of their need or circumstance?" To investigate the approaches used to answer these questions, this study evaluated the strengths and weaknesses of four traditional costing-out methodologies: cost-function, professional judgment, successful schools or districts, and the evidence-based approach. The study then drew upon the strengths of each of these approaches to propose a new hybrid model for costing out adequate funding.*
Independent Comprehensive Study of the New Mexico School Funding Formula	*New Mexico Legislature*	*2006–2009*	*Principal investigator: Dr. Jay Chambers Project director: Dr. Jesse Levin*	*The focus of this study was to estimate the cost of providing a sufficient education to all students in New Mexico based on thoughtful comprehensive program designs developed from the ground-up by expert practitioners. AIR collaborated with educational policymakers and practitioners at the state and local levels to understand their perspectives on school programming and resource allocation. http://www.nmschoolfunding.org/*

Efficiency and Adequacy in California School Finance: A Professional Judgment Approach	*Bill & Melinda Gates Foundation*	*2006*	*Principal investigator: Dr. Jay Chambers Project director: Dr. Jesse Levin*	*This report presented the results of a professional judgment panel study focused on answering a central question: What is the cost of providing all California public school students with access to the California content standards and the opportunity to achieve proficiency levels established by the California State Board of Education?* *http://www.air.org/sites/default/files/downloads/report/AIR_PJP_Report_0.pdf*
The New York Adequacy Study: Determining the Cost of Providing All Children in New York an Adequate Education	*Bill & Melinda Gates Foundation and the Ford Foundation*	*2002–2004*	*Principal investigator: Dr. Jay Chambers Project director: Dr. Jesse Levin*	*This report presented the results of a high-profile project undertaken to answer the question: "What is the cost of providing all New York public school students a full opportunity to meet the Regents Learning Standards?"* *The methodological centerpiece for this study was a professional judgment approach. The AIR/Management Analysis and Planning (MAP) research team selected highly qualified New York State educators to serve on a series of professional judgment panels to design instructional programs necessary to meet the outcome goal specified (i.e., a "full opportunity to meet the Regents Learning Standards"). These panels were then asked to specify the resources needed to deliver those programs. AIR/MAP supplemented the information provided from these panels with commentary from an external cadre of researchers in the field and feedback from stakeholders outside of education; with analysis of staffing patterns in schools identified as "highly successful" in serving their student populations and with econometric explorations of New York education labor markets.* *AIR/MAP imputed costs to the instructional models resulting from this process. Various analytic techniques were used to estimate the costs of an adequate education. These included econometric modeling, analyses of "successful schools," and current research on school effectiveness.* *Volume I:* *http://www.air.org/sites/default/files/downloads/report/NYAdequacyReportVOLUMEI_0.pdf* *Technical Appendices:* *http://www.air.org/sites/default/files/downloads/report/NYAdequacyAppendicesVOLUMEII_0.pdf*

3.1.10 Provide a brief description of the length of time vendor has been providing services described in this RFP to the public and/or private sector.

As an organization, AIR has been working in the field of education research since 1947. Collectively, the researchers participating on this project have many decades of combined education finance research experience.

3.1.11 Financial information and documentation to be included in accordance with Section 8.5, Part III – Confidential Financial Information.

3.1.11.1 Dun and Bradstreet Number

04-173-3197

3.1.11.2 Federal Tax Identification Number

25-0965219

3.1.11.3 The last two (2) years and current year interim:

A. Profit and Loss Statement

B. Balance Statement

See proposal volume Part III Confidential Financial Information for the financial information and documentation.

3.2 Subcontractor Information

Subcontractors are defined as a third party, not directly employed by the contractor, who shall provide services identified in this RFP. This does not include third parties who provide support or incidental services to the contractor.

3.2.1 Does this proposal include the use of subcontractors?

Yes	***X***	No	

If "Yes", vendor shall:

3.2.1.1 Identify specific subcontractors and the specific requirements of this RFP for which each proposed subcontractor will perform services.

WestEd will subcontract to AIR for this project to work on study Objectives 2.1.3, 2.1.5, and 2.1.6. The WestEd Principal Investigator, Jason Willis, has worked extensively on the implementation of California's Local Control Funding Formula (LCFF) at both the state and district levels. In addition, he has worked to support states and school districts to analyze, model, and propose improvement to their funding formulas, including the construction and execution of weighted student funding systems. Moreover, WestEd already has experience

interacting effectively within Nevada public school districts, as evidenced by its work with Clark County to develop the English learner master plan. To this end, the subcontractor is more than qualified to fulfill the RFP objective requirements that will be assigned to WestEd as follows. As part of this project, he will use that expertise within two pieces of this project. First, he will lead a qualitative analysis of Nevada school district administrators regarding their perceived definitions of at-risk and gifted and talented student populations. Specifically, he will lead the design and administration of interviews that probe at how Nevada district administrators define and identify such students, and whether district officials have any recommendations regarding the development and functional use of formal state definitions for such pupils. Second, he will describe the key considerations and potential challenges and benefits for Nevada districts if the states were to implement a weighted student funding system. The project team will then develop recommendations for how Nevada could transition from its current system to implementing a weighted student funding system while minimizing district challenges and maximizing potential benefits.

3.2.1.2 If any tasks are to be completed by subcontractor(s), vendors shall:

A. Describe how the work of any subcontractor(s) shall be supervised, channels of communication shall be maintained and compliance with contract terms assured; and

Regular project team check-ins will ensure that all subcontractors and study consultants are in regular communication with the AIR study team. In addition, Jason Willis is located in the San Francisco area, in close proximity to AIR's San Mateo office. Therefore, we will be able to have in-person check-ins as needed.

AIR will work with WestEd to develop a set of deliverables with deadlines for meeting those deliverables. Payment from AIR to WestEd will be based on meeting the requirements and expectations for each deliverable.

B. Describe your previous experience with subcontractor(s).

AIR has experience working with Jason Willis on previous projects, including a federal national study of weighted student funding systems directed by Dr. Jesse Levin and studies of the weighted student funding systems in Oakland and San Francisco led by Dr. Jay Chambers and Dr. Jesse Levin. The members of this study team and Jason Willis have supported each other's work and seek to maintain a good working relationship moving forward.

In addition, AIR has vast experience working with many subcontractors on previous projects. In the vast majority of these instances, AIR and the subcontractors have worked in tandem to deliver the highest quality work products.

In the rare instance in which a subcontractor has not been able to fulfill its obligation to deliver a satisfactory work product, the AIR study team was able to take on the work originally tasked to the subcontractor and met the requirements of the RFP, delivering a high-quality report. Although we in no way foresee this occurring with WestEd, given our long history of

working with Jason Willis, AIR is large enough to be able to absorb work with little problem should a subcontractor in question not produce a high-quality work product.

3.2.1.3 Provide the same information for any proposed subcontractors as requested in Section 3.1, Vendor Information.

1. Company Background and References

1.1 Vendor Information

1.1.1 Vendors shall provide a company profile in the table format below.

Question	Response
Company name:	***WestEd***
Ownership (sole proprietor, partnership, etc.):	***Joint Powers Authority***
State of incorporation* *note: not a corporation	***California***
Date of incorporation:	***1995***
# of years in business:	***22***
List of top officers:	***Glen Harvey, CEO*** ***Catherine Walcott, CDO*** ***Max McConkey, Chief Policy Officer*** ***Nancy Riddle, CFO*** ***Richard Whitmore, CAO*** ***Sabrina Laine, Chief Program Officer***
Location of company headquarters, to include City and State:	***San Francisco, CA***
Location(s) of the office that shall provide the services described in this RFP:	***Sacramento, CA***
Number of employees locally with the expertise to support the requirements identified in this RFP:	***3***
Number of employees nationally with the expertise to support the requirements in this RFP:	***WestEd has a vast network of staff across the agency with significant expertise relevant to the requirements of this RFP. Should the need arise to involve someone within the agency that is not specifically listed in the proposal, we will, with the permission of the State of Nevada, ask the staff member with the requisite expertise to fulfill that need.***
Location(s) from which employees shall be assigned for this project:	***Sacramento, CA***

1.1.2 A Nevada-based business may apply for a five percent (5%) preference on its proposal. This preference may apply if a business has its principal place of business within Nevada. This preference cannot be combined with any other preference, granted for the award of a contract using federal funds, or granted for the award of a contract procured on a multi-state basis. To claim this preference a business must submit a letter with its proposal showing that it qualifies for the preference.

1.1.3 **Please be advised**, pursuant to NRS 80.010, a corporation organized pursuant to the laws of another state shall register with the State of Nevada, Secretary of State's Office as a foreign corporation before a contract can be executed between the State of Nevada and the awarded vendor, unless specifically exempted by NRS 80.015.

1.1.4 The selected vendor, prior to doing business in the State of Nevada, shall be appropriately licensed by the State of Nevada, Secretary of State's Office pursuant to NRS76. Information regarding the Nevada Business License can be located at http://nvsos.gov.

Question	Response
Nevada Business License Number:	***NV20111743662***
Legal Entity Name:	***WestEd***

Is "Legal Entity Name" the same name as vendor is doing business as?

Yes	***X***	No	

If "No", provide explanation.

1.1.5 Has the vendor ever been engaged under contract by any State of Nevada agency?

Yes	***X***	No	

If "Yes", complete the following table for each State agency for whom the work was performed. Table can be duplicated for each contract being identified.

Question	Response
Name of State agency:	***State of Nevada, Purchasing Division***
State agency contact name:	***Ronda Miller***
Dates when services were performed:	***8/2013–6/2015***
Type of duties performed:	***Validation Study of the Nevada Educator Performance Framework***
Total dollar value of the contract:	***$320,000***

Question	Response
Name of State agency:	***Nevada Department of Education***[12]
State agency contact name:	***Janie Lowe***
Dates when services were performed:	***1/2015–3/2017***
Type of duties performed:	***Nevada eNote Support Services and Continuation of Services***
Total dollar value of the contract:	***$43,750***

Question	Response
Name of State agency:	***Nevada Department of Education***
State agency contact name:	***Colin Usher and Evelyn Barragan***
Dates when services were performed:	***6/2012–9/2013***
Type of duties performed:	***Nevada Striving Readers Evaluation***
Total dollar value of the contract:	***$457,880***

Question	Response
Name of State agency:	***Nevada Department of Education***
State agency contact name:	***Kim Boles***
Dates when services were performed:	***3/2012–6/2013***
Type of duties performed:	***Nevada Teachers and Leaders Council***
Total dollar value of the contract:	***$99,335***

Question	Response
Name of State agency:	***Nevada Department of Education***
State agency contact name:	***Kim Boles***
Dates when services were performed:	***3/2012–6/2013***
Type of duties performed:	***Supporting Diverse Learners through Educator Effectiveness***
Total dollar value of the contract:	***$190,690***

Question	Response
Name of State agency:	***Nevada Department of Education***
State agency contact name:	***Diane Mugford***
Dates when services were performed:	***1/2011–4/2012***
Type of duties performed:	***Nevada ESEA Waiver Proposal***
Total dollar value of the contract:	***$39,923***

[12] ***WestEd has worked extensively with the Nevada Department of Education. We have listed contracts spanning the past five years to show recent engagement with the agency and will provide further contract information if requested.***

1.1.6 Are you now or have you been within the last two (2) years an employee of the State of Nevada, or any of its agencies, departments, or divisions?

