

IN THE UNITED STATES DISTRICT COURT
FOR THE NORTHERN DISTRICT OF ILLINOIS
EASTERN DIVISION

CHICAGO TEACHERS UNION, LOCAL 1,
AMERICAN FEDERATION OF TEACHERS,
AFL-CIO, et al. ,

individually and on behalf of all similarly situated
persons,

Plaintiffs,

v.

BOARD OF EDUCATION OF THE CITY OF
CHICAGO

Defendant

Case No. 12 C 10311, 15 C 8149
Judge Sarah Ellis

RULE 26(a)(2)(B) REPORT OF BRUCE BAKER

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Bruce D. Baker

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Bruce D. Baker response to Dr. Brian Jacob's January 30, 2018 Report

May 25, 2018

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The following report is prepared in response to written testimony provided by Dr. Brian Jacob on January 30, 2018 on behalf of the Board of Education of the City of Chicago. Dr. Jacob's report specifically addresses the attributes of Chicago Public Schools identified for Turnaround in 2013 and 2014. In that report:

- 14 1. Dr. Jacob draws misleading conclusions pertaining to the relationships among measures of
- 15 school quality, and their meaning and application to the present case;
- 16 2. Dr. Jacob misrepresents claims from my previous report;
- 17 3. Dr. Jacob adopts a collateral damage excuse for the disproportionate dismissal of minority,
- 18 predominantly black teachers (and their replacement by predominantly white teachers) in
- 19 turnaround schools.

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In the first two sections of this report, I revisit Dr. Jacob's summaries and conclusions and rebut Dr. Jacob's misrepresentation of my position on value-added measures from my initial report. In the third section, I dissect Dr. Jacob's collateral damage model of teacher dismissal which disregards, outright, consideration of the rights of individual teachers, leading to the disproportionate dismissal of minority, predominantly black teachers.

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Specifically, the collateral damage model presumes that when schools receive low cumulative point totals, those low totals are an accurate reflection (by way of moderate correlation with schoolwide "value-added" measures) of the individual performance of all employees of the school, justifying subjecting them collectively to employment consequences. This, despite large shares of those teachers receiving excellent or superior ratings, and in 2014, none receiving unsatisfactory ratings. Notably, the value-added measures used by Dr. Jacob to justify basing employment consequences on school total accumulated points account directly for only 12.5% of total points and are calculated based only on that subset of teachers in each school responsible for the delivery of language arts and math instruction between grades 3 and 8.¹

Dr. Jacob concluded that the 2013 turnarounds provide evidence that the metrics used for determining turnaround status were sufficiently accurate. Specifically, Dr. Jacob noted:

"In SY2013 (**but not SY2014**), the schools selected for turnaround scored substantially lower on various measures of school quality than other schools." (Jacob, p. 9) (**emphasis added**)

In the following report, I show how even in 2013, the metrics used for determining accountability status, leading to turnaround classification, are deeply problematic – imprecise and inaccurate for determining employment consequences or even for broadly classifying school quality or effectiveness (even if limited to effectiveness at improving reading and math test scores).

¹ Slide 31: https://www.ctunet.com/quest-center/research/text/cps-framework/CPS_Final_Offer.pdf , for illustrative analysis, see: <https://schoolfinance101.wordpress.com/2009/12/04/pondering-the-usefulness-of-value-added-assessment-of-teachers/>

1 Dr. Jacob’s own quote above appears to indicate that he is not even defending the 2014 turnaround
2 selections. On the one hand, this is problematic because the point system which leads to the classification
3 of 2014 turnarounds as low performing, precipitating selection for turnaround is the same in both years,
4 and most of the underlying correlates similar. A system cannot possibly be valid for purposes of determining
5 employment consequences in one year, and invalid the next, without substantive changes to that system.
6 The fact that the statistical comparisons used by Dr. Jacob don’t hold up from year to year casts doubt on
7 the metrics and process as a whole and on Dr. Jacob’s conclusions. One could easily flip Dr. Jacob’s
8 conclusion above to conclude instead:

9 “In 2014 (but not in 2013) the schools selected for turnaround DID NOT score substantially lower on
10 various measures of school quality than other schools.”

11 My empirical analyses herein of the 2013 turnarounds show:

- 12 • About 60% of teachers in 2013 turnaround schools were rated excellent or superior. The percent
13 rated superior was nearly equal to the percent rated unsatisfactory.
- 14 • 73% of the teachers in the 2013 turnaround schools were black, compared to only 25% in all
15 other schools.
- 16 • Clearly, based on this information alone, the collateral damage policy leads to disproportionate
17 dismissal of black teachers who were rated excellent or superior.
- 18 • Upon turnaround, the staff of these schools was substantially whitened.

19 And my empirical analyses herein of the 2014 turnarounds show:

- 20 • About 76% of teachers in 2014 turnaround schools were rated excellent or superior, and nearly
21 30% superior.
- 22 • 70% of the teachers in the 2014 turnaround schools were black, compared to only 25% in all
23 other schools.
- 24 • The district’s collateral damage policy leads to disproportionate dismissal of black teachers who
25 were rated excellent or superior.
- 26 • Upon turnaround, the staff of these schools was substantially whitened.

27 **1.0 Dr. Jacob Draws Misleading & Inappropriate Statistical Conclusions**

28 Dr. Jacob’s conclusions and summary of his empirical findings can be found at the beginning and at
29 the end of his report. At the beginning of his report, on Page 2, Dr. Jacob makes three main summary points,
30 which I provide here in their entirety so as not to create any confusion over what Dr. Jacob actually wrote.
31 I have added **emphasis** on a few key phrases.

- 32 1. In both years, the primary measure used by the district to determine turnarounds (i.e., the % of
33 possible points earned in the accountability system) is **strongly correlated** with the
34 subcomponents of the accountability system that attempt to capture the “value-added” of a
35 school.
- 36 2. In both years, the % of possible points earned in the accountability system is also correlated with
37 two alternative measures of school effectiveness: i) the survey-based measure of school
38 organization known as the 5 Essentials and ii) the evaluation ratings received by teachers in the
39 school.

- 1 3. These findings suggest to me that while the system used by the district to identify schools for
2 potential turnaround focused **largely on contemporary student performance on standardized**
3 **tests**, it captures important dimensions of school quality that do not merely reflect the racial or
4 socioeconomic composition of students in the school. (Jacob, p. 2)

5 The centerpiece of Dr. Jacob’s report is his argument that the point system used as the primary tool for
6 rating schools and thus screening and identifying schools for probation and ultimately turnaround is
7 correlated – or as he characterizes “strongly correlated” – with subcomponents of that system which attempt
8 to capture “value-added” of a school. This claim overstates (at best) statistical reality in two ways. First,
9 the correlations, which are on the order of .50 are not, per se, strong as would be generally characterized in
10 statistical analysis.

11 I concur with Dr. Jacob that when dealing with uncertain education policy data (or most social
12 science measures), judgments about “strong” versus “weak” are not absolute. Very little in social science
13 data is “strongly” correlated by conventional standards (that is, around .80). However, to assert that these
14 school level correlations are “strong,” given the implications for individual employees’ rights, is a statistical
15 stretch at the very least, leading to suspect policy inferences.

16 Therein lies the second concern. As I will show in the second section of this report, a correlation
17 of .50 between a supposed measure of school effectiveness and the consequential measures of school status,
18 is anything but a precise or reliable characterization of school effectiveness and even less precise
19 characterization of the effectiveness of individual employees within any given school. Much of this
20 disconnect is illustrated in Dr. Jacob’s own tables but disregarded under the collateral damage model he
21 accepts as justifiable.

22 Dr. Jacob appears to be claiming that despite the fact that the system which leads to racially
23 disparate individual employment consequences is based “largely on contemporary student performance on
24 standardized tests,” it is still reasonable to use those measures to impose employment consequences, even
25 on individual teachers who have been rated excellent or superior. He asserts that this is because those
26 measures are, as he says “strongly” (though they are not) correlated with value-added.

27 I provide a summary in my original report regarding the specific measures used for determining
28 school accountability status and imposing employment consequences:

29 Page 21 of my original report:

- 30 • 42.5% of weight for elementary school ratings is placed on measures which a) make no attempt
31 at attribution to school (and by extension, teacher) effectiveness and b) are well understood to
32 be racially and socio-economically disparate.
- 33 • Another 42.5% of the weight is placed on indicators that also make no attempt at attribution to
34 school effectiveness and are well understood to be little more than noise, or junk, to the extent
35 they aren’t picking up shifting demographics or changes in test administration.
- 36 • Only 15% weight at the elementary level is placed on indicators which attempt to isolate school
37 effect on the underlying measures.
- 38 • At the high school level, even the “growth” indicator, the *% making expected gains on EPAS*,
39 does not attempt to attribute (via statistical modeling) that growth (or the share of kids making
40 expected growth) to schools.

1 Thus, the rating system consists of 42.5% racial/socioeconomic bias, 42.5% junk, and 15%
2 questionably sufficient statistical attempt at the capturing school or employee effectiveness (for
3 elementary schools only).

4 Below are Dr. Jacob's empirical conclusions, from Page 9 of his January 30th report.

- 5 1. The CPS academic performance measures that **best reflect the true productivity of a school**
6 **(e.g., the school's "value-added")** are positively correlated with the CPS academic performance
7 that simply measure student academic achievement in SY2013 and SY2014.
- 8 2. The summary measure of academic performance used in part by CBOE to select schools for
9 turnaround is strongly correlated with a variety of more direct, transparent and/or authentic
10 measures of school quality, such as student- and teacher-based surveys indicators of instructional
11 quality and school environment as well as observation-based evaluations of teacher performance.
- 12 3. In SY2013 (**but not SY2014**), the schools selected for turnaround scored substantially lower on
13 various measures of school quality than other schools. (Jacob, p. 9)

14 Again, Dr. Jacob stands by the assertion that the value-added measures "best reflect the true
15 productivity of a school," and thus, by extension, any other measure which is "strongly" correlated with
16 them is a reasonable reflection of the productivity of a school, and further, by yet another extension, a
17 reasonable metric to use for imposing employment consequences on all those employed within that
18 institution. But each extension takes us one step further from a measure which itself is insufficient for
19 making such determinations.

20 Again, a correlation of around .50 is not a strong correlation. Yes, the context of a correlation matters,
21 and one might consider a correlation of .50 between a noisy value-added measure and school status
22 measures to be relatively high (given expectations for these types of measures). But to the extent that
23 statistical context matters, then so too does the policy context wherein these measures are being applied to
24 institutions (schools as a whole) and used to impose collective employment consequences (on individuals),
25 raising the bar for what should be considered a sufficiently "strong" correlation.

26 The approach endorsed here by Dr. Jacob is that the accountability point system which ultimately leads
27 to employment consequences on all those working in a given school reasonably reflects school quality and
28 effectiveness, and thus employee quality and effectiveness. Dr. Jacob's endorsement of the district's policy
29 is built on his statistical finding that, while the point system is based on largely invalid measures for
30 determining how good (productive) a school is, that point system is correlated at about .50 with a "better"
31 measure of how good (productive) each school is. That .50 is an "r" value (correlation). Translated to
32 "variance explained" (r-squared), that value becomes .25. That is, the "better" measure of how productive
33 a school actually is, explains about 25% of the variations in the measure that is used for imposing
34 consequences on all employees in any given school.

35 Even if we accept the correlation as characterizing "variance explained,"² having the "more valid"
36 measure explain about half of the variation in the "less valid" measure, and then using the latter to impose
37 collective employment consequences is problematic, at best. As I illustrated in my previous report, and
38 elaborate here, many other factors, such as student racial composition and income status, which are well

² Johnson, Wendy. "Correlation and Explaining Variance: To Square or Not to Square?." *Intelligence* 39, no. 5
(2011): 249-254.

1 outside the control of teachers in those schools, explain much larger shares of the variation in the
2 consequential accountability measure and likelihood that school is targeted for turnaround.

3 Dr. Jacob's second point above seems to also suggest a "strong" correlation between the overall points
4 and survey responses, but he reports correlations between .23 and .51 (2013), and .25 and .47 (2014) for
5 these measures, even weaker than those for the value-added measures.

6 Dr. Jacob's final point above should also not be overlooked for its inconsistency. Dr. Jacob evaluated
7 two years of turnaround schools in his January 30th report, concluding that the overall accountability
8 measures were good enough, as a basis for dismissing teachers because the school selected scored lower on
9 various subcomponents and other measures. But, as Dr. Jacob notes, this finding is true in only one of the
10 two years of his analysis, for 5 (2013) of 8 (+3 in 2014) consequential choices (school turnarounds),
11 affecting over 200 teachers.

12 **2.0 Dr. Jacob Misrepresents my Opinions**

13 Dr. Jacob's report relies significantly on the "value-added" measure as the true indicator of school
14 productivity. To clarify, the value-added estimates for schools are, as I explained in my original report,
15 measures which attempt to isolate the influence of schools and the teachers within them on the test score
16 gains in reading and math of students in tested grade levels. Thus, at the very best, these value-added
17 measures are an extremely limited characterization of the contribution of schools and teachers to a very
18 limited subset of measured student outcomes. Also, because these measures are applicable to only those
19 teachers connected to tested grade levels and reading and math, they are calculable for only a small subset
20 of teachers in any given school, but consequences of turnaround distinction are applied to all employees,
21 regardless of their individual effectiveness.

22 Dr. Jacob justifies his emphasis on value-added measures in his report, in part, by asserting that I
23 argued that value-added measures are "the appropriate measure for the district to use." To quote Dr. Jacob:

24 In particular, there is a strong positive correlation between the school value-added in reading and math
25 and the total accountability score ($p=0.57$ and $p=0.51$). This is notable because Dr. Baker, an expert
26 witness for the plaintiffs, argued that the value-added was the appropriate measure for the district to
27 use (in contrast to the status-based measures of student achievement). (Jacob, p. 3-4)

28 This claim mischaracterizes what I wrote in my report and what I have written in many academic
29 articles³ and blog posts.⁴ To restate my position on these measures as I explained in my original report, the
30 value-added measure is the only measure in the Chicago Public Schools rating system which even attempts,
31 on its face, to isolate a school or teacher effect on a measure of student outcomes. That is not to say it is a
32 good, or appropriate measure for direct use in determining which schools are good or bad and which schools
33 should be slated for turnaround, and it is certainly not to say that value-added is an ideal, precise and

³ Green III, Preston C., Bruce D. Baker, and Joseph Oluwole. "The legal and policy implications of value-added teacher assessment policies." *BYU Educ. & LJ* (2012): 1.

Baker, Bruce, Joseph Oluwole, and Preston Green. "The legal consequences of mandating high stakes decisions based on low quality information: Teacher evaluation in the race-to-the-top era." (2013).

⁴ <https://schoolfinance101.wordpress.com/?s=value-added>

1 accurate measure for deciding which teachers should be dismissed.⁵ Specifically, on Page 15 of my original
2 report, I note that value-added measures”

3 ...at least attempt to isolate classroom or school correlates of growth, partially addressing face
4 validity concerns, but still failing to achieve sufficient statistical validity or reliability. (Page 15)

5 It is a huge unwarranted stretch to go from my statement here to the claim that I support value-added
6 measures as “**the** appropriate measure for the district to use.” (emphasis added) Even if some such phrase
7 can be extracted, out of context, from either my deposition in this matter, or my report, that phrase must be
8 couched in the broader context and explanations I have provided in my report and related writings. Yes, the
9 value-added measure is the only measure in the CPS accountability system that is not, on its face, entirely
10 invalid for characterizing school effectiveness and imposing employment consequences. But, as I explained
11 further in my original report:

12 While still not entirely sufficient, the value-added model goes several steps beyond all other
13 measures employed by CPS for characterizing school performance and serves as acknowledgment
14 by CPS leadership that they know full well that more complicated modeling is required for
15 measuring effectiveness. A value-added model of this type might at least be used as a noisy,
16 preliminary screening tool to identify schools for further observation. As Preston Green, Joseph
17 Oluwole and I explain:

18 *Arguably, a more reasonable and efficient use of these quantifiable metrics in human*
19 *resource management might be to use them as a knowingly noisy pre-screening tool to*
20 *identify where problems might exist across hundreds of classrooms in a large district.*
21 *Value-added estimates might serve as a first step toward planning which classrooms to*
22 *observe more frequently. Under such a model, when observations are completed, one might*
23 *decide that the initial signal provided by the value-added estimate was simply wrong. One*
24 *might also find that it produced useful insights regarding a teacher’s (or group of*
25 *teachers’) effectiveness at helping students develop certain tested skills.*

26 *School leaders or leadership teams should clearly have the authority to make the case that*
27 *a teacher is ineffective and that the teacher even if tenured should be dismissed on that*
28 *basis. It may also be the case that the evidence would actually include data on student*
29 *outcomes – growth, etc. The key, in our view, is that the leaders making the decision –*
30 *indicated by their presentation of the evidence – would show that they have reasonably*
31 *used information to make an informed management decision. Their reasonable*
32 *interpretation of relevant information would constitute due process, as would their*
33 *attempts to guide the teacher’s improvement on measures over which the teacher actually*
34 *had control. (p. 19)⁶*

⁵ Green III, Preston C., Bruce D. Baker, and Joseph Oluwole. "The legal and policy implications of value-added teacher assessment policies." *BYU Educ. & LJ* (2012): 1.

Baker, Bruce, Joseph Oluwole, and Preston Green. "The legal consequences of mandating high stakes decisions based on low quality information: Teacher evaluation in the race-to-the-top era." (2013).

⁶ Baker, B. D., Oluwole, J., & Green, P. C. (2013). The legal consequences of mandating high stakes decisions based on low quality information: Teacher evaluation in the race-to-the-top era. *Education Evaluation and Policy Analysis Archives*, 21, 1-71. <http://epaa.asu.edu/ojs/article/view/1298/1043>

1 (Pages 24-25)

2 It is entirely inappropriate for Dr. Jacob to condition the importance and relevance of strong (which
3 are actually modest best) correlations between the consequential point system and the value-added measures
4 on my supposed endorsement of the validity of the value-added measures for determining collective
5 employment consequences.

