



Getting Down to Facts A Research Project Examining California's School Governance and Finance Systems

California's students are far behind those in other states on many measures of achievement. On the 2005 National Assessment of Education Progress, for example, California ranked 7th lowest in eighth grade math in comparison to the 49 other states and the District of Columbia. The story is at least as bad in other subjects. California performed 3rd lowest in reading, ahead of only Hawaii and the District of Columbia, and 2nd lowest in science, ahead of only Mississippi. Some suggest that California's position simply reflects the large minority populations in the state, but the facts on achievement belie this. California schools do not do well for any group. While the State has clearly made great strides in establishing world class standards and developing a system of assessment and accountability for schools and students, there is yet overwhelming agreement that California can and should do better.

"Getting Down to Facts" is a research project of more than 20 studies designed to provide California's citizens with comprehensive information about the status of the state's school finance and governance systems. The overall hypothesis underlying this research project is that improvement to California's school finance and governance structures could enable its schools to be more effective.

Over an 18 months period from September 2005 to March 2007, the Getting Down to Facts Project brought together an extraordinary array of scholars from 32 institutions with diverse expertise and policy orientations. It represents an unprecedented attempt to synthesize *what we know* as a basis for convening the necessary public conversations about *what we should do*. "Getting Down to Facts" was specifically requested by the Governor's Committee on Education Excellence, former Secretary of Education Alan Bersin, the President pro Tem of the California Senate, the Speaker of the California Assembly, and the Superintendent of Public Instruction.

The project is not designed to recommend specific policies. Rather it aims to provide common ground for understanding the current state of California school finance and governance and for a serious and substantive conversation about necessary reforms.

The project addressed three broad questions.

1. What do California school finance and governance systems look like today?
2. How can we use the resources that we have more effectively to improve student outcomes?
3. To what extent are additional resources needed so that California's students can meet the performance goals that we have for them?

THE STUDIES

Getting Down to Facts researchers took a two-pronged approach to uncovering the most valuable information for California policymakers. First they looked broadly at California's school finance and governance system in order to identify the most important factors that facilitate or hinder the effective use of education resources in California. Second, they targeted a number of crucial areas that *a priori* appeared particularly important to address in an in-depth exploration of school finance and governance. The researchers aimed to make the best possible use of existing research findings, identifying important holes in existing research and determining whether there were empirical studies that could be performed in the given timeframe to fill some of these holes. The new empirical work stems from this approach. As a result, the studies each provide a strong review of the literature with targeted new empirical additions.

Conceptual Background

1. *Equality and Adequacy in the State's Provision of Education: Mapping the Conceptual Landscape*, Reich, Robert (2007), Stanford University.

Effectiveness Studies

A. School Finance

2. *Financing K-12 Education in California: A System Overview*, Timar, Thomas (2007), University of California. Davis.
3. *Evolution of California State School Finance with Implications from Other States*, Kirst, Michael, Goertz, Margaret, and Odden, Allan. (2007), Consortium for Policy Research In Education (CPRE).
4. *Understanding the Incentives in California's Education Finance System*, Duncombe, William and Yinger, John (2007), Syracuse University.
5. *District Dollars: Painting a Picture of Revenues and Expenditures in California's School Districts*, Loeb, Susanna, Grissom, Jason and Strunk, Katharine (2007), Stanford University.
6. *Financing School Facilities in California*, Brunner, Eric J. (2007), Quinnipiac University.
7. *Do Non-School Resources Substitute for School Resources? A Review of the Evidence*, Downes, Thomas (2007), Tufts University

B. Governance and Structural Issues

8. *Evaluating the "Crazy Quilt": Educational Governance in California*, Brewer, Dominic J., and Smith, Joanna (2007), University of Southern California.
9. *Charter Schools in California: A Review of their Autonomy and Resources Allocation Practices*, Perez, Maria; Anand, Priyanka; Speroni, Cecilia; Parrish, Thomas; Esra, Phil; Socias, Miguel; and Gubbins, Paul (2007), American Institutes for Research.
10. *School District Financial Management: Personnel Policies, and Practices*, Perry, Mary; Oregon, Isabel; Williams, Trish; Miyashiro, Robert, Kubinec, Jannelle, Groff, Laurel, Wong, Philip, and Bennett, Robert (2007), EdSource (Principal) & School Services of California (Sub-Contractor).

