

<1>

Accession Number

ED378676

Author

Hickrod, G Alan. And Others.

Institution

Illinois State Univ., Normal. Center for the Study of Educational Finance. [BBB12660]

Title

Common Sense: Plain Talk to Legislators about School Finance.

Availability

EDRS Availability: Microfiche [\$1.42 card(s)], Paper.

Date of Publication

November 1993

Country of Publication

U.S., Illinois

ERIC Subject Headings

Costs

*Court Litigation

*Educational Equity (finance)

*Educational Finance

Elementary Secondary Education

Federal Legislation

*Finance Reform

Government Role

Property Taxes

State Aid

State Legislation

*Tax Effort

Abstract

This publication contains testimony, given by personnel at the Center for the Study of Educational Finance, initially intended for legislators at the federal and state levels to help them deal with public policy matters in K-12 finance. The first document is testimony given before the United States Senate Committee on Labor and Human Resources, the subcommittee on Education, Arts, and Humanities, in July 1993. The Subcommittee was holding hearings on problems and issues in public school finance as background for reauthorization of the Elementary and Secondary Education Act of 1965 as amended, and on other pending K-12 legislation. The second document is testimony given to the Revenue Committee of the Illinois State Senate in September 1993. The committee was holding hearings on the tax structure of Illinois and its

relationship to education funding. The third document was prepared for State Senator Alice Palmer of Chicago, and was a continuation of the State Revenue hearings. The fourth document is a letter to Progress Illinois concerning the state's progressive income tax. Documents 5 through 7 are communications from Dr. Robert Arnold to selected legislators, including the president of the Illinois State Senate and Representative Penny Wessels. The appendix provides information on the status of school finance constitutional litigation as of November 1993. (LMI)

Publication Type

LEGAL/LEGISLATIVE/REGULATORY MATERIALS. COLLECTED WORKS - General.

Language

English

Clearinghouse Code

Educational Management.

Entry Month

199506

<2>

Accession Number

ED332330

Author

Hickrod, G Alan. And Others.

Institution

Illinois State Univ., Normal. Center for the Study of Educational Finance. [BBB12660]

Sponsoring Agency

Spencer Foundation, Chicago, IL. [BBB06744], John D. and Catherine T. MacArthur Foundation, Chicago, IL. [BBB25107]

Title

The Long March to Educational Inequality in Illinois: Financial Facts for "The Committee versus Edgar."
MacArthur-Spencer Series Number 18.

Availability

EDRS Availability: Microfiche [\$1.42 card(s)], Paper.

Date of Publication

March 1991

Country of Publication

U.S., Illinois

ERIC Subject Headings

*Economic Impact

*Educational Equity (finance)

*Educational Finance

Elementary Secondary Education

*Equalization Aid

Expenditure Per Student

*Finance Reform

Fiscal Capacity

Resource Allocation

School District Spending

Identifiers

*Illinois.

Abstract

The equity of public school funding in Illinois is investigated in this report. A longitudinal, cartographic methodology examines the county as the unit of analysis for the school years 1972-73 through 1990-91. Findings indicate that Illinois school districts are currently more unequal than when the state equalization aid formula state was adopted in 1970. A dramatic reduction in inequalities 3 to 4 years after implementation show that the equity situation improves as the proportion of state dollars increases and the proportion of local district support decreases. Also, more districts' expenditures are dependent on district wealth. Causes contributing to financial disparities include: (1) the unequal economic development of various regions within the state; (2) the grant-in-aid system in effect until 1980; and (3) a reduction in state aid. Recommendations call for examining longitudinal records other than expenditures per student and balancing resources among districts. Appendix A contains seven tables, Appendix B includes seven cartographic figures, and Appendix C details the computation of the Gini coefficient. (18 references) (LMI)

Publication Type

COLLECTED WORKS - Serials. REPORTS - Evaluative/Feasibility.

Language

English

Clearinghouse Code

Educational Management.

Entry Month

199110

<3>

Accession Number

ED330042

Author

Weber, Peter S. Hickrod, G Alan.

Institution

Illinois State Univ., Normal. Center for the Study of Educational Finance. [BBB12660]

Sponsoring Agency

Spencer Foundation, Chicago, IL. [BBB06744], John D. and Catherine T. MacArthur Foundation, Chicago, IL. [BBB25107]

Title

School Finance Reform: Equity or Adequacy. A Brief Look at Several Widely Circulated Proposals for Reform. MacArthur/Spencer Series Number 17.

Availability

EDRS Availability: Microfiche [\$1.42 card(s)], Paper.

Date of Publication

January 1991

Country of Publication

U.S., Illinois

ERIC Subject Headings

- *Accountability
- *Educational Equity (finance)
- *Educational Finance
- Elementary Secondary Education
- Expenditure Per Student
- *Finance Reform
- *Models

Identifiers

*Funding Formulas, *Illinois.

Abstract

This monograph examines several proposed school finance formulas addressing funding and/or taxation disparities produced by the current Illinois system. The analysis is conceptual, as each model is either in the developmental stage or has not been simulated to demonstrate actual impact. Specific algebraic formulations are ignored when discussing each proposal's underlying goals and assumptions. The distribution formulas examined include the State Board of Education Prototype, the Adequacy Plus Property Tax Relief (APPTAR) model, full state assumption, the Changing How Illinois Education Is Financed (CHIEF) proposal, full state funding of elementary education, and a proposal introduced as Senate Bill 1902 during the 86th General Assembly. Following a brief description of individual proposals, they are examined and evaluated collectively, as they share a common thread. Each assumes that Illinois schools are, in part, inequitably funded because funding is inadequate to meet equalization needs. Efforts to develop distribution models for a nonexistent pool of money are premature. If state policy makers decided that per pupil

expenditures should be the same for every school district (equity) and were unwilling to increase overall funding (adequacy), the result would be funding mediocrity. Presently successful districts could no longer afford high-quality programs and the best-qualified teachers. Steps must be taken to convince taxpayers and policy makers of the need for substantial increases in educational appropriations. (4 references) (MLH)

Publication Type

REPORTS - Evaluative/Feasibility.

Language

English

Clearinghouse Code

Educational Management.

Entry Month

199108

<4>

Accession Number

ED329013

Author

Hickrod, G Alan. And Others.

Institution

Illinois State Univ., Normal. Center for the Study of Educational Finance. [BBB12660]

Sponsoring Agency

Spencer Foundation, Chicago, IL. [BBB06744], John D. and Catherine T. MacArthur Foundation, Chicago, IL. [BBB25107]

Title

The Biggest Bang for the Buck: A Further Investigation of Economic Efficiency in the Public Schools of Illinois. MacArthur/Spencer Series Number 16.

Availability

EDRS Availability: Microfiche [\$1.42 card(s)], Paper.

Date of Publication

September 1990

Country of Publication

U.S., Illinois

ERIC Subject Headings

*Cost Effectiveness

*Educational Finance

Elementary Secondary Education

*Productivity

Public Schools

*School District Spending

Statistical Analysis

Identifiers

*Illinois.

Abstract

This study presents a new approach to identifying economically efficient school districts in Illinois and provides a preliminary analysis of the determinants of public schools' economic efficiency. Economically efficient schools are those attaining higher than expected test scores at lower than expected costs. Expectation is based on school district socioeconomic status and property wealth. Using the quadriform procedure, which combines two related data sets to produce a visual representation, 75 K-12 Illinois districts were identified as economically efficient. The study differentiates between the concepts and goals of economic efficiency and professional effectiveness. Numerous internal budget ratios in school districts failed to discriminate between economically efficient and inefficient districts. Generally, characteristics beyond local superintendent and board control contributed more to determining economic efficiency than factors under administrative control. Some partially controllable factors do seem to affect economic efficiency, such as district size and pupil transportation investment. Other administratively controlled variables are listed. Since so many factors are outside administrative control, districts' economic-efficiency status may simply be fortuitous. Included are six pages of suggested readings and six appendices containing survey data. (MLH)

Publication Type

REPORTS - Evaluative/Feasibility.

Language

English

Clearinghouse Code

Educational Management.

Entry Month

199107

<5>

Accession Number

ED324814

Author

Franklin, David L. Hickrod, G Alan.

Institution

North Central Regional Educational Lab., Elmhurst, IL. [BBB24174]

Sponsoring Agency

Office of Educational Research and Improvement (ED), Washington, DC. [EDD00036]

Title

School Finance Equity: The Courts Intervene. A National Perspective. Policy Briefs Number 6 and 7.

Availability

EDRS Availability: Microfiche [\$1.42 card(s)], Paper.

Date of Publication

1990

Country of Publication

U.S., Illinois

ERIC Subject Headings

Constitutional Law

*Court Litigation

*Educational Equity (finance)

Elementary Secondary Education

*Equal Education

Equal Protection

Federal Courts

Financial Policy

Fiscal Capacity

School District Spending

*State Aid

State Courts

Tax Allocation

Abstract

An overview of the constitutionality of various state public education finance systems is presented. Issues addressed include education as a fundamental right mandated by the education clause of state constitutions and the impact of the equal protection clause on the education clause. Criteria for successful challenges to state school finance systems are identified, as follows: (1) state court declaration of education as a fundamental right; (2) education clause requirement of qualitative demands and affirmative duty by a state legislature; (3) use of the "strict scrutiny" level of analysis; and (4) verdict of a district or state finance school system as inequitable. Two tables list 14 constitutional and 12 unconstitutional state finance systems. Also included are a summary of regional agenda, a guest commentary on the Illinois finance equity system, and 10 viewpoints by regional state legislators on pros and cons of current funding structures. (11 references)

(LMI)

Publication Type

REPORTS - Evaluative/Feasibility.

Grant Number

400-86-0004

Language

English

Clearinghouse Code

Educational Management.

Entry Month

199103

<6>

Accession Number

ED323595

Author

Hickrod, G Alan. And Others.

Institution

Illinois State Univ., Normal. Center for the Study of Educational Finance. [BBB12660]

Title

Witnesses for the Prosecution: Policy Papers on Educational Finance, Governance, and Constitutionality in Illinois (Including the Declaration of Galesburg). MacArthur/Spencer Series Number 12.

Availability

EDRS Availability: Microfiche [\$1.42 card(s)], Paper.

Date of Publication

December 1989

Country of Publication

U.S., Illinois

ERIC Subject Headings

Administrative Change

*Educational Finance

Elementary Secondary Education

*Finance Reform

*Governance

Higher Education

Power Structure

State Courts

Identifiers

*Illinois.

Abstract

Advocacy for drastic change in the governance and structure of Illinois educational finance is the theme of this collection of oral presentations. Section 1 contains testimonies by G. Alan Hickrod and Lawrence E. Frank delivered to the Citizens Council on School Problems, focusing on K-12 educational funding problems and solutions. Section 2 contains speeches by Hickrod, Frank, and James Gordon Ward to a special Voice of the Prairie conference, held in Galesburg, Illinois, advocating a constitutional challenge to the Illinois K-12 funding system. Included is the "Declaration of Galesburg," which stimulated the formation of the nonprofit Coalition for Educational Rights. The third section consists of testimony and correspondence from Edward R. Hines, which address the funding and governance structure of higher education in Illinois. References and appendices accompany the articles. (LMI)

Publication Type

VIEWPOINTS (Opinion Papers, Position Papers, Essays, etc.). COLLECTED WORKS - General.

Language

English

Clearinghouse Code

Educational Management.

Entry Month

199102

<7>

Accession Number

ED309552

Author

Hickrod, G Alan. And Others.

Institution

Illinois State Univ., Normal. Center for the Study of Educational Finance. [BBB12660]

Sponsoring Agency

Spencer Foundation, Chicago, IL. [BBB06744], John D. and Catherine T. MacArthur Foundation, Chicago, IL. [BBB25107]

Title

The Biggest Bang for the Buck: An Initial Report on Technical Economic Efficiency in Illinois K-12 Schools. With a Comment on "Rose v. the Council." MacArthur/Spencer Series Number 11.