Yes		No	***X***

If "Yes", please explain when the employee is planning to render services, while on annual leave, compensatory time, or on their own time?

If you employ (a) any person who is a current employee of an agency of the State of Nevada, or (b) any person who has been an employee of an agency of the State of Nevada within the past two (2) years, and if such person shall be performing or producing the services which you shall be contracted to provide under this contract, you shall disclose the identity of each such person in your response to this RFP, and specify the services that each person shall be expected to perform.

1.1.7 Disclosure of any significant prior or ongoing contract failures, contract breaches, civil or criminal litigation in which the vendor has been alleged to be liable or held liable in a matter involving a contract with the State of Nevada or any other governmental entity. Any pending claim or litigation occurring within the past six (6) years which may adversely affect the vendor's ability to perform or fulfill its obligations if a contract is awarded as a result of this RFP shall also be disclosed.

Does any of the above apply to your company?

Yes	***X***	No	

If "Yes", please provide the following information. Table can be duplicated for each issue being identified.

Question	**Response**	
Date of alleged contract failure or breach:	***Contract end date 4/6/15***	
Parties involved:	***Arizona State Board for Charter Schools***	
Description of the contract failure, contract breach, or litigation, including the products or services involved:	***Funder terminated contract for lack of performance by the staff who were assigned to do the work. Staff assigned to that agreement are not a part of this proposal.***	
Amount in controversy:	***N/A***	
Resolution or current status of the dispute:	***Funder exercised termination clause***	
If the matter has resulted in a court case:	***Court***	***Case Number***
	N/A	***N/A***
Status of the litigation:	***N/A***	

Question	Response	
Question	**Response**	
Date of alleged contract failure or breach:	***Contract end date 10/19/15***	
Parties involved:	***California State University, Bakersfield***	
Description of the contract failure, contract breach, or litigation, including the products or services involved:	***Funder terminated contract for lack of performance. Staff assigned to that agreement are not a part of this proposal.***	
Amount in controversy:	***N/A***	
Resolution or current status of the dispute:	***Funder exercised termination clause. Project moved to another staff member, and a new contract is being drafted.***	
If the matter has resulted in a court case:	***Court***	***Case Number***
	N/A	***N/A***
Status of the litigation:	***N/A***	
Date of alleged contract failure or breach:	***Contract end date 7/15/16***	
Parties involved:	***Kamehameha Schools***	
Description of the contract failure, contract breach, or litigation, including the products or services involved:	***Funder terminated contract for lack of performance by the staff who were assigned to do the work. Staff assigned to that agreement are not a part of this proposal.***	
Amount in controversy:	***N/A***	
Resolution or current status of the dispute:	***Parties mutually agreed to amendment to the contract to end early, reducing services and cost.***	
If the matter has resulted in a court case:	***Court***	***Case Number***
	N/A	***N/A***
Status of the litigation:	***N/A***	

1.1.8 Vendors shall review and provide if awarded a contract the insurance requirements as specified in ***Attachment D, Insurance Schedule for RFP 3489.***

Should AIR be considered for award, WestEd will provide this information upon request.

1.1.9 Company background/history and why vendor is qualified to provide the services described in this RFP. Limit response to no more than five (5) pages.

WestEd History and Status

WestEd is a preeminent educational research, development, and service organization with more than 600 employees and 17 offices nationwide. WestEd has been a leader in moving research into practice by conducting research and development (R&D) programs, projects, and evaluations; by providing training and technical assistance; and by working with policymakers and practitioners at state and local levels to carry out large-scale school improvement and innovative change efforts. The agency's mission is to promote excellence, achieve equity, and improve learning for children, youth, and adults. In developing and applying the best available resources toward these goals, WestEd has built solid working relationships with education and community organizations at all levels, playing key roles in facilitating the efforts of others and in initiating important new improvement ventures. In 2016, WestEd celebrated a half-century milestone, marking 50 years of improving learning and healthy development for children, youth, and adults from cradle to career.

WestEd is a Joint Powers Agency (JPA), authorized in 1995 by a California Joint Powers Agreement and governed by public entities in Arizona, California, Nevada, and Utah, with Board members representing agencies from these states and nationally. Its two predecessors, Far West Laboratory for Educational Research and Development (FWL) and Southwest Regional Laboratory (SWRL), were JPAs created in 1966. WestEd is a nonpartisan, not-for-profit organization that is tax exempt under Section 115(1) of the Internal Revenue Code. Because of this status, our work meets the giving guidelines of most philanthropic organizations. From Fiscal Years 2010 through 2015, WestEd has carried out more than 2,750 new contracts representing major contributions to the nation's R&D resources, for an average of 527 new contracts per year. Current work extends beyond the western region to include most states in the nation and an increasing number of other countries.

In FY 2017, the agency is expecting to operate on program funding of approximately $165 million. Funding comes from sources including U.S. federal agencies; state departments of education; international entities; and universities, school districts, foundations, and other state and local agencies. WestEd is vetted and approved as a qualified service provider in the U.S. Department of Health and Human Services Program Support Center (PSC) Task Order Contracts, and the General Service Administration's Professional Services Schedule (PSS) federal contracting programs. This large variety of funding sources provides WestEd with a stable funding base and a stable organizational structure for carrying out the work of this opportunity.

Track Record and History of Successfully Completed Projects

From Fiscal Years 2010 through 2015, WestEd has carried out more than 2,750 new contracts representing major contributions to the nation's R&D and TA resources, for an average of 556 new contracts per year. In FY 2017, the agency is expecting to operate on program funding of approximately $165 million with contracts from federal, state, and local agencies; social service agencies; schools; philanthropies; and private industry companies. This variety of funding sources provides a stable funding base and hence a stable organizational structure for carrying out the work of this proposal.

Through all of our work, we establish clear management structures and communication processes that ensure all staff know what is expected so that they can do their work

productively and effectively. WestEd has several tools for planning, scheduling, budgeting, and reporting accomplishments to its funders. An example of client satisfaction is that WestEd has consecutively been awarded the Regional Educational Laboratory (REL) by the U.S. Department of Education since its inception in 1966. Numerous other national and regional centers also have been consecutively awarded—a testament to our ability to not only support the relevant agency but to develop strong on-the-ground relationships with state education agencies and school districts and the early childhood and K–12 communities they serve.

1.1.10 Provide a brief description of the length of time vendor has been providing services described in this RFP to the public and/or private sector.

WestEd is a Joint Powers Agency (JPA), authorized in 1995 by a California Joint Powers Agreement and governed by public entities in Arizona, California, Nevada, and Utah, with Board members representing agencies from these states and nationally. Its two predecessors, Far West Laboratory for Educational Research and Development (FWL) and Southwest Regional Laboratory (SWRL), were JPAs created in 1966. WestEd is a nonpartisan, not-for-profit organization that is tax exempt under Section 115(1) of the Internal Revenue Code. Because of this status, our work meets the giving guidelines of most philanthropic organizations. From Fiscal Years 2010 through 2015, WestEd has carried out more than 2,750 new contracts representing major contributions to the nation's R&D resources, for an average of 527 new contracts per year. Current work extends beyond the western region to include most states in the nation and an increasing number of other countries.

1.1.11 Financial information and documentation to be included in accordance with ***Section 8.5, Part III – Confidential Financial Information***.

1.1.11.1 Dun and Bradstreet Number: DUNS: ***074653882***

1.1.11.2 Federal Tax Identification Number: ***94-3233542***

1.1.11.3 The last two (2) years and current year interim:

A. Profit and Loss Statement

B. Balance Statement

WestEd is unable to share this proprietary information with AIR.

3.2.1.4 Vendor shall not allow any subcontractor to commence work until all insurance required of the subcontractor is provided to the vendor.

AIR will work with the subcontractor to obtain all necessary insurance. Until such insurance is provided, the subcontractor will not be allowed to commence work.

3.2.1.5 Vendor must notify the using agency of the intended use of any subcontractors not identified within their original proposal and provide the information originally requested in the RFP in Section 3.2, Subcontractor Information. The vendor must receive agency approval prior to subcontractor commencing work.

The AIR study team will notify the Nevada Department of Education if we intend to use any subcontractor not identified within this proposal. In the case that this may occur, we will provide all information requested in Section 3.2 of this RFP.

3.3 Business References

3.3.1 Vendors shall provide a maximum **of three (3) business references** from similar projects performed for private, and/or public sector clients within the **last three (3) years.**

BUSINESS REFERENCE #1	
CLIENT INFORMATION	
Client Name:	***William Penn Foundation***
Contact Name:	***Elliot Weinbaum***
Street Address:	***Two Logan Square, 11th Floor*** ***100 North 18th St.***
City, State, Zip:	***Philadelphia, PA 19103***
Phone, including area code:	***(215) 988-1830***
Facsimile, including area code:	***N/A***
Email address:	*eweinbaum@williampennfoundation.org*
PROJECT INFORMATION	
Project Title:	***Educational Equity, Adequacy, and Equal Opportunity in the Commonwealth: An Evaluation of Pennsylvania's School Finance System***
Brief description of the project/contract and description of services performed:	***This report provided an overview of the state of school funding in Pennsylvania, including analyses of extant data from both Pennsylvania and national sources; a review of current conceptions of educational equity, adequacy and equal opportunity; empirical methods for measuring education costs; current policies across states; and recent reforms.***
Project/Contract Start Date:	***June 2014***
Project/Contract End Date:	***October 2014***
Project/Contract Value:	***$68,051***
BUSINESS REFERENCE #2	
CLIENT INFORMATION	
Client Name:	***Maryland State Department of Education***
Contact Name:	***Carol Beck***
Street Address:	***200 West Baltimore St***
City, State, Zip:	***Baltimore, MD 21201***
Phone, including area code:	***410-767-0100***
Facsimile, including area code:	***N/A***
Email address:	*Carol.beck@maryland.gov*