6 **3.0 Dr. Jacob Endorses a Collateral Damage Model with Reckless Disregard** 7 **for Individual Employee Rights**

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9 Here, I provide a statistical review of Dr. Jacob’s findings and data, with illustrations of the problems
10 of applying a collateral damage model for disparately dismissing minority teachers serving predominantly
11 minority student populations. First, I review the data on 2013 turnarounds and then on 2014 turnarounds. I
12 begin by including Dr. Jacob’s own summary tables.

13 **2013 Turnarounds**

14 Figure 1 below is a copy of Dr. Jacob’s Table 1, showing the correlations between various
15 subcomponent measures and % possible points – which is the aggregate measure used for setting the stage
16 for accountability consequences. To summarize:

- 17 • The highest correlated measures with % total points are achievement LEVEL indicators,
18 specifically ISAT scores ($r=.75$ & $.77$), measures which reveal strong bias based on student
19 backgrounds, race and economic status;
- 20 • The next highest correlated measure with % total points is “% daily attendance in prior year”, which
21 is also well understood to be associated with race and poverty and associated chronic health
22 conditions;⁷
- 23 • Next in line and substantively less correlated with % possible points are the value-added measures.
- 24 • Even further down in strength of correlation are the essential survey measures.

25 That is, % possible points is most strongly correlated with measures which a) are strongly racially and
26 socioeconomically biased (and well understood to be so) and b) make no attempt on their face to isolate the
27 schools’ or teachers’ influence on those outcomes.

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⁷ http://changelabsolutions.org/sites/default/files/School-Financing_StatePolicymakers_FINAL_09302014.pdf

FIGURE 1

Table 1 - Correlation between % of Possible Points and Other School Characteristics, Elementary School SY2013 Sample

	Correlation
Panel A - Components of the CPS Accountability Metric	
ISAT reading - % meeting or exceeding in prior year	0.75
ISAT math - status - % meeting or exceeding in prior year	0.77
ISAT read - trend - % meeting or exceeding	0.43
ISAT math - trend - % meeting or exceeding	0.27
% daily attendance in prior year	0.64
trend in % daily attendance	0.15
Value-added in reading	0.57
Value-added in math	0.51
Panel B - 5 Essential Survey Measures	
Overall score on 5 essentials (-5 to + 5)	0.38
Ambitious Instruction (percentile rank within CPS)	0.23
Effective leaders (percentile rank within CPS)	0.27
Collaborative teachers (percentile rank within CPS)	0.32
Involved families (percentile rank within CPS)	0.51
Supportive environment (percentile rank within CPS)	0.34
Panel C - Teacher Evaluation Ratings	
% teachers with ratings	0.25
% rated superior	0.38
% rated excellent or superior	0.36
% rated unsatisfactory	-0.29

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3 Figure 2 provides Dr. Jacob's Table 2 in which he compares the characteristics of a) all schools to b)
4 probation schools to c) turnaround schools on several dimensions. To summarize this table:

- 5 • Turnaround schools serve predominantly – nearly entirely – black student populations, whereas
6 black students make up only slightly more than half of the student population.
- 7 • While fewer schools are rated as “well organized or organized” among turnarounds, 20% (1/5) are,
8 compared to slightly less than half of “all schools.”
- 9 • While fewer teachers are rated as “excellent or superior” in turnaround schools, about 60% still
10 were. That is, a majority of teachers facing employment consequences due to the point system were
11 rated excellent or superior and should have no reason to assume their jobs are in jeopardy.

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FIGURE 2

Table 2 - Summary Statistics of School Characteristics, Elementary School SY2013 Sample

	All Schools	Schools on probation	Schools selected for turnaround
Number of schools in the sample	515	194	5
% Possible Points	57.8	40.7	26.2
Student Demographics			
% Black	52.0	76.5	94.5
% Hispanic	34.9	20.7	4.7
% Black or Hispanic	86.9	97.2	99.2
% Subsidized Meals	84.1	92.2	91.3
% Special Education	12.7	13.3	10.5
5 Essential Survey Measures			
% with survey data	91.3	89.2	100.0
% Well organized or organized	45.3	31.8	20.0
% Moderately well organized	17.5	17.7	20.0
% Partially or not at all organized	37.4	50.3	60.0
Teacher Evaluation Ratings			
% with teacher evaluation data	90.1	99.0	100.0
% teachers with ratings	80.4	76.5	79.4
% rated superior	41.0	26.1	6.6
% rated excellent or superior	81.2	72.0	59.5
% rated unsatisfactory	1.8	3.2	7.0

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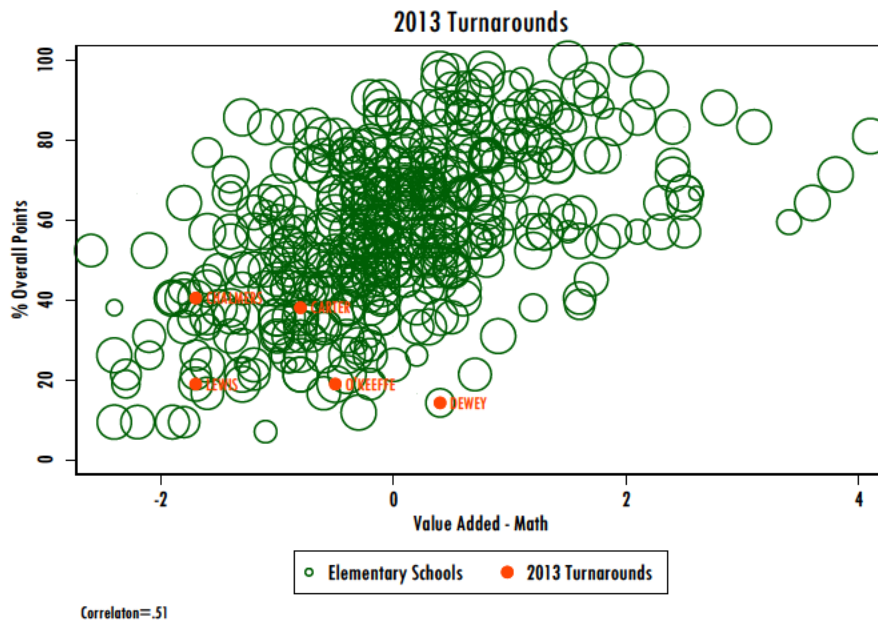
3 Figure 3 and Figure 4 present the relationship between % possible points and math and reading
4 value-added measures, to reveal just how uncertain, imprecise and messy these relationships are. Again,
5 Dr. Jacob's argument is that these relationships are sufficiently accurate to decide which teachers should
6 be dismissed. Specifically, that it should be considered reasonable to dismiss teachers in schools that have
7 received too few total points.

8 2013 turnaround schools are indicated with labels and orange dots. Circle size indicates the
9 numbers of teachers per school. While the turnaround schools are generally clustered toward the lower left,
10 Dewey, for example, has above average value-added in math, slightly below average in reading, but falls
11 lowest in total points among 2013 turnarounds. Chalmers is highest in total points, and higher than many
12 non-turnarounds, but nearly tied with Lewis among turnarounds for lowest Math value-added, and lowest
13 for reading value added. It is important to note that value-added estimates can be extremely volatile from
14 year to year.

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FIGURE 3



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Data source: JACOB_00000358^Confidential Subject to Protective Order.dta

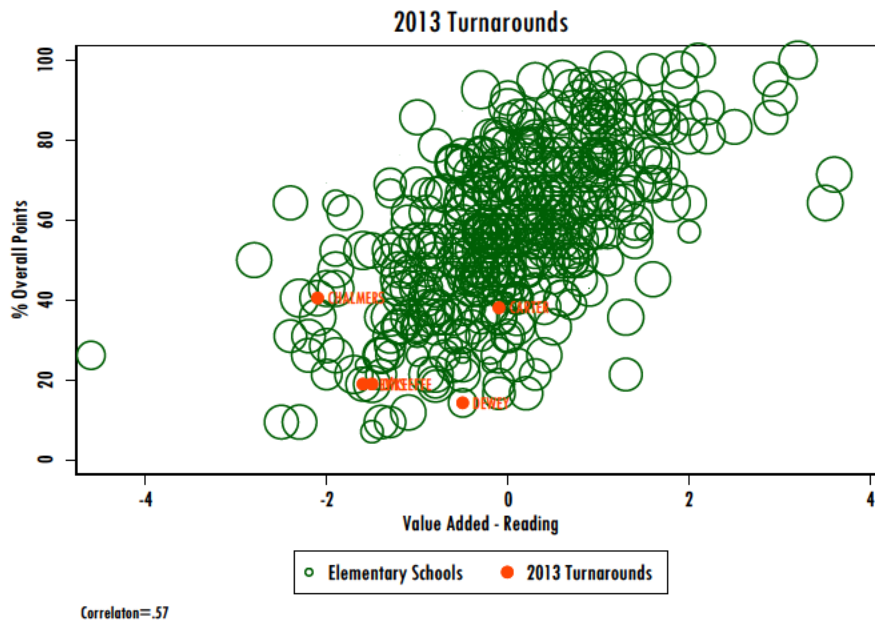
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In both figure 3 and figure 4, there are several schools with equal or lower value-added scores than the identified turnaround schools and many schools with equal or lower percent possible points. Further, one can easily visually discern that while there does exist a relationship by which schools with higher value-added scores tend to have higher % possible points, that relationship is not clear, precise, or STRONG.

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FIGURE 4



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Data source: JACOB_00000358^Confidential Subject to Protective Order.dta

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By contrast, Figure 5 is what a “strong” correlation actually looks like. Figure 5 presents the relationship between ISAT Math Status scores and % overall points for elementary schools in 2013. The correlation would be higher, but for the few status score outliers to the left, outside the pattern. Again, turnaround schools cluster in the lower left of the pattern, but even this pattern, which is much clearer than the previous patterns, provides insufficient basis for making determinations about the individual teachers within these schools.

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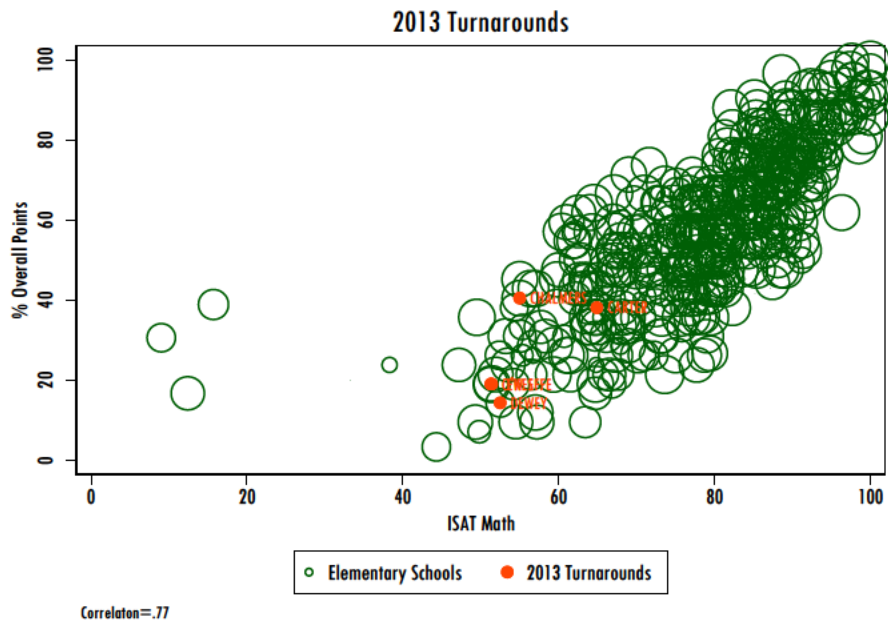
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Figure 6 shows the much weaker ($r=.29$) relationship between the share of teachers rated unsatisfactory and percent overall points obtained. Again, turnaround schools are along the lower boundary for overall points obtained, but not invariably the lowest. Chalmers is actually quite high in the distribution of overall points obtained AND has no teachers rated unsatisfactory, raising questions as to why all teachers in Chalmers should face employment consequences under the rating system and turnaround selection process. Several other elementary schools have similar or greater shares of “unsatisfactory” teachers than Carter, Lewis and Dewey schools, again raising concerns over the bulk determination that these teachers are ineffective. They are, in fact, the victims of collateral damage inflicted by not only imprecise targeting measures, but inaccurate ones. That is, measures which capture primarily the backgrounds of the students they teach and not the effectiveness of their institution as a whole, or themselves as teachers within that institution.

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FIGURE 5



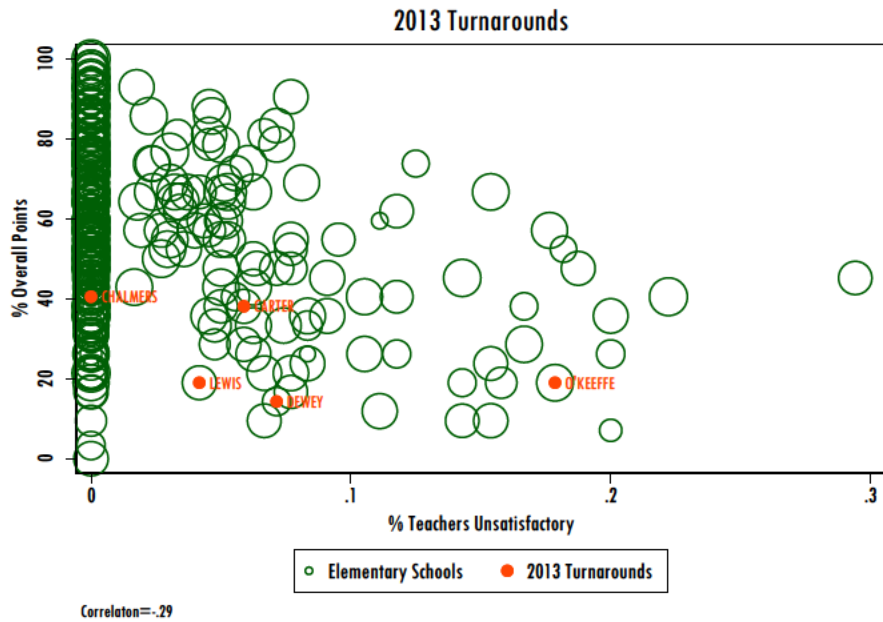
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Data source: JACOB_00000358^Confidential Subject to Protective Order.dta

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FIGURE 6



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Data source: JACOB_00000358^Confidential Subject to Protective Order.dta

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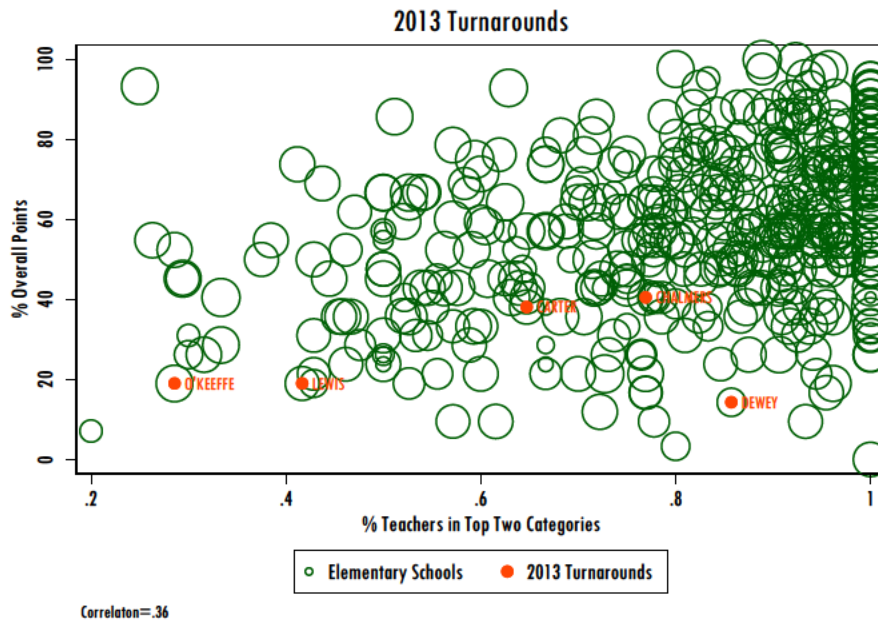
Figure 7 flips the metric to evaluate the percent of teachers rated excellent or superior in relation to overall points obtained. Just as O’Keeffe had a relatively high share of unsatisfactory teachers, the school

1 also has a low share of “excellent” or “superior” teachers. But again, other schools with higher total points
2 have even fewer teachers in the top two categories. The correlation between the percent of teachers in the
3 top two categories and percent points accumulated is also only modest (.36) and quite visually messy.

4 Three schools identified for turnaround have relatively high percentages of teachers in the top two
5 categories – Dewey, Carter and Chalmers (which had no teachers in the bottom category). In Chalmers,
6 nearly 80% of teachers are in the top two categories and in Dewey, over 80%. These are sizeable proportions
7 of teachers rated “excellent” or “superior” to be subjected to a collateral damage model of teacher
8 displacement – based on measures which a) make no attempt to isolate their individual effectiveness and
9 b) are only modestly correlated with imprecise (noisy from year to year), questionably accurate (subject to
10 various biases) and extremely limited (reading & math test scores) value-added measures that do make such
11 attempts.