Availability

EDRS Availability: Microfiche [\$1.42 card(s)], Paper.

Date of Publication

July 1989

Country of Publication

U.S., Illinois

ERIC Subject Headings

*Cost Effectiveness

*Court Litigation

*Educational Economics

*Educational Finance

*Efficiency

Elementary Secondary Education

Regression (statistics)

Identifiers

*Illinois, *Rose v Council for Better Education.

Abstract

The MacArthur/Spencer special project on Illinois school finance is dedicated to the exploration of three central concepts in Illinois school finance: equity, adequacy, and efficiency. While most reports on the project have dealt directly with equity and adequacy, this report confronts the issue of efficiency by discussing the policy and legal implications (within the constraints established by "Rose versus the Council for Better Education") of identifying school districts as being technically economically efficient. The report discusses the limitations of the regression analysis developed to determine the efficiency of the project. The conclusion that professional effectiveness and economic efficiency interrelate suggests the need for further tests of validity and reliability on the instruments used to measure such efficiency. (JAM)

Publication Type

REPORTS - Evaluative/Feasibility.

Language

English

Clearinghouse Code

Educational Management.

Entry Month

199001

<8>

Accession Number

ED306903

Author

Hickrod, G Alan Karnes-Wallis. Ward, James Gordon.

Institution

American Association of State Colleges and Universities, Washington, DC. [FGK01570], Illinois State Univ., Normal. [JIM34800]

Sponsoring Agency

John D. and Catherine T. MacArthur Foundation, Chicago, IL. [BBB25107]

Title

Measuring and Monitoring Equity, Adequacy and Efficiency in the K-12 School Districts in Illinois: A Five-Year Agenda. MacArthur/Spencer Project.

Availability

EDRS Availability: Microfiche [\$1.42 card(s)], Paper.

Date of Publication

December 9, 1988

Country of Publication

U.S., Illinois

ERIC Subject Headings

- *Educational Equity (finance)
- *Educational Finance
- *Educational Policy
- Educational Quality
- Efficiency
- *Elementary Secondary Education
- Financial Support
- Higher Education
- Models
- Policy Formation
- Program Descriptions
- *Public Schools
- Research
- State Programs
- State Universities

Identifiers

*AASCU ERIC Model Programs Inventory Project, Illinois, *Illinois State University.

Abstract

Discussed in this report is the MacArthur/Spencer Special Project on Educational Finance conducted on the campuses of the Illinois State University. This 5-year research effort is designed to conduct research into equity, adequacy, and efficiency aspects of educational finance in Illinois. When possible, conclusions and generalizations are applicable to other states, but the primary responsibility is to provide empirical research for policy makers within Illinois. Information from the project is sent to all 50 states and several foreign

countries, and a special distribution is made to members of the Illinois General Assembly. The project has produced a series of eight monographs, and many more are in progress. It has utilized the services of 14 faculty, staff, graduate students, and consultants. Fifteen doctoral dissertations have arisen tangentially from the major research thrust. Some public service activities have taken place in the pursuit of the goals of the project. The following are appended: abstracts of the MacArthur/Spencer Series on Illinois Educational Finance; a research agenda; a list of doctoral dissertations; a list of the members of the advisory committee; minutes of an advisory committee meeting; and information on studies under subcontract or in progress.

(Author/SM)

Notes

23 p., This report is one of a group gathered by the AASCU/ERIC Model Programs Inventory Project, funded by the Fund for the Improvement of Postsecondary Education to the American Association of State Colleges and Universities, in collaboration with the ERIC Clearinghouse on Higher Education. For related documents, see HE 022 565-617, HE 022 619-643 and HE 022 645-659. Also sponsored by the Lyle Spencer Foundation.

Publication Type

REPORTS - Descriptive (i.e. Project Descriptions).

Language

English

Clearinghouse Code

Higher Education.

Entry Month

198910

<9>

Accession Number

ED302889

Author

Hickrod, G Alan. And Others.

Institution

Illinois State Univ., Normal. Center for the Study of Educational Finance. [BBB12660]

Sponsoring Agency

Spencer Foundation, Chicago, IL. [BBB06744], John D. and Catherine T. MacArthur Foundation, Chicago, IL. [BBB25107]

Title

Guilty Governments: The Problem of Inadequate Educational Funding in Illinois and Other States.
MacArthur/Spencer Series Number 8.

Availability

EDRS Availability: Microfiche [\$1.42 card(s)], Paper.

Center for the Study of Educational Finance, 331 DeGarmo Hall, Illinois State University, Normal, IL 61761 (\$1.00 postage and handling charge).

Date of Publication

1988

Country of Publication

U.S., Illinois

ERIC Subject Headings

Budgeting

Business Cycles

Court Litigation

*Economics

*Educational Finance

Educational Legislation

Elementary Secondary Education

*Financial Problems

Higher Education

Socioeconomic Status

*State Aid

*State School District Relationship

Identifiers

*Illinois.

Abstract

This monograph is the eighth in a series on Illinois educational finance. The first section discusses the decline of Illinois' funding for both K-12 and higher education relative to other states. The second section investigates whether the decline in funding is part of a general decline in the economic affairs of Illinois or whether other factors are involved. The third section discusses the effectiveness of litigation in K-12 finance and advocates litigation as a means of increasing the funding levels for education in Illinois. The fourth section deals with the wording of an education article in the Illinois Constitution. Appended are (1) references; (2) eight rank-change tables; (3) two elasticity comparison tables; (4) two expenditure tables; (5) alternative computations of elasticities by the two-point-in-time method; (6) data sources; and (7) abstracts of the MacArthur/Spencer series on Illinois educational finance. (SI)

Publication Type

REPORTS - Research/Technical.

Language

English

Clearinghouse Code

Educational Management.

Entry Month

198906

<10>

Accession Number

ED295294

Author

Hickrod, G Alan. And Others.

Institution

Illinois State Univ., Normal. Center for the Study of Educational Finance. [BBB12660]

Title

Documenting a Disaster: Equity and Adequacy in Illinois School Finance, 1973 through 1988.

MacArthur/Spencer Special Series on Illinois School Finance, Series Number 4.

Availability

EDRS Availability: Microfiche [\$1.42 card(s)], Paper.

Date of Publication

December 1987

Country of Publication

U.S., Illinois

ERIC Subject Headings

Comparative Analysis

*Educational Equity (finance)

*Educational Finance

Elementary Secondary Education

Expenditure Per Student

*Finance Reform

*Financial Needs

Financial Problems

Fiscal Capacity

Foundations of Education

Nondiscriminatory Education

Resource Allocation

School Support

*State Aid

Identifiers

*Illinois.

Audience Type

Policymakers

Abstract

This monograph evaluates the equity, adequacy, and efficiency of the Illinois system of school finance. After a brief introduction outlining the purpose and limitations of the study, it first develops two operational definitions of equity, based on disparity measurements and on the association between district spending and local wealth. The results of the equity monitoring are presented in seven tables with corresponding charts for the previous 16 years. The next section similarly begins with operational definitions of educational adequacy, based on comparisons with other states, and follows with an explanation of tables showing Illinois operating expenditure per pupil 1973 through 1986. The final section discusses policy implications of the foregoing fiscal analysis. The conclusion drawn is that Illinois is not equitably funded for K-12 education, and that the situation relative to equity is growing progressively worse. Approximately 400 million new dollars are needed to remedy the situation, and this can only be achieved by raising the personal income tax rate. Notes and references are included, and the tables and charts cited in the text are appended. (TE)

Notes

50 p., Report supported by grants from the Illinois State University Graduate School, John D. and Catherine T. MacArthur Foundation, and Lyle Spencer Foundation.

Publication Type

LEGAL/LEGISLATIVE/REGULATORY MATERIALS. REPORTS - Evaluative/Feasibility.

Language

English

Clearinghouse Code

Educational Management.

Entry Month

198811

<11>

Accession Number

EJ359356

Author

Hickrod, G Alan.

Title

A Reply to the "Forbs" Article or the Political Theory of School Finance Revisited: A Victorian Essay.

Source

Journal of Education Finance. v12 n4 p447-62 Spr 1987.

Date of Publication

1987

ERIC Subject Headings

*Cost Effectiveness

*Democracy

*Educational Equity (finance)

*Educational Finance

Elementary Secondary Education

*Equal Education

*Outcomes of Education

Private Education

Identifiers

*Economic Efficiency.

Audience Type

Practitioners

Abstract

Examines a "Forbes" cover story on educational expenditures that poses questions related to three current research guidelines for educational finance: adequacy, equity, and efficiency. Different "production functions" must be sought for children of differing family backgrounds. Without adequate education, the world's armies, trade, currency, and financial institutions will collapse! Includes 12 references. (MLH)

Publication Type

JOURNAL ARTICLES. VIEWPOINTS (Opinion Papers, Position Papers, Essays, etc.).

Language

English

Clearinghouse Code

Educational Management.

Entry Month

198801

<12>

Accession Number

ED282342

Author

Hickrod, G Alan Karnes-Wallis. And Others.

Institution

Illinois State Univ., Normal. Center for the Study of Educational Finance. [BBB12660]

Sponsoring Agency

Spencer Foundation, Chicago, IL. [BBB06744], John D. and Catherine T. MacArthur Foundation, Chicago, IL. [BBB25107]

Title

A Brief History of K-12 Finance in Illinois, or, 162 Years in Search of the Perfect Formula. The MacArthur/Spencer Special Series on Illinois School Finance, Number 2.

Availability

EDRS Availability: Microfiche [\$1.42 card(s)], Paper.

Publication Sales, Center for the Study of Educational Finance, Illinois State University, 331 DeGarmo Hall, Normal, IL 61761 (\$4.00).

Date of Publication

April 1987

Country of Publication

U.S., Illinois

ERIC Subject Headings

Educational Equity (finance)

*Educational Finance

*Educational Legislation

Elementary Secondary Education

*Politics of Education

*State Aid

State History

State Legislation

State Programs

State School District Relationship

*Tax Allocation

Identifiers

*Illinois.

Audience Type

Practitioners, Researchers

Abstract

Contemplation by the Illinois General Assembly of a new grant-in-aid system for school finance has suggested a review of educational finance in that state. Taxation maintaining support of public education since 1825 and the establishment of the first free schools are examined. The issue of local funding, the inequities caused by such funding due to the poor resources of some districts, and the steps taken by the General Assembly to correct that problem are investigated. The passage of the first state sales tax in an

effort to save the schools during the depression of 1929 is covered, and the Resource Equalizer formula, calling for greater state aid to education and emphasizing reward for local effort and poverty impactation weighting for students, is examined. Developments such as legislative changes in the Resource Equalizer formula in 1976, changes in farm land assessment and poverty impactation weighting from 1977 to 1979, and the ending of the reward-for-local-effort experiment in 1980 are discussed. The 1984 proposal of the Resource Cost Model system of grant-in-aid, the 1985 educational reform bill, and the establishment in 1986 of various committees to review the grant-in-aid system are also examined. Thirteen notes and references conclude the monograph. (WTH)

Publication Type

VIEWPOINTS (Opinion Papers, Position Papers, Essays, etc.). HISTORICAL MATERIALS.

Language

English

Clearinghouse Code

Educational Management.

Entry Month

198710

<13>

Accession Number

ED282341

Author

Hickrod, G Alan Karnes-Wallis. Ward, James Gordon.

Institution

Illinois State Univ., Normal. Center for the Study of Educational Finance. [BBB12660]

Sponsoring Agency

Spencer Foundation, Chicago, IL. [BBB06744], John D. and Catherine T. MacArthur Foundation, Chicago, IL. [BBB25107]

Title

Two Essays on the Political and Normative Aspects of American School Finance: An Historical Perspective. The MacArthur/Spencer Special Series on Illinois School Finance, Number 1.