PROJECT INFORMATION	
Project Title:	***Study of Funding Provided to Public Schools and Public Charter Schools in Maryland***
Brief description of the project/contract and description of services performed:	***This study examined school-level funding levels and patterns in Maryland, distinguishing between traditional and charter public schools. This work included analysis of extant data, documentation, and interviews with school district and charter school officials. Based on this analysis, the research team compared average spending levels and patterns, unconditionally and adjusting for student needs, between traditional and charter public schools and described charter school funding formulas and service arrangements in each Maryland school district with active charter schools.***
Project/Contract Start Date:	***February 2016***
Project/Contract End Date:	***December 2016***
Project/Contract Value:	***$430,346***
BUSINESS REFERENCE #3	
CLIENT INFORMATION	
Client Name:	***U.S. Department of Education: Policy and Program Studies Service***
Contact Name:	***Stephanie Stullich***
Street Address:	***400 Maryland Ave SW***
City, State, Zip:	***Washington, DC***
Phone, including area code:	***(202) 401-2342***
Facsimile, including area code:	***N/A***
Email address:	*Stephanie.stullich@ed.gov*
PROJECT INFORMATION	
Project Title:	***Exploring the Quality of School-Level Expenditure Data: Practices and Lessons Learned in Nine Sites***
Brief description of the project/contract and description of services performed:	***This study examined the feasibility of improving and expanding the implementation of fiscal data systems that attribute dollars to school sites. We explored several facets of school-level expenditure data including comprehensiveness (how much of the total district spending was attributed to school sites and whether spending was tracked or allocated to schools), consistency with other school-level spending sources, and the accuracy of allocated dollars.***
Project/Contract Start Date:	***February 2014***
Project/Contract End Date:	***February 2017***
Project/Contract Value:	***$529,013***

BUSINESS REFERENCE #4	
CLIENT INFORMATION	
Client Name:	***U.S. Department of Education: Policy and Program Studies Service***
Contact Name:	***Oliver Schak***
Street Address:	***400 Maryland Ave SW***
City, State, Zip:	***Washington, DC***
Phone, including area code:	***(202) 401-2342***
Facsimile, including area code:	***N/A***
Email address:	*oliver.schak@ed.gov*
PROJECT INFORMATION	
Project Title:	***Study of School Based Budgeting and Weighted Student Funding Systems***
Brief description of the project/contract and description of services performed:	***This is an ongoing national study of how districts allocate resources to schools. In particular, we are focusing on systems that allocate dollars to schools using weighted student funding (WSF) systems. This study consists of a nationally representative survey of districts and case studies of nine districts that currently use WSF systems.***
Project/Contract Start Date:	***February 2017***
Project/Contract End Date:	***Ongoing***
Project/Contract Value:	***$1,440,000***

3.3.2 Vendors shall submit Attachment E, Reference Questionnaire to their business references.

We have provided the reference questionnaire to the four references identified previously.

3.3.3 It is the vendor's responsibility to ensure that completed forms are received by the Purchasing Division on or before the deadline as specified in Section 7, RFP Timeline for inclusion in the evaluation process. Reference Questionnaires not received, or not complete, may adversely affect the vendor's score in the evaluation process.

We have asked each of the four references identified to submit their completed questionnaires to the Purchasing Division according to the deadlines provided.

3.3.4 The State reserves the right to contact and verify any and all references listed regarding the quality and degree of satisfaction for such performance.

3.4 Vendor Staff Resumes

A resume shall be completed for each proposed key personnel responsible for performance under any contract resulting from this RFP per Attachment F, Proposed Staff Resume.

See Attachment F, Proposed Staff Resume for the resumes of the proposed key personnel.

Section VII - Attachment F – Proposed Staff Resumes

A. Vendors shall include all proposed staff resumes per ***Section 3.4, Vendor Staff Resumes*** in this section.

See the following pages for AIR staff resumes (Dr. Jesse Levin, Dr. Drew Atchison, and Dr. Jay Chambers).

B. This section shall also include any subcontractor proposed staff resumes, if applicable.

See following pages for resumes for Professor Teresa Jordan, Professor Deborah Verstegen, Professor Bruce Baker, and Jason Willis.

PROPOSED STAFF RESUME FOR RFP 3489

A resume must be completed for all proposed prime contractor staff and proposed subcontractor staff.

Company Name Submitting Proposal:	***American Institutes for Research***

Check the appropriate box if the proposed individual is prime contractor staff or subcontractor staff.			
Contractor:	***X***	**Subcontractor:**	

The following information requested pertains to the individual being proposed for this project.			
Name:	***Jesse Levin, Ph.D.***	**Key Personnel: (Yes/No)**	***Yes***
Individual's Title	***Principal Research Economist***		
# of Years in Classification:	***3***	**# of Years with Firm:**	***15***

BRIEF SUMMARY OF PROFESSIONAL EXPERIENCE

Information should include a brief summary of the proposed individual's professional experience.

Jesse Levin Ph.D., is a principal research economist at AIR, where he has been involved in a number of projects investigating educational production, school finance and adequacy, and resource allocation. He currently serves as the project director of a national study of weighted student funding systems, a feasibility study to improve the quality of school-level expenditure data, and deputy director for a study of Title I resource allocation, all for the U.S. Department of Education. In addition, Levin recently directed a study of public school funding for the Maryland State Department of Education and Maryland Department of Legislative Services. He has directed high-profile educational adequacy studies in California, New Mexico and New York, investigations of educator supply and demand in Oklahoma and Massachusetts, evaluations of state school finance systems in Hawaii, Nevada and Pennsylvania, and researched educational resource allocation and effectiveness both within and across school districts. His work at AIR over the past 15 years has drawn upon his expertise in applied econometrics and quantitative methods.

Levin is co-recipient of the Association of Educational Service Agencies 2007 E. Robert Stephens Award for the research study Similar Students, Different Results: Why Do Some Schools Do Better? A Large-Scale Survey of California Elementary Schools Serving Low-Income Students. His articles have appeared in Economics of Education Review, Empirical Economics, Labour Economics, Oxford Bulletin of Economics and Statistics, and Peabody Journal of Education. He also regularly serves as a referee for several peer reviewed journals (Economics of Education Review, Education Finance and Policy, Educational Policy, and Empirical Economics).

Prior to his work at AIR, he served as an economics researcher for the Institute for Research of Schooling, Labor Market and Economic Development (SCHOLAR) in the Netherlands, where he conducted research in the economics of education and labor economics and performed major countrywide studies of the efficacy of class size reduction, the differences in the effectiveness of private versus public schooling, and measuring the rate of return to educational investment. Dr. Levin earned his Ph.D. from the University of Amsterdam and Tinbergen Institute in the Netherlands in 2002.

Included below are descriptions of a select number of projects in which Dr. Levin has taken a significant role.

RELEVANT EXPERIENCE

Information required should include: timeframe, company name, company location, position title held during the term of the contract/project and details of contract/project.

***Study Director**, Study of Weighted Student Funding and School-Based Budgeting Systems, U.S. Department of Education Policy and Program Study Service (PPSS), Washington, DC (2016–Present)*

Currently directing study to investigate implementation of School-Based Budgeting (SBB) and Weighted Student Funding (WSF) systems, intradistrict resource allocation mechanisms that provide increased school-level discretion over educational resources (funding, staff and non-personnel) and distribute resources to schools according to the needs of the students being served. Duties include providing conceptual leadership over the following key study tasks: collecting and analyzing extant data documenting WSF systems and their effect on funding equity; development and administration of nationally representative district and school leader surveys on district/school discretionary split over resources, and performing case study site visits including interviews with staff from a purposive sample of WSF district and school sites.

***Study Director**, Maryland Study of Public School and Charter School Funding, Maryland State Department of Education, Baltimore, MD (2016)*

Served as the director for a study of resource allocation and spending on charter and non-charter public schools in Maryland. Responsibilities include directing the research team in collecting quantitative fiscal (expenditure and revenue) data and qualitative interview and survey data from local education agencies and charter organizations; analysis of spending at the school-level and central-level (central district office/charter administrative office); examination of policies governing the allocation of resources from central offices to individual schools; and, drafting of results and study recommendations in report format.

***Study Deputy Director**, Study of Title I Schoolwide and Targeted Assistance Programs, U.S. Department of Education Policy and Program Study Service (PPSS), Washington, DC (2015–Present)*

Currently directing study to investigate resource allocation and expenditures in schools receiving Title I funding that operate schoolwide versus targeted assistance programs. Duties include providing conceptual leadership over the following key study tasks: collecting and analyzing extant data documenting current resource allocation and spending practices in a purposive sample of districts; development and administration of fiscal office and school leader surveys on planning, budgeting and spending practices to a nationally representative sample of district and school sites; and, performing case study site visits including interviews with staff from a purposive sample of district and school sites.

***Study Director**, Network to Transform Teaching (NT3) Cost Study: A Comprehensive Review of Site-Level Costs for National Board of Professional Teaching Standards (NBPTS), Washington, DC (2015–2017)*

Directed a study of the costs of the efforts on the part of five NT3 sites across the county to recruit and support teacher candidates in pursuit of their national board certification. Duties included providing conceptual leadership and guidance in implementation of research plan involving use of the ingredients approach to cost analysis and development of site-specific resource cost models. Oversaw study team in the analysis of candidate recruitment and support costs within and across sites, developing a comprehensive report, and disseminating findings.

***Study Director**, Exploring the Quality of School-Level Expenditure Data: Practices and Lessons Learned in Nine Sites, U.S. Department of Education Policy and Program Study Service (PPSS) Washington, DC (2013–2017)*

Directed study investigating the extent to which district and state fiscal data systems track educational expenditures to individual school sites and the methods used to do so in an effort improve the quality school-level expenditure data in new and existing systems. Duties include directing the following three key study tasks: 1) Conducting a panel meeting of expert practitioners and researchers; 2) Recruiting study sample of district and state sites capable of tracking expenditures to school sites; 3) Conducting interviews with fiscal staff from each site; and, 4) Collecting and analyzing school-level expenditure data from each district/school site to check for its comprehensiveness and consistency with data sets collected independently by federal agencies.

***Study Director**, Massachusetts Study of Teacher Supply and Demand: Trends and Projections, Massachusetts Department of Elementary and Secondary Education, Malden, MA (2015)*

Served as the director for a study of educator supply and demand in Massachusetts. Responsibilities include directing the research team in collecting administrative data on certificated educator personnel and staffing assignments, analyzing trends in educator supply and demand trends across public school districts in the state, and drafting of results and recommendations in report format.

***Study Director**, Oklahoma Educator Supply and Demand Study for Oklahoma State Regents of Higher Education, Oklahoma City, OK (2014)*

Served as the director for a study of educator supply and demand in Oklahoma. Responsibilities include directing the research team in collecting individual-level administrative data on certificated educator personnel and staffing assignments, analyzing five-year supply and demand trends across public school districts in the state, drafting of results and recommendations in report format, and making presentations to the client.