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FIGURE 7



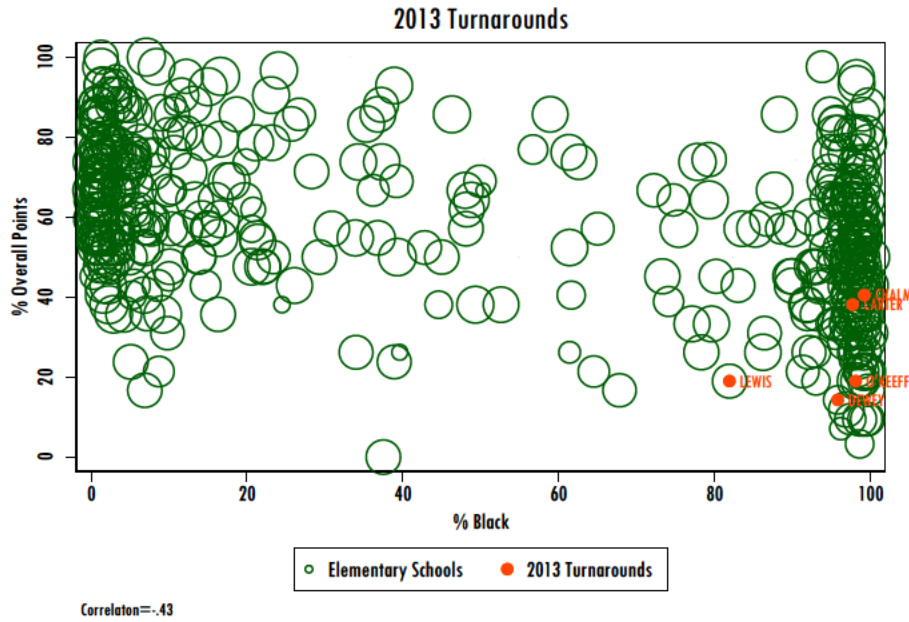
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14 Data source: JACOB_00000358^Confidential Subject to Protective Order.dta

15 Figure 8 shows that the relationship between student population percent black and total points obtained is
16 also modest, but stronger than the previous correlations between teacher ratings and points obtained. The
17 relationship in Figure 8 is as weak as it is because Chicago schools are largely divided on racial lines – with
18 a few schools continuing to serve white populations and many other serving either, but not both, black or
19 Hispanic populations. As noted from Dr. Jacob’s summary table, the thing the turnaround schools have
20 most in common, as reiterated in Figure 8, is that they serve almost entirely black student populations.

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FIGURE 8



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Data source: JACOB_00000358^Confidential Subject to Protective Order.dta

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The next series of bar graphs are drawn from records on individual teachers in Chicago Public Schools drawn from the Employment Information System (EIS), with turnaround schools tagged in the data set. Figure 9 shows that the vast majority of teachers in schools identified for turnaround are black, whereas the vast majority of teachers in other schools, districtwide are not. Figure 10 shows that while the proportions of teachers districtwide who are black OR Hispanic is somewhat greater, inclusion of Hispanic teachers when considering turnaround schools has relatively small effect. Schools identified for turnaround in 2013 serve almost exclusively black student populations and employ predominantly black teachers.

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Figure 11 through Figure 14 display the whitening of the teacher workforce in turnaround schools at the point of turnaround, as determined using the Employment Information System data. In the aggregate, turnaround schools go from a majority black teacher workforce to a minority black teacher workforce. Shifts are only marginally different when including Hispanic teachers.

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Figure 13 shows that each individual turnaround school experiences a substantial reduction in the number of black teachers (and proportion of them) after 2013.

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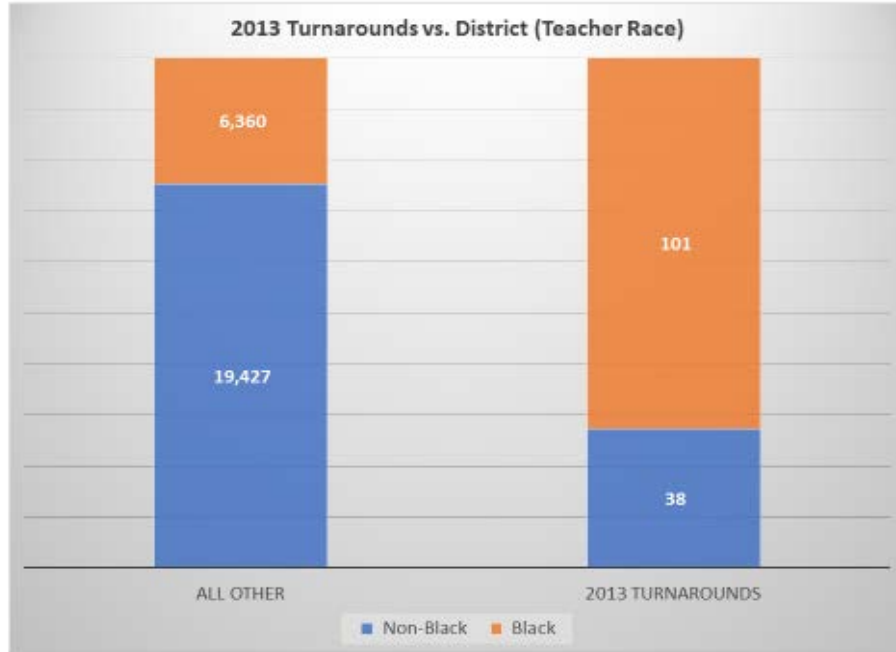
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Finally, Figure 14 shows that the majority of black teacher displacement is associated with increased shares of white teachers.

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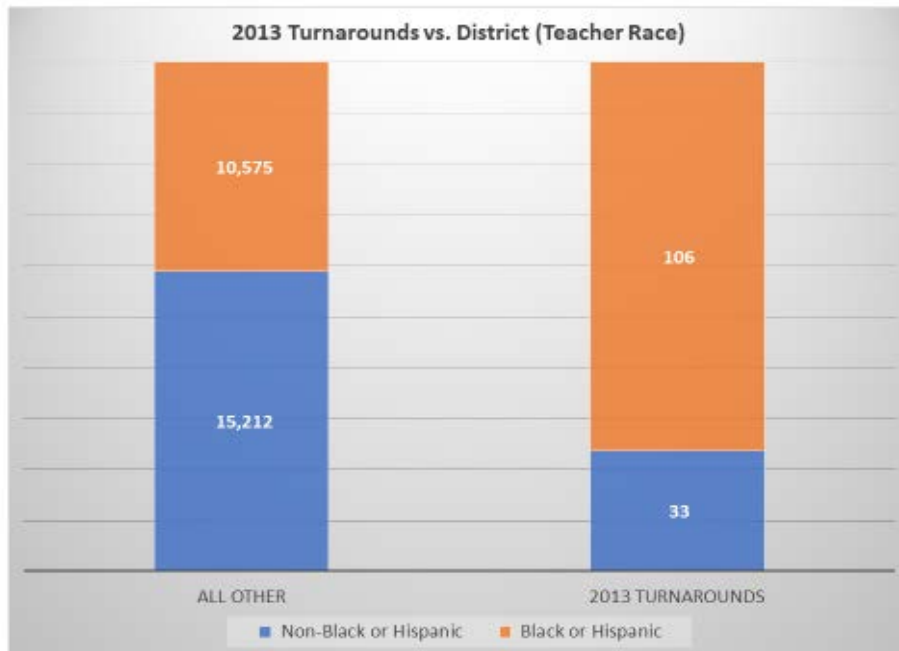
FIGURE 9



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FIGURE 10

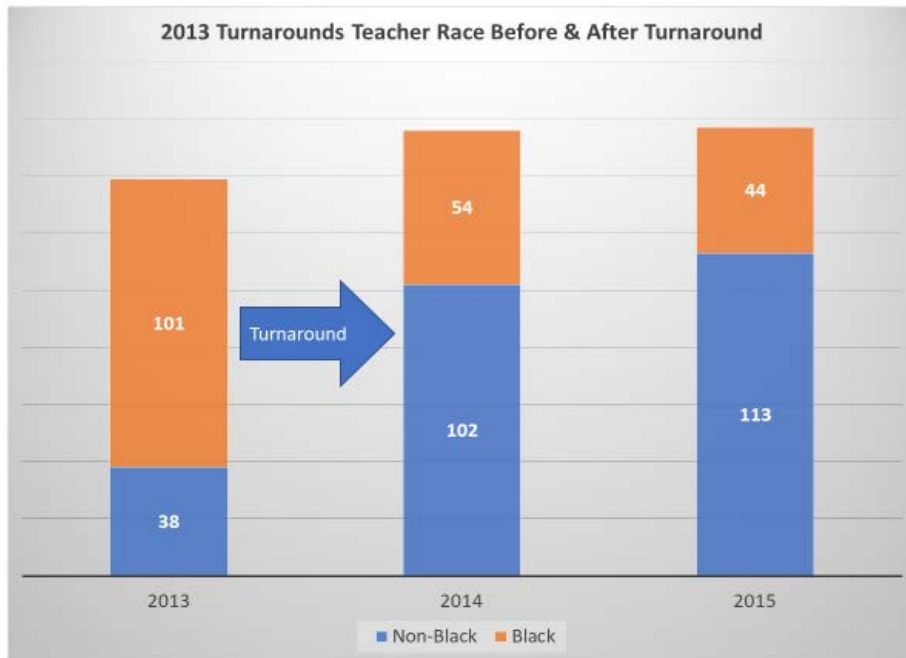


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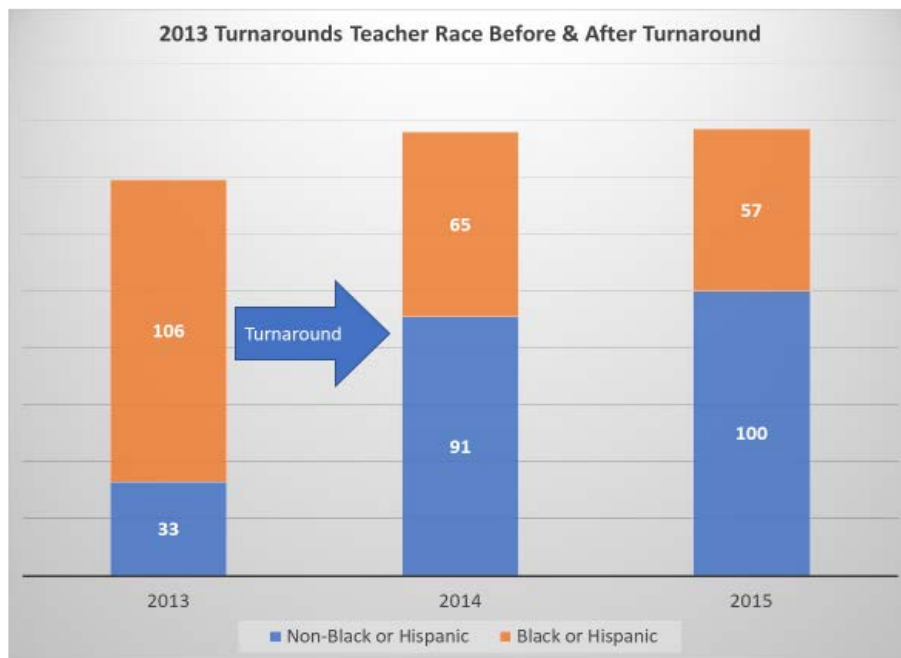
FIGURE 11



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FIGURE 12

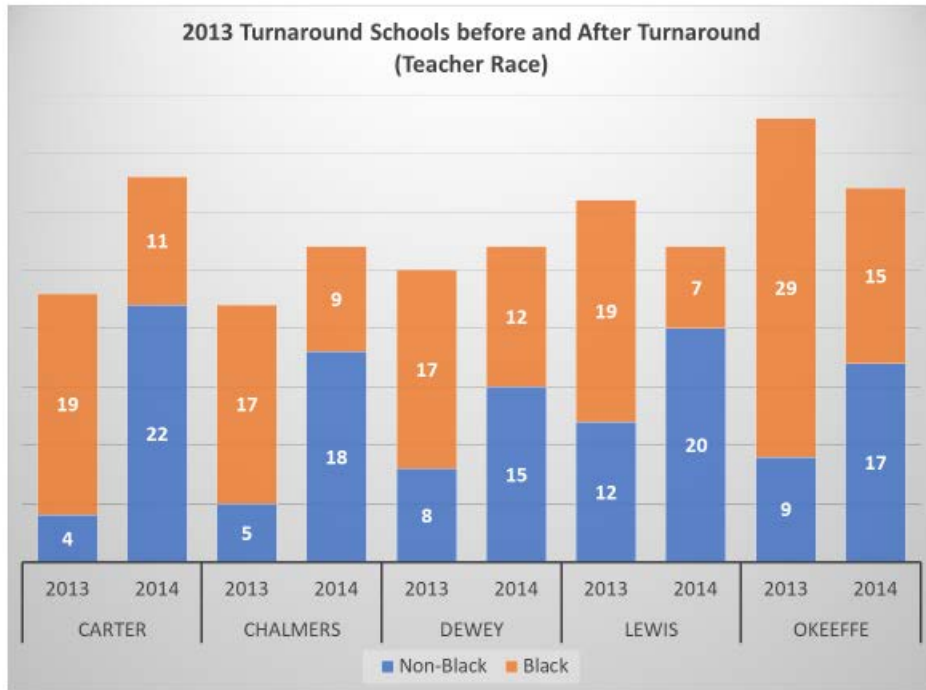


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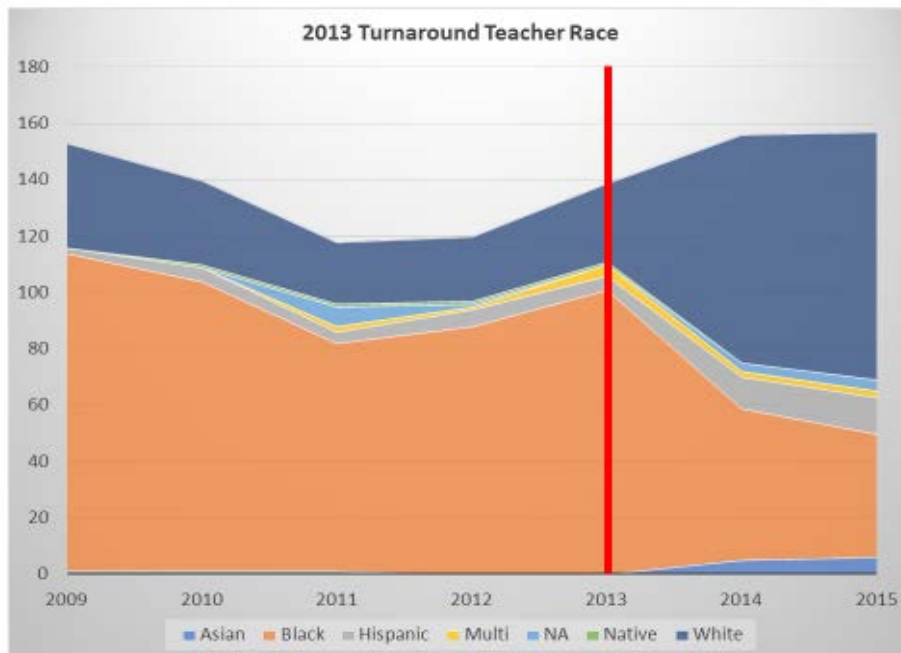
FIGURE 13



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FIGURE 14



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To summarize the above figures pertaining to the 2013 turnarounds:

- About 60% of teachers in 2013 turnaround schools were rated excellent or superior. The percent rated superior was nearly equal to the percent rated unsatisfactory.
- 73% of the teachers in the 2013 turnaround schools were black, compared to only 25% in all other schools.
- Clearly, based on this information alone, the collateral damage policy leads to disproportionate dismissal of black teachers who were rated excellent or superior.
- Upon turnaround, the staff of these schools was substantially whitened.

2014 Turnarounds

Dr. Jacob concluded that the 2013 turnarounds provide evidence that the metrics used for determining turnaround status were sufficiently accurate. Specifically, Dr. Jacob noted:

“In SY2013 (**but not SY2014**), the schools selected for turnaround scored substantially lower on various measures of school quality than other schools.” (Jacob, p. 9) (**emphasis added**)

In the previous section, I displayed how, even in 2013, the metrics used for determining accountability status, leading to turnaround classification, are deeply problematic – imprecise and inaccurate for determining employment consequences or even for broadly classifying school quality or effectiveness (even if limited to effectiveness at improving reading and math test scores). Dr. Jacob’s own quote above appears to indicate that he is not even defending the 2014 turnaround selections.

On the one hand, this is problematic because the point system which leads to the classification of 2014 turnarounds as low performing, precipitating selection for turnaround is the same in both years, and most of the underlying correlates quite similar. A system cannot possibly be valid for purposes of determining employment consequences in one year, and invalid the next, without substantive changes to that system. The fact that the statistical comparisons used by Dr. Jacob don’t hold up from year to year casts doubt on the metrics and process as a whole and on Dr. Jacobs conclusions. One could easily flip Dr. Jacob’s conclusion above to conclude instead:

“In 2014 (but not in 2013) the schools selected for turnaround DID NOT score substantially lower on various measures of school quality than other schools.”

Dr. Jacob’s Table 3 (included as Figure 15 below) shows that the underlying correlates of the accountability point system in 2014 are largely the same as they were in 2013. To summarize:

- By far, the strongest correlations with % total points in 2014 were with ISAT status measures, which make no attempt to isolate school or teacher effect;
- Again, the next strongest correlations were with average daily attendance, also a known racially and economically disparate measure;
- Value-added measures are next in line at .42 and .53, well below the correlations of the known, racially and economically disparate status measures and attendance rates;
- Correlations with survey measures are weak to moderate, and highly variable.