Availability

EDRS Availability: Microfiche [\$1.42 card(s)], Paper.

Publication Sales, Center for the Study of Educational Finance, Illinois State University, 331 DeGarmo Hall, Normal, IL 61761 (\$4.00).

Date of Publication

March 1987

Country of Publication

U.S., Illinois

ERIC Subject Headings

Democracy

*Educational Economics

*Educational Equity (finance)

*Educational Finance

Educational History

Elementary Secondary Education

*Equal Education

Politics of Education

Public Education

Identifiers

Illinois.

Audience Type

Policymakers, Practitioners

Abstract

Two essays are presented in this monograph, the first in a series of publications examining educational finance and using Illinois data. After an introduction, the first essay replies to a "Forbes" magazine cover story on educational finance that asks if education is economically efficient. The central theme is that the maintenance of a large, well-financed, public educational system is central to the continued existence of a democratic society, and that economic efficiency should not be the highest priority in education. Selected readings and an appendix graphically depicting the concepts of equity and adequacy conclude this essay. The second essay is an inquiry into the normative foundations of American school finance and uses the works of the founders of the field of school finance written at the beginning of the century to support the suggestion that school finance policy issues are as deeply embedded in American political philosophy and in the history of the Republic as they are in economics and technical analysis. It is argued that the Republic and in fact civilization is in danger without an adequate, equitable, and efficient school finance system. Forty notes conclude this essay. (WTH)

Publication Type

VIEWPOINTS (Opinion Papers, Position Papers, Essays, etc.). REPORTS - Evaluative/Feasibility.

Language

English

Clearinghouse Code

Educational Management.

Entry Month

198710

<14>

Accession Number

ED258364

Author

Yong, Richard S. Hickrod, G Alan.

Institution

Illinois State Univ., Normal. Center for the Study of Educational Finance. [BBB12660]

Sponsoring Agency

Illinois State Univ., Normal. Graduate School. [BBB14434], Illinois School Problems Commission, Springfield. [BBB15539]

Title

Private Sector Support of K-12 Education: A Review of Selected Programs in Seventeen States and Recommendations for Illinois.

Availability

EDRS Availability: Microfiche [\$1.42 card(s)], Paper.

Publication Sales, Center for the Study of Educational Finance, 340-C DeGarmo Hall, Illinois State University, Normal, IL 61761 (\$1.00).

Date of Publication

April 1985

Country of Publication

U.S., Illinois

ERIC Subject Headings

Cooperative Programs

Elementary Secondary Education

Government Role

Philanthropic Foundations

*Private Financial Support

Program Development

Public Education

Public Support

*School Business Relationship

*School Support

State Departments of Education

Identifiers

Illinois.

Abstract

Revenue for education from public sources has been decreasing since the beginning of the 1980's. The federal government, state governments, government-sponsored task forces, and private associations have simultaneously urged the private sector to increase its contributions to public education. The two most common sources of such support are: (1) local, state, and national educational foundations, usually formed to provide grants financing programs not and (2) underwritten by public funds partnerships between businesses and schools or educational systems, often involving the provision of services, equipment, or benefits in kind. The benefits available to schools, businesses, and the community through such private sector involvement are virtually unlimited, but some limitations exist: private efforts cannot replace public funding, long-term commitments are rare, not all efforts are successful, strings may be attached to some gifts, and equalization efforts may be affected. Districts interested in setting up cooperative programs should survey those operating in other districts; seek assistance from state, regional, or federal agencies; make sure top district administrators are involved; and ensure clear structuring of the programs. Concluding recommendations concern alternative private funding sources, the role of state education departments, further research efforts, and specific actions that should be taken in Illinois. (PGD)

Publication Type

REPORTS - Research/Technical.

Language

English

Clearinghouse Code

Educational Management.

Entry Month

198511

<15>

Accession Number

ED258327

Author

Johnson, Wayne Paul. Hickrod, G Alan.

Institution

Illinois State Univ., Normal. Center for the Study of Educational Finance. [BBB12660]

Sponsoring Agency

Illinois State Univ., Normal. Graduate School. [BBB14434], Illinois School Problems Commission, Springfield. [BBB15539]

Title

Estimating the Cost of Adequate K-12 Educational Expenditure in Selected Midwestern States: An Adjusted Miner/McMahon Approach.

Availability

EDRS Availability: Microfiche [\$1.42 card(s)], Paper.

Publication Sales, Center for the Study of Educational Finance, 340-C DeGarmo Hall, Illinois State University, Normal, IL 61761 (\$1.00).

Date of Publication

March 1985

Country of Publication

U.S., Illinois

ERIC Subject Headings

Comparative Analysis

Educational Finance

Elementary Secondary Education

*Expenditure Per Student

Expenditures

Mathematical Formulas

*Standards

*State Norms

Statistical Analysis

Identifiers

Illinois, Indiana, Iowa, Michigan, Missouri, Wisconsin.

Abstract

According to a formula developed to measure the adequacy of state educational finance levels, only three of six selected midwestern states provided adequate levels of expenditure per pupil in 1981-82. The formula for determining adequacy, developed by Jerry Miner and Walter McMahon, consists of totaling adequate levels of expenditure in seven areas: instruction, plant operation and maintenance, fixed costs, administration, transportation, food, and other costs. The level of expense judged adequate in each area is calculated by multiplying the national average expenditure per pupil (designated as the standard of adequacy) by the percentage of national educational expenditures accounted for by the expense category in question, and adjusting the result on the basis of state cost of living indexes when personnel costs are involved. Of the states examined, Illinois, Wisconsin, and Michigan achieved financial adequacy while Iowa, Indiana, and Missouri did not. The methods used by Miner and McMahon to develop their formulas are described; limitations to the findings are discussed; and appendixes are provided identifying actual expenditure levels, levels of adequacy, cost of living variations, and public school enrollment in the 50 states.

(PGD)

Publication Type

REPORTS - Research/Technical.

Language

English

Clearinghouse Code

Educational Management.

Entry Month

198511

<16>

Accession Number

ED254952

Author

Hickrod, G Alan. Chaudhari, Ramesh B.

Institution

Illinois State Univ., Normal. Center for the Study of Educational Finance. [BBB12660]

Sponsoring Agency

Illinois State Univ., Normal. Graduate School. [BBB14434], Illinois School Problems Commission, Springfield. [BBB15539], Illinois State Board of Education, Springfield. [BBB17331]

Title

A Proposed Resource Cost Model Grant-in-Aid System in Illinois: Equity Considerations and Other Observations.

Availability

EDRS Availability: Microfiche [\$1.42 card(s)], Paper.

Publication Sales, Center for the Study of Educational Finance, Illinois State University at Normal, 331 DeGarmo Hall, Normal, IL 61761 (\$2.00 prepaid).

Date of Publication

March 1985

Country of Publication

U.S., Illinois

ERIC Subject Headings

*Educational Equity (finance)

Elementary Secondary Education

Equalization Aid

*Finance Reform

*Foundation Programs

Grants

Models

Resource Allocation

School Funds

School Support

*State Aid

State Boards of Education

State Legislation

*State Programs

State School District Relationship

Tax Allocation

Identifiers

Illinois, Illinois State Board of Education, *Resource Cost Model.

Audience Type

Policymakers, Researchers

Abstract

This paper evaluates the equity dimensions of a grant-in-aid system based on the Resource Cost Model (RCM), as proposed by the Illinois State Board of Education. The first section is an independent evaluation of the conceptual and legal aspects of the RCM, focusing on both the weaknesses and the strengths of the model. In the second section, an initial empirical investigation of the RMC distribution is described. The third section addresses the central purpose of the study: the conduct of the equity tests. In addition, reasons are provided for the abandonment of the older dispersion tests as not appropriate with the RCM model. In the fourth section, contrasts are drawn between the RCM and other reform proposals currently within the Illinois General Assembly. The conclusion suggests that if the RCM were funded at the levels indicated by the board's proposal, progress would be made toward equity goals. Nine illustrative tables are provided to complement the text, and an appendix offers the rationale for the reforms, as cited by the Governor of Illinois and the State Superintendent of Education respectively. (TE)

Publication Type

REPORTS - Evaluative/Feasibility.

Language

English

Clearinghouse Code

Educational Management.

Entry Month

198508

Accession Number

ED245312

Author

Hickrod, G Alan. And Others.

Institution

Illinois State Univ., Normal. Center for the Study of Educational Finance. [BBB12660]

Title

Proposal for a Venture Capital Grant: A Programmatic Approach to Excellence in Illinois Public Schools.

Availability

EDRS Availability: Microfiche [\$1.42 card(s)], Paper.

Date of Publication

March 3, 1984

Country of Publication

U.S., Illinois

ERIC Subject Headings

*Categorical Aid

Educational Equity (finance)

*Educational Finance

Elementary Secondary Education

*Equalization Aid

Expenditure Per Student

Family Income

*Grants

Program Costs

Program Development

Program Implementation

School Funds

State Aid

Identifiers

*Excellence in Education, *Illinois.

Audience Type

Policymakers

Abstract

A new formula proposed for categorically funding local education programs in Illinois can channel more money into programs for excellence than can general purpose grants. The formula, which would provide venture capital to stimulate local initiatives, would depend on district plans for using the money to improve instruction and on distribution of monies according to an equalization formula. By thus balancing the grants

awarded against the district income, the state would allot grants by multiplying a constant (\$250) times the ratio of district personal incomes per pupil (DI) over state average income per pupil (SI), with this total multiplied by a district's weighted average daily attendance (WADA) and a constant equalization factor: $G = \$250 (1 - .80 DI/SI) WADA$. Appropriate programs fundable under such grants would include master teaching projects, technology for lower-income school districts, and projects to improve classroom conditions. With suitable legislative safeguards, this formula should help attain excellence without thwarting equity goals. (JW)

Notes

12 p., Paper prepared for Speaker of the House Michael J. Madigan's Conference on Education Reform and School Improvement (Springfield, IL, March 3, 1984).

Publication Type

REPORTS - Evaluative/Feasibility. LEGAL/LEGISLATIVE/REGULATORY MATERIALS. SPEECHES, CONFERENCE PAPERS.

Language

English

Clearinghouse Code

Educational Management.

Entry Month

198411

<18>

Accession Number

ED245311

Author

Lee, Boon Yiu. Hickrod, G Alan.

Institution

Illinois State Univ., Normal. Center for the Study of Educational Finance. [BBB12660]

Sponsoring Agency

Illinois School Problems Commission, Springfield. [BBB15539]

Title

Financial Problems of Central City School Districts in Illinois: An Analysis of Changes in Selected Fiscal Variables and Policy Implications of Those Changes.

Availability

EDRS Availability: Microfiche [\$1.42 card(s)], Paper.

Publications, Center for the Study of Educational Finance, 331 DeGarmo Hall, Illinois State University, Normal, IL 61761 (\$4.00).

Date of Publication

February 1984

Country of Publication

U.S., Illinois

ERIC Subject Headings

*Average Daily Attendance

*Declining Enrollment

*Educational Finance

Elementary Secondary Education

Family Income

Financial Support

*Longitudinal Studies

Population Trends

Property Taxes

*Retrenchment

State Aid

State Government

*Urban Schools

Identifiers

Elasticity, *Illinois.

Audience Type

Administrators, Policymakers, Practitioners

Abstract

A longitudinal study of the rate of growth of school districts' resources in large central cities in Illinois is presented. The data analyzed covered the years 1972-73 and 1981-82 and were derived from the State Board of Education and the 1970 and 1980 United States Census. The study looked at the changes in average daily attendance (ADA), changes in per capita and median family income, local dollars generated per ADA, and elasticity of effort based on equalized assessed valuation per ADA. The study concluded that a decline in fiscal capacity has occurred over the decade, but that school operating expenditures have not decreased. This is a result of increased state aid and some increases in local fiscal support. Noting that in some cases per capita income and median family income have increased faster than dollars locally raised per ADA, the study suggests that central city schools could be quickly plunged into financial difficulties if state aid cannot be sustained. Many schools appear to be slowly giving up their base of local financial support. The authors conclude that Illinois school districts not keeping pace with increases in per capita income need to carefully examine their fiscal health. The authors offer four legislative implications and recommendations for the future. (MD)

Publication Type

REPORTS - Research/Technical.