***Principal Investigator**, Evaluation Educational Equity, Adequacy, and Equal Opportunity in Pennsylvania, William Penn Foundation, Philadelphia, PA (2014)*

Led an evaluation of Pennsylvania's public school finance system to help support the next wave of reform in that state. Responsibilities included managing the collection and analysis of extant data on district-level revenues, spending, and cost factors (student needs, price levels, scale of operations and other regional factors); drafting results in a final report and recommendations; and providing testimony to the Pennsylvania legislative Basic Education Funding Commission.

***Study Director**, Evaluation of Hawaii's Weighted Student Formula, Hawaii Department of Education, Honolulu, HI (2013)*

Served as project director for study that investigated Hawaii's 2006 implementation of a Weighted Student Formula (WSF). The purpose of the study was three-fold: 1) to study to what extent the WSF empowered principals and school communities with greater decision-making authority over the use of funds allocated to the school; 2) to evaluate whether Hawaii has achieved its WSF goal of streamlining the allocation of resources to schools; and, 3) to examine if the WSF increased transparency and understanding of how resources are allocated to school sites and the equity with which resources are allocated. In addition to providing the conceptual leadership and managing the day-to-day work of the study, my duties involved overseeing the data collection, the methodological development of statistical models used, and drafting report and final recommendations.

***Study Director**, Study of a New Method of Funding for Public Schools in Nevada, Nevada Legislative Counsel Bureau, Carson City, NV (2012)*

Directed study that investigates Nevada's existing system of public school funding and makes recommendations of "best practices" that might be incorporated in order to improve the equity with which resources are allocated according to student and regional needs. In addition to managing the work of three contracting professors and AIR staff, my duties involved overseeing the data collection, the methodological development of statistical models and corresponding tool used to simulate district funding allocations, and drafting report and final recommendations.

***Principal Analyst**, National Evaluation of Magnet Schools, U.S. Department of Education Institute for Education Sciences, Washington, DC (2008–2015)*

Serve as primary analyst for an investigation of the relative effectiveness of schools that have received a federal Magnet School Assistance Program (MSAP) grant. Main duties include developing analysis plan, data preparation, and analysis using quasi-experimental techniques (comparative interrupted time series framework).

EDUCATION

Information required should include: institution name, city, state, degree and/or Achievement and date completed/received.

University of Amsterdam and Tinbergen Institute, Amsterdam, The Netherlands, Ph.D., Economics with specialization in Economics and Education, Labor Economics and Applied Econometrics, 2002

San Francisco State University, San Francisco, CA, M.A., Economics with specialization in Public Finance, 1995

University of Oregon, Eugene, OR, B.S., Economics major with minor in Music, 1991

CERTIFICATIONS

Information required should include: type of certification and date completed/received.

N/A

REFERENCES

A minimum of three (3) references are required, including name, title, organization, phone number, fax number and email address.

Julie Waller, Senior Program Analyst
Fiscal Analysis Division
Nevada State Legislative Counsel Bureau
Phone: (775) 684-6821
Fax: (775) 684-6475
E-Mail: jwaller@lcb.state.nv.us

Stephanie Stullich, Education Research Specialist
Policy and Program Studies Service
Office of Planning, Evaluation and Policy Development
U.S. Department of Education

Phone: (202) 401-2342
Fax: (202) 401-3036
E-Mail: stephanie.stullich@ed.gov

Brian Hallett, Budget Director and Acting Superintendent for Fiscal Services
Hawaii State Department of Education
Phone: (808) 784-6022
Fax: (808) 586-3445
E-Mail: Brian_Hallett/BUDGET/HIDOE@notes.k12.hi.us

PROPOSED STAFF RESUME FOR RFP 3489

A resume must be completed for all proposed prime contractor staff and proposed subcontractor staff.

Company Name Submitting Proposal:	***American Institutes for Research***

Check the appropriate box if the proposed individual is prime contractor staff or subcontractor staff.			
Contractor:	***X***	**Subcontractor:**	

The following information requested pertains to the individual being proposed for this project.			
Name:	***Drew Atchison***	**Key Personnel: (Yes/No)**	**Yes**
Individual's Title	***Researcher***		
# of Years in Classification:	***1***	**# of Years with Firm:**	***2***

BRIEF SUMMARY OF PROFESSIONAL EXPERIENCE

Information should include a brief summary of the proposed individual's professional experience.

Drew Atchison is a researcher at American Institutes for Research (AIR). His primary responsibilities include quantitative analysis on a wide range of projects examining topics such as education finance, teacher supply and demand, and educational equity. Atchison also has contributed substantially to the research and writing of several reports for state education agency and Department of Education projects including Exploring the Quality of School-Level Expenditure Data: Practices and Lessons Learned in Nine Sites and Study of Funding Provided to Public Schools and Public Charter Schools in Maryland. He has extensive experience in quantitative methodology, education finance, education technology, and issues of inequality and educational opportunity. In his personal research, Atchison has focused on the equity of education funding, examining how state and federal policy changes have impacted the distribution of funding with respect to students' educational needs. Previously, Atchison was a research assistant at George Washington University and a consultant working for Digital Promise. Atchison recently completed his doctorate degree in Education Policy from The George Washington University and is currently an adjunct professor there, teaching a graduate level course on education policy.

RELEVANT EXPERIENCE

Information required should include: timeframe, company name, company location, position title held during the term of the contract/project and details of contract/project.

- ***Analyst, Study of Title I Schoolwide and Targeted Assistance Programs, AIR (2016-2017)***
  Led the analysis of a nationally representative survey of districts and Title I school principals comparing use of Title I funds in schoolwide and targeted assistance Title I programs and how decisions regarding use of funds are made in such schools. Conducted case study visits to three Title I schools in two districts and assisted with conducting interviews with school and district officials. Cleaned and coded qualitative notes for those sites.

- ***Quantitative Analyst, Study of Funding Provided to Public Schools and Public Charter Schools in Maryland, AIR (2016)***

Participated in all phases of this project, from study design to report writing. Contributed substantially to the collection, cleaning, and analysis of quantitative fiscal data examining levels of spending on traditional and charter public schools in the state of Maryland.

- ***Quantitative Analyst, Feasibility Study on Improving the Quality of School-Level Expenditure Data, AIR (2015–2016)***
  Conducted quantitative analysis examining school-level fiscal data in order to understand the comprehensiveness of the data that is attributed to schools, the consistency of school-level fiscal data provided by study sites to other sources of fiscal data, and the accuracy of expenditures that are linked to schools through allocation formulas rather than tracked directly. Also contributed substantially to the writing of the final report, along with other deliverables.

- ***Quantitative Analyst, Massachusetts Educator Supply and Demand, AIR (2015)***
  Contributed to refining analytical methods and analyzed quantitative data using various regression models in order to develop predictions of teacher supply and demand for the next 10 years in the state of Massachusetts. Also contributed significantly to the presentation of results and report writing.

EDUCATION

Information required should include: institution name, city, state, degree and/or Achievement and date completed/received.

The George Washington University, Washington, D.C., Ed.D., Education Policy, 2017
The College of William and Mary, Williamsburg, VA, M.A.Ed., Secondary Education, 2009
The College of William and Mary, Williamsburg, VA, B.S., Biology, 2007

CERTIFICATIONS

Information required should include: type of certification and date completed/received.

N/A

REFERENCES

A minimum of three (3) references are required, including name, title, organization, phone number, fax number and email address.

Stephanie Stullich, Education Research Specialist, U.S. Department of Education, Phone: (202) 401-2342, Fax: (202) 401-3036, Stephanie.stullich@ed.gov

Donna Gunning, Program Manager, Office of Finance and Administration, Maryland State Department of Education, Phone: 410-767-0757, Fax: 410-333-2232, donna.gunning@maryland.gov

Oliver Schak, Education Research Analyst, U.S. Department of Education, Phone: (202) 401-2342, Fax: (202) 401-3036, oliver.schak@ed.gov

PROPOSED STAFF RESUME FOR RFP 3489

A resume must be completed for all proposed prime contractor staff and proposed subcontractor staff.

Company Name Submitting Proposal:	***American Institutes for Research***

Check the appropriate box if the proposed individual is prime contractor staff or subcontractor staff.			
Contractor:	***X***	**Subcontractor:**	

The following information requested pertains to the individual being proposed for this project.			
Name:	***Jay Chambers***	**Key Personnel: (Yes/No)**	***X***
Individual's Title	***Senior Research Fellow and Managing Director***		
# of Years in Classification:	***28***	**# of Years with Firm:**	***28***

BRIEF SUMMARY OF PROFESSIONAL EXPERIENCE

Information should include a brief summary of the proposed individual's professional experience.

Dr. Jay G. Chambers, a Senior Research Fellow at AIR, is a nationally recognized expert in school finance and education cost analysis. Dr. Chambers has conducted numerous resource allocation and cost studies for the U.S. Department of Education, analyses of school finance adequacy and equity for state education agencies and legislatures, and worked closely with on studies of resource allocation for and with local school districts. Dr. Chambers has also served in 2002 on the President's Commission on Excellence in Special Education (under President Bush), has testified before Congress and state legislatures on issues related to school funding, and has served as the President of the American Education Finance Association (now known as the Association of Education Finance and Policy). His latest work is directed toward developing tools and processes for improving school finance and governance within local education agencies. He is also currently working with a team to estimate the resource allocation implications of implementing the Effective Teacher initiative funded by the Bill and Melinda Gates Foundation.

RELEVANT EXPERIENCE

Information required should include: timeframe, company name, company location, position title held during the term of the contract/project and details of contract/project.

Expert Consultant, Exploring the Quality of School-Level Expenditure Data: Practices and Lessons Learned in Nine Sites, U.S. Department of Education Policy and Program Study Service (PPSS) Washington, DC (2013–2017)

Served as expert consultant on study to investigate the extent to which district and state fiscal data systems track educational expenditures to individual school sites and the methods used to do so in an effort improve the quality school-level expenditure data in new and existing systems. Duties include directing the following three key study tasks: 1) Conducting a panel meeting of expert practitioners and researchers; 2) Recruiting study sample of district and state sites capable of tracking expenditures to school sites; 3) Conducting interviews with fiscal staff from each site; and, 4) Collecting and analyzing

school-level expenditure data from each district/school site to check for its comprehensiveness and consistency with data sets collected independently by federal agencies.