1

FIGURE 15

Table 3 - Correlation between % of Possible Points and Other School Characteristics, Elementary School SY2014 Sample

	Correlation
Panel A - Components of the CPS Accountability Metric	
ISAT reading - % meeting or exceeding in prior year	0.82
ISAT math - status - % meeting or exceeding in prior year	0.83
ISAT read - trend - % meeting or exceeding	0.32
ISAT math - trend - % meeting or exceeding	0.40
% daily attendance in prior year	0.65
trend in % daily attendance	0.24
Value-added in reading	0.42
Value-added in math	0.53
Panel B - 5 Essential Survey Measures	
Overall score on 5 essentials (-5 to + 5)	0.39
Ambitious Instruction (percentile rank within CPS)	0.25
Effective leaders (percentile rank within CPS)	0.29
Collaborative teachers (percentile rank within CPS)	0.34
Involved families (percentile rank within CPS)	0.47
Supportive environment (percentile rank within CPS)	0.28
Panel C - Teacher Evaluation Ratings	
% teachers with ratings	0.23
% rated superior	0.37
% rated excellent or superior	0.31
% rated unsatisfactory	-0.22

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3 Figure 16, which is Dr. Jacob’s Table 4 shows that:

- 4 • 76% of teachers in turnaround schools were rated excellent or superior, a higher percent than in
- 5 the short list, or in the broader probation list;
- 6 • No teachers in turnaround schools were rated unsatisfactory, compared to small percentages in
- 7 other schools. Nearly 30% were rated superior;
- 8 • The defining feature of turnaround schools is their extremely high share of enrolled students who
- 9 are black (95.7%).

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FIGURE 16

Table 4 - Summary Statistics of School Characteristics, Elementary Schools SY2014 Sample

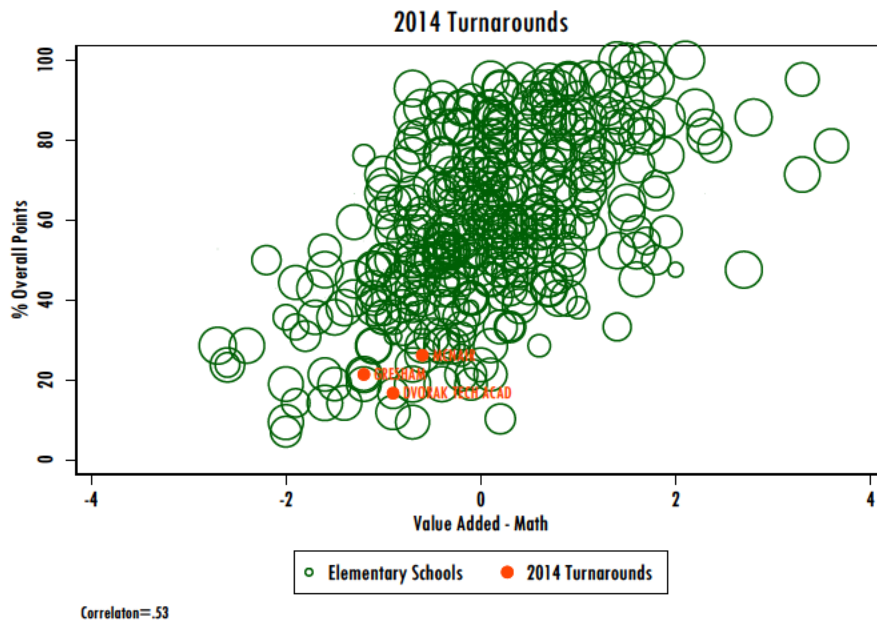
	All Schools	Schools on probation	Short List for Turnaround	Schools selected for turnaround
Number of schools in the sample	471	159	72	3
% Possible Points	59.7	39.4	38.9	21.4
Student Demographics				
% Black	48.2	73.4	67.0	95.7
% Hispanic	37.7	24.0	29.9	3.4
% Black or Hispanic	85.9	97.4	96.9	99.1
% Subsidized Meals	83.4	92.3	92.8	92.3
% Special Education	12.0	12.9	14.1	14.1
5 Essential Survey Measures				
% with survey data	97.9	99.4	98.6	100.0
% Well organized or organized	52.9	38.6	38.0	66.7
% Moderately well organized	9.8	10.8	12.7	0.0
% Partially or not at all organized	37.3	50.6	49.3	33.3
Teacher Evaluation Ratings				
% with teacher evaluation data	88.5	98.7	100.0	100.0
% teachers with ratings	80.4	76.3	77.1	79.0
% rated superior	42.7	29.9	26.4	29.7
% rated excellent or superior	82.3	75.2	73.2	76.3
% rated unsatisfactory	1.7	3.0	2.8	0.0

2

3 Figure 17 shows the modest correlation between value-added math performance and percent total
4 points attained, and Figure 18 shows the modest correlation between value-added reading performance and
5 percent total points attained. In Figure 17, one can see that the three turnaround schools are toward the
6 right-hand side of the lower portion of the figure. That is, their value-added, while below average (left of
7 0), is higher than the value-added for other schools (to their left) which have similar total points obtained.
8 In fact, some schools that have between 80 and 100% total points obtained have only similar math value
9 added to that of the turnaround schools. The same is true for reading in Figure 18.

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FIGURE 17



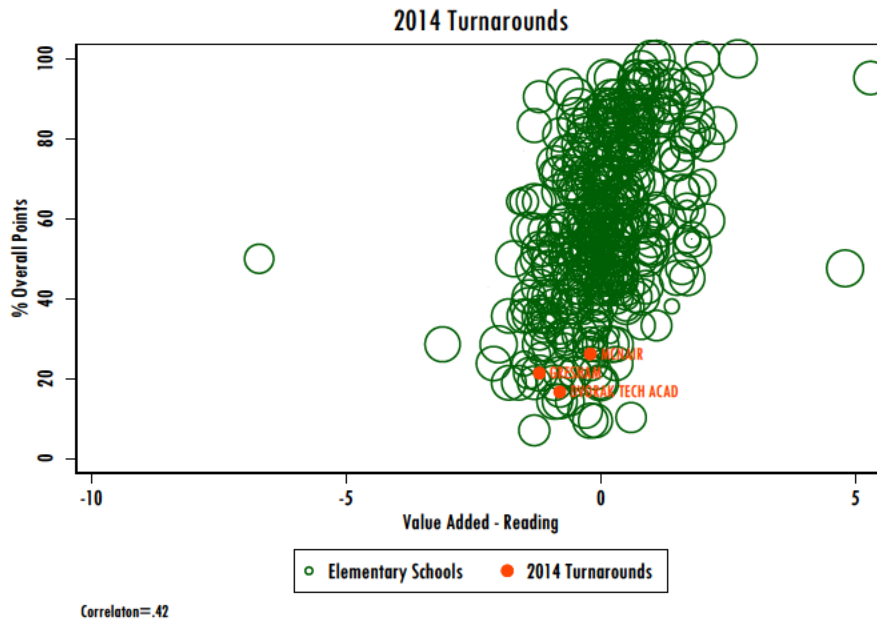
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Data source: JACOB_00000358^Confidential Subject to Protective Order.dta

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FIGURE 18



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Data source: JACOB_00000358^Confidential Subject to Protective Order.dta

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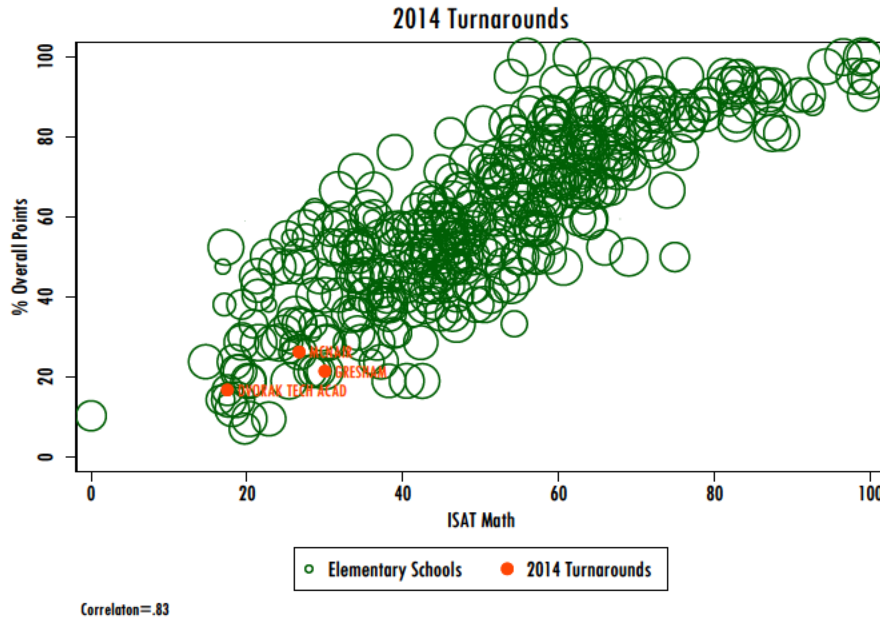
8

Figure 19 shows the much stronger relationship between ISAT Math scores and percent overall points obtained. This correlation exceeds .8. That is, math test score levels, which are strongly driven by

1 student demographics – race and economic background – are strong determinants of total points – much
2 stronger than the value-added measures.

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FIGURE 19



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Data source: JACOB_00000358^Confidential Subject to Protective Order.dta

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7 Figure 20 shows the relatively weak relationship between the proportion of teachers rated

8 unsatisfactory and percent total points obtained. While many schools in 2014 did have substantive shares

9 of teachers rated unsatisfactory, the three turnaround schools each had 0% teachers rated unsatisfactory.

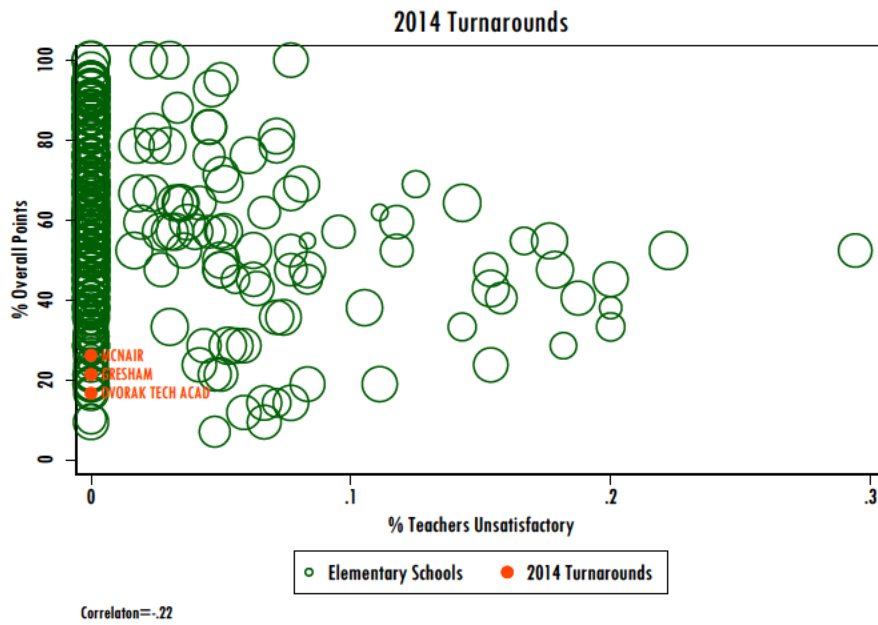
10 Yet, they are the ones to face employment consequence under the current rating and selection measures and

11 procedures.

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FIGURE 20



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Data source: JACOB_00000358^Confidential Subject to Protective Order.dta

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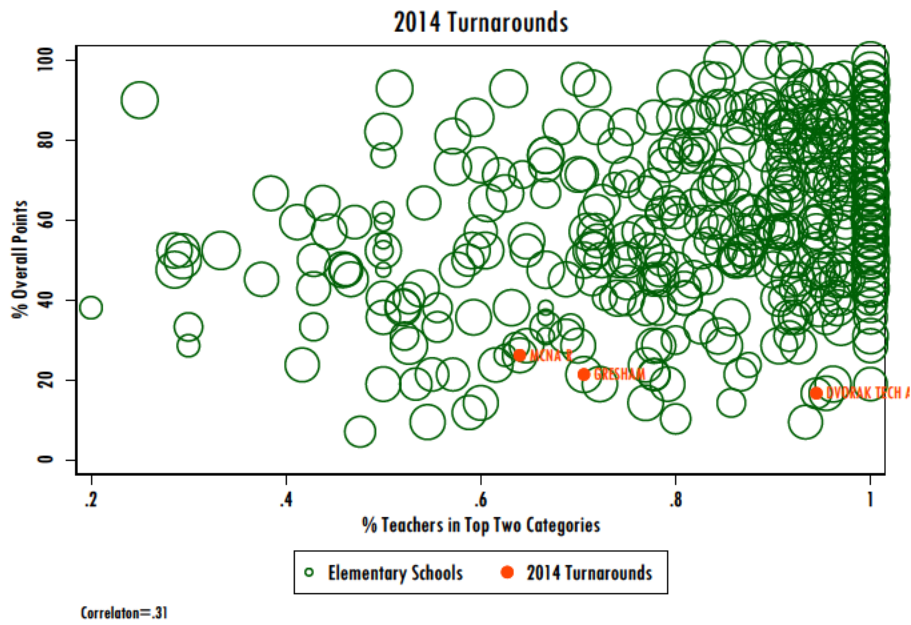
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Figure 21 shows the near equally messy relationship between the percent of teachers rated excellent or superior in 2014 and the percent total points obtained. Each of the three schools slated for turnaround in 2014 had more than 60% of teachers classified as excellent or superior, while many other schools had far fewer. Dvorak in particular had among the highest shares of teachers rated excellent or superior.

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FIGURE 21



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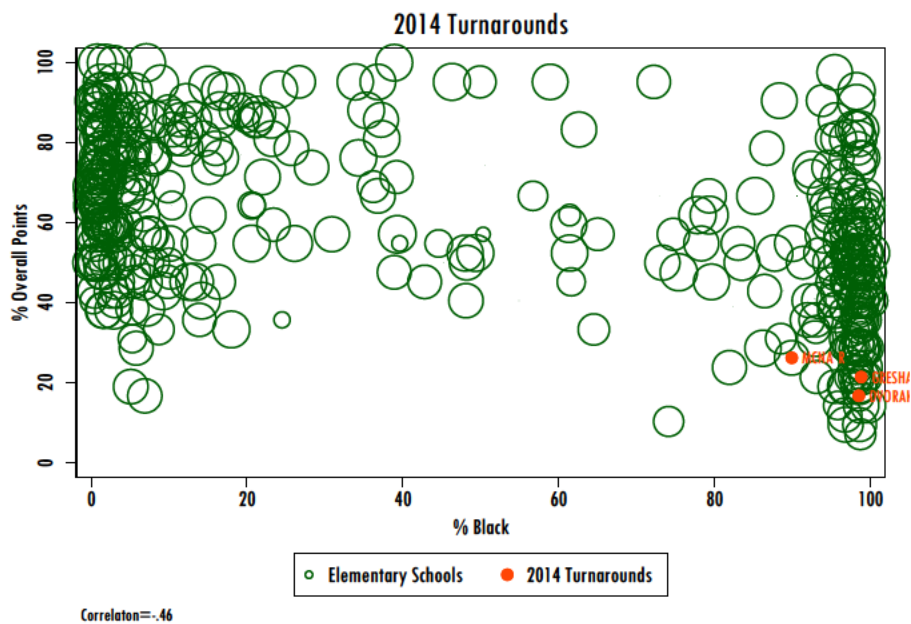
Data source: JACOB_00000358^Confidential Subject to Protective Order.dta

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Figure 22 shows that like 2013, a defining feature of turnaround schools is that they serve predominantly black student populations.

6

FIGURE 22



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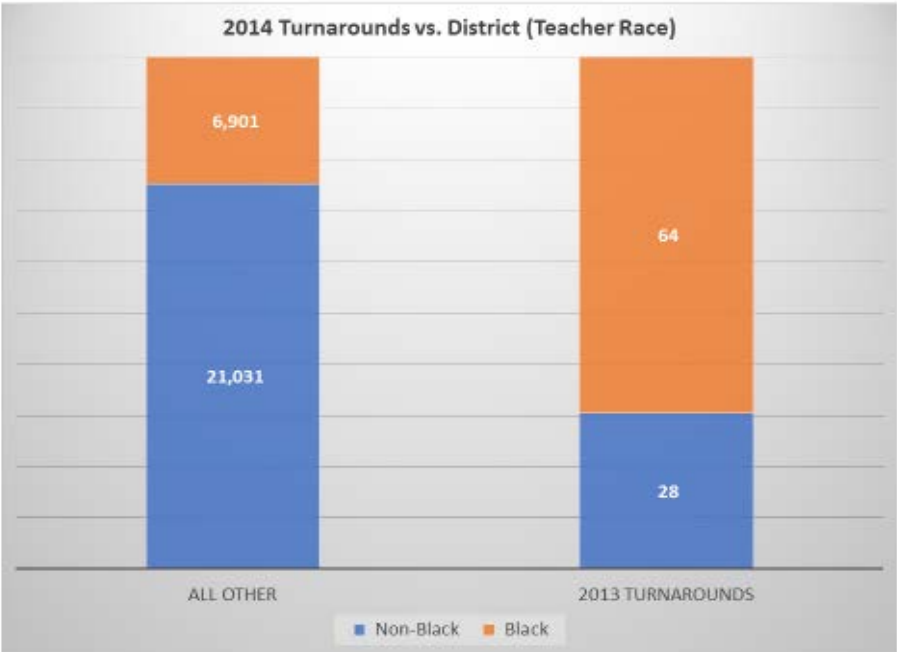
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Data source: JACOB_00000358^Confidential Subject to Protective Order.dta

1 Just as with the 2013 turnarounds, Figure 23 shows that 2014 turnarounds have a predominantly
2 black teacher workforce, compared to the minority black teacher workforce citywide. Figure 24 shows that
3 when considering Hispanic teachers, while minority shares increase citywide, they stay in the minority.
4 Turnaround schools continue to have predominantly black, with a few Hispanic teachers.