Language

English

Clearinghouse Code

Educational Management.

Entry Month

198411

<19>

Accession Number

ED218790

Author

Hickrod, G Alan. And Others.

Institution

Illinois State Univ., Normal. Center for the Study of Educational Finance. [BBB12660]

Sponsoring Agency

National Conference of State Legislatures, Washington, DC. [BBB07118], Illinois School Problems Commission, Springfield. [BBB15539]

Title

Toward the Restoration of Equity in Illinois K-12 Finance. A Report to the National Conference of State Legislatures and the Illinois School Problems Commission.

Availability

EDRS Availability: Microfiche [\$1.42 card(s)], Paper.

Center for the Study of Educational Finance, Department of Educational Administration, Illinois State University, 331 DeGarmo Hall, Normal, IL 61761 (\$5.00).

Date of Publication

May 1982

Country of Publication

U.S., Illinois

ERIC Subject Headings

Educational Finance

Elementary Secondary Education

*Equal Education

Equalization Aid

Expenditure Per Student

*Finance Reform

Fiscal Capacity
Resource Allocation
State Aid
Tables (data)

Identifiers

*Illinois, State Aid Formulas.

Abstract

Based on a definition of equity that includes both equality in expenditure per pupil and fiscal neutrality, this paper examines equity in Illinois school finance and makes recommendations for its improvement. Following a brief introduction outlining deterioration of equity since 1977, part 2 describes further reasons for this deterioration. The next part describes the future state of equity in Illinois if the present general grant-in-aid system and current trends continue. Since this analysis suggests that Illinois will continue to move away from its equity goals, part 4 looks at possible new methods for providing general purpose grants-in-aid that would be more equitable. The remainder of the study explores some of the consequences of adopting in Illinois the type of supplementary general purpose grant-in-aid system used in New York State. Two different methods of financing this proposed new legislative initiative are explored and the equity consequences of each noted. Finally, the document presents a summary of policy conclusions, principal limitations of the study, and questions for further research. (Author/JM)

Publication Type

VIEWPOINTS (Opinion Papers, Position Papers, Essays, etc.). REPORTS - Research/Technical.

Language

English

Clearinghouse Code

Educational Management.

Entry Month

198212

<20>

Accession Number

ED218726

Author

Hickrod, G Alan. And Others.

Institution

Illinois State Univ., Normal. Center for the Study of Educational Finance. [BBB12660]

Sponsoring Agency

Illinois State Board of Education, Springfield. [BBB17331]

Title

A Proposal for the Distribution of Federal Block Grant Funds in Illinois.

Availability

EDRS Availability: Microfiche [\$1.42 card(s)], Paper.

Publications, Center for the Study of Educational Finance, College of Education, Illinois State University, 331 DeGarmo Hall, Normal, IL 61761 (\$4.00).

Date of Publication

April 1982

Country of Publication

U.S., Illinois

ERIC Subject Headings

Assessed Valuation

*Block Grants

Economically Disadvantaged

Educational Finance

Elementary Secondary Education

Expenditure Per Student

*Federal Aid

Finance Reform

Institutional Characteristics

Minority Group Children

Models

Population Distribution

Predictor Variables

*Resource Allocation

School Districts

Identifiers

*Illinois, School District Wealth, Weighted Variables.

Abstract

It is proposed that federal block grants to Illinois be distributed to school districts according to four characteristics of those districts. Funds will be distributed inversely proportional to property valuation per pupil, directly proportional to percentage of minority children, directly proportional to percentage of poverty children (Title I eligibles), and indirectly proportional to number of children per square mile. A statistical system of weighting is provided to allocate the available pool of federal block grant funds between these four selected district characteristics. The system is based upon the relative power of these four factors to predict operating expenditure per pupil. A computer simulation of the proposed grant was accomplished and some aspects of the impact of the proposed grant are explored. Finally, a short summary outlines both the

strengths and the weaknesses of the proposed new distribution method. The proposal assumes that reductions in federal funding should be borne more by the affluent than by the poor. (Author)

Publication Type

VIEWPOINTS (Opinion Papers, Position Papers, Essays, etc.).

Language

English

Clearinghouse Code

Educational Management.

Entry Month

198212

<21>

Accession Number

ED207214

Author

Hickrod, G Alan. And Others.

Institution

Illinois State Univ., Normal. Center for the Study of Educational Finance. [BBB12660]

Sponsoring Agency

Illinois State Univ., Normal. Graduate School. [BBB14434], Illinois School Problems Commission, Springfield. [BBB15539]

Title

Reformation and Counter-Reformation in Illinois School Finance: 1973-1981.

Availability

EDRS Availability: Microfiche [\$1.42 card(s)], Paper.

Center for the Study of Educational Finance, Department of Educational Administration and Foundations, College of Education, Illinois State University, 331 DeGarmo Hall, Normal, IL 61761 (\$5.00).

Date of Publication

June 1981

Country of Publication

U.S., Illinois

ERIC Subject Headings

Assessed Valuation

Educational Finance

Elementary Secondary Education

*Equalization Aid

Expenditure Per Student

*Finance Reform

Longitudinal Studies

*State Aid

State Surveys

Statistical Analysis

*Tax Rates

Identifiers

*Equity (Education), *Illinois, School District Wealth, Wealth Neutrality.

Abstract

A nine-year evaluation of the effects of Illinois' 1973 school finance reforms on educational equity indicated that the degree of equity increased from 1972 until about 1977 but then decreased through 1981. The researchers measured educational equity in terms of both wealth (or fiscal) neutrality and the variation among school districts in expenditures per pupil. A review of previous equity research revealed no clear trends in the achievement of educational equity. This evaluation studied all 1,100 Illinois school districts, using four statistical measures, including a coefficient of variation, a Gini index of inequality, and linear regression. Variables examined comprise local tax revenues, state aid, property values, expenditures, and numbers of pupils. Besides illustrating the 1972-1981 changes in Illinois' educational equity, the findings showed that state aid increased the degree of equity, and that equity declined after 1977 because wealthier districts raised their tax rates more than poorer districts. Further research is recommended on the effects of state school law changes on equity. The researchers also feel that the state must decide whether to limit local taxation in the pursuit of educational equity. (RW)

Publication Type

REPORTS - Evaluative/Feasibility.

Language

English

Clearinghouse Code

Educational Management.

Entry Month

198202

<22>

Accession Number

EJ256380

Author

Hickrod, G Alan. And Others.

Title

Percentage of State Funds and Equity in Illinois School Finance.

Source

Journal of Education Finance. v7 n2 p230-31 Fall 1981.

Date of Publication

1981

ERIC Subject Headings

Elementary Secondary Education

*Equalization Aid

Financial Support

Longitudinal Studies

*State Aid

Identifiers

Equity (Education), *Illinois, *Wealth Neutrality.

Abstract

Longitudinal data for 1973-81 for Illinois elementary school districts indicate that the higher the percentage of state aid to K-12 education, the greater the degree of wealth neutrality or equity in educational finance. Further longitudinal studies are needed, however, before the relationship can be considered proven. (RW)

Publication Type

JOURNAL ARTICLES. REPORTS - Research/Technical.

Language

English

Clearinghouse Code

Educational Management.

Entry Month

198205

<23>

Accession Number

ED202112

Author

Hinrichs, William L. Hickrod, G Alan.

Institution

Illinois State Univ., Normal. Center for the Study of Educational Finance. [BBB12660]

Title

Additional Approaches to the Measurement of Equity in Illinois Public School Finance.

Availability

EDRS Availability: Microfiche [\$1.42 card(s)], Paper.

Center for the Study of Educational Finance, College of Education and the Graduate School, Illinois State University, Normal, IL 61761 (\$1.50).

Date of Publication

February 1981

Country of Publication

U.S., Illinois

ERIC Subject Headings

Elementary Secondary Education

Finance Reform

*Financial Support

Multiple Regression Analysis

*School District Spending

*School Support

State School District Relationship

Identifiers

Fiscal Neutrality, *Illinois, Tax Equity, *Wealth Neutrality.

Abstract

The Center for the Study of Educational Finance at Illinois State University has been monitoring the progress toward or away from equity in Illinois since the state finance reform of 1973. The two main areas of concern are (1) wealth neutrality, or to what extent a district's expenditures are a function of its wealth and (2) permissible variance, or to what extent the expenditure level of a district varies from the norm. Recent studies in the area have explored the possibility of combining types of districts (elementary, secondary, and unit) for this investigation, rather than conducting independent studies of each of the three types. Results of the study show that the coefficient of variation and wealth neutrality measures for the state appear reasonable, but inadequate weighting for high school students in Illinois' school finance laws make the permissible variance measures unacceptable. Other results indicate that cost of living adjustments should be made, that income data from the 1980 census should be considered, that a longitudinal study should be attempted, and that Illinois is drifting away from the goal of wealth neutrality and should, in consequence, make a new commitment to equity goals. Tables display the basic data examined. (PGD)

Notes

18 p., For related documents, see ED 172 341 and ED 177 727.

Publication Type

REPORTS - Research/Technical.

Language

English

Clearinghouse Code

Educational Management.

Entry Month

198110

<24>

Accession Number

ED191142

Author

Hickrod, G Alan. And Others.

Institution

Illinois State Univ., Normal. Center for the Study of Educational Finance. [BBB12660]

Sponsoring Agency

Office of Education (DHEW), Washington, DC. [RMQ66000]

Title

Equity Measurements in School Finance: Indiana, Iowa and Illinois.

Availability

EDRS Availability: Microfiche [\$1.42 card(s)], Paper.

Center for the Study of Educational Finance, Illinois State University, Normal, IL 61761 (\$5.00).

Date of Publication

May 1980

Country of Publication

U.S., Illinois

ERIC Subject Headings

Educational Finance

*Expenditure Per Student

*Finance Reform

Fiscal Capacity

State Aid

State Legislation

Tax Rates

Identifiers

Illinois, Indiana, Iowa, Tax Equity, *Taxpayer Equity, *Wealth Neutrality.

Abstract

Empirical studies of the school finance reforms of the 1970s have not indicated that equity has been satisfactorily achieved in all cases. The methods of equity analysis used and the data bases analyzed in

those studies have differed enough to prevent ready comparison or the formulation of overall assessments of the effects of school finance reform as a whole. A hypothesis drawn from past analyses was tested using information for districts in Indiana, Iowa, and Illinois between 1972 and the late 1970s. Three dimensions of equity were considered: taxpayer equity, disparities in expenditure per pupil, and wealth neutrality. Contrary to expectations, the evidence indicated that progress had been greatest in achieving unconditional wealth neutrality rather than in reducing tax rate disparities between districts. On the whole, Indiana did least well, making gains only in the area of wealth neutrality. Iowa made considerable gains in all areas except conditional wealth neutrality. The results from Illinois were mixed and complicated by the existence of three kinds of school district in the state--elementary, secondary, and unit (K-12)--each of which was affected differently by reforms. (Author/PGD)

Notes

75 p., Some pages may not reproduce clearly due to broken print of original document.

Publication Type

REPORTS - Research/Technical.

Language

English

Clearinghouse Code

Educational Management.

Entry Month

198101

<25>

Accession Number

EJ238639

Author

Hickrod, G Alan. And Others.

Title

Progress toward School Finance Equity Goals in Indiana, Iowa, and Illinois.

Source

Journal of Education Finance. v6 n2 p176-200 Fall 1980.