Principal Investigator, Evaluation of Hawaii's Weighted Student Formula, Hawaii Department of Education, Honolulu, HI (2013)

Served as principal investigator that investigated Hawaii's 2006 implementation of a Weighted Student Formula (WSF). The purpose of the study was three-fold: 1) to study to what extent the WSF empowered principals and school communities with greater decision-making authority over the use of funds allocated to the school; 2) to evaluate whether Hawaii has achieved its WSF goal of streamlining the allocation of resources to schools; and, 3) to examine if the WSF increased transparency and understanding of how resources are allocated to school sites and the equity with which resources are allocated. In addition to providing the conceptual leadership and managing the day-to-day work of the study, my duties involved overseeing the data collection, the methodological development of statistical models used, and drafting report and final recommendations.

Principal Investigator, Study of a New Method of Funding for Public Schools in Nevada, Nevada Legislative Counsel Bureau, Carson City, NV (2012)

Served as principal investigator for study that investigated Nevada's existing system of public school funding and makes recommendations of "best practices" that might be incorporated in order to improve the equity with which resources are allocated according to student and regional needs. In addition to managing the work of three contracting professors and AIR staff, my duties involved overseeing the data collection, the methodological development of statistical models and corresponding tool used to simulate district funding allocations, and drafting report and final recommendations.

Principal Investigator, Evaluation of Hawaii's Weighted Student Formula. American Institutes for Research

An evaluation of HI WSF on patterns of resource allocation across all schools within the state.

Task Leader, Resource Allocation Component of the Evaluation of the Empowering Effective Teachers (EET) Initiative, Bill and Melinda Gates Foundation, Seattle, WA (2010–Present)

Serve as task leader for resource allocation component of large-scale project that examines the implementation, outcomes, and replication of the EET initiative. The focus of the evaluation includes alternative compensation for teachers along with s lead on resource allocation task.

Principal Investigator, Strategic School Funding for Results (SSFR), William and Flora Hewlett Foundation (Palo Alto, CA), Ford Foundation (New York, NY) and the Institutes of Education Sciences (Washington, DC) (2009–2013)

Served as principal investigator on project supporting the development, implementation, and evaluation of a pupil- and need-based strategy for distributing resources among schools in two California school districts (Los Angeles and Twin Rivers Unified School Districts). Duties included overseeing all project activities including data analysis, technical assistance, coaching, and district/school training. Total combined grant amounted to over $3 million.

EDUCATION

Information required should include: institution name, city, state, Degree, and/or Achievement and date completed/received.

Stanford University, Stanford, CA, Ph.D., Economics, 1975
San Jose State College, San Jose, CA, B.A., Economics, 1969

CERTIFICATIONS

Information required should include: type of certification and date completed/received.

N/A

REFERENCES

A minimum of three (3) references are required, including name, title, organization, phone number, fax number and email address.

Julie Waller, Senior Program Analyst
Fiscal Analysis Division
Nevada State Legislative Counsel Bureau
Phone: (775) 684-6821
Fax: (775) 684-6475
E-Mail: jwaller@lcb.state.nv.us

Stephanie Stullich, Education Research Specialist
Policy and Program Studies Service
Office of Planning, Evaluation and Policy Development
U.S. Department of Education
Phone: (202) 401-2342
Fax: (202) 401-3036
E-Mail: stephanie.stullich@ed.gov

Brian Hallett, Budget Director and Acting Superintendent for Fiscal Services
Hawaii State Department of Education
Phone: (808) 784-6022
Fax: (808) 586-3445
E-Mail: Brian_Hallett/BUDGET/HIDOE@notes.k12.hi.us

PROPOSED STAFF RESUME FOR RFP 3489

A resume must be completed for all proposed prime contractor staff and proposed subcontractor staff.

Company Name Submitting Proposal:	***American Institutes for Research***

Check the appropriate box if the proposed individual is prime contractor staff or subcontractor staff.			
Contractor:		**Subcontractor:**	***X (Consultant)***

The following information requested pertains to the individual being proposed for this project.			
Name:	***Teresa Jordan***	**Key Personnel: (Yes/No)**	***Yes***
Individual's Title	***Consultant and Professor of Educational Leadership***		
# of Years in Classification:	***37***	**# of Years with Firm:**	***NA***

BRIEF SUMMARY OF PROFESSIONAL EXPERIENCE

Information should include a brief summary of the proposed individual's professional experience.

Teresa S. Jordan is a Professor Emerita of Urban Leadership at the University of Nevada, Las Vegas, and will serve as a principal consultant to the study. Her expertise is in the field of school finance. Her specialties include equity of state school finance programs, funding for special needs youth, and state level accountability systems. Specific research and public policy activities of Dr. Jordan related to this project include the following: an in-depth analysis of New Mexico's public school funding system and the development of a comprehensive state accountability program with rewards and incentives for New Mexico schools; a cost study for the funding of at-risk youth for the Texas Center for Educational Research; studies designed to improve the funding, staff development, and management of schools operated on Federal Indian Reservations by the Bureau of Indian Affairs; and fiscal studies for the Clark County School District. These include the development and simulation of a site-based intra-district allocation system, an historical study of state funding for Nevada public schools, an analysis of the equity of the Nevada public school funding formula, and a projection of the resources required to provide students with access to the human and material resources required to meet state standards and pass the high school proficiency exam.

RELEVANT EXPERIENCE

Information required should include: timeframe, company name, company location, position title held during the term of the contract/project and details of contract/project.

Relevant Policy Studies/Research Reports:

American Institutes for Research (2012). Study of a New Method of Funding for Public Schools in Nevada. This study of Nevada's funding system included an investigation of state funding formulas, demographic characteristics, and fiscal data from all 50 U.S. states. Based on empirical analyses of these data, the researchers attempted to identify the best practices that lead to an equitable distribution of funding with respect to the incidence of students in poverty, English language learners, students enrolled in special education programs, and students attending schools in districts that have a small scale of operations.

Jordan, T., (2007) Funding Nevada's Charter Schools: A Proposal for Refinement, Commissioned report to the Nevada Charter Schools Association.

Meyers, J. and Jordan T., (2007) Two Year Baseline Report: School Site Finances for Empowerment and Non-Empowerment Control Schools in Clark County School District, report submitted to Empowerment Schools Study Committee, Clark County School District, Las Vegas, NV

Relevant Journal Articles:

Verstegen, D. and Jordan, T., (Winter, 2009). A fifty state survey of school finance policies and programs: An overview, Journal of Education Finance, University of Illinois Press, Urbana, ILL.

Jordan, T., Jordan, K., & Crawford, J. (2005) The interaction among tax and expenditure limitations, supermajority requirements and school finance litigation. Journal of Education Finance, Fall, 125-145.

Jordan, T., & Jordan, K. (2004). Rural schools under scrutiny. The Rural Educator, 26(1), 1-3.

Jordan, T., Garcia, P., Kops, G. & Jordan, K. (1998). School finance reform in New Mexico. Journal of Education Finance. 23(3) (Winter), 323-350.

Relevant Book Chapters:

Jordan, T. & Verstegen, D. (2008). The Nevada Plan: Then and Now. In Iatorola, P. (ed.), [Monograph]. School Finance SIG, American Education Research Association.

Jordan, T., (2001) The interaction of shifting special education policies with state funding practices. In Barnes, MaryAnn. (Ed.), Taking Sides: Special Education, Boston, MA: McGraw-Hill/Duskin Publishing.

EDUCATION

Information required should include: institution name, city, state, degree and/or Achievement and date completed/received.

Ph.D.	***Educational Leadership and Policy Studies*** ***Arizona State University, Tempe, AZ*** ***Dissertation: Alternative State Funding Allocation Methods for Local School Programs to Serve At-Risk Students (1990 AEFA Outstanding Dissertation Award)***
M.S.	***Communication Disorders*** ***Arizona State University, Tempe, AZ***
B.S.	***Speech Pathology and Audiology*** ***Miami University, Oxford, OH***

REFERENCES

A minimum of three (3) references are required, including name, title, organization, phone number, fax number and email address.

Julie Waller, Senior Program Analyst, Nevada State Legislative Counsel Bureau, Phone: 775-684-6821, Fax: 775-684-6475, E-Mail: jwaller@lcb.state.nv.us

Jay Chambers, Managing Director, American Institutes for Research, Phone: 408-997-1080, Fax: (650) 376-6400, jchambers@air.org

Deborah Verstegen, Professor of Finance, Policy and Educational Leadership, University of Nevada, Reno, Phone: (775) 682-9095, Fax: (775) 784-6298, dav3e@unr.edu

PROPOSED STAFF RESUME FOR RFP 3489

A resume must be completed for all proposed prime contractor staff and proposed subcontractor staff.

Company Name Submitting Proposal:	***American Institutes for Research***

Check the appropriate box if the proposed individual is prime contractor staff or subcontractor staff.			
Contractor:		**Subcontractor:**	***X (Consultant)***

The following information requested pertains to the individual being proposed for this project.			
Name:	***Deborah Verstegen***	**Key Personnel: (Yes/No)**	***X***
Individual's Title	***Professor-Finance, Policy and Leadership; University of Nevada, Reno***		
# of Years in Classification:	***17***	**# of Years with Firm:**	***14***

BRIEF SUMMARY OF PROFESSIONAL EXPERIENCE

Information should include a brief summary of the proposed individual's professional experience.

Deborah Verstegen is a Professor of Finance, Policy and Educational Leadership, College of Education, University of Nevada, Reno. She served as Edwin J. O'Leary Endowed Chair of Financial Management, University of Illinois, Urbana-Champaign, in 2006-07 and was a professor in finance and policy in the Curry School of Education at the University of Virginia for nearly two decades. Prior to joining the university community in 1984, she was a teacher, administrator and legislative aide in state government. She has had teaching experience at all levels, from pre-school, elementary, secondary, and community college, to university. Her administrative experience in education is also broad. She has been a central office administrator for a K-12 school system in Alaska's Iditarod Area School District, Director of the Mid-Management Program at the University of Texas at Austin, and Department Chair in Educational Leadership at UNR.

She has worked in government as a legislative aide in Wisconsin's House of Representatives and as a lobbyist for the nonpartisan League of Women Voters of Virginia in the Virginia General Assembly. She was named Distinguished National Fellow in Finance in 2011 by the National Education Finance Academy and developed an equity statistic, later named after her by scholars--the "Verstegen Index".

Professor Verstegen received the Ph.D. from the University of Wisconsin-Madison in 1983, when she was elected to membership in the national honorary societies, Phi Kappa Phi and Phi Delta Kappa. In 1984, she was selected as recipient of the Outstanding Dissertation Research Award in the area of education finance sponsored by the American Education Finance Association, the American Association of School Administrators, and the National Education Association. Her dissertation "The Great Society Meets a New Federalism," was added to the Lyndon Baines Johnson Presidential Archives in 1986.