C. Personnel Issues

11. *A Review of State Teacher Policies: What are they, What are their effects, and What are their Implications for School Finance?* Loeb, Susanna, and Miller, Luke (2007), Stanford University.
12. *Leadership Development in California*, Darling-Hammond, Linda, and Orphanos, Stelios. (2007), Stanford University.
13. *California Principals' Resources: Acquisition, Deployment, and Barriers*, Fuller, Bruce; Loeb, Susanna; Arshan, Nicole; Chen, Allison; and Yi, Susanna (2007), Policy Analysis for California Education (PACE).
14. *Curbing or Facilitating Inequality? Law, Collective Bargaining, and Teacher Assignment Among Schools in California*, Koski, William, and Horng, Eileen (2007), Stanford University.

D. Data & Information Systems

15. *Education Data in California: Availability and Transparency*, Hansen, Janet (2007), RAND Corporation.
16. *Bringing the State and Locals Together: Developing Effective Data Systems in California School Districts*, Oberman, Ida; Hollis, Jim and Dailey, Don (2007), SpringBoard Schools.

Adequacy -- Cost Studies

A. Lessons from "Beating-the-Odds" Schools

17. *Successful California Schools in the Context of Educational Adequacy*, Perez, Maria; Anand, Priyanka; Speroni, Cecilia; Parrish, Thomas; Esra, Phil; Socias, Miguel; and Gubbins, Paul (2007), American Institutes for Research.

B. Cost-Function & Production Function Approach

18. *Assessing the Costs of K-12 Education in California Public Schools*, Imazeki, Jennifer (2007), San Diego State University.

C. Professional Judgment Panel Approach

19. *Efficiency and Adequacy in California School Finance: A Professional Judgment Approach*, Chambers, Jay; Levin, Jesse, and DeLancey, Danielle. (2007), American Institutes for Research.

D. Professional Judgment Survey Approach

20. *Aligning School Finance with Academic Standards: A Weighted-Student Formula Based on a Survey of Practitioners*, Sonstelie, Jon (2007), Public Policy Institute of California.

E. Special Education

21. *Considering Special Education Adequacy in California*, Harr, Jenifer; Parrish, Tom; Chambers, Jay; Levin, Jesse and Segarra, Maria. (2007), American Institutes for Research.

F. English Language Learners

22. *Resource Needs for California's English Learners*, Gándara, Patricia, and Rumberger, Russell W. (2007), University of California, UCLA & Santa Barbara, respectively.

G. Teacher Cost Differences

23. *Teacher Compensation and Local Labor Market Conditions in California: Implications for School Funding*, Rose, Heather, and Sengupta, Ria. (2007), Public Policy Institute of California.

REVIEWERS & REVIEW PROCESS

Upon completion of initial drafts, each study was reviewed internally at the Institute for Research on Education Policy and Practice at Stanford (IREPP) and was assigned to a least one external expert reviewer who was asked to provide a candid assessment of the methods, data and findings reported. Reviewers were also asked to provide comments to guide researchers in necessary revisions.

Additionally, IREPP convened the researchers on three occasions: in January of 2006 to begin the project and create connections across researchers; in June of 2006 when researchers reported on the status of their studies; and again in November, 2006 when researchers presented their findings and worked together to draw themes from the collection of studies. Some of the reviewers also attended this third meeting. Revised final papers were prepared and submitted in December 2006 and January 2007.

Reviewers

Jacob Adams, *University of Washington*, Julian Betts, *University of California – San Diego*, Harry Brighthouse, *University of Wisconsin*, Davis Campbell, *University of California – Davis*, Julie Cullen, *University of California – San Diego*, Amanda Datnow, *University of Southern California*, David Figlio, *University of Florida*, Paul Hill, *University of Washington*, Paul Goldfinger, *School Services of California*, Dan Goldhaber, *University of Washington*, Norton Grubb, *University of California – Berkeley*, James Guthrie, *Vanderbilt University*, Kenji Hakuta, *Stanford University*, Julia Koppich, *Koppich & Associates*, Hamilton Lankford, *Sate University of New York – Albany*, Henry Levin, *Columbia University*, Margaret McLaughlin, *University of Maryland*, Larry Picus, *University of Southern California*, David Plank, *University of California -- Berkeley*, Michael Podgursky, *University of Missouri*, Michelle Reininger, *Northwestern University*, Andrew Reschovsky, *University of Wisconsin*, Marguerite Roza, *University of Washington*, Kim Rueben, *The Urban Institute*, Amy Ellen Schwartz, *New York University*, Karen Seashore, *University of Minnesota*, Leanna Steifel, *New York University*, Lori Taylor, *Texas A&M University*, and Ron Zimmer, *RAND Corporation*.

PROJECT SUPPORTERS

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The papers and summaries of the papers are available at www.irepp.net.