Date of Publication

1980

ERIC Subject Headings

Assessed Valuation

Elementary Secondary Education

*Equalization Aid

Expenditure Per Student

*Finance Reform

*Measurement Techniques

Tax Rates

Identifiers

Fiscal Neutrality, Gini Coefficient, Illinois, Indiana, Iowa.

Abstract

Concludes that a state may make very uneven progress toward some general equity goal if that equity goal is operationalized in different ways. A preference for tax disparity, expenditure disparity reduction, or wealth neutrality gains may have to be expressed. (Author/IRT)

Publication Type

JOURNAL ARTICLES. REPORTS - Research/Technical.

Language

English

Clearinghouse Code

Educational Management.

Entry Month

198105

<26>

Accession Number

ED180525

Author

Doversberger, Betty. Hickrod, G Alan.

Institution

Illinois State Univ., Normal. Center for the Study of Educational Finance. [BBB12660]

Sponsoring Agency

Illinois State Univ., Normal. [JIM34800]

Title

Proposed Tax Reforms and Community College Finance in Illinois.

Availability

EDRS Availability: Microfiche [\$1.42 card(s)], Paper.

Center for the Study of Educational Finance, Department of Educational Administration and Foundations, Illinois State University, Normal, IL 61761 (\$3.50).

Date of Publication

September 1979

Country of Publication

U.S., Illinois

ERIC Subject Headings

Community Colleges

Educational Finance

Enrollment Trends

Expenditures

Financial Problems

*Financial Support

Property Taxes

State Aid

*State Legislation

*Tax Allocation

Tuition

*Two Year Colleges

Identifiers

Hedley Bill (Michigan 1979), Proposition 13 (California 1978), *Taxpayers Rights Amendment (Illinois 1980).

Abstract

In response to the likelihood of some form of tax limitation in Illinois in the near future, this study discusses a tax limitation measure that was proposed to the 81st Illinois General Assembly, the Taxpayer's Rights Amendment (also known as the Totten Bill), and compares it with measures recently passed in other states, with emphasis on Proposition 13 in California and the Hedley Amendment in Michigan. Recent trends in the funding of the state's community colleges are examined to determine the rate of growth of revenues from local taxes, chargebacks, tuition and fees, and state appropriations. Growth rates are also indicated for total revenues, total expenditures, enrollments, equalized assessed valuations, and equalized assessed valuations per full-time equivalent (FTE) student. Additionally, the geographic distribution of the revenue per FTE student is plotted for various sources. Next, the effects of the proposed Taxpayer's Rights Amendment are projected backwards to 1972 to examine the impact of this measure on local property tax revenues for the community colleges. Finally, the incompatibility of general tax relief and expanded educational services is highlighted in terms of policy implications for the community college system. (Author/AYC)

Notes

91 p., Some tables in Appendix B may not reproduce well due to small size of type

Publication Type

REPORTS - Research/Technical. STATISTICAL DATA (Numerical, Quantitative, etc.).

Language

English

Clearinghouse Code

Junior Colleges.

Entry Month

198005

<27>

Accession Number

ED172341

Author

Hickrod, G Alan. And Others.

Institution

Illinois State Univ., Normal. Center for the Study of Educational Finance. [BBB12660]

Title

Equity Goals in Illinois School Finance: 1973-1979.

Availability

EDRS Availability: Microfiche [\$1.42 card(s)], Paper.

Center for the Study of Educational Finance, 331 DeGarmo Hall, Illinois State University, Normal, Illinois 61761 (\$3.00).

Date of Publication

February 1979

Country of Publication

U.S., Illinois

ERIC Subject Headings

Elementary Secondary Education

*Equalization Aid

Expenditure Per Student

*Finance Reform

Multiple Regression Analysis

Program Evaluation

State Aid

State Legislation

Identifiers

*Gini Index, Illinois, Wealth Neutrality.

Abstract

This paper uses the year 1972-73 as a base line in evaluating the progress of Illinois toward certain "equity goals." In determining the equity goals, two dimensions are studied--disparity and wealth neutrality. One

measure of disparity is the permissible variance in school district expenditures expressed in the coefficient of variation, another is the McLoone index. Two different calculations were also made using the concept of fiscal neutrality or wealth neutrality. One calculation uses the Gini index, the other the simple regression of expenditures on a specification of wealth. The results of the calculations are presented in charts and in appendices. Subject to the limitations identified, the general finding seems clear. For four years the basic legislation passed in 1973 and the substantial increase in state aid necessary to fund that reform were successful in moving Illinois toward less expenditure disparity between school districts and greater wealth neutrality. However, in the last two years a reversal has taken place. The reversal has caused all the gains to be lost with regard to expenditure disparity in unit districts and elementary districts, and some of the gains to be lost with regard to wealth neutrality. (Author/IRT)

Publication Type

REPORTS - Evaluative/Feasibility. REPORTS - Research/Technical.

Language

English

Clearinghouse Code

Educational Management.

Entry Month

197911

<28>

Accession Number

ED168125

Author

Hubbard, Ben C. Hickrod, G Alan.

Institution

Illinois State Univ., Normal. Center for the Study of Educational Finance. [BBB12660]

Sponsoring Agency

Illinois School Problems Commission, Springfield. [BBB15539]

Title

A Proposed Plan for Altering the Present State Aid System, to Correct for Objectionable Features of the Present Illinois System of Funding Public Education, and a Suggestion About a Way to Adjust Property Taxes Downward while Leaving the System Flexible.

Availability

EDRS Availability: Microfiche [\$1.42 card(s)].

Center for the Study of Educational Finance, Department of Educational Administration and Foundations, Illinois State University, Normal, Illinois 61761 (\$1.00).

Date of Publication

November 1978

Country of Publication

U.S., Illinois

ERIC Subject Headings

*Educational Finance

Elementary Secondary Education

*Inflation (economics)

*Property Taxes

School District Spending

*State Aid

State Legislation

*State School District Relationship

Identifiers

*Illinois.

Abstract

The current method of financing education in Illinois is explained and reasons are advanced for changing it to afford property tax relief by a more equitable formula. The proposed plan and the arguments supporting it are then offered. The plan increases the state basic support level per student to \$1,400, and the state assumes the full cost of the previous year's inflation on the basic \$1,400 program. When school districts exceed the state-used rate in step one, the state assures those districts that their tax rate will at least get the dollars that the average of all like districts in the state would receive. Property tax relief would be achieved by replacing part of a property tax with alternative tax sources. It is suggested that the law authorizing this require the local collection form to calculate the tax bill, reduce any taxes that the bill reflects between 2 percent and 3 percent, and show on the form that the levy made by the board of education has been paid to the local district and that the taxpayer's bill was reduced by the amount of such taxes levied, but paid by the state. The tax reduction would be obvious and the prerogative of the local board would remain.

(Author/MLF)

Notes

20 p., A presentation for the Illinois Association of School Boards; Not available in paper copy due to marginal legibility of original document; Appendix A may be marginally legible

Publication Type

REPORTS - Evaluative/Feasibility.

Language

English

Clearinghouse Code

Educational Management.

Entry Month

197908

<29>

Accession Number

ED168124

Author

Hubbard, Ben C. Hickrod, G Alan.

Institution

Illinois State Univ., Normal. Center for the Study of Educational Finance. [BBB12660]

Sponsoring Agency

Illinois School Problems Commission, Springfield. [BBB15539]

Title

Illinois School Finance in an Era of Property Tax Relief: Some Alternatives to a Proposition Thirteen.

Availability

EDRS Availability: Microfiche [\$1.42 card(s)], Paper.

Center for the Study of Educational Finance, Department of Educational Administration and Foundations, Illinois State University, Normal, Illinois 61761 (\$2.00).

Date of Publication

November 1978

Country of Publication

U.S., Illinois

ERIC Subject Headings

*Educational Finance

*Equalization Aid

*Inflation (economics)

*Property Taxes

*School District Spending

State School District Relationship

Identifiers

*Illinois.

Abstract

The purpose of this paper is to outline some policy options that might be considered by decision-makers in Illinois as they struggle with school finance in adequately funding the public schools, but also bringing about property tax relief. First the report looks at ways of attaining property tax relief through the distributive side by discussing state dollars to aid local school districts offset inflation, for equity purposes, and for property

tax replacement. Then the report describes ways of attaining property tax relief through the options on the revenue side. Options discussed include freezing property tax levies, property tax reductions, property tax assessment, and property taxes not allowed to exceed a standard percentage of an individual's income. A general strategy is outlined for attaining property tax relief without at the same time reducing the level of educational services in the school districts. (Author/MLF)

Publication Type

REPORTS - Evaluative/Feasibility.

Language

English

Clearinghouse Code

Educational Management.

Entry Month

197908

<30>

Accession Number

ED153305

Author

Hickrod, G Alan. And Others.

Institution

Illinois State Univ., Normal. Center for the Study of Educational Finance. [BBB12660]

Sponsoring Agency

National Inst. of Education (DHEW), Washington, DC. [BBB06621], National Conference of State Legislatures, Washington, DC. [BBB07118], Illinois School Problems Commission, Springfield. [BBB15539]

Title

Reward for Effort in Illinois School Finance: Policy Debate, Empirical Evidence, Legislative Implications.

Availability

EDRS Availability: Microfiche [\$1.42 card(s)], Paper.

Center for the Study of Educational Finance, Department of Educational Administration, 331 DeGarmo Hall, Illinois State University, Normal, Illinois 61761 (\$3.00).

Date of Publication

February 1978

ERIC Subject Headings

Elementary Education

Elementary Secondary Education

*Equalization Aid

Finance Reform

Models

School Districts

Secondary Education

*Socioeconomic Influences

State Aid

*State Legislation

Statistical Data

*Tables (data)

*Tax Effort

*Tax Rates

Identifiers

*Illinois.

Abstract

In the first section of this study, arguments for and against reward for local effort are presented along with brief summaries of some previous empirical studies on the subject. The second and third sections describe the methodology and the findings of a new empirical study that investigated the determinates of tax rate change in Illinois before the 1973 reform and after it. The study examines the impact of several socioeconomic variables--wealth, income level of residents, education level of residents, occupation of residents, percentage of population living in urban areas, percentage of nonwhite population, percentage of population between ages six and eighteen, percentage of owner-occupied housing, and existing operating tax rate--on changes in tax rates before and after the reform. Three empirical models were constructed for the research--the socioeconomic linear model, the socioeconomic interaction model, and the fiscal response model. Among the findings were that the amount of tax rate increase was lower after reform and that low income and low assessed valuation districts increased their tax rate by a smaller amount than the overall average. Numerous tables are included. (Author/IRT)

Publication Type

REPORTS - Research/Technical.

Clearinghouse Code

Educational Management.

Entry Month

197809

<31>

Accession Number

ED153304

Author

Hubbard, Ben C. Hickrod, G Alan.

Institution

Illinois State Univ., Normal. Center for the Study of Educational Finance. [BBB12660]

Sponsoring Agency

National Inst. of Education (DHEW), Washington, DC. [BBB06621], National Conference of State Legislatures, Washington, DC. [BBB07118], Illinois School Problems Commission, Springfield. [BBB15539]

Title

A Pilot Study of Possible Adjustments to the Wealth Measurement in Illinois Based on Using Private or Parochial Students in the Student Count.

Availability

EDRS Availability: Microfiche [\$1.42 card(s)], Paper.

Center for the Study of Educational Finance, Department of Educational Administration, 331 DeGarmo Hall, Illinois State University, Normal, Illinois 61761 (\$1.25).

Date of Publication

March 1978

ERIC Subject Headings

*Average Daily Attendance

Elementary Secondary Education

*Equalization Aid

*Finance Reform

*Measurement Techniques

State Aid

State Legislation

Tables (data)

Identifiers

*Illinois.