Her scholarly involvement since joining the university community is represented by presentations at national and state conferences and her publication record, which shows that she is author or co-author of over 300 books, articles, monographs and chapters. The focus of her scholarship is on equal opportunity and justice in the area of education finance, and the fiscal aspects of education policy at the state and national levels. Her writing has appeared in such journals as West's Education Law Reporter, Phi Delta Kappan, The Journal of Education Finance, Education Administration Quarterly, The Economics of Education Review,

***Education Evaluation and Policy Analysis*, and *Educational Policy*. Her book, *The Impacts of Legislation and Litigation on Public Education Finance* (with Julie Underwood) was released by Harper and Row in 1990. *Spheres of Justice in Education* (with James Ward) was published by HarperCollins in 1991. Her textbook, the leader in the field, *Financing Education in a Climate of Change* (with Brimley and Garfield), was released by Pearson, Inc. in 2016. A new edition is expected in 2019.**

***Dr. Verstegen is actively involved in several professional associations, including: National Education Finance Conference, the American Education Research Association (AERA), the Association for Education Finance and Policy; previously the Association for Public Policy and Management (APPAM) and the University Council for Education Administration (UCEA). She has served two terms on the Board of Directors of the American Education Finance Association and has provided counsel to the United States Department of Education's National Center for Education Statistics Technical Panel. She served on the Advisory Board for the University Council in Educational Administration's Education Finance Center, served on the Board of Trustees for the National Education Finance Academy, and UCEA's Education Law Center. She is past president of the American Association of University Professors, Virginia conference, and the American Education Research Association's SIG, Fiscal Issues, Policy and Education Finance. She has served/serves on numerous editorial boards and has reviewed manuscripts for journals such as *The Education Administration Quarterly*, *Economics of Education Review*, *Educational Considerations*, *Education Evaluation and Policy Analysis*, *The Journal of Education Finance*, and *The Journal of Law and Politics*. She is past editor of the *Journal of Education Finance*, the premier scholarly journal in the field of education finance. Currently she serves as an Education Policy Editor for the *JEF*.**

***Professor Verstegen has been invited to provide counsel/assistance to such groups as the: United States Department of Education, Nevada Legislature, Wisconsin State Legislature, Colorado Commission on Higher Education, Utah's Department of Education, the Research and Development Center for Teacher Education, the Education Commission of the States, the National Governors' Association, National Conference of State Legislatures, the American Federation of Teachers, U.S. General Accounting Office, the Appalachia Education Lab, the Virginia Education Association, Texas State Education Agency, the Ohio Coalition of Rural and Appalachian School Districts, the Virginia Association of School Boards, The Council for Better Education, The League of Women Voters of Virginia. Pennsylvania's Interim Special Education Finance Committee and the Virginia Association of School Superintendents. She has served as expert witness in school finance litigation and developed the equity analysis entered into the record in over a dozen states. She was PI on two state adequacy studies—in Kentucky and Massachusetts.**

***Ms. Verstegen received a Distinguished Service Award from the American Education Finance Association in 2011 and a Lifetime Achievement Award in 2016. She was nominated to Outstanding Young Women of America in 1989. In 1991 she received a Distinguished Service Award from the University Council for Education Administration. Also in 1991, she was a research associate at Oxford University's Department of Education Studies, the Norham Centre for Leadership Studies, United Kingdom, in addition to providing counsel to the National Governors' Association while in residence. She is listed in *Who's Who in the World*, *Who's Who in America*, *Who's Who in the South and Southwest*, *International Who's Who of Intellectuals* and *Who's Who of American Women*. She was Associate Faculty in the South Asian Studies Center at the University of Virginia and attached to the National Center for Educational Planning and Administration in New Delhi, India, in 1995, while on research leave from the University of Virginia. In 1997 the University of Wisconsin-Madison, School of Education, awarded her the alumni achievement award. In 2004 she received a distinguished service award from the Virginia conference of the American Association of University Professors and a service award from AERA-SIG, Fiscal Issues, Policy and Education Finance. She organized the first leadership conference of, by and for women educators in Virginia and served as chair and president of the newly formed organization that emerged as a result, Women Education Leaders in Virginia. In 2006-07. Currently, she is a tenured professor at the University of Nevada.**

RELEVANT EXPERIENCE

Information required should include: timeframe, company name, company location, position title held during the term of the contract/project and details of contract/project.

Professor Verstegen has conducted many studies related to state education policy and finance, in the capacity of Principal Investigator and key staff, including three 50-state surveys of finance policies and programs (www.schoolfinances.info); two state adequacy studies in both Kentucky and Massachusetts, multiple policy studies including studies of Education Savings Accounts, equity (in over a dozen states), weighted student funding, and yearly updates on Nevada's education policy including legislative changes. She has published research in major education journals and wrote several books. Her new edition to the popular textbook, Financing Education in a Climate of Change (2016 with Brimley and Garfield) is due out in 2019.

EDUCATION

Information required should include: institution name, city, state, degree and/or Achievement and date completed/received.

University of Wisconsin, Madison, WI, Ph.D., Educational Administration, 1983
University of Wisconsin, Madison, WI, M.S., Educational Administration, 1981
University of Rochester, Rochester, NY, Ed.M., Curriculum & Instruction, 1972
Loretta Heights College, Denver, CO, B.A., English & Philosophy, 1969

CERTIFICATIONS

Information required should include: type of certification and date completed/received.

N/A

REFERENCES

A minimum of three (3) references are required, including name, title, organization, phone number, fax number and email address.

S. Kern Alexander, Distinguished Faculty & Excellence Professor, University of Illinois Urbana-Champaign, 270-753-8140 (phone), 217-344-6245 (fax), alexander@illinois.edu

Robert Knoeppel, Professor and Chair, Clemson University, 864-656-1882, rck@clemson.edu

Teresa Jordan, Professor Emerita, University of Nevada, Las Vegas, 703-433-4111, Tlyons16@cox.net

PROPOSED STAFF RESUME FOR RFP 3489

A resume must be completed for all proposed prime contractor staff and proposed subcontractor staff.

Company Name Submitting Proposal:	***American Institutes for Research***

Check the appropriate box if the proposed individual is prime contractor staff or subcontractor staff.			
Contractor:		**Subcontractor:**	***X (Consultant)***

The following information requested pertains to the individual being proposed for this project.			
Name:	***Bruce D. Baker***	**Key Personnel: (Yes/No)**	***X***
Individual's Title	***Professor, Educational Theory, Policy & Administration, Rutgers University***		
# of Years in Classification:	***20***	**# of Years with Firm:**	***8***

BRIEF SUMMARY OF PROFESSIONAL EXPERIENCE

Information should include a brief summary of the proposed individual's professional experience.

Bruce Baker has worked in the field of state school finance policy for 20 years. He has consulted for state legislatures on state school finance formula design in Texas, Missouri, Kansas and Nevada among many other states. His expertise includes formula simulation, cost analysis and modeling and specifically estimating marginal costs associated with achieving common outcomes across varied student populations and settings.

RELEVANT EXPERIENCE

Information required should include: timeframe, company name, company location, position title held during the term of the contract/project and details of contract/project.

2011 – Present: Rutgers, The State University of New Jersey
Professor I
Educational Theory, Policy and Administration

2008 – Present: Rutgers, The State University of New Jersey
Associate Professor
Educational Theory, Policy and Administration

2002 – 2008: University of Kansas, Lawrence
Associate Professor, Teaching and Leadership
Program in Educational Administration

1997 – 2002: University of Kansas, Lawrence
Assistant Professor, Teaching and Leadership
Program in Educational Administration
Research Associate: Policy Research Institute

EDUCATION

Information required should include: institution name, city, state, degree and/or Achievement and date completed/received.

Teachers College, Columbia University, New York, NY, 1997, Ed.D., Department of Organization and Leadership, 1997

University of Connecticut, Mansfield, CT, M.A., Educational Psychology, 1989

Lafayette College, Easton, PA, B.A., Biology, 1987

CERTIFICATIONS

Information required should include: type of certification and date completed/received.

N/A

REFERENCES

A minimum of three (3) references are required, including name, title, organization, phone number, fax number and email address.

Elliot Weinbaum, Program Director, William Penn Foundation, Phone: 215-988-1830, Fax: None, weinbaum@williampennfoundation.org

Adam Gamoran, President, William T. Grant Foundation, Phone: 212-752-0071, Fax: 212-752-1398, agamoran@wtgrantfdn.org

Richard D. Kahlenberg, Senior Fellow, The Century Foundation, Phone: 202-745-5476, Fax: 212-535-7534, kahlenberg@tcf.org

PROPOSED STAFF RESUME FOR RFP 3489

A resume must be completed for all proposed prime contractor staff and proposed subcontractor staff.

Company Name Submitting Proposal:	***American Institutes for Research***

Check the appropriate box if the proposed individual is prime contractor staff or subcontractor staff.			
Contractor:		**Subcontractor:**	***X***

The following information requested pertains to the individual being proposed for this project.			
Name:	***Jason Willis***	**Key Personnel: (Yes/No)**	***Yes***
Individual's Title	***Director of Strategy & Performance***		
# of Years in Classification:	***14***	**# of Years with Firm:**	***2***

BRIEF SUMMARY OF PROFESSIONAL EXPERIENCE

Information should include a brief summary of the proposed individual's professional experience.

Jason Willis is the Director of Strategy & Performance for the Comprehensive School Assistance Program (CSAP) at WestEd. In this role, he oversees and guides the expansion of CSAP's existing performance and accountability services, which include support to California's state and local education agencies to implement policies and practices to support the Local Control Funding Formula (LCFF) and realization of genuine continuous improvement efforts in school systems. Performance and accountability services provides this support through capacity building, facilitation of professional learning networks, and analysis of financial data including the effective use of resources. He has also worked with weighted student funding systems and identified the weights for additional resources that are allocated to schools for EL students.

Willis also provides visionary and strategic leadership to expand CSAP's project portfolio by working in collaboration with CSAP's Management Team.

Prior to joining WestEd, Willis served as Assistant Superintendent, Engagement and Accountability, for the San Jose Unified School District. He also served as the Chief Financial Officer/Chief Business Official for the Stockton Unified School District and Budget Director and Program Manager for the Oakland Unified School District.

RELEVANT EXPERIENCE

Information required should include: timeframe, company name, company location, position title held during the term of the contract/project and details of contract/project.

2016–Present ***Strategy and Performance Director, Comprehensive School Assistance Program***
WestEd, Washington, DC

Oversee and guide the expansion of CSAP's existing performance and accountability services, which include support to California's state and local education agencies to implement policies and practices to support the Local Control Funding Formula (LCFF) and realization of genuine continuous improvement efforts in school systems.