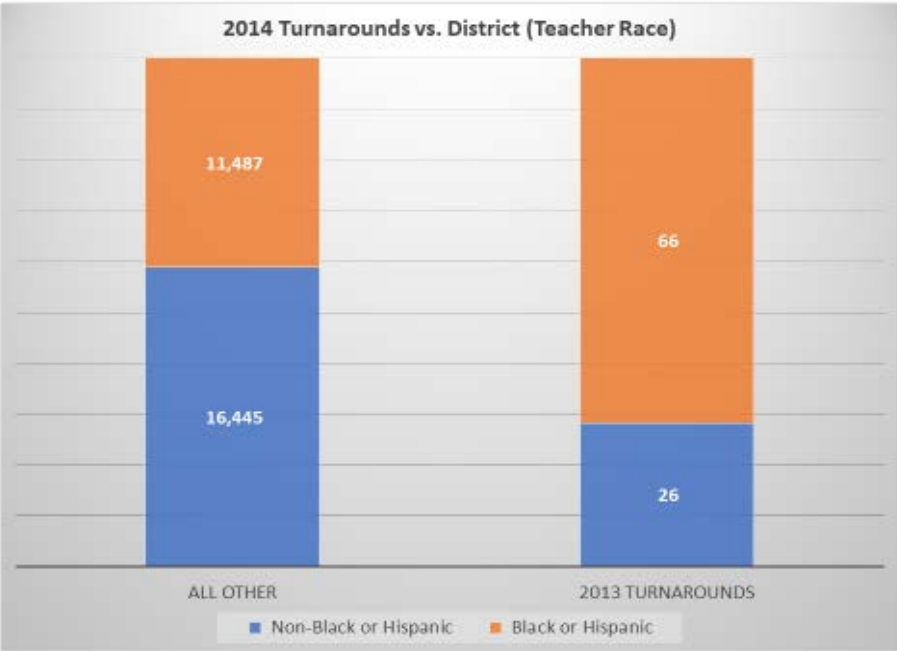
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FIGURE 23



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FIGURE 24



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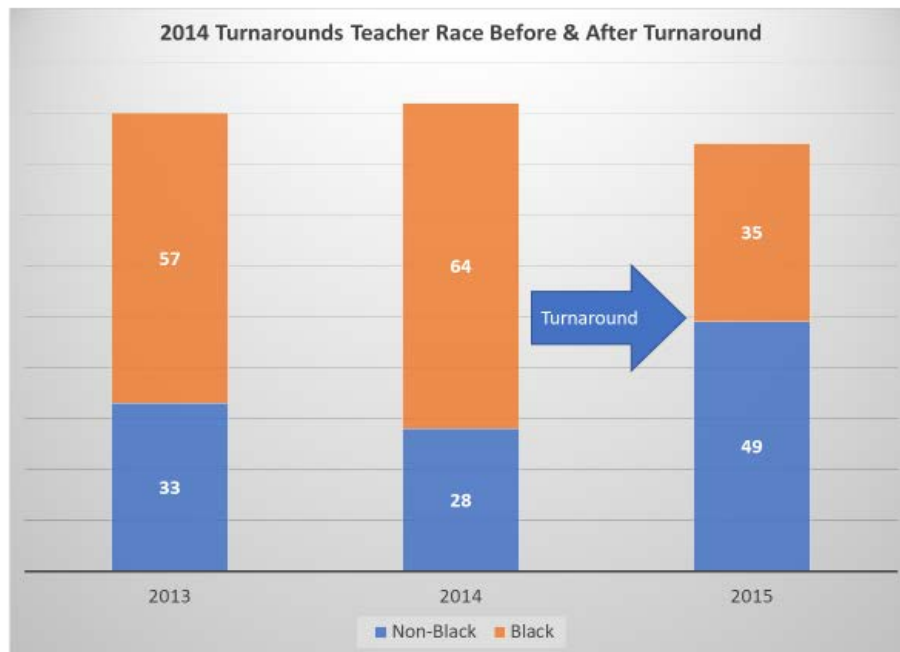
1 Figures 25 through 28 reveal the striking reduction of black teachers in the turnaround schools on
2 the year after turnaround. Figure 25 and 26 show that prior to turnaround, schools have majority black, or
3 majority black or Hispanic teacher workforces. Immediately following turnaround, the share of teachers
4 who are black or Hispanic is in the minority, losing nearly half of the black or Hispanic teachers.

5 Figure 27 shows that in each of the three schools, numbers of black relative to non-black teachers
6 were significantly reduced, and in two of the three, black teachers went from being in the decisive majority
7 to being in the minority.

8 Finally, Figure 28 shows that the majority of teacher replacement involved white teachers.

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FIGURE 25

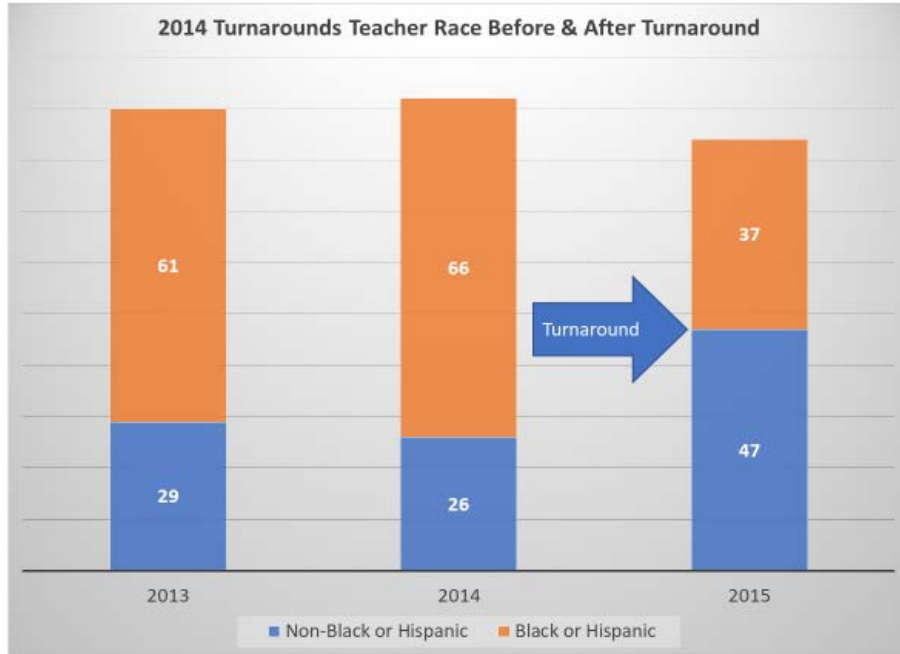


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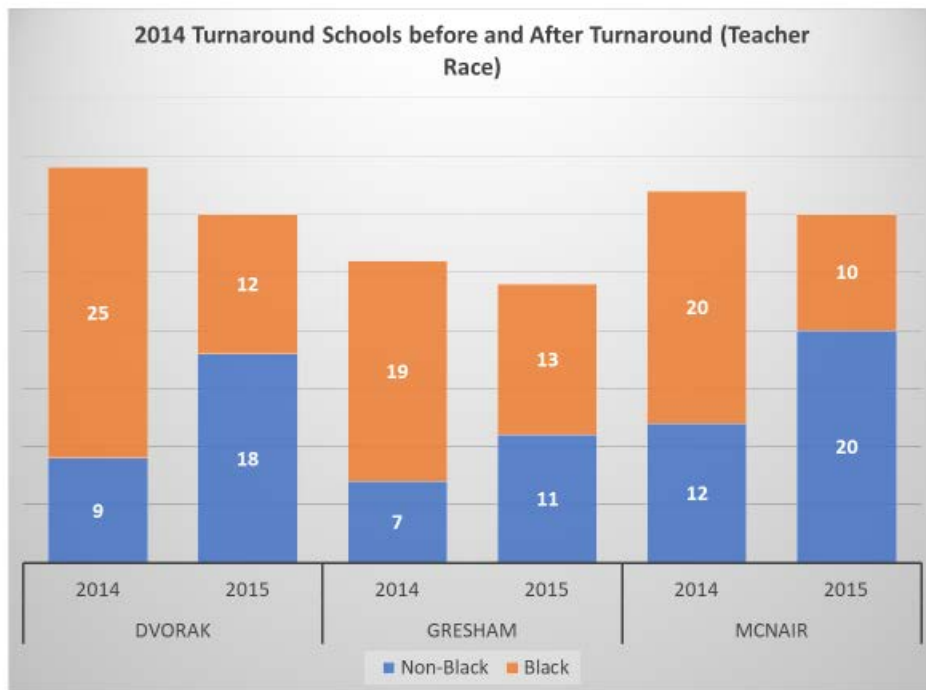
FIGURE 26



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FIGURE 27

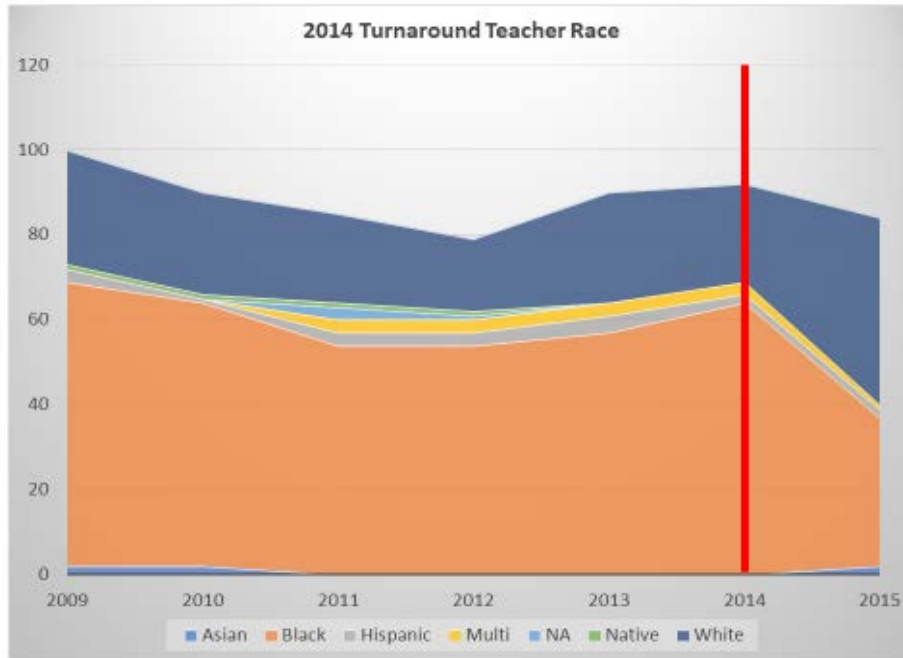


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FIGURE 28



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4 To summarize the above series of figures:

5 • About 76% of teachers in 2014 turnaround schools were rated excellent or superior, and nearly
6 30% superior.

7 • 70% of the teachers in the 2014 turnaround schools were black, compared to only 25% in all other
8 schools.

9 • Clearly, based on this information alone, the collateral damage policy leads to disproportionate
10 dismissal of black teachers who were rated excellent or superior.

11 • Upon turnaround, the staff of these schools was substantially whitened

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A. EDUCATION

- 1997, Doctor of Education
Teachers College, Columbia University
Department of Organization and Leadership
Dissertation: *A Comparison of Statistical and Neural Network Models for Forecasting Educational Spending*
Advisor: Craig E. Richards
- 1989, Master of Arts
University of Connecticut
Department of Educational Psychology
Program in Teaching the Talented
Advisor: Joseph S. Renzulli
- 1987, Bachelor of Arts
Lafayette College
Biology

B. ACADEMIC APPOINTMENTS

- 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

1996 - 1997: Teachers College, Columbia University
Instructor, Organization and Leadership
Program in Educational Administration

C. RELATED TEACHING & ADMINISTRATIVE EXPERIENCE

1993 – 1997, The Ethical Culture Fieldston Schools, NY
Instructor of Science
1992 – 1993, Pocantico Hills Central School, NY
Coordinator of Gifted and Talented Programs
1989 – 1992, Mastricola Middle School, NH
Coordinator of Gifted and Talented Programs
1987 – 1988, Randolph-Macon Academy, VA
Instructor of Biology
1994 – 1997, College Gifted Programs, Summer Institute for the Gifted, NJ/PA/NY
Site Director

D. HONORS

2018 Ranked 118th in RHSU Education Week Edu-Scholar Public Influence
2017 Ranked 92nd in RHSU Education Week Edu-Scholar Public Influence.
2016 Ranked 81st in RHSU Education Week Edu-Scholar Public Influence.
2015 Rutgers Graduate School of Education Distinguished Faculty Lecture. Invited by GSE Alumni Association
2015 Ranked 64th in RHSU Education Week Edu-Scholar Public Influence.
2014 Askwith Forum Presenter, *Is School Funding Fair?* Harvard Graduate School of Education
2014 Ranked 64th in RHSU Education Week Edu-Scholar Public Influence.
2013 – AERA Division L Policy Report Award for Baker, B. D., Sciarra, D. G., & Farrie, D. (2010). *Is School Funding Fair?: A National Report Card*. Education Law Center.
2013 – Ranked 40th in RHSU Education Week Edu-Scholar Public Presence.
2012 – School Finance 101 Blog nominated for Bammy Award, Education Commentators Category, Academy of Education Arts & Sciences, <http://www.bammyawards.com/>
2011 – Outstanding Faculty Research Award, Rutgers Graduate School of Education Alumni Association
2011 – Journal of Education Finance Scholarly Paper Award, National Education Finance Conference (Co-author, Matthew J. Ramsey)
2010 – Invited Lecturer: Jerry Miner Lecture Series. Maxwell School, Syracuse University. Center for Policy Research. http://www-cpr.maxwell.syr.edu/efap/Jerry_Minor/Lecture_Series.htm

2007 – Present: Appointed Research Fellow, Education Policy Research Unit/Education and the Public Interest Center (EPRU/EPIC)

2001, National Center for Education Statistics/American Education Finance Association
New Scholars Program

1998, National Center for Education Statistics/American Educational Research Association
Institute on Statistics for Policy Analysis

1996, University Council on Educational Administration
Graduate Student Research Seminar

E. SELECTED EXTERNALLY FUNDED RESEARCH (RECENT GRANTS & CONTRACTS)^{§§}

- 2017
1. Kahlenberg, R., Baker, B., Levin, J., Carnevale, A., Zuckerman, M., Shireman, R. (2017) Making Community Colleges Engines for Social Mobility: A Century Foundation Working Group on Financial Resources. William T. Grant Foundation (\$30k subcontract)
 2. Kim, B., Baker, B. (2017) Leveraging School Finance Research to Increase Education Equity and Opportunity for All Students. William T. Grant Foundation (\$200,000)
- 2016
3. Levin, J., Baker, B.D. et al. (2016) Evaluation of “Commensurate Funding” for Maryland Charter Schools. Maryland Department of Education (\$36k subcontract)
- 2015
4. Baker, B.D. (2015-2016) Indicators of Educational Inequality in the U.S. William T. Grant Foundation (\$257,039)
- 2014
5. Baker, B.D., Levin, J. Research to Inform the Development of a Pennsylvania Basic Education Funding Formula. William Penn Foundation (\$60k)
 6. Levin, J., Chambers, J., Manship, K., Baker, B.D., Goertz, M. Feasibility Study on Improving the Quality of School Level Expenditure Data. Institute for Education Sciences, U.S. Dept. of Education [RFTO No. PEPP130018]
- 2013
7. Baker, B.D. Poverty, Children’s Health and Public School Funding. With *ChangeLab Solutions* (Oakland, CA) Funded by Robert Wood Johnson Foundation [Grant I.D. 70352] (\$20,000)
 8. Baker, B.D., Miron, G. Organization for Economic Cooperation and Development. Education Indicators at a Glance. (€5,000)
 9. Baker, B.D., Coley, R. Understanding Child Poverty: Implications for Education Policy. Educational Testing Service (\$20,000)
- 2011
10. Baker, B.D., DiCarlo, M. Revisiting the Age Old Question: Does Money Matter in Education? (Shanker Institute, \$6000)
 11. Baker, B.D., Libby, K., Wiley, K. Evaluating Financial Resources and Equity Implications of *High Flying Charter School Networks*. (National Education Policy Center & Shanker Institute, \$6000)
 12. *Stealth Inequities: Hidden Disparities in State School Finance Systems*. Center for American Progress (\$17,500). With Sean Corcoran of NYU.
 13. *Alternative Measures of Poverty*. With Jay Chambers & Jesse Levin (American Institutes for Research) and Lori Taylor (Texas A&M University). West & Midwest Regional Labs. (approx. \$200k total)
- 2009
14. Evaluation of Undergraduate Student Degree Completion Pathways and “Cost of Attainment”. University of Texas at Austin. Co-Pi with Christopher Morphew, University of Iowa, Scott L. Thomas, Claremont Graduate School & Harrison Keller, University of Texas at Austin.

§§ Does not include reports written as expert testimony for litigation or other support (testimony, etc.) for state constitutional or federal litigation.