Abstract

Dividing the number of students in average daily attendance (ADA) in a district into that district's assessed value can result in a distorted view of the district's actual wealth if the number of students in nonpublic schools is not taken into consideration. To attempt to see what this means to communities, three Illinois districts in which both the public and the parochial schools were willing to furnish attendance data were selected for study. Two new methods of establishing district wealth were examined. In one, all students in ADA in both public and private schools were counted and this number was used to determine relative wealth and to claim state aid. In the other, all students in ADA in both public and private schools were counted but only in determining the wealth of the district. State aid was paid only for the students attending public

schools. Arguments for the second plan are the strongest. Either plan would be contingent on legislation to require private and parochial schools to furnish attendance data not now available. (Author/IRT)

Publication Type

REPORTS - Research/Technical.

Clearinghouse Code

Educational Management.

Entry Month

197809

<32>

Accession Number

ED149415

Author

Hickrod, G Alan. And Others.

Institution

Illinois State Univ., Normal. Center for the Study of Educational Finance. [BBB12660]

Title

School Finance Reform and Suburban Districts: A Few Facts, Several Research Design Questions, and Some Policy Considerations.

Availability

EDRS Availability: Microfiche [\$1.42 card(s)].

Center for the Study of Educational Finance, Illinois State University, 331 DeGarmo Hall, Normal, Illinois 61761 (\$2.50).

Date of Publication

September 15, 1977

ERIC Subject Headings

Change Strategies

*Educational Finance

Elementary Secondary Education

*Finance Reform

*Research Design

State Aid

State School District Relationship

*Suburban Schools

Tables (data)

Identifiers

*Illinois.

Abstract

This paper reviews previous research on school finance reform in Illinois and examines the impact of various types of finance reform on suburban school districts as compared to urban and rural districts. The paper is divided into two parts. Part 1 reviews data from three previous annual evaluations of the results of the Illinois school finance reforms of 1973 and, based on these data, raises a number of research design questions about suburban school district analysis. Part 2 outlines situations in which suburban school districts might be expected to gain or lose from various types of school finance reform. (Author/JG)

Notes

35 p., Paper prepared for the Ford Foundation Seminar on School Finance Reform and Suburban Schools (Chicago, Illinois, September 15, 1977); Not available in paper copy due to marginal legibility of original document

Publication Type

SPEECHES, CONFERENCE PAPERS.

Clearinghouse Code

Educational Management.

Entry Month

197806

<33>

Accession Number

ED146686

Author

Hickrod, G Alan. Hubbard, Ben C.

Institution

Illinois State Univ., Normal. Center for the Study of Educational Finance. [BBB12660]

Title

Return to the "Two-Tier" Funding Notion in Illinois: A Reexamination of the Basic Rationale for the School Finance Reform of 1973.

Availability

EDRS Availability: Microfiche [\$1.42 card(s)].

Center for the Study of Educational Finance, Illinois State University, 331 DeGarmo Hall, Normal, Illinois 61761 (\$0.75).

Date of Publication

October 1977

ERIC Subject Headings

Change Strategies

*Educational Finance

Elementary Secondary Education

*Equalization Aid

*Finance Reform

*Models

*State Aid

Tax Effort

Identifiers

*Illinois.

Abstract

This paper examines the impact of Illinois' present system of state aid to education in light of the rationale for its adoption, and argues that the stated purposes of the present system would be better realized through the adoption of a "two-tiered" finance system. The present Illinois system consists of the Strayer-Haig system of foundation grants and a "resource equalizer" system of aid to districts based on their local tax effort. The authors argue that much of the political support for this system was based on the desire for overall property tax relief, and not on the desire to reduce disparities in per-pupil expenditures between districts. Although Illinois' resource equalizer system did provide short-term tax relief during its phase-in period, they point out, its long-term effect is to reward increases in local tax rates. By adopting a "two-tiered" system, they suggest, it would be possible to provide more or less of this district power equalizing, simply by varying the relative size of the basic foundation grant (tier 1) and the "local initiative" or "tax incentive" grant (tier 2). (Author/JG)

Notes

14 p., Not available in paper copy due to marginal legibility of original document

Publication Type

REPORTS - Research/Technical.

Clearinghouse Code

Educational Management.

Entry Month

197804

<34>

Accession Number

EJ183213

Author

Hickrod, G Alan. Hubbard, Ben C.

Title

The 1973 School Finance Reform in Illinois: Quo Jure? Quo Vadis?

Source

Journal of Education Finance. 3, 4, 412-32, Spr 78.

Date of Publication

1978

ERIC Subject Headings

Elementary Secondary Education

*Equalization Aid

*Finance Reform

Political Influences

Program Evaluation

State Aid

*State Legislation

Identifiers

*Illinois.

Abstract

Describes the political values operating to allow the Illinois finance reform legislation to be passed in 1973, outlines the legislation and subsequent amendments to the reform, and discusses evaluative research done on the reform. (Author/IRT)

Clearinghouse Code

Educational Management.

Entry Month

197811

<35>

Accession Number

EJ175584

Author

Hickrod, G Alan. Hubbard, Ben C.

Title

The Concept of Fiscal Effort in the Illinois General Purpose Educational Grant-in-Aid.

Source

Journal of Education Finance. 3, 3, 272-8, Win 78.

Date of Publication

1978

ERIC Subject Headings

Assessed Valuation

*Educational Finance

Elementary Secondary Education

Equalization Aid

*Finance Reform

Income

*State Aid

State Legislation

*Tax Effort

Identifiers

*Illinois.

Abstract

Discusses the Illinois grant-in-aid formula for school finance and argues that an income factor needs to be included in the measurement of fiscal effort if the state wants to retain its concept of "equal expenditure for equal effort." (JG)

Clearinghouse Code

Educational Management.

Entry Month

197807

<36>

Accession Number

ED137916

Author

Hickrod, G Alan. Hubbard, Ben C.

Sponsoring Agency

Illinois State Univ., Normal. Coll. of Education. [BBB02974], Illinois State Univ., Normal. Graduate School. [BBB14434]

Title

Illinois School Finance Research: Some Knowns and Unknowns.

Availability

EDRS Availability: Microfiche [\$1.42 card(s)].

Center for the Study of Educational Finance, Department of Educational Administration, Illinois State University, 331 DeGarmo Hall, Normal, Illinois 61761 (\$2.00).

Date of Publication

February 1977

ERIC Subject Headings

*Educational Finance

*Educational Research

Elementary Secondary Education

Evaluation Methods

*Finance Reform

*Research Problems

*Research Projects

State Aid

State Legislation

Identifiers

*Illinois.

Abstract

This paper examines the challenges and problems involved in studying the Illinois school finance system, based on the experience of the Center for the Study of Educational Finance in studying the 1973 Illinois school finance reform. The first major section of the paper outlines the major variables in the 1973 Illinois reform and discusses problems that have emerged with each variable. These variables include the unweighted pupil count, the number of pupils eligible for Title I benefits, the property valuation per pupil, and the local tax rate for operating purposes. The second section discusses the three annual evaluations of the 1973 Illinois reform that have been conducted by the Center for the Study of Evaluation, with particular attention to the limitations of those evaluations. The final section briefly describes some of the difficulties facing researchers who would like to study Illinois school finance. (Author/JG)

Notes

36 p., Paper prepared for the Conference on Dilemmas in School Finance: Illinois and the Nation (Midwest Administration Center, University of Chicago, Illinois) ; Not available in hard copy due to authors' restrictions

Publication Type

SPEECHES, CONFERENCE PAPERS.

Clearinghouse Code

Educational Management.

Entry Month

197709

<37>

Accession Number

ED137914

Author

Hickrod, G Alan. Hubbard, Ben C.

Institution

Illinois State Univ., Normal. Center for the Study of Educational Finance. [BBB12660]

Sponsoring Agency

Illinois State Univ., Normal. Coll. of Education. [BBB02974]

Title

The Concept of Fiscal Effort in the Illinois General Purpose Educational Grant-in-Aid: Some Legal and Measurement Problems. A Policy Paper.

Availability

EDRS Availability: Microfiche [\$1.42 card(s)], Paper.

Center for the Study of Educational Finance, Department of Educational Administration, Illinois State University, 331 DeGarmo Hall, Normal, Illinois 61761 (\$0.50).

Date of Publication

December 1976

ERIC Subject Headings

*Educational Finance

Elementary Secondary Education

*Equalization Aid

*Finance Reform

Incentive Grants

*State Aid

State School District Relationship

*Tax Effort

Identifiers

*Illinois.

Abstract

Recent legal action and research raise doubts about the advisability of measuring fiscal effort in the Illinois general grant-in-aid program by using the simple school district tax rate for operational purposes. Various logical, and perhaps legal, considerations might be sufficient to compel adjustment of the measurement of effort. Beyond these reasons, indications are that in the long run, greater state aid will go to districts that pass tax referenda and retain higher tax rates. The weight of research evidence suggests that low-income school districts will not be able to pass school tax referenda as often and therefore will not be able to take advantage of Illinois' "reward for effort" grant-in-aid system. An income factor is needed in the Illinois formula, more as a correction factor in the measurement of fiscal effort, than as an adjustment to "ability to pay." Introducing a new effort specification in the formula will require change in other parameters in that

formula, including the guaranteed valuation level. If Illinois wishes to retain its present concept of "equal expenditure for equal effort," there must be a reevaluation of how effort will be measured. (Author/JG)

Publication Type

REPORTS - Research/Technical.

Clearinghouse Code

Educational Management.

Entry Month

197709

<38>

Accession Number

ED135867

Author

Hickrod, G Alan. And Others.

Institution

Illinois State Univ., Normal. Center for the Study of Educational Finance. [BBB12660]

Sponsoring Agency

Illinois State School Problems Commission, Springfield. [BBB02029]

Title

The 1973 Reform of the Illinois General Purpose Grant-in-Aid: An Evaluation After Three Years.

Availability

EDRS Availability: Microfiche [\$1.42 card(s)].

Date of Publication

November 1976

ERIC Subject Headings

Compensatory Education

*Educational Finance

Educational Legislation

*Equalization Aid

*Evaluation

Evaluation Criteria

Expenditure Per Student

Finance Reform

Grants

Policy Formation

Property Taxes

School District Spending

*School Districts

School Taxes

*State Aid

State Programs

State School District Relationship

Statistical Analysis

*Tax Allocation

Tax Rates

Identifiers

*Illinois.

Abstract

A reform in the grant-in-aid system passed in Illinois in the summer of 1973 was evaluated. The State Changed on that date from a foundation system to a district power equalization system. Operational definitions of fiscal policy goals, such as fiscal neutrality and permissible variance of expenditures, were established and measurements taken pre-reform. Evidence relating to the passage of tax referenda was also introduced. The question of whether the policy goal of reward for local effort is incompatible with equity-oriented policy goals in school finance is discussed. (Author)

Notes

66 p., Paper presented at the Annual Meeting of the American Educational Research Association (61st, New York, New York, April 4-8, 1977)

Publication Type

REPORTS - Research/Technical.

Clearinghouse Code

Tests, Measurement, and Evaluation.

Entry Month

197707

<39>

Accession Number

ED128917

Author

Hickrod, G Alan. And Others.

Institution

Illinois State Univ., Normal. Center for the Study of Educational Finance. [BBB12660]

Sponsoring Agency

Office of Education (DHEW), Washington, DC. [RMQ66000]

Title

Enrollment Change and Educational Personnel Change in the K-12 Schools of Illinois.

Availability

EDRS Availability: Microfiche [\$1.42 card(s)], Paper.

Center for the Study of Educational Finance, Department of Educational Administration, Illinois State University, 331 DeGarmo Hall, Normal, Illinois 61761 (\$2.00).

Date of Publication

March 1976

ERIC Subject Headings

Administrators

*Declining Enrollment

Elementary Secondary Education

*Enrollment

*Enrollment Rate

Job Layoff

Property Appraisal

*Reduction in Force

Salaries

School Districts

Statistical Analysis

*Statistical Data

Tax Rates

Teachers

Identifiers

Illinois.