Performance and accountability services provides this support through capacity building, facilitation of professional learning networks, and analysis of financial data including the effective use of resources. Willis also provides visionary and strategic leadership to expand CSAP's project portfolio by working in collaboration with CSAP's Management Team.

2011–2016 ***Assistant Superintendent, Engagement & Accountability, San Jose Unified School District, San Jose, California***

Guided the design, development, and implementation of the school district's strategic plan for 2012-2017, including significant reforms such as teacher evaluation and compensation, transformational school redesign, and school performance management systems. In addition, oversaw departments within the school district, including technology and information services; data, research, and accountability; strategic planning/implementation; student services; charter schools; public/media relations; and alternative programs.

2009–2011 ***Chief Financial Officer/Chief Business Official, Stockton Unified School District, Stockton, California***

Led and oversaw all non-instructional operations for the school district including finance, facilities, information technology, transportation, food services, and procurement. Balanced the SUSD district budget totaling approximately $475 million. Managed approximately 600 staff, providing daily support for the instruction and education of students.

2007–2009 ***Budget Director and Program Manager, Oakland Unified School District Oakland, California***

Supervised and managed the overall OUSD budget functions. Develop annual budget that aligned strategy with resource allocations. Managed the school district's annual $710 million budget, which included operating, facilities, food service, early childhood, and adult education funds. Supervised nine staff members in the budget department who were responsible for assisting and communicating with school sites and central office departments. Provided support and training on budget management and strategic planning to school district principals.

2003–2006 ***Assistant Product Manager, Senior Research Assistant, and Research Assistant, School Evaluation Services, Standard & Poor's New York, New York***

Helped to lead efforts to implement the Resource Management Service (RMS) for education leaders. Provided tools, analysis, and training to improve the management of school districts through a data-driven decision-making framework. Led efforts to design and implement the Municipal Analytical Platform, a web-based platform aimed to allow data comparisons of public entities for use in the S&P Public Finance department. Provided analytical and research support for the 'Resource Adequacy Study' for the New York State Commission on Education Reform.

EDUCATION

Information required should include: institution name, city, state, degree and/or Achievement and date completed/received.

Columbia University, Teachers College New York, NY, M.A.Ed., Policy, 2005

The Catholic University of America, Washington, D.C., B.A., Educational Studies, Psychology

CERTIFICATIONS

Information required should include: type of certification and date completed/received.

REFERENCES

A minimum of three (3) references are required, including name, title, organization, phone number, fax number and email address.

Lisa Blyler
Department of Education
Deputy Associate Superintendent
Phone: (602) 542-3144
Email: lisa.blyler@azed.gov

Joshua Daniels
Director, Outreach and Communications
California Collaborative for Educational Excellence
Phone: (510) 670-4115
Email: jdaniels@ccee-ca.org

David Silver
Director of Education to the Mayor
City of Oakland
Phone: (510) 238-3141
Email: dsilver@oaklandnet.com

Section VIII – Other Informational Material

Vendors shall include any other applicable reference material in this section clearly cross referenced with the proposal.

N/A

References

Baker, B., & Levin, J. (2014). Educational equity, adequacy, and equal opportunity in the commonwealth: An Evaluation of Pennsylvania's school finance system. San Mateo, CA: American Institutes for Research.

Chambers, J., Levin, J., Verstegen, D., Jordan, T., Baker, B., & Wang, A. (2012). Study of a new method of funding for public schools in Nevada. San Mateo, CA: American Institutes for Research.

Chambers, J., & Levin, J. (2009). Determining the cost of providing an adequate education for all students. Washington, DC: National Education Association.

Chambers, J., Levin, J., DeLancey, D., & Manship, K. (2008). An independent comprehensive study of the New Mexico public school funding formula: Volume 1—Final report. Palo Alto, CA: American Institutes for Research.

Chambers, J., Levin, J., & DeLancey, D. (2006). Efficiency and adequacy in California school finance: A professional judgment approach. Palo Alto, CA: American Institutes for Research.

Chambers, J., Parrish, T., Levin, J., Smith, J., Guthrie, J., Seder, R., & Taylor, L. (2004). The New York adequacy study: Determining the cost of providing all children in New York an adequate education. Report prepared for the Campaign for Fiscal Equity. Palo Alto, CA: American Institutes for Research.

Chambers, J., & Parrish, T. (1982). The development of a resource cost model funding base for education in Illinois. Report prepared for Illinois State Board of Education. Stanford, CA: Associates for Education Finance and Planning, Inc.

Chambers, J., & Parrish, T. (1984). The development of a program cost model and a cost of education index for the State of Alaska: Final Report, Volumes I-IV. Report. Stanford, CA: Associates for Education Finance and Planning, Inc.

Education Trust-West. (2014). Building a more equitable and participatory school system in California: The local control funding formula's first year. Oakland, CA: Education Trust-West.

Education Trust-West. (2016). Puzzling plans and budgets: Making sense of California's second year local control and accountability plans. Oakland, CA: Education Trust-West.

Hill, L., & Ugo, I. (2015). Implementing California's school funding formula: Will high-need students benefit? San Francisco, CA: Public Policy Institute of California.

Jordan, T., & Verstegen, D. (2008). The Nevada Plan: Then and Now. In Iatorola, P. (Ed.), [Monograph]. School Finance SIG, American Education Research Association.

Lee, J., & Fuller, B. (2017). How decentralizing school finance may narrow achievement gaps – Uneven progress in California after $41 billion. Institute of Human Development Working Paper. Berkeley, CA: University of California, Berkeley.

Levin, J., Chambers, J., Epstein, D., Mills, N., Archer, M., Lane, K., & Wang, A. (2013). Evaluation of Hawaii's weighted student formula. San Mateo, CA: American Institutes for Research.

Levin, J., Baker, B., Atchison, D., Brodziak, I., Boyle, A., Hall, A., & Becker, J. (2016). Study of funding provided to public schools and public charter schools in Maryland. San Mateo, CA: American Institutes for Research.

Levin, J., Manship, K., Chambers, J., Johnson, J., & Blankenship, C. (2011). Do schools in rural and nonrural districts allocate resources differently? An analysis of spending and staffing patterns in the West Region states. (Issues & Answers Report, REL 2011–No. 099). Washington, DC: U.S. Department of Education, IES.

Taylor, L. L., Chambers, J. G., & Robinson, J. P. (2004). A new geographic cost of education index for Alaska: Old approaches with some new twists. Journal of Education Finance, 30(1), 51-78.

Verstegen, D. (1990). School finance at a glance. Denver, CO: Education Commission of the States.

Verstegen, D., Jordan, T., & Benedict, C. (2010). Stimulating Nevada: The impact of ARRA funding on education. American Education Research Association Annual Meeting, Denver, CO.

Warren, P., & Carrillo, G. (2015). Implementing local accountability in California's Schools: The first year of planning. San Francisco, CA: Public Policy Institute of California.

Appendices

Appendix A.
Letters of Support

University of Nevada, Reno

September 12, 2017

Lawrence B. Friedman, Ph.D.
Vice President
American Institutes for Research
10 S. Riverside Plaza, Suite 600
Chicago, IL 60606

Dear Dr. Friedman:

I am pleased to confirm my intent to support the work of the American Institutes for Research (AIR) as you pursue a proposal to the State of Nevada for *Nevada School Funding Consultant*. This letter confirms my commitment to this effort.

Assuming your success in securing the award, I am committed to contributing to the project and bring a wealth of knowledge and experience to the task. This includes participating in and directing studies in other states, and across the states.

Sincerely,

Deborah A Verstegen, PhD
Professor
Education Policy and Finance
University of Nevada
Reno, Nevada

September 19, 2017

Lawrence B. Friedman, Ph.D.
Vice President
American Institutes for Research
10 S. Riverside Plaza, Suite 600
Chicago, IL 60606

Dear Dr. Friedman:

I am pleased to confirm my intent to support the work of the American Institutes for Research (AIR) as you pursue a proposal to the State of Nevada for *Nevada School Funding Consultant*. This letter confirms my commitment to this effort.

Assuming your success in securing the award, I am committed to providing project advisement, oversight, analysis and recommendations pertaining to state school finance policy options for the State of Nevada.

Sincerely,

Bruce D. Baker

Consultant

excellence in research, development, and service

September 20, 2017

Lawrence B. Friedman, Ph.D.
Vice President
American Institutes for Research
10 S. Riverside Plaza, Suite 600
Chicago, IL 60606

Dear Dr. Friedman:

On behalf of WestEd, I am pleased to confirm our intent to support the work of the American Institutes for Research (AIR) as you pursue a proposal to the State of Nevada for the Nevada School Funding Consultant. This letter confirms our commitment to this effort.

WestEd is a preeminent educational research, development, and service organization with over 600 employees and 16 offices nationwide. WestEd has been a leader in moving research into practice by conducting research and development (R&D) programs, projects, and evaluations; by providing training and technical assistance; and by working with policymakers and practitioners at state and local levels to carry out large-scale school improvement and innovative change efforts. In developing and applying the best available resources toward these goals, WestEd has built solid working relationships with education and community organizations, playing key roles in facilitating the efforts of others and in initiating important new improvement ventures. We have a long-standing commitment to the field of education at all levels and a combined experience base of 50 years of educational leadership. Additionally, we have substantial qualifications in the technical areas called for in a project of this scope, and we bring to this effort our understanding, sensitivity, and commitment.

Assuming your success in securing the award, we are available to begin work as stated in the proposal.

We look forward to the work and the outcome of your efforts.

Sincerely,

Jason Willis
Director, Strategy & Performance
Comprehensive School Assistance Program, WestEd
jwillis@wested.org

Appendix B.
Staff Biographies

Jesse Levin, proposed principal investigator, is a principal research economist at AIR, where he has been involved in projects investigating educational production, school finance and adequacy, and resource allocation. He currently serves as the project director of a national study of weighted student funding systems, a feasibility study to improve the quality of school-level expenditure data, and deputy director for a study of Title I resource allocation, all for the U.S. Department of Education. In addition, Levin is currently directing a study of public school funding for the Maryland State Department of Education and Maryland Department of Legislative Services. He has directed high-profile educational adequacy studies in California, New Mexico, and New York; investigations of educator supply and demand in Oklahoma and Massachusetts; evaluations of state school finance systems in Hawaii, Nevada, and Pennsylvania; and researched educational resource allocation and effectiveness both within and across school districts. His work at AIR over the past 15 years has drawn upon his expertise in applied econometrics and quantitative methods. Levin is co-recipient of the Association of Educational Service Agencies 2007 E. Robert Stephens Award for the research study, Similar Students, Different Results: Why Do Some Schools Do Better? A Large-Scale Survey of California Elementary Schools Serving Low-Income Students. His articles have appeared in Economics of Education Review, Empirical Economics, Labour Economics, Oxford Bulletin of Economics and Statistics, and Peabody Journal of Education. He also regularly serves as a referee for several peer-reviewed journals (Economics of Education Review, Education Finance and Policy, Educational Policy, and Empirical Economics). Prior to his work at AIR, he served as an economics researcher for the Institute for Research of Schooling, Labor Market and Economic Development (SCHOLAR) in the Netherlands, where he conducted research in the economics of education and labor economics and performed major countrywide studies of the efficacy of class size reduction, the differences in the effectiveness of private versus public schooling, and measuring the rate of return to education. Dr. Levin earned his PhD in 2002 from the University of Amsterdam and the Tinbergen Institute.