15. Evaluation of Spending Patterns and Philanthropic Contributions to New York City Charter Schools. Education and the Public Interest Center. \$6,000
16. Evaluation of teacher workforce and labor markets in Newark New Jersey. Funded by the Ford Foundation in collaboration with Rutgers University at Newark. Alan Sadovnik, Project Director. (\$18k subcontract on \$125k grant)
17. Development of an alternative indicator system for evaluating state school funding systems. *Education Law Center of New Jersey & Educational Testing Service*. Funded by the Ford Foundation. (\$25k subcontract)
18. Evaluating the principal preparation pipeline for Wisconsin public schools. With Matthew Clifford (Learning Point Associates) and Carolyn Brown (Fordham University). Midwest Regional Education Lab
- 2008 19. Evaluating the *Costs of Private Schooling in America*. Education and the Public Interest Center. University of Colorado/Arizona State University. \$4,000.
- 2007 20. Barnett, W.S., Baker, B.D., Bausmith, J., Burzichelli, C., J., Firestone, W., Goertz, P., Mackey, P. Evaluating the Productivity and Efficiency of New Jersey's Public Schools.
21. Changing demography of rural communities: Implications for state education policy. Funding Source: U.S. Department of Agriculture. Subcontract with Tennessee State University (Gary Peevely, PI). \$54,000 subcontract (through 2009)
- 2006 22. Evaluating wage variation and marginal costs associated with student needs and school and district characteristics in Washington. Funding Source: Washington Education Association. Subcontract with Education Policy Improvement Center (U. of Oregon, David Conley, PI). \$50,000 subcontract (included course buy-out for Spring 2006)
23. Evaluation of Hawaii's Weighted Student Funding Program. Funding Source: Hawaii Board of Education. Co-PI with Scott Thomas, U. of Georgia. \$24,440 total.
- 2005 24. Evaluating wage variation and marginal costs associated with student needs and school and district characteristics in Wyoming. Funding Source: Wyoming Legislature. Subcontract to Lawrence O. Picus and Associates. \$40,000 subcontract (\$1 million + total).
- 2004 25. Texas School Finance Project. Funding Source: Joint Select Committee on School Finance of the Texas Legislature. Co-PI with Lori Taylor, Tim Gronberg & Dennis Jansen of Texas A&M. \$30,000+ subcontract.
- 2002-2003 26. Design and simulation of state school finance policy options for the State of Texas. Funding Source: Texas Governor's Office. (included 50% buyout of full-year salary + 45% KU indirect)
27. Estimating Instructional Costs for Academic Programs: A resource cost model approach. Funding Source: Association for Institutional Research. Co-PI with Christopher Morphew. \$28,108 total.

F. BOOKS

- 2018 1. Baker, B.D. *School Finance 101: Toward Equity, Adequacy and Efficiency*. Harvard Education Press.
- 2008 2. Baker, B.D., Green, P.C., Richards, C.E. (2008) *Financing Education Systems*. Upper Saddle River, NJ: Merrill/Prentice-Hall, 448 pages
- 2004 3. Baker, B.D., Richards, C.E. (2004) *The Ecology of Educational Systems: Data and Models for Improvisational Leading and Learning*. Upper Saddle River, NJ: Merrill/Prentice-Hall. 280 pages.

G. JOURNAL *** & LAW REVIEW††† ARTICLES

[i] invited, [lr] law review

- 2018 1. Kolbe, T., & Baker, B. D. (2018). Fiscal Equity and America's Community Colleges. *The Journal of Higher Education*, 1-39.
- 2017 2. Green, P. C., Baker, B. D., & Oluwole, J. (2017). Are Charter Schools the Second Coming of Enron?: An Examination of the Gatekeepers That Protect against Dangerous Related-Party Transactions in the Charter School Sector.
3. Weber, M., Baker, B.D. (in press) Do For-Profit Managers Spend Less on Schools and Instruction? A national analysis of charter school staffing expenditures. *Educational Policy*
- 2016 4. Baker, B.D. (2016) School Finance and the Distribution of Equal Educational Opportunity in the Post-Recession U.S. *Journal of Social Issues* 72 (4), 629-655
5. Baker, B.D., Weber, M. (2016) Beyond the Echo-Chamber: State Investments and Student Outcomes in U.S. Elementary and Secondary Education. *Journal of Education Finance* 42 (1) 1-27
6. Green, P.C., Baker, B.D., Oluwole, J., Mead, J.F. (2016) Are We Heading Toward a Charter School 'Bubble'? Lessons from the Subprime Mortgage Crisis. *University of Richmond Law Review* 50 (3) 783-808.
7. Baker, B. D., & Weber, M. (2016). State school finance inequities and the limits of pursuing teacher equity through departmental regulation. *Education Policy Analysis Archives*, 24(47). <http://dx.doi.org/10.14507/epaa.v24.2230>
- 2015 8. Green, P.C., Baker, B.D., Oluwole, J. (2015) The Legal Status of Charter Schools in State Statutory Law. *University of Massachusetts Law Review*
9. Baker, B.D., Libby, K., Wiley, K. (2015) Charter School Expansion & Within District Equity: Confluence or Conflict? *Education Finance and Policy*
- 2014 10. Baker, B.D. (2014) America's Most Financially Disadvantaged Local Public School Districts. *Journal of School Business Management* 26 (2) 10-19[[
11. Baker, B. D. (2014). Evaluating the recession's impact on equity & adequacy of state school finance systems. *Education Policy Analysis Archives*, 22 (91) Retrieved [date], from <http://epaa.asu.edu/ojs/article/view/1590>
12. Green, P.C., Baker, B.D., Oluwole, J. (2014) How the Kansas Courts Have Permitted and May Remedy Racial Funding Disparities in the Aftermath of Brown. *Washburn Law Journal*
13. Green, P.C., Baker, B.C., Oluwole, J. (2014) Having it Both Ways: How Charter Schools try to Obtain Funding of Public Schools and the Autonomy of Private Schools. *Emory Law Journal* 63 (2) 303-338
- 2013 14. Baker, B.D., Taylor, L., Chambers, J., Levin, J., Blankenship, C. (2013) Adjusted Poverty Measures and the Distribution of Title I Aid: Does Title I Really Make the Rich States Richer? *Education Finance and Policy* 8(3) 394-417
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1. Kolbe, T., Baker, B.D. Fiscal Equity and America's Community Colleges

L. MANUSCRIPTS IN PREPARATION

JOURNAL ARTICLES

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^{###} Served as editor for professional organization collection of policy briefs

- Baker, B.D. (2006) Estimating the Costs of Meeting Educational Outcome Standards in Illinois: A Cost Function Approach. *The Chicago Reporter: Chicago Matters*
- Baker, B.D. (2006) Missouri's State School Finance Formula Fails to Guarantee Equal or Minimally Adequate Educational Opportunity to Missouri Schoolchildren. Prepared for plaintiff districts in *Committee for Educational Equality v. State*
- Baker, B.D., Thomas, S.L. (2006) Review of Hawaii's Weighted Student Formula. Hawaii State Board of Education.
- Baker, B.D. (2005 - Fall) Nebraska's State School Finance Policy Fails to Provide Equal Opportunity for Nebraska School Children.
- Baker, B.D. (2005 – Fall) Using Econometric Methods to Reconcile School-Level Economies of Scale Adjustments in the Wyoming School Funding Model. Lawrence O. Picus & Associates, North Hollywood, CA.
- Baker, B.D. (2005 – Fall) Development of an Hedonic Wage Index for the Wyoming School Funding Model. Lawrence O. Picus & Associates, North Hollywood, CA.
- Baker, B.D. (2005 – Fall) Commentary on the Kansas "Cost of Living Adjustment." Prepared on behalf of plaintiff districts in the case of *Montoy v. Kansas*.
- Wood, C.R., Baker, B.D. (2004) Evaluation of Texas School Finance Policy. Prepared for the Attorney General of the State of Texas in the Case of *West Orange Cove v. State*
- Wood, C.R, Baker, B.D. (2004) Evaluation of Missouri School Finance Policy. Report to the Missouri State Legislature.
- Baker, B.D., Taylor, L., Vedlitz, A. (2003) *Measuring Educational Adequacy in Public Schools*. Report to the Texas Select Joint Committee on Education Finance.
- Baker, B.D. (2003) *Evaluation of the Suitability of the Kansas School District Finance Act. Expert Testimony in the Case of Montoy v. Kansas*. Report commissioned by Husch and Eppenberger (Wichita), Somers, Robb and Robb (Newton) and Schools for Fair Funding, Inc.
- Baker, B.D. (2003) *Favoring District Needs over Student Needs: The Adverse Effects of the Kansas School District Finance Act on Minority Children and Children with Disabilities*. Expert Witness Testimony in the Case of Robinson v. Kansas. Report commissioned by Husch and Eppenberger (Wichita), Somers, Robb and Robb (Newton) and Schools for Fair Funding, Inc.
- Baker, B.D. (2002) *Evaluating the Performance of Private Schools Receiving Scholarship Students from the Educational Choice Charitable Trust*. Indianapolis, IN.
- Baker, B.D. (2002) *The Allocation of Fiscal and Human Resources in Kansas School Districts*. Prepared under contract for United School Administrators of Kansas. Topeka, KS.
- Baker, B.D. (2001) *Living on the Edges of School Funding Policy: The Plight of At-Risk, Limited English Proficient and Gifted Children*. National Center for Education Statistics, U.S. Department of Education, Washington, DC.
- Baker, B.D. (2001) Expert Witness Report. Analysis and Opinions on the Suitability of the School District Finance Act. *Montoy v. State of Kansas*, No. 99-C-1788 (Shawnee County Dist. Ct.)

Invited Reports

- Brant, D. (Chair), Baker, B., Ballard, B., Ferguson, L., Jones, D., Vratil, J. (Drafting Team) (2000) Final Report of the Governor's 21st Century Vision Task Force. K-12 Education: Financing for Results. Presented to Governor Bill Graves, December 1, 2000.

Other Reports/Monographs

- Baker, B.D. (1997) *A Comparison of Statistical and Neural Network Models for Forecasting Educational Spending*. Doctoral Dissertation. Teachers College, Columbia University. Sponsor: Craig E. Richards.
- Baker, B.D. (1995) *The Economic Health of Gifted Education in Three Northeastern States: an analysis of public school opportunities and private programs in New York, Connecticut and New Jersey*. Unpublished Manuscript. Teachers College, Columbia University (Department of Organization and Leadership). ERIC Clearinghouse on Disabilities and Gifted Education. ED 419 321.
- Baker, B.D. (1995) *The Economics of Privatized Management of Public Schools: The Case of Education Alternatives and the Baltimore City Public Schools*. Unpublished Manuscript. Teachers College, Columbia University (Department of Organization and Leadership). Data analyses eventually published in "Risky Business: The Private Management of Public Schools." Economic Policy Institute. 1996.

POLICY BRIEFS

- Baker, B.D. (2002) Financing "Adequate" Educational Services in Kansas. Prepared for the Kansas Economic Policy Conference. Policy Research Institute. University of Kansas. www.pri.ku.edu
- Baker, B.D. (2002) Policy Brief on State Funding for Programs for the Gifted and Talented. Prepared for the State Legislative Policy Task Force of the National Association for Gifted Children. James Gallagher, Chair.
- Baker, B.D. (2000) Policy Brief to the Governor's Task Force on Education Finance: School Performance-Based Incentive Funding. Presented to the 21st Century Vision Task Force on Public Education: Financing for Results. State of Kansas. David Brant, Chair.
- Baker, B.D. (2000) Policy Brief to the Governor's Task Force on Education Finance: Estimating and Funding an "Adequate" Education in Kansas. Presented to the 21st Century Vision Task Force on Public Education: Financing for Results. State of Kansas. David Brant, Chair.
- Baker, B.D. (2000) Policy Brief to the Governor's Task Force on Education Finance: At Risk Funding. Presented to the 21st Century Vision Task Force on Public Education: Financing for Results. State of Kansas. David Brant, Chair.
- Baker, B.D. (2000) Policy Brief to the Governor's Task Force on Education Finance: Policy Options for Special Education Funding. Presented to the 21st Century Vision Task Force on Public Education: Financing for Results. State of Kansas. David Brant, Chair.
- Baker, B.D. (1999) Policy proposals for the future of gifted education. *Brief solicited by Council for Exceptional Children (CEC)*. Prepared for Jay McIntire, Policy Specialist for Governmental Relations.
- Baker, B.D. & Richards, C.E. (1998) Equal Opportunity for Gifted Urban Kids: How Vouchers Can Help.
- Baker, B.D. (1997) *Chain Reaction: Bad Research, Bad Policy, Implications for the Gifted*. New York State Association for Gifted and Talented Education (AGATE). ERIC Clearinghouse on Disabilities and Gifted Education.

N. NATIONAL & INTERNATIONAL CONFERENCE PRESENTATIONS

Master Classes

- Baker, B.D., Friedman-Nimz, R.C. (2002 – Spring) *Designing and Evaluating State Policies for Meeting the Needs of Gifted Children*. Annual Meeting of The Council for Exceptional Children. New York, NY.
- Baker, B.D., Friedman-Nimz, R.C. (2001 – Fall) *Designing and Evaluating State Policies for Meeting the Needs of Gifted Children*. Annual Meeting of The National Association for Gifted Children. Cincinnati, OH.

Symposia^{§§§§}

- (2009-Spring) Symposium on Litigation. With Kevin Welner (U. Colo.), Michael Rebell (Teachers College), Bill Koski (Stanford U.), Anne Newman (Wash. U.). American Education Research Association. San Diego, CA.
- (2009-Spring) Symposium on the Distribution of Title I Funding. With Kevin Welner, Kevin Carey, Marguerite Roza and Goodwin Liu. American Education Research Association. San Diego, CA.
- (2009-Spring) Symposium on Within District Resource Allocation. With Ross Rubenstein and Larry Miller (Syracuse U.), Jesse Levin (AIR)
- (2008-Spring) Presidential Session: Think Tanks and Educational Research. With David Berliner, W. Steven Barnett, Walter Farrell, Alex Molar and Kevin Welner.
- Baker, B.D., Fuller, E., Young, M.D., Punswick, E., Belt, C., Liu, E. (2007-Fall) Understanding Principal Labor Markets. University Council on Educational Administration. Alexandria, VA.

§§§§ Entire session proposed by group of authors. Competitive acceptance, but often not blind review.

- Baker, B.D., Elmer, D., Slagle, M., Arbuckle, L. (2007-Fall) Racial Isolation and the Costs of Providing Equal Educational Opportunity. University Council on Educational Administration. Alexandria, VA.
- Baker, B.D., Oluwole, J., Ramsey, M. (2007-Fall) Legal, Conceptual and Empirical Foundations of Vertical Equity. University Council on Educational Administration. Alexandria, VA.
- Ed Fuller (U.T. Austin), Bruce Baker (U. of Kansas), Michelle Young (U.T. Austin), Margaret Terry Orr (Bank Street College) (2006-Fall) Examining the Impact of Principals and Principal Preparation Programs. University Council on Educational Administration. San Antonio, TX.
- Margaret Terry Orr (Bank Street College), Bruce D. Baker (U. of Kansas) and others (2006 – Spring). *Leadership Preparation and Development*. Annual Meeting of the American Educational Research Association. San Francisco, CA.
- Margaret Terry Orr (Bank Street College), Bruce D. Baker (U. of Kansas) and others (2005 – Fall). *Researching the Big Picture of Leadership Preparation Programs*. Annual Meeting of the University Council on Educational Administration. Nashville, TN.
- Verstegen, D.A., Jordan, T., Jordan, K.F., Cooper, B.S., Addonizio, M. (2005 – Spring) *Adequacy: It's Measurement and Conceptualization*. Annual Meeting of The American Education Finance Association. Louisville, KY.
- Picus, L.O., Conley, D., Baker, B., Mathis, W. (2005 – Spring) *Conceptions of Educational Adequacy*. Annual Meeting of the American Educational Research Association. Montreal, QE.
- Baker, B.D., Duncombe, W.D., Reschovsky, A., Imazeki, J., Chambers, J.G. (2004 – Spring) *Striking the Right Balance between District and Student Needs in Cost Adjustments to State Aid: Findings from Research and Implications for Policy*. Annual Meeting of The American Education Finance Association. Salt Lake City, UT.
- Baker, B.D.^(c), Driscoll, L., Salman, R., Huff, B., Picus, L.O. (2001 – Spring) *Unlocking the Potential of Dynamic Systems Modeling*. Annual Meeting of The American Education Finance Association. Cincinnati, OH.
- Baker, B.D. (2000 – Fall) *Exploring the Equitable Distribution of Resources for Gifted Children*. In Jenkins, R.C., McIntire, J. "Exploring Directions for G/T Policies: Twenty-first Century Implications." Symposium with Mary Ruth Coleman (UNC Chapel Hill), Davis Hendricks (Pulaski County Special School District, AR), Joseph S. Renzulli (University of Connecticut, National Research Center on the Gifted and Talented). Annual Meeting of the National Association for Gifted Children. Atlanta, GA.
- Baker, B.D., Richards, C.E. (2000 – Spring) *Designed to Fail: Static School Funding Formulas in Dynamic Systems*. Interactive Symposium with Allan R. Odden (University of Wisconsin), Lawrence O. Picus (University of Southern California), Scott R. Sweetland (Ohio State University), "Data, Models and Simulations for Research, Practice and Teaching in School Finance." Annual Meeting of the American Education Finance Association. Austin, TX.
- Cooper, B.S., Cilo, M.R., Baker, B.D. (2000-Spring) *Applying the Concept of K-16 Education in NYC: Bridging the Methodological Gaps between Schools and Colleges*. Symposium with Michael Kirst (Stanford University), Margaret Terry Orr (Teachers College), Sheri Ranis (Social Science Research Council), Deborah Sullivan (American Institutes for Research), Debra Bragg (University of Illinois), Donna Dare (University of Illinois), David Brennaman (University of Virginia), Richard Hasselbach (CUNY), "Beyond High School: Negotiating the School-to-College Transition into the 21st Century." Annual Meeting of the American Educational Research Association, Division J. New Orleans, LA.

Paper Sessions

- Baker, B.D. (2012 – Spring) Exploring the depth, breadth and drift of curricular offerings across school districts facing varied resource constraints. Association for Education Finance and Policy. Boston, MA.
http://aefpweb.org/sites/default/files/webform/Baker.AEFP_NY_IL.Unpacking.Jan_2012.pdf
- Levin, J., Chambers, J., Blankenship, C., Taylor, L., Baker, B. (2012 – Spring) Towards a More Accurate Measure of Student Poverty: An Alternative Method for Calculating Cost-Adjusted Poverty. Association for Education Finance and Policy. Boston, MA.