Abstract

At present, there are no viable models of organizations in decline; all sociological and economic theories deal with growing, expanding organizations. However, as the statistical data from Illinois school districts indicate, declining enrollment and reduction in force are pressing problems. This statistical analysis contains data on population, tax bases, property appraisal, salary, pupil/teacher ratios, teacher/administrator ratios, and community types. These variables were correlated to determine the trends and patterns in enrollment decline in Illinois. Data from Chicago were not included. The authors recommend changes in Title I weighting to relieve urban districts undergoing enrollment decline and changes in student clientele. They assert that reductions in administrative staff should keep pace with both enrollment decline and teacher reduction. The teacher/administrator ratios discovered in this study could perhaps be used as guidelines for

reduction in force. They suggest that the state provide financial assistance to districts hardest hit by declining enrollment and reduction in force. (DS)

Notes

55 p., Supplement to Report of the Illinois Task Force on Declining Enrollments in the Public Schools, ED 116 353

Publication Type

STATISTICAL DATA (Numerical, Quantitative, etc.).

Report Number

RR-3-HYCH-76

Grant Number

POO-75-0365

Clearinghouse Code

Educational Management.

Entry Month

197702

<40>

Accession Number

ED127681

Author

Hickrod, G Alan. And Others.

Institution

Illinois State Univ., Normal. Dept. of Educational Administration. [BBB00788]

Title

The 1973 Reform of the Illinois General Purpose Educational Grant-in-Aid: A Description and an Evaluation.

Availability

EDRS Availability: None.

Center for the Study of Educational Finance, Department of Educational Administration, Illinois State University, 331 DeGarmo Hall, Normal, Illinois 61761 (\$2.50).

Date of Publication

1974

ERIC Subject Headings

*Educational Finance

Educational History

Elementary Secondary Education

*Equalization Aid

Evaluation

*Evaluation Criteria

*Evaluation Methods

*Finance Reform

Resource Allocation

State Aid

State Legislation

Statistical Analysis

Tables (data)

*Tax Effort

Tax Rates

Identifiers

*Illinois.

Abstract

This study is divided into three chapters. In the first chapter the historical background essential for an understanding of the Illinois situation is presented and the various provisions of the new allocation system are described. In Chapter 2 a body of scholarly and professional literature concerning criteria for evaluation of state education grant-in-aid is reviewed and the ways and means to make the various evaluative criteria operational in a measurement and statistical sense are outlined. In Chapter 3 data from the 1973-74 school year is used along with the procedures outlined in Chapter 2 to evaluate the 1973 reforms. On the basis of one year's data, it does appear that the state has generally moved toward the several fiscal policy goals desired. Movement was made toward the goals of fiscal neutrality, variation in revenue per pupil, reduced tax rates, increased reward for effort, and equal expenditure for equal effort. (Author/IRT)

Notes

82 p., For a related document, see ED103977

Publication Type

REPORTS - Research/Technical.

Clearinghouse Code

Educational Management.

Entry Month

197701

<41>

Accession Number

ED127680

Author

Hickrod, G Alan. Hubbard, Ben C.

Institution

Illinois State Univ., Normal. Center for the Study of Educational Finance. [BBB12660]

Title

Research Agenda for School Finance Reform in Illinois. Research Report 1-HH-75.

Availability

EDRS Availability: None.

Center for the Study of Educational Finance, Department of Educational Administration, Illinois State University, 331 DeGarmo Hall, Normal, Illinois 61761 (\$0.75).

Date of Publication

August 1975

ERIC Subject Headings

Declining Enrollment

*Educational Finance

Elementary Secondary Education

*Equal Education

*Equalization Aid

*Finance Reform

*Property Taxes

State Aid

Tax Allocation

Tax Effort

Tax Rates

Identifiers

Elementary Secondary Education Act Title I, *Illinois.

Abstract

Eight matters relative to the Illinois general purpose educational grant-in-aid that might be subjected to further research and development are discussed. The eight matters are (1) the use of a notational system based on the concept of a guaranteed expenditure for each cent of tax effort, (2) the possibility of adding a curvature to the present district power equalization (DPE) system, (3) the addition of a reorganization and consolidation incentive, (4) the addition of an inflation factor, (5) the addition of a "cushioning" factor to offset loss of pupils, (6) the addition of an income factor, (7) the effect of the removal of the corporate personal property from the tax rolls on the distribution of state aid, and (8) the continued evaluation of the equity effects of the DPE or "reward for effort" system. (Author/IRT)

Notes

29 p., Paper prepared for the Illinois Office of Education; For a related document, see ED103977

Publication Type

REPORTS - Research/Technical.

Clearinghouse Code

Educational Management.

Entry Month

197701

<42>

Accession Number

ED127679

Author

Hickrod, G Alan. And Others.

Institution

Illinois State Univ., Normal. Center for the Study of Educational Finance. [BBB12660]

Title

Cost-Size Relationship Among School Districts in Illinois, 1974. Research Paper 2-HCYH-75.

Availability

EDRS Availability: None.

Center for the Study of Educational Finance, Department of Educational Administration, Illinois State University, 331 DeGarmo Hall, Normal, Illinois 61761 (\$0.35).

Date of Publication

September 1975

ERIC Subject Headings

*Cost Effectiveness

Elementary Secondary Education

Operating Expenses

*School Districts

*School Size

Statistical Analysis

Identifiers

*Illinois.

Abstract

An analysis relating district size in terms of average daily attendance (ADA) to costs in terms of current operating expenditures reveals that districts operating most efficiently in 1974 are unit districts at 2,432 ADA, high school districts at 874 ADA, and elementary districts at 336 ADA. Each population is treated separately and, thus, the "optimal" sizes cannot be added together. It should be noted that these simple

gross, or bivariate, functions have relatively low explanatory power. Loss of pupils will probably focus more attention on the high costs of small schools in Illinois. However, it is far from clear just what the electorate wants to do about these high costs. Lack of knowledge about the relation of variables other than cost to school size is a further limiting factor. It is also not clear that district size is the most important aspect of the situation; it could very well be attendance center size or educational program size. Finally, some schools will probably always be small no matter what the actions of the state government. The educational opportunities of children in these "forever small" schools cannot be ignored. (Author/IRT)

Notes

11 p., Paper prepared for the Illinois Office of Education

Publication Type

REPORTS - Research/Technical.

Clearinghouse Code

Educational Management.

Entry Month

197701

<43>

Accession Number

ED116359

Author

Hubbard, Ben C. Hickrod, G Alan.

Institution

Illinois State Univ., Normal. Center for the Study of Educational Finance. [BBB12660]

Title

A Look at Comparing State Aid to Local School Districts on an Interstate Basis.

Availability

EDRS Availability: Microfiche [\$1.42 card(s)].

Center for the Study of Educational Finance, Department of Educational Administration, Illinois State University, Normal, Illinois 61761 (\$0.35).

Date of Publication

October 28, 1975

ERIC Subject Headings

Comparative Analysis

Constitutional Law

Costs

Court Litigation

Education

*Educational Finance

Elementary Secondary Education

*Equal Education

*Equalization Aid

Federal Aid

Federal Programs

Interstate Programs

Measurement Techniques

State Federal Aid

State Programs

*Statistical Analysis

Identifiers

*Fiscal Neutrality.

Abstract

The United States Supreme Court decision in the Rodriguez case does not make unequal educational opportunity between students any less of a moral injustice. It is immaterial whether these students are in different school districts in the same state, or in different school districts in different states. There is a role for the federal government in reducing the permissible variance of educational expenditures between states. This interstate comparison of permissible variance cannot be easily accomplished without agreement on criteria and increased sophistication of statistical techniques. Several methodologies and criteria that might aid in the measurement of intrastate permissible variance are suggested. (Author)

Notes

20 p., Speech presented at the Annual Meeting of the Association of School Business Officials of the United States and Canada (Las Vegas, Nevada, October 27-31, 1975); Not available in hard copy due to light type of original document

Publication Type

SPEECHES, CONFERENCE PAPERS.

Report Number

S-1-HH-75

Clearinghouse Code

Educational Management.

Entry Month

197605

Accession Number

ED114990

Author

Hickrod, G Alan. Hou, Daniel Jaw-Nan.

Sponsoring Agency

Illinois State Univ., Normal. [JIM34800], Office of Education (DHEW), Washington, DC. [RMQ66000]

Title

Social and Economic Inequalities Among Suburban School Districts: Observations from a Two-Decade Study.

Availability

EDRS Availability: Microfiche [\$1.42 card(s)], Paper.

Date of Publication

April 1975

ERIC Subject Headings

*Economic Factors

*Educational Finance

Educational Research

Elementary Secondary Education

Measurement

Measurement Techniques

Residential Patterns

Social Differences

*Social Influences

*Socioeconomic Status

Suburban Environment

*Suburban Schools

Suburbs

Abstract

This paper reports on a continuation of a previous investigation of social and economic inequalities among suburban school districts, points out some of the measurement problems encountered while engaged in this task, and summarizes some literature in economics and sociology that relates to this topic. The empirical research tested three hypotheses: school districts in at least some metropolitan areas are becoming less alike regard to their stock of human resources; school districts in at least some metropolitan areas are becoming more alike with regard to certain fiscal characteristics such as per pupil expenditures, property valuations, and tax effort; and the expenditure levels of school districts in at least some metropolitan areas are becoming increasingly determined by the material and human resources found in those districts. The first hypothesis is not strongly supported, with the possible exception of the income measurement. The

second hypothesis is strongly supported, though the movement toward equality may have been more a phenomenon of the 1950's than of the 1960's. The third hypothesis is also strongly supported. The paper includes conclusions, tables of data, references, and appendixes that define terms and deal with statistical complexities. (Author/IRT)

Notes

45 p., Paper presented at the Annual Meeting of the American Educational Research Association (Chicago, Illinois, April 1974)

Publication Type

SPEECHES, CONFERENCE PAPERS.

Grant Number

OEG-5-9-235060-0005

Clearinghouse Code

Educational Management.

Entry Month

197604

<45>

Accession Number

ED103977

Author

Hickrod, G Alan. And Others.

Institution

Illinois State Univ., Normal. [JIM34800]

Sponsoring Agency

Bureau of Elementary and Secondary Education (DHEW/OE), Washington, DC. [BBB00077]

Title

Measurable Objectives for School Finance Reform: A Further Evaluation of the Illinois School Finance Reforms of 1973.

Availability

EDRS Availability: Microfiche [\$1.42 card(s)], Paper.

Date of Publication

April 1, 1975

ERIC Subject Headings

*Educational Finance

Elementary Secondary Education

*Equalization Aid

Expenditure Per Student

*Finance Reform

Financial Policy

Fiscal Capacity

Income

Objectives

School Taxes

*State Aid

Statistics

*Tax Effort

Tax Rates

Identifiers

District Power Equalization, Elementary Secondary Education Act Title III, Illinois.

Abstract

A 1973 Illinois school finance reform program initiated a guaranteed tax yield system that can also be considered a district power equalization system. This paper evaluates this reform according to four criteria: permissible variance, fiscal neutrality, reward for effort, and aid to urban areas. Emphasis is given to a discussion of legal and economic aspects of fiscal neutrality. The report includes limitations and qualifications of findings, but generally concludes that overall variation among districts has decreased, progress toward fiscal neutrality has been made, rewards for effort have increased, and large districts have received significant additional aid. Appended tables present the results and statistical methods. (DW)

Notes

64 p., Paper presented at the Annual Meeting of the American Educational Association (60th, Washington, D.C., March 31-April 4, 1975)

Publication Type

SPEECHES, CONFERENCE PAPERS.

Clearinghouse Code

Educational Management.

Entry Month

197508

<46>

Accession Number

EJ112418

Author

Hickrod, G Alan. And Others.

Title

Towards a Political Theory of School Finance Reform in the United States.

Source

Journal of Educational Administration. 12, 2, 57-70, Oct 74.