Drew Atchison, proposed project director, is a researcher at AIR. His primary responsibilities include quantitative analysis on a wide range of projects examining topics such as teacher supply and demand, education finance, and educational equity. Atchison has contributed substantially to the writing of several reports for state education agency and U.S. Department of Education projects. He has extensive experience in quantitative methodology, education finance, education technology, and issues of inequality and educational opportunity. In his personal research, Atchison has focused on the equity of education funding, examining how state and federal policy changes have impacted the distribution of funding with respect to students' educational needs. Previously, Atchison was a research assistant at George Washington University and a consultant working for Digital Promise. Atchison recently completed his doctorate degree in education policy from The George Washington University and is currently an adjunct professor there, teaching a graduate-level course on education policy.

Jay G. Chambers, proposed internal expert consultant, is a senior research fellow at AIR and a nationally recognized expert in school finance and education cost analysis. Dr. Chambers has more than 40 years of experience with educational cost studies. He has conducted numerous resource allocation and cost studies for the U.S. Department of Education, analyzed school finance adequacy and equity for state education agencies and legislatures, and worked closely with Dr. Levin on studies of adequacy and resource allocation in states as well as local school districts. In 2002 he served on the President's Commission on Excellence in Special Education (under President George W. Bush), has testified before Congress and state legislatures on issues related to school funding, and has served as the president of the American Education Finance Association (now known as the Association of Education Finance and Policy). His latest work is directed toward developing tools and processes for improving school finance and governance within local education agencies. He is also currently working with a team to estimate the resource allocation implications of implementing the Effective Teacher Initiative funded by the Bill & Melinda Gates Foundation. He earned his PhD in economics from Stanford University.

Teresa S. Jordan is a Professor Emerita of Urban Leadership at the University of Nevada, Las Vegas, and will serve as a principal consultant to the study. Her expertise is in the field of school finance. Her specialties include equity of state school finance programs, funding for special needs youth, and state level accountability systems. Specific research and public policy activities of Dr. Jordan related to this project include the following: an in-depth analysis of New Mexico's public school funding system and the development of a comprehensive state accountability program with rewards and incentives for New Mexico schools; a cost study for the funding of at-risk youth for the Texas Center for Educational Research; studies designed to improve the funding, staff development, and management of schools operated on Federal Indian Reservations by the Bureau of Indian Affairs; and fiscal studies for the Clark County School District. These include the development and simulation of a site-based intra-district allocation system, an historical study of state funding for Nevada public schools, an analysis of the equity of the Nevada public school funding formula, and a projection of the resources required to provide students with access to the human and material resources required to meet state standards and pass the high school proficiency exam.

Deborah Verstegen, proposed lead of the inventory of state school finance systems task, is a professor of finance, policy and leadership in the College of Education, University of Nevada, Reno. She was previously a faculty member in the Curry School of Education at the University of Virginia for 19 years; and served as an endowed chair in finance management at the University of Illinois, Urbana-Champaign. She is a co-author of a leading text on school finance used in graduate programs in higher education, Financing Education in a Climate of Change (with Brimley and Garfield, Pearson, 2012) and has developed an equity statistic, later given her name by researchers (the Verstegen Index). In 2011, she was selected as a Distinguished National Fellow in Finance by the National Education Finance Conference. She has served two terms on the Board of Directors of the American Education Finance Association and has provided counsel to the United States Department of Education's National Center for Education Statistics Technical Panel. She has served on the Advisory Board for the University Council in Educational Administration's Education Finance Center, serves as past president of the American Association of University Professors, Virginia conference and the American Education Research Association's SIG, Fiscal Issues, Policy

and Education Finance. She serves on numerous editorial boards and has reviewed manuscripts for journals such as The Education Administration Quarterly, Economics of Education Review, Educational Considerations, Education Evaluation and Policy Analysis, The Journal of Education Finance, and The Journal of Law and Politics. She is past editor of the Journal of Education Finance, the premier scholarly journal in the field of education finance. Currently she serves as an Education Policy Editor for the JEF. Currently she serves as a member of the Board of Advisors for the National Education Finance Conference.

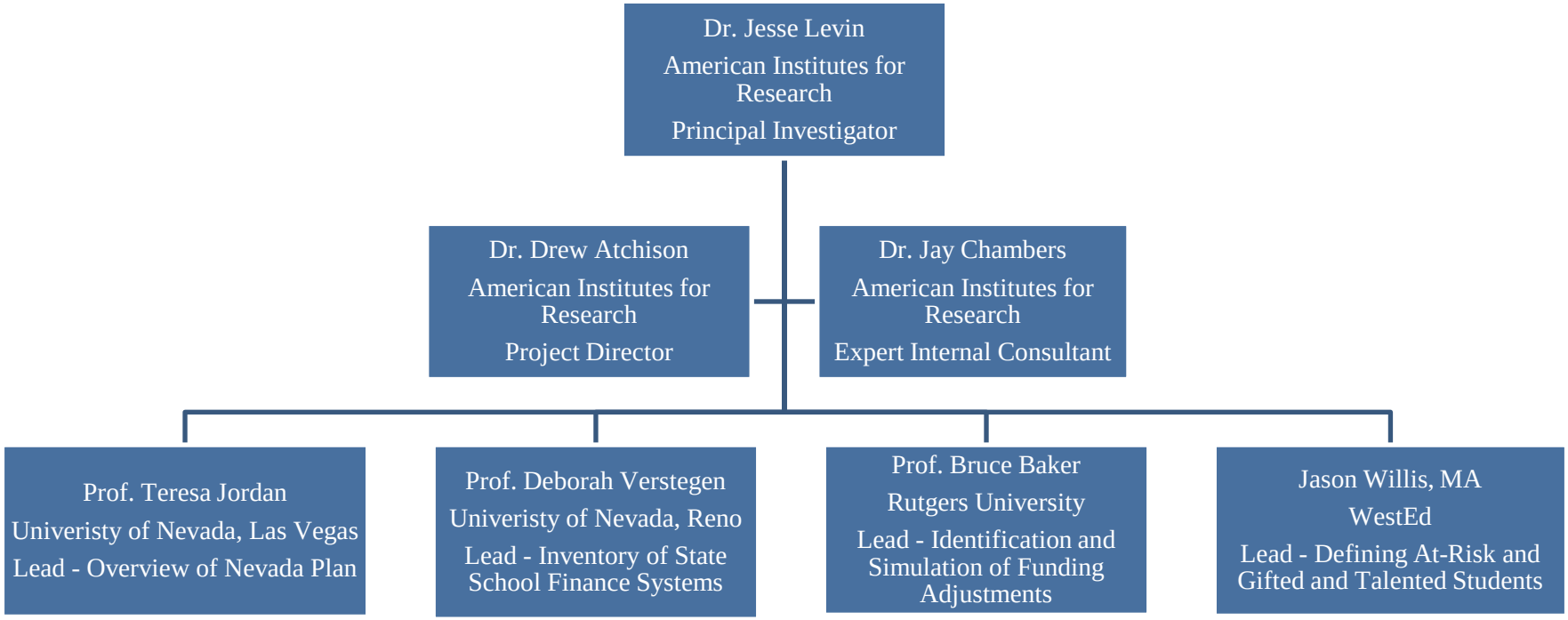
Bruce D. Baker, proposed lead of the Identification and Simulation of Funding Adjustments task, is a professor of educational theory, policy and administration in the Graduate School of Education at Rutgers, where he teaches courses in data analysis, school finance, and education law. He received his doctorate from Teachers College, Columbia University in 1997. His recent research and scholarly writing has focused on education cost analysis, measures of student need and their influence on education costs, and the organization and governance of charter schooling in relation to charter school revenues and expenditures, including recent law review articles (UMASS Law Review, 2015; Emory Law Journal, 2014) on the governance of charter schools and analyses of charter school and management organization expenditures (Education Finance and Policy, summer 2015). Professor Baker has written extensively on state aid allocation policies and practices, with particular attention to the equity and adequacy of aid for special student populations. He is lead author with Preston Green (Penn State University) and Craig Richards (Teachers College, Columbia University) of Financing Education Systems, a graduate level textbook on school finance policy published by Merrill/Prentice-Hall. Baker co-authored the chapter on Conceptions of Equity in the Handbook of Research Education Finance and Policy, the chapter on the Politics of Education Finance in the Handbook of Education Politics and Policy, and the chapter on School Finance in the Handbook of Education Policy of the American Educational Research Association. He has also testified as an expert witness on issues surrounding school funding equity in state and federal courts in Arizona, Colorado, Kansas, Nebraska, Texas, Missouri, New Jersey, Pennsylvania, Connecticut, and New York. Professor Baker was recently ranked among the most influential scholars of education policy in the nation by Education Next.

Jason Willis, proposed lead of the Defining At-Risk and Gifted and Talented Students task, is the Director of Strategy & Performance for the Comprehensive School Assistance Program (CSAP) at WestEd. In this role, he oversees and guides the expansion of CSAP's existing performance and accountability services, which include support to California's state and local education agencies to implement policies and practices to support the state's Local Control Funding Formula (LCFF) and realization of genuine continuous improvement efforts in school systems. Performance and accountability services provides this support through capacity building, facilitation of professional learning networks, and analysis of financial data including the effective use of resources. He has also worked to support states and school districts to analyze, model and propose improvement to their funding formulas. This includes the construction and execution of weighted student funding systems. Willis also provides visionary and strategic leadership to expand CSAP's project portfolio by working in collaboration with CSAP's Management Team. Prior to joining WestEd, Willis served as Assistant Superintendent, Engagement and Accountability, for the San Jose Unified School District. He also served as the Chief Financial Officer/Chief Business Official for the Stockton Unified School District and Budget Director and Program Manager for the Oakland Unified

School District. He received his master's degree in education policy and finance from Teachers College at Columbia University in 2006.

Appendix C.
Project Management Organization Chart

Project Management Organizational Chart for Nevada School Funding Consulting



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