- Baker, B.D. (2011-Spring) Cheerleading, Ceramics and Inefficiency in High Poverty Schools: Are low performing school districts simply squandering resources on "non-essential" services? American Education Research Association. New Orleans
- Baker, B.D., Peevely, G., Harrison, R. (2010-Spring) Competitive Wages and the Distribution of Teachers Across Demographically Diverse Micropolitan Schools. American Education Research Association.
- Fuller, E., Young, M., Baker, B. (2009 - Spring) School Leadership, Entrance, Attrition and Migration. American Education Research Association. San Diego, CA.
- Clifford, M., Brown, C., Baker, B. (2009 - Spring) The Relationship between Principals Attributes, School Level Teacher Quality and Turnover. American Education Research Association. San Diego, CA.
- Peevely, G., Baker, B., Smith, S. (2009- Spring) Education and the Black Belt: The Need for Additional Capacity. American Education Research Association. San Diego, CA.
- Baker, B.D., Ramsey, M. (2009-Spring) Census based funding in special education: Can it really provide equity for children with disabilities? American Education Research Association. San Diego, CA.
- Baker, B. (2008-Spring) Wage Adjustments in State School Finance Policy: Doing more harm or good? American Educational Research Association. NY, NY.
- Killeen, K, Baker, B. (2008-Spring) Addressing the moving target: Should measures of student mobility be included in education cost studies. American Educational Research Association. NY, NY.
- Slagle, M., Yan, B., Baker, B.D. (2008-Spring) A Geographically Weighted Regression Approach for Explaining Spatial Variation Among School Districts in Education Demand. American Educational Research Association. NY, NY.
- Fuller, E., Baker, B.D., Young, M.D. (2008-Spring) Examining the effect of school leaders and their preparation on teacher quality and student achievement. American Educational Research Association. NY, NY.
- Baker, B. (2008-Spring) Within district budgeting policy and the allocation of resources across schools: What do we really know? American Education Finance Association, Denver, CO.
- Slagle, M., Yan, B., Baker, B.D. (2008-Spring) A Geographically Weighted Regression Approach for Explaining Spatial Variation Among School Districts in Education Demand. American Education Finance Association, Denver, CO.
- Punswick, E., Baker, B. (2008-Spring) Principal Backgrounds and School Leadership Stability: Evidence from Flyover Country. American Education Finance Association, Denver, CO.
- Baker, B. (2007-Spring) The Politics of Teacher Wage Adjustments in State School Finance Policies. American Education Finance Association. Baltimore, MD.
- Killeen, K, Baker, B. (2007-Spring) On the move: Evaluating the impact of measures of student population transiency on district level costs of improving educational outcomes. American Education Finance Association. Baltimore, MD.
- Fuller, E., Young, M.D., Baker, B.D. (2007-Spring) Career Paths and the Influence of School Principals on Teachers. American Educational Research Association Chicago, IL
- Baker, B.D. (2007-Spring) Black-White Funding Disparities in America's Major Metropolitan Areas: Implications for Teacher Labor Markets. American Educational Research Association Chicago, IL
- Baker, B.D., Green, P.C. (2007-Spring) Evaluating the Effect of Racial Isolation on the Cost of Educational Outcomes in Two Midwestern States. American Educational Research Association Chicago, IL
- Baker, B.D., Thomas, S.L. (2007-Spring) Toward what end? Comparing the costs of producing adequate test scores with the costs of improving college matriculation. American Educational Research Association Chicago, IL
- Baker, B.D., Green, P.C. (2006-Fall) Black-White Funding Disparities in America's Major Metropolitan Areas. University Council on Educational Administration, San Antonio, TX.
- Ng, J.C., Baker, B.D. (2006-Spring) Big Changes in Small Town America: A macro level analysis of micropolitan schooling. Annual Meeting of the American Educational Research Association. San Francisco, CA.
- Slagle, M., Baker, B.D. (2006 - Spring) Application of Local Indicators of Spatial Association Modeling to Missouri Teacher Wages. Annual Meeting of the American Education Finance Association.

- Baker, B.D., Green, P.C. Goin' to Kansas City: A critical empirical analysis of the *Urban Legends* of the aftermath of *Missouri v. Jenkins*. (2005 – Fall) Annual Meeting of the University Council on Educational Administration. Nashville, TN.
- Morphew, C.C., Baker, B.D. (2005 – Spring) Sibling Rivals: Conceptualizing the Relationship between K-12 and Postsecondary Finance at the State Level. Annual Meeting of the American Educational Research Association. Montreal, QE.
- Baker, B.D., Green, P.C. (2005 – Spring) The Re-Measurement of Equity (and Adequacy) in School Finance. Annual Meeting of the American Educational Research Association. Montreal, QE.
- Morphew, C.C., Baker, B.D. (2005 – Spring) Sibling Rivals: Conceptualizing the Relationship between K-12 and Postsecondary Finance at the State Level. Annual Meeting of the American Education Finance Association. Louisville, KY.
- Baker, B.D., Green, P.C. (2005 – Spring) The Re-Measurement of Equity (and Adequacy) in School Finance. Annual Meeting of the American Education Finance Association. Louisville, KY.
- Baker, B.D., Green, P.C. (2004 – Fall) Race as a "Plus Factor" in School Finance Policy. Annual Meeting of the American Education Finance Association. Louisville, KY.
- Baker, B.D., Green, P.C. (2004 – Fall) Race as a "Plus Factor" in School Finance Policy. Annual Meeting of the University Council on Educational Administration. Kansas City, MO.
- Baker, B.D., Wolf-Wendel, Lisa E. (2004 – Fall) Exploring the Faculty Pipeline in Educational Administration: Evidence from the Survey of Earned Doctorates 1990 to 2000. Annual Meeting of the University Council on Educational Administration. Kansas City, MO.
- Baker, B.D., Keller, H. (2004 – Spring) A Systematic Approach to Computer Simulation Development in School Finance: Application to the State of Texas. Annual Meeting of The American Education Finance Association. Salt Lake City, UT.
- Wolf-Wendel, L.E., Baker, B.D., Twombly, S., Mahlios, M. (2004 – Spring) Who's Teaching the Teachers? An empirical analysis of predictors of doctoral degree attainment and faculty placement in teacher education. Annual Meeting of the American Educational Research Association. San Diego, CA.
- Baker, B.D., Markham, P. (2004 – Winter) A Comprehensive Legal and Empirical Framework for Evaluating State Financial Aid for the Provision of Services to English Language Learners. Annual Meeting of the National Association for Bilingual Education (NABE). Albuquerque, NM.
- Baker, B.D., Green, P.C., Fusarelli, L. (2003 – Fall) Tricks of the Trade: Legislative Actions in School Finance that Disadvantage Minorities in the Post-Brown Era. Annual Meeting of the University Council on Educational Administration. Portland, OR.
- Baker, B.D. (2003 – Fall) Principals' Academic Preparation and Experience and the Distribution of Quality Teachers? Evidence from the Schools and Staffing. Annual Meeting of the University Council on Educational Administration. Portland, OR.
- Baker, B.D. (2003 – Spring) *The Collapse of the Kansas School District Finance Act*. Symposium on the State of the States and Provinces. Annual Meeting of The American Educational Research Association. Chicago, ILL.
- Morphew, C & Baker, B.D. (2003 – Spring) *Measuring the Costs to Baccalaureate Degree Attainment: A Resource Cost Model Approach*. Annual Meeting of The Association for Institutional Research. Tampa, FL.
- Baker, B.D. & Morphew, C (2003 – Spring) *Measuring the Costs to Baccalaureate Degree Attainment: A Resource Cost Model Approach*. Annual Meeting of The American Education Finance Association. Orlando, FL.
- Green, P.C. & Baker, B.D. (2002 – Spring) *Circumventing Rodriguez: Alternatives for Seeking Federal Solutions to State School Finance Inequities*. Annual Meeting of The American Educational Research Association. New Orleans, LA.
- Baker, B.D. (2002 - Spring) *Living on the Edges of School Funding Policy: The Plight of At-Risk, Limited English Proficient and Gifted Children*. Annual Meeting of The American Educational Research Association. New Orleans, LA.
- Baker, B.D. (2002 – Spring) *Estimating the Adequacy and Effects of State Aid Allocations for Gifted, Limited English Proficient and At Risk Students*. Annual Meeting of The American Education Finance Association. Albuquerque, NM.
- Baker, B.D. (2002 – Spring) *Determinants of Within and Between State Differences in the Internal Allocation of District Resources: Evidence from the Common Core of Data*. Annual Meeting of The American Education Finance Association. Albuquerque, NM.

- Baker, B.D., Richards, C.E. (2001 - Spring) *Unlocking the Potential of Dynamic Systems Modeling in School Finance*. Proposal for a Demonstration/Consultation Session. SIG - Fiscal Issues. Annual Meeting of The American Educational Research Association. Seattle, WA.
- Morphew, C.C., Baker, B.D. (2001 - Spring) *The Administrative Lattice and the New Research I Universities*. Division J – Higher Education. Division J. Annual Meeting of The American Educational Research Association. Seattle, WA.
- Baker, B.D., Friedman-Nimz (2001 - Spring) *State Policy Influences Governing Equal Opportunity: The Example of Gifted Education*. American Education Finance Association Annual Meeting. Cincinnati, OH.
- Baker, B.D., Green, P.C. (2001 - Spring) *Challenging School Finance Policy as Civil Rights Violation: The Application of Title VI to School Finance in Kansas*. American Education Finance Association Annual Meeting. Cincinnati, OH.
- Baker, B.D. (2000-Spring) *Challenging Opportunities in Fiscally Challenged Schools?* Annual Meeting of the American Education Finance Association. Austin, TX.
- Baker, B.D. (1999-Spring) *Searching for a "Rational Educational Explanation" for Spending Differences in Kansas Schools*. Annual Meeting of the American Education Finance Association. Seattle, WA.
- Baker, B.D. (1999-Spring) *A Comparison of Linear and Non-linear Models for Testing the Sensitivity of Cost to Different Performance Expectations*. Annual Meeting of the American Education Finance Association. Seattle, WA.
- Baker, B.D. (1999-Spring) *Effort, Burden, What do They Really Mean? Testing the Fairness of Formula Alternatives for Vermont*. Annual Meeting of the American Education Finance Association. Seattle, WA.
- Baker, B.D. (1999-Spring) *Predicting the Cost of High Performance: A Sensitivity Simulation Using GMDH Neural Networks*. Annual Meeting of the American Educational Research Association. Division L. Montreal, Quebec.
- Baker, B. D., Keller-Wolf, C., Wolf-Wendel, L. (1999-Spring) *Dispelling Myths through Disaggregation: The relationship between race/ethnicity and student achievement*. Annual Meeting of the American Educational Research Association. Montreal, Quebec.
- Baker, B.D. (1998-Fall) *Systems Thinking Applied: Moving Beyond Conversation with ITHINK*. Annual Meeting of the University Council on Educational Administration. St. Louis, MO.
- Baker, B.D. (1998-Fall) *Enhancing our Understanding of the Complexities of Education: "Knowledge Extraction from Data" Using Neural Networks*. Annual Meeting of the University Council on Educational Administration. St. Louis, MO.
- Wolf-Wendel, L., Baker, B.D., Morphew, C. (1998-Fall) *Dollars & Sense: Resources and the Baccalaureate Origins of Women Doctorates*. Annual Meeting of the Association for the Study of Higher Education. Miami, Florida.
- Baker, B.D. (1998-Spring) *A Comparison of Linear and Flexible Non-Linear Regression Methods for Forecasting Educational Spending*. Annual Meeting of the American Education Finance Association. Mobile, AL.
- Baker, B.D. (1998-Spring) *An Inductive Approach to Production-Function Modeling: A Comparison of Group Method of Data Handling (GMDH) and Other Neural Network Methods*. Annual Meeting of the American Education Finance Association. Mobile, AL.
- Baker, B.D., Richards, C.E. (1997-Spring) *Equity Through Vouchers: The Special Case of Gifted Education*. Annual Meeting of the American Education Finance Association. Jacksonville, FL.
- Richards, C.E., Baker, B.D., Cilo, M. (1996-Spring) *Is Privatization More Efficient? The Case of Education Alternatives inc. in Baltimore*. Annual Meeting of the American Educational Research Association. New York, NY.

Roundtables

- Wolf-Wendel, L.E., Twombly, S., Baker, B.D. (2006 – Spring) Pathways to the Professoriate in Educational Administration: Are they different for men and women? Annual Meeting of the American Educational Research Association. San Francisco, CA.
- Baker, B.D., Lacireno-Paquet, N. (2005 – Fall) Do the Smarter Kids get the Smarter Teachers? Evidence from the Schools and Staffing Survey on Teacher Sorting and Selective Magnet and Charter Schools. Annual Meeting of the University Council on Educational Administration. Nashville, TN.
- Baker, B.D., Cooper, B.S. (2004 – Spring) Do Principals with Stronger Academic Backgrounds Hire Better Teachers? Policy Implications for High Poverty Schools. Annual Meeting of the American Educational Research Association. San Diego, CA.
- Baker, B.D., Dickerson, J. (2004 – Spring) Charter Schools and State Policies Regarding Teacher Certification: Using flexibility for “good” or “evil?” Annual Meeting of the American Educational Research Association. San Diego, CA.
- Baker, B.D. (2001 – Spring) *The State of School Finance in Kansas: State of the States Roundtable Series*. Annual Meeting of The American Educational Research Association. SIG - Fiscal Issues. Seattle, WA.
- Reis, S.B., Baker, B.D., Pewewardy, C., Tippeconnic, J. (1999-Spring) *The Federal Government's Responsibility for Indian Education in an Era of Self-Determination*. Annual Meeting of the American Educational Research Association. SIG - Indian Education. Montreal, Quebec.
- Baker, B.D. (1998-Spring) *Production-Function What's Your Function? A closer look at how the complexities of educational productivity evade traditional analytical techniques, and some new solutions*. Annual Meeting of the American Educational Research Association. San Diego, CA.
- Baker, B.D., Richards, C.E. (1998-Spring) *Exploratory Application of Neural Networks to School Finance: Forecasting Educational Spending*. Annual Meeting of the American Educational Research Association. San Diego, CA.

O. OTHER PROFESSIONAL PRESENTATIONS

Guest Lectures

- 2002 (Fall) 2002 Kansas Economic Policy Conference: At the Crossroads: Can Kansas Afford its Future? Policy Research Institute of the University of Kansas, Lawrence.
- 2002 (Fall) State Policies, Educational Efficiency and the Internal Allocation of School District Resources. Southwest Educational Development Laboratory (SEDL) Annual Policy Conference. Little Rock, AR.
- 2002 (Summer) Simulation Modeling in School Finance. Fordham University Summer Institute on School Finance. Coordinator, Bruce S. Cooper.
- 2002 (Spring) Alternatives for Funding Special Education in Kansas. Kansas Special Education Advisory Committee. Topeka, KS.
- 2001 (Fall): School Finance in Kansas. School of Education Research Roundtable. University of Kansas.
- 2000 (Summer) Evaluation & Critique of Kansas School Finance Policy. To the Governor's Task Force on “K – 12 Education: Financing for Results.”
- 1998 (Fall): School Finance Equity in Kansas. School of Education Symposium. University of Kansas.
- 1998 (Spring): State of the States Roundtable. Annual Meeting of the American Education Finance Association. Mobile, AL. *Invited*
- 1998 (Spring): Equity and Adequacy in Education. Invited presentation to graduate seminar on Economics and Education. University of Kansas (Coordinator: Barbara Phipps) *Invited*
- 1997 (Summer): *A Comparison of Statistical and Neural Network Models for Forecasting Educational Spending*. Research Seminar: The RAND Corporation.
- 1996 (Spring): Technology in the Science Classroom: Using Computers to Develop Analytical Reasoning Skills. NJ Association for Gifted Children Annual Conference (Princeton, NJ)

- 1995 (Summer): Report on the Economic Health of Gifted Education in the Northeast. An invited roundtable presentation to the elected chairs of the state associations of New Jersey, Connecticut, New York and Massachusetts.
- 1995 (Spring): Integrating technology into science through projects involving data collection and analysis. College Gifted Day (Montclair State University, NJ)
- 1994 (Spring) Overview of School Finance Policy in the United States. Korean Ministry of Education. An invited presentation at Teachers College, Columbia University.
- 1989 (Spring) Developing Scientific Research Projects with Gifted High School Students. Connecticut State Update Conference on Gifted Education. Southern Connecticut State University (New Haven, CT)
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P. SERVICE PRESENTATIONS

- Special Education Finance Policy. Invited Lecture, University of Kansas. Coordinator - Jeannie Trammel. Spring, 2003.
- Financing an Adequate Education in Kansas. Lawrence Business Education Partnership. January, 2003.
- Financing an Adequate Education in Kansas. Lawrence – Douglas County League of Women Voters. November, 2002.
- Evaluation of Augenblick & Myers Study on "The Cost of a Suitable Education in Kansas." Presented to the Governors Task Force. August 23, 2002.
- Education Finance in Kansas. Invited presentation, University of Kansas Media Tour. Lawrence, KS. Fall, 2001.
- Understanding Gifted Education Policy. Invited presentation, Gifted Education Advocacy Conference. Overland Park, KS. Summer, 2001.
- Special Education Finance Policy. Invited Lecture, University of Kansas. Coordinator - Jeannie Trammel. Spring, 2000.
- Special Education Finance Policy. Invited Lecture, University of Kansas. Coordinator - Jeannie Trammel. Spring, 1999.
- Overview of Education Finance Policy. Invited Lecture, University of Kansas. Coordinator - Barbara Phipps. Spring, 1998.
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Q. OTHER GRANTS

External: Not Awarded

- Baker, B.D., (PI) The Influence of Resource Progressiveness on Achievement Gaps within Major Metropolitan Areas and Large Urban School Districts. Funding Source – Institute for Education Sciences, U.S. Dept. of Education (\$89,907 for one year, commencing Summer 2007)
- Baker, B.D., (PI) The Influence of Resource Progressiveness on Teacher Labor Markets within Major Metropolitan Areas and Large Urban School Districts. Funding Source – Institute for Education Sciences, U.S. Dept. of Education (\$143,303 for two years, commencing Summer 2007)
- Baker, B.D. (Subcontractor) Career Paths and Influence of School Administrators. PI – Michelle D. Young, University of Texas at Austin. Funding Source – Institute for Education Sciences, U.S. Dept. of Education (Subcontract = \$40,045 for two years, commencing Summer 2007)

External: Awarded Small Grants

Baker, Bruce D. (PI) *Exploring the Rationality of State Aid for Fringe Populations: Evidence from the Common Core of Data*. 2001 NCES/AEFA New Scholars Program. (\$5,000)

Baker, Bruce D.; Hatley, Richard.; Arney, Lynn. (Spring - 1998) *Technology for Effective Educational Leadership*. Regional Consortia Grants. University Council on Educational Administration. (\$1,000)

Internal: Awarded

Baker, B.D. (2003 – Summer) Understanding the Nexus Between State Policies, Education Governance and Teacher Labor Markets. University of Kansas Policy Research Institute (Research Fellow).