Date of Publication

1974

ERIC Subject Headings

*Court Litigation

*Educational Change

*Educational Finance

*Educational History

*Educational Policy

Elementary Secondary Education

History

Politics

Abstract

There is an identifiable "democratic theory of school finance" that can be seen in the works of classical authors, in the current professional educational literature, and in some recent court opinions. (Author/WM)

Clearinghouse Code

Educational Management.

Entry Month

197507

<47>

Accession Number

EJ110145

Author

Hickrod, G Alan.

Title

"No Wealth Discrimination": Reply from a "Conventional" School Finance Analyst.

Source

Education & Urban Society. 7, 1, 88-96, Nov 74.

Date of Publication

1974

ERIC Subject Headings

*Educational Finance

*Equal Education
*Equalization Aid
Finance Reform
*Financial Policy
*Financial Problems
Grants
School Funds
School Taxes
State Aid

Abstract

It is asserted that conventional school finance analysis must address itself to the social realities of politics and dealing with state legislatures, thus disputing some of the theses offered by Daniel C. Morgan in a previous article. (EH)

Clearinghouse Code

Urban Education.

Entry Month

197505

<48>

Accession Number

EJ100949

Author

Hickrod, G Alan.

Title

Flash: The (Expletive Deleted) Serrano Pot Boils Again.

Source

Planning & Changing - a Journal for School Administrators. 5, 1, 33-35, Spr 74.

Date of Publication

1974

ERIC Subject Headings

*Court Litigation
*Educational Finance
*Educational Legislation
*Equal Education
School Support
School Taxes

Identifiers

*California, Serrano v Priest.

Abstract

Draws attention to a few of the far-reaching implications contained in the 106-page opinion of Judge Bernard S. Jefferson regarding the Serrano case and the unconstitutionality of the California public school financing system. (Author/DN)

Clearinghouse Code

Educational Management.

Entry Month

197412

<49>

Accession Number

ED074621

Author

Hickrod, G Alan. Chaudhari, Ramesh.

Institution

Illinois State Univ., Normal. Dept. of Educational Administration. [BBB00788]

Title

A Longitudinal Study of Fiscal Equalization in Illinois.

Availability

EDRS Availability: Microfiche [\$1.42 card(s)], Paper.

Date of Publication

February 1973

ERIC Subject Headings

Economic Status

Educational Finance

Educational Research

*Equal Education

*Equalization Aid

Expenditure Per Student

*Property Taxes

School Taxes

*State Aid

*Tax Rates

Abstract

Fiscal data were analyzed for a nine-year period (1963-1971) for all school districts in Illinois. Two hypotheses were tested relative to two different definitions of equalization -- "permissible variance" and "fiscal neutrality." Support was given to the notion of increasing interdistrict equality relative to expenditures and tax effort. Support was also given to the hypothesis that grants-in-aid have done little to change the proportion of total funds available to the poorer students of the State. (Author)

Notes

39 p., Paper presented at American Educational Research Association Annual Meeting (58th, New Orleans, Louisiana, February 26-March 1, 1973)

Clearinghouse Code

Educational Management.

Entry Month

197308

<50>

Accession Number

ED060544

Author

Hickrod, G Alan. And Others.

Institution

Illinois State Office of the Superintendent of Public Instruction, Springfield. Advisory Committee on School Finance. [BBB08618]

Title

Definition, Measurement, and Application of the Concept of Equalization in School Finance. An Integration and Critique of School Finance Research Conducted on the Subject of Equal Educational Opportunity. An Occasional Paper.

Availability

EDRS Availability: Microfiche [\$1.42 card(s)], Paper.

Date of Publication

February 1972

ERIC Subject Headings

Court Litigation

Disadvantaged

Educational Economics

*Educational Finance

*Equal Education

*Equalization Aid

Expenditure Per Student

Rural Urban Differences

*School Taxes

*State Aid

State School District Relationship

Urban Education

Abstract

This paper explores definitional problems of the equalization concept in school finance, highlights some problems in the measurement of this concept, and discusses its application to current State educational fiscal policy matters. To define equalization, the report poses basic questions covering the concept, surveys school finance literature for appropriate responses, and then progresses to a series of graphic models. To aid in measuring the concept, a technique is outlined for measuring equalization, and some illustrations of the use of this technique are provided. (Author/JF)

Notes

82 p., Occasional paper of the State Superintendent's Advisory Committee on School Finance

Clearinghouse Code

Educational Management.

Entry Month

197207

<51>

Accession Number

EJ050396

Author

Sabulao, Cesar M. Hickrod, G Alan.

Title

Optimum Size of School Districts Relative to Selected Costs.

Source

Journal of Educational Administration. 9, 2, 178-192, Oct 71.

Date of Publication

1971

ERIC Subject Headings

*Cost Effectiveness

*Costs

*Educational Economics

*Educational Research

Expenditure Per Student

School Districts

School Size

Identifiers

*School District Size.

Abstract

The economic efficiency of public school districts was explored by utilization of the concept of economies and diseconomies of scale. An optimum size relative to costs was discovered by analyzing the data with curvilinear least squares regression and also with the differential calculus. (Author)

Clearinghouse Code

Educational Management.

Entry Month

197204

<52>

Accession Number

ED047377

Author

Sabulao, Cesar M. Hickrod, G Alan.

Title

Optimum Size of School Districts Relative to Selected Costs.

Availability

EDRS Availability: Microfiche [\$1.42 card(s)], Paper.

Date of Publication

December 1970

ERIC Subject Headings

Average Daily Attendance

Costs

*Educational Economics

Expenditure Per Student

*Multiple Regression Analysis

*School Districts

*School Size

Abstract

Two theories direct researchers in their efforts to find the optimum school or district size. The first theory holds that expenditures per student decrease as the size of the school increases. The second theory

maintains that the first is true only to a certain enrollment level at which point the greater complexity of the school increases expenditures per student. Using samples of 100 elementary, 100 secondary, and 100 unit districts from Illinois, regression analysis showed the second theory to be more nearly correct. The optimum district size in terms of per student operating expenditures was 750 in an elementary district (K-8), 500 in a secondary district (9-12), and 5,000 in a unit district (K-12). (RA)

Notes

25 p., Paper presented at American Educational Research Association Annual Meeting (55th, New York, New York, February 4-7, 1971)

Clearinghouse Code

Educational Management.

Entry Month

197106

<53>

Accession Number

EJ033387

Author

Hickrod, G Alan.

Title

Local Demand for Education: A Critique of School Finance and Economic Research Circa 1959-1969.

Source

Review of Educational Research. 41, 1, 35-49, Feb '71.

Date of Publication

1971

ERIC Subject Headings

Cross Sectional Studies

*Educational Demand

*Educational Economics

*Educational Finance

*Expenditure Per Student

Longitudinal Studies

Models

School Administration

Clearinghouse Code

Social Science/Social Studies Education (including input of Adjunct ERIC CH for Art Education and Adjunct ERIC CH on United States-Japan Studies since March 1990).

Entry Month

197105

<54>

Accession Number

ED037963

Author

Hickrod, G Alan.

Institution

Office of Education (DHEW), Washington, DC. Bureau of Research. [RMQ66004]

Title

Further Explorations in Human Resource Migration Among School Districts in Metropolitan Areas and the Effect of this Migration Upon School Finance. Final Report.

Availability

EDRS Availability: Microfiche [\$1.42 card(s)], Paper.

Date of Publication

September 1969

ERIC Subject Headings

*Educational Finance

*Migration Patterns

Relocation

*School Demography

Abstract

This report is divided into seven sections. Section one deals with the design of the study which includes the basic questions asked, the nature of the data collected in order to answer these questions, and the samples upon which the statistical analyses are performed. Sections two and three are concerned with the matter of social and economic inequalities among suburban school districts and specifically with trends through time with respect to these inequalities. Sections four and five are devoted to an investigation of the determinants of local spending for education. Section six concentrates upon the role of state aid both with respect to the social and economic inequalities previously explored, and with respect to the determination of local expenditure levels. In the final section the empirical findings are summarized and some recommendations for legislative action are offered. (Author)

Grant Number

OEG-5-9-235060-0005

Clearinghouse Code

Educational Facilities.

Entry Month

197008

<55>

Accession Number

ED037823

Author

Hickrod, G Alan. Sabulao, Cesar M.

Institution

Illinois State Univ., Normal. [JIM34800]

Sponsoring Agency

Office of Education (DHEW), Washington, DC. Bureau of Research. [RMQ66004]

Title

Increasing Social and Economic Inequalities among Suburban Schools: A Study in Educational Administration and Finance. Final Report.

Availability

EDRS Availability: None.

The Interstate Printers and Publishers, Inc., Danville, Illinois 61832 (\$3.00).

Date of Publication

1969

ERIC Subject Headings

Bibliographies

Educationally Disadvantaged

*Equal Education

Expenditures

Grants

Human Resources

*Metropolitan Areas

Public Education

School District Spending

*School Districts

School Taxes

Socioeconomic Status

*State Aid

*Suburban Schools

Abstract

This study of five metropolitan areas indicates increasing social and economic inequalities among suburban schools. In addition, the metropolitan areas seemed to be developing contiguous sectors of "advantaged" school districts and "disadvantaged" school districts. Financial differences are at the base of the inequalities, with high income/low tax burden areas providing more quality in education. State grants-in-aid to education have had little impact to date on lessening inequalities. To eliminate educational deprivation, the study recommends that an income measurement be introduced in the general aid formulas of the States and that middle-sized school districts be established in concentrations of disadvantaged areas to provide aid-in-kind. Further studies are necessary to find ways of helping districts that are doubly disadvantaged in both property valuation and income distribution and to help impacted districts find outside taxation bases. A further aid would be the establishment of monitoring agencies to detect shifts in human resources among school districts. This would provide data on social and economic character as well as traditional financial measures on which to base future policy intended to achieve equal educational opportunity. (LN)

Grant Number

OEG-5-9-235060-0005

Clearinghouse Code

Educational Management.

Entry Month

197008

<56>

Accession Number

ED024147

Author

Hickrod, G Alan. Hubbard, Ben C.

Institution

Illinois State Univ., Normal. Dept. of Educational Administration. [BBB00788]

Title

Alternatives in Educational Expenditure Policy for the State of Illinois.

Availability

EDRS Availability: Microfiche [\$1.42 card(s)], Paper.

Date of Publication

October 1968

ERIC Subject Headings

Assessed Valuation

*Educational Finance

Elementary Schools

*Equalization Aid

*Financial Policy

Fiscal Capacity

Grants

Human Resources

Income

Intermediate Administrative Units

*School Districts

School Taxes

Secondary Schools

*State Aid

Identifiers

Illinois, Strayer Haig Equalization Formula.

Abstract

This paper (1) provides background on types of State aid to education and describes how they work, (2) discusses the existing expenditure structure in Illinois, (3) describes and analyzes the fixed foundation (Strayer-Haig), variable foundation, percentage equalization, and resource equalizer formulae used for equalization aid in the United States, and (4) analyzes alternatives in educational expenditure policy for Illinois. It is suggested that equalization formulae should include weighting for income and human resources because property valuation, the traditional measure of ability to pay, is becoming more equalized among districts. Although alternatives in expenditure policy are presented, no policy is recommended as best. (TT)

Clearinghouse Code

Educational Management.

Entry Month

196904

<57>

Accession Number

EJ000057

Author

Hickrod, G Alan. Hubbard, Ben C.

Title

Social Stratification, Educational Opportunity, and the Role of State Departments of Education.

Source

Educ Admin Quart. 5, 1, 81-96, 69 W.

Date of Publication

1969

ERIC Subject Headings

Academic Achievement

Black Achievement

Ecological Factors

*Educational Economics

*Educational Opportunities

Educational Sociology

Policy Formation

*Social Class

*Socioeconomic Status

*State Departments of Education

Clearinghouse Code

Educational Management.

Entry Month

196901