Friedman-Nimz, R.C., Baker, B.D. (2001 - Summer) Estimating the Resource Costs of Opportunities for Gifted Children. Graduate Research Fund. (\$10,000)

Baker, B.D., Friedman, R.C. (2000 - Summer) Assessing Resource Equity: Social Status and the Availability of Opportunities for Gifted Children. Graduate Research Fund (Award: \$11,979)

Baker, Bruce D., Pewewardy, Cornel. (Spring - 1998) *Financing Indian Education in an Era of Self Determination*. New Faculty General Research Fund Grants, University of Kansas Center for Research. (\$5,000)

R. OTHER CONSULTANCIES & CONTRACTED RESEARCH

2012: NEPC – Evaluating expenditures of charter schools in New York City, Texas and Ohio

2010: NEPC – Evaluating expenditures of New York City charter schools

2008: EPIC/Great Lakes Center - Evaluating expenditures of private schools

2008: National Research Council. National Academy of Sciences. Evaluation of methods for costing out common education standards. With Lori L. Taylor and Arnold Vedlitz.

2006 – Present: CG & SB v. Commonwealth of Pennsylvania

2007: Arizona Center for Law in the Public Interest

2006: NY State Office of the Attorney General

2004: Education Week – Quality Counts 2005. Consultant on feature article on *Educational Adequacy* (\$2.5k)

2004: Expert witness for the State of Texas, Attorney General. *West Orange Cove Consolidated Independent School District et al. v. Nelson, et al.* (\$12k subcontract)

2004 – Present: Expert witness for plaintiff districts in *Committee for Educational Equality, et al. v. State*. Husch & Eppenberger, Jefferson City.

2004 – Present: Expert witness for plaintiff districts in *Douglas County School District v. Heineman*. Baird, Holm, McEachen, Pedersen, Hamann & Strasheim, LLP, Omaha.

2002 (Spring - Summer) Project consultant to Southwest Educational Development Laboratory (SEDL). Zena Rudo, Project Coordinator. (\$1.5k)

2002 (Spring – Summer) Evaluation of Student Gains in CHOICE Schools in Indianapolis. Educational Choice Charitable Trust. Tim Ehgott, Project Coordinator. (\$9k)

2001 - 2002 (Winter) Analysis of the Allocation of Fiscal and Human Resources in Kansas School Districts. United School Administrators of Kansas. Brilla Highfill-Scott, Project Coordinator. (\$2k)

2001 (Summer). Analysis of State Funding Programs for Limited English Proficient Students. Project Director: Paul Markham, University of Kansas.

2001 (Winter - Present). Expert Witness for plaintiffs in case of *Robinson v. State of Kansas* (U.S. Dist. Ct. Case No. 99-1193-MLB). The federal case charges that the current Kansas school funding formula (a) violates the enactment provisions of Title VI of the Civil Rights Act of 1964 by creating disparate impact by race, ethnicity or national origin (b) violates the Americans with Disabilities Act by creating disparate impact on

- students with disabilities and (c) violates equal protection. Attorneys for the plaintiffs: John Robb of Somers, Robb & Robb, Newton, KS and Alan Rupe of Husch & Eppenberger, LLC, Wichita, KS.
- 2001 (Winter – Present). Expert Witness for plaintiffs in case of *Montoy v. State of Kansas* (No. 99-C-1788 (Shawnee County Dist.Ct.)). The state case charges that the current Kansas school funding formula does not meet the state’s constitutional requirement of providing for a “suitable” system of public education. Attorneys for the plaintiffs: John Robb of Somers, Robb & Robb, Newton, KS and Alan Rupe of Husch & Eppenberger, LLC, Wichita, KS.
- 1999 (Winter). Statistical Consultant, Mayor’s Advisory Task Force on the City University of New York. Provided support on statistical analysis of predictors of remedial needs for students moving from NYC k-12 public schools to the City University system for *Bridging the Gap Between School and College: A Report on Remediation in New York City Education*. Commission Chair: Benno Schmidt. Research Project Coordinator: Miriam Cilo. Collaborating Researcher: Bruce S. Cooper, Fordham University.
- 1999 (Winter). Policy Consultant, Council for Exceptional Children. Prepared policy briefs for Council for Exceptional Children in support of federal legislation for gifted education. Briefs requested by Jay McIntire, Policy Specialist for Governmental Relations, Department of Public Policy, CEC.
- 1996 – 1997. Research Assistant, Department of Organization and Leadership. Teachers College of Columbia University. NY, NY. Assistant to Dr. Craig E. Richards on *Developing Multidimensional Computer Simulations for Strategic Planning in Education* supported by an internal grant from Teachers College for curriculum development.
- 1994 – 1995. Research Assistant, Department of Educational Administration (Teachers College) & Economic Policy Institute. Assistant to Dr. Craig E. Richards on a grant from the Economic Policy Institute. Analyzed contractual issues and finances of Education Alternatives Inc. in Baltimore for a book titled Risky Business: Private Management of Public Schools.

S. EXPERT WITNESS TESTIMONY BY CASE

- 2010 – Present: *CCJEF v. State of Connecticut*
 Reports Submitted - 2011 & 2013
 Trial Testimony - February 2016
- 2009 – Present: *Maisto v. New York*
 Trial Testimony - March 2015
 Reports Submitted - 2011 & 2013
- 2012- ????: *Texas Taxpayer & Student Fairness Coalition v. Scott*
 Position: The Texas school finance system fails to provide equal educational opportunity to Texas schoolchildren
 Report Submitted – August, 2012
 Deposition Taken – October, 2012
 Trial Testimony – November, 2012
- 2012 – 2012: *Chester Upland School District v. Commonwealth of Pennsylvania*
 Position: The Pennsylvania special education finance formula and charter school funding formula arbitrarily and capriciously disadvantage CUSD
 Report Submitted – May 2012
 Trial Testimony – May 2012
 Eastern District Court of Pennsylvania (Federal)
- 2011 – ????: *Gannon v. Kansas*

Position: Plaintiffs against state on question of whether finance formula complies with judicial order in *Montoy v. Kansas*

Report Submitted – November, 2011

Deposition Taken – December, 2011

Trial Testimony – June, 2012

Shawnee County District Court (Kansas)

2010 – 2011: *Lobato v. State of Colorado*

Position: Plaintiffs against state on question of whether Colorado school finance formula complies with equity and adequacy provisions of state constitution.

Report Submitted – March 17, 2011

Deposition Taken – June 22, 2011

Trial Testimony – August 5, 2011

Contact, Kathleen Gebhardt, kgebhardt@childrens-voices.org

2009 – Present: *Chicago Urban League v. Illinois State Board of Education*

2009: *Abbott v. Burke*

Position: Plaintiffs against state on question of whether process used to derive School Finance Reform Act establishes sufficient link between mandated outcomes and resources needed for children attending high poverty urban districts.

Report Submitted - Jan 21, 2009

Deposition Taken - Jan 30, 2009

Trial Testimony - Feb 20, 2009

Contact: David Sciarra, Education Law Center, Newark, NJ.

2008 – Present: *C.G. vs. Commonwealth of Pennsylvania*

Position: Plaintiffs against state on question of inequities arising from census based financing of special education

Report Submitted - Dec 1, 2008

Contact: Evalynn Welling, Community Justice Project. Pittsburgh, PA.

Middle District Court of Pennsylvania (Federal)

2007 – 2008: *Espinoza v. State of Arizona*

Position: Plaintiffs against state on question of whether Arizona school funding formula provides equal educational opportunity for poor and non-English speaking children

Report Submitted - Fall 2007

Deposition Taken - Fall 2007

Trial Testimony - Summer 2008

Contact: Tim Hogan, Arizona Center for Law in the Public Interest. Phoenix, AZ.

2004 – 2007: *Committee for Educational Equality, et al. v. State of Missouri* [04CV 323022]

Position: Plaintiffs against state on question of whether Missouri school funding formula provides equal educational opportunity for poor and minority children

Report Submitted - Fall 2006

Deposition Taken - Fall 2006

Trial Testimony - Winter 2007

Contact: Alex Bartlett, Husch-Blackwell-Sanders. Jefferson City, MO.

2004 – Present: *Douglas County School District v. Heineman (Nebraska)*

Position: Plaintiffs against state on question of whether Nebraska school funding formula provides equal educational opportunity for poor and minority children

First Report Submitted - Fall 2005

Supplemental Report Submitted - Fall 2007

Deposition Taken - Winter 2008

Contact: Jill Robb Ackerman, Baird Holm Law Firm. Omaha, NE.

2003 – 2006: *Montoy v. Kansas*. No. 92,032

Position: Plaintiffs against state on question of whether Kansas school funding formula provides equal educational opportunity or educational adequacy for poor and minority children

First Report Submitted - Spring 2003

Additional Reports Submitted - Through 2006

Deposition Taken - Spring/Summer 2003

Trial Testimony - Fall 2003

Contact: Alan Rupe, Kutak Rock. Wichita, KS.

2003 – 2005: *Robinson v. Kansas*. 295 F.3d 1183

First Report Submitted - Winter 2003

Deposition Taken - Spring/Summer 2003

Contact: Alan Rupe, Kutak Rock. Wichita, KS.

T. PROFESSIONAL ORGANIZATIONS & SERVICE

National

2009 – Present: NEA Task Force on Indicators

2007 – Present: UCEA Task Force on Leadership Preparation.

2005 – Fall: Nominating Committee for candidates for the Executive Committee of University Council on Educational Administration.

2005 – Spring: AERA Division A Dissertation Award Committee

2003 – 2004: Program Chair - AERA Special Interest Group: Fiscal Issues and Policy

2002 – 2003: Member – State Policy Task Force, National Association for Gifted Children

2002 – 2003: Chair - AERA Special Interest Group: Charter Schools Research and Evaluation

2000 – 2002: Secretary/Treasurer - AERA Special Interest Group: Charter Schools Research and Evaluation.

2000 - Present: Webmaster - AERA Special Interest Group: Charter Schools Research and Evaluation.

www.csre.org

1997 - Present: Plenum Representative, University Council on Educational Administration

1996 - Present: Member, American Educational Research Association (Divisions A & L)

1996 - Present: Member, American Educational Finance Association

Regional

1998: Coordinator: Technology for Effective Educational Leadership. Regional UCEA Seminar on the uses of Computer Technology for 1) Information Management 2) Content Delivery and 3) Decision Making Analysis. (Postponed)

State

2002: Governor's (Bill Graves) Vision 21st Century Task Force. Member of the subcommittee on *K-12 Education: Financing for Results*. Task Force Chair: Lieutenant Governor Gary Sherrer.

2000: Governor's (Bill Graves) Vision 21st Century Task Force. Member of the subcommittee on *K-12 Education: Financing for Results*. Task Force Chair: Lieutenant Governor Gary Sherrer.

University

2003 – 2008: Executive Committee, Graduate Council
2000 – 2008: Graduate Council
2001 (Spring) - Reviewer for Graduate Teaching Assistant awards

School

2004 – Present: Personnel Committee

Department

1998 – 2000: Personnel Committee
1998 – Present: Faculty Representative to KAW Valley Purchasing Coop.
1997 – 1999: Member, T&L Operations Committee
1997 – 1998: Ad-Hoc Planning Team, Instructional Leadership Program

U. EDITORIAL RESPONSIBILITIES

Editorial Boards

Journal of Education Finance. Editor: James Gordon Ward. Association of School Business Officials International
Journal of Education Finance and Policy. Editors: David Monk & David Figlio. MIT Press.
2001 – 2003 Leadership and Policy in Schools

Journal Reviewer

Teachers College Record
Leadership and Policy in Schools
Journal of Education Finance
Education Finance & Policy
Education Policy Analysis Archives
Educational Evaluation and Policy Analysis
Economics of Education Review
Educational Administration Quarterly
Journal of Statistics Education (2003)

Grant Reviewer

William T. Grant Foundation (2009)

*Policy Review Panels*****

National External Policy Review Panel (Kevin Welner, Coordinator)
Texas School Finance Project 2005
School Finance Redesign Project (<http://www.schoolfinanceredesign.org/>)

V. TEACHING AND ADVISING

Doctoral Dissertations as Chair *University of Kansas*

Brian Huff (2002) Systems modeling for integrated fiscal planning in education

**** Involve academic review of policy proposals and related policy research

- Michael Sullivan (2004) The allocation of resources in Catholic schools
- Pamela Best (2005) Benefit-cost analysis of the Kansas Computerized Assessment (KCA): Implications for equity and cost-effectiveness in the allocation and use of educational resources
- Paul Wooten (2006) The impact of business and industry tax appeals on education funding in Missouri
- Michele Norman (2006) How much leave do school employees utilize? An analysis of sick leave policies and their relationship to the amount of leave used by school employees in Missouri public schools
- Carolyn Carlson (2007) An examination of secondary reading specialists: Demographic, training, and employment characteristics
- Mike Slagle (2007) A geographically weighted regression approach for explaining spatial variation among school districts in a median voter model of education demand
- Eric Punswick (2008) Elementary principals' backgrounds, stability, moves, and departures: Evidence from Iowa, Minnesota, Missouri, and Wisconsin
University of Kansas (while at Rutgers)
- Charles Belt (2010) Factors affecting principal turnover: A study of three Midwestern cities (co-chaired with Mickey Imber)
- Craig Correll (2010) Principal participation in induction programs: Evidence from the Schools and Staffing Survey
- Gretchen Anderson (2010) The effect of participation in teacher induction and mentor programs and the assignment of mentor teacher on the satisfaction and retention of new teachers (co-chaired with Marc Mahlios)

Rutgers University

- Rich, A. (2014) The Intervention and Referral Process: Purpose, Uses, and Implications
- Palmieri, J. R. (2014). 21st century girls' schools: for what reasons are new independent girls' schools opening in the United States? (Doctoral dissertation, Rutgers University-Graduate School of Education).
- Gristina, M. (2014). A descriptive analysis of the principalship in New Jersey, 1996-2011 (Doctoral dissertation, Rutgers University-Graduate School of Education).
- Kolu, M. K. (2014). A longitudinal analysis of New Jersey school superintendents, their professional profiles and career paths (Doctoral dissertation, Rutgers University-Graduate School of Education).
- Kirk, K. L. (2013). Personnel allocation in middle schools in the state of New Jersey: an examination of school context, accountability pressure, and teacher assignments (Doctoral dissertation, Rutgers University-Graduate School of Education).
- Casarico, P. (2013). Factors affecting the distribution and access to athletic opportunities for New Jersey high school students (Doctoral dissertation, Rutgers University-Graduate School of Education).
- Zengel, S. (2010). An analysis of athletic expenditures in New Jersey schools (Doctoral dissertation, Rutgers, The State University of New Jersey).

Doctoral Dissertations as Committee Member

- Yuan Hong (2010) A comparison among major value-added models: A general model approach
- Brian Smith (2005) An investigation of the use of canine searches in Kansas high schools
- Darrell Stufflebeam (2005) Suspicionless drug testing of students in Kansas public schools
- Jean McCally (2004) Educational administration doctoral recipients in the state of Kansas and their pursuit of the superintendency: A study of gender differences

Helen Jenkins (2003) A study of risk management practices in K--12 Kansas school districts
Frank Jones (2003) Endowed teaching chairs at independent schools: Two case studies
Scott Strawn (2003) Herding cats with carrots and sticks: Performance funding, governance structures and faculty productivity
Christine Keller-Wolf (2003) Moving forward or standing still? Progress in achieving wage equity for women faculty in the 1990s
Jill Smith (2003) Reference checking and reference giving practices of Kansas school districts: A legal analysis
Todd Covault (2001) Early retirement incentive programs in Kansas school districts: Issues of compliance with state and federal law
Glenn Walker (2000) The effect of block scheduling on mathematics achievement in high and low SES secondary schools

Bruce D. Baker

47 Old Chester Road
Gladstone, NJ 07934

Phone: 913-488-0403

Fax: NA

E-mail: educpolicy@gmail.com

Invoice

Invoice #: 2018_I

Date: May 21, 2018

Customer ID: UChicagoLaw

Bill To: Mandel Legal Aid Clinic

6020 S. Univ. Avenue

Chicago, IL 60637-2786

Date	Project ID	Invoice #	Description	Amount	Payment	Balance
						\$ -
5/21/2018		2018_I	Rebuttal Report	\$5,000.00	Total	\$5,000.00

REMITTANCE

Customer Name: Edwin F. Mandel Legal Aid Clinic

Customer ID: UChicagoLaw

Statement #: 2018_I

Date: May 21, 2018

Amount Due: \$5,000.00

Amount Enclosed: