The University Consortium to Improve Public School Finance and Promote Economic Growth presents a symposium on:

“Funding Pennsylvania’s Public Schools: A Look Ahead”

hosted by

University of Pittsburgh
Center on Regional Politics
Temple University

Institute of Politics

Doubletree Hotel Pittsburgh
Green Tree, PA
October 3, 2014

8:00 am Registration and Continental Breakfast

8:30 am Call to Order and Introduction by Hon. Rod D. Ruddock, Chair and Commissioner, Indiana County and Cochair, University of Pittsburgh Institute of Politics Education Policy Committee

8:35 am Welcome by Dr. Neil D. Theobald, President, Temple University

8:45 am SESSION I: FORECASTING THE FISCAL FUTURE OF PENNSYLVANIA’S PUBLIC SCHOOLS with introductions by Dr. Stan Thompson, Education Program Director, The Heinz Endowments, and Cochair, University of Pittsburgh Institute of Politics Education Policy Committee

Where Current Law and Policy Are Taking Our Public Schools: A Five-Year Fiscal Forecast:

Dr. William Hartman, Penn State College of Education
Dr. Timothy Shrom, Business Manager, Solanco School District, Lancaster County

What Long-Term Population Trends Mean for the Future of School Finance:

Dr. Maureen McClure, University of Pittsburgh School of Education

9:30 am GOVERNMENT OFFICIALS RESPONSE PANEL moderated by Rick Stafford, Distinguished Service Professor of Public Policy, Carnegie Mellon University and Member, Pennsylvania Policy Forum

Hon. Patrick Browne, Majority Whip, PA Senate and Co-Chair, Basic Education Funding Commission
Hon. Donna Oberlander, Member, PA House and Basic Education Funding Commission
Hon. Matt Smith, Member, PA Senate and Basic Education Funding Commission
Hon. Jake Wheatley, Member, PA House and House Education Committee and House Appropriations Committee
Ms. Nichole F. Duffy, Deputy Secretary, Office of Administration, PA Department of Education, and Member, Basic Education Funding Commission

10:20 am 10 Minute Break
SESSION II: WHY SMART INVESTMENTS IN PUBLIC SCHOOLS ARE CRITICAL TO PENNSYLVANIA’S ECONOMIC FUTURE by Ms. Eva Tanksy Blum, President, PNC Foundation

BUSINESS RESPONSE PANEL moderated by Mr. Bill Flanagan, Host, “Our Region’s Business,” and Executive Vice President of Corporate Relations, Allegheny Conference on Community Development
- Mr. Michael R. Dunleavy, Business Manager, International Brotherhood of Electrical Workers Local Union No. 5
- Mr. Dave Malone, President & CEO, Gateway Financial, and Chair, PA Workforce Investment Board
- Hon. John Pippy, former PA Senator, CEO, Pennsylvania Coal Alliance and Lieutenant Colonel, Pennsylvania Army National Guard
- Mr. Richard W. Taylor, CEO, Imbue Technology Solutions, Inc. (ImbuTec)

CONCLUDING REMARKS by Ms. Terry Miller, Director, University of Pittsburgh Institute of Politics

12:00 pm ADJOURNMENT

Introduction and Welcome

The Honorable Rodney D. Ruddock serves on the Board of Fellows for the University of Pittsburgh Institute of Politics and is a co-chair to the IOP’s Education Policy Committee. He was elected to the Indiana County Board of Commissioners in 2004 and currently serves as its chairman. After 35 years in public education, he retired as a high school principal of the Indiana Area School District. In addition to his career in education, Chairman Ruddock completed 37 years of military service, retiring as a major general in the United States Army Reserve. He graduated from Indiana University of Pennsylvania in 1965 with a bachelor of science in mathematics and safety education. He holds a master’s degree in counseling education from Indiana University and a secondary administrative certificate from Duquesne University. Recently, he completed an MBA Certificate Program from the IUP Eberly College School of Business.

Dr. Neil D. Theobald was named President of Temple University in January of 2013 and is a recognized expert on education finance, having authored several pieces on public school finance. Under President Theobald’s leadership, Temple has emerged as an innovative leader in public higher education, introducing strategies to reduce student debt and improve student learning. His research on the role of decentralization in educational finance and in modeling educational labor markets has resulted in more than $1.5 million in funded research, as well as many published articles, books, and reports. President Theobald came to Temple after a successful career at Indiana University, where he was named senior vice president in 2007. Previously, he served as senior vice provost at the university’s flagship campus in Bloomington and as special assistant to IU’s president. President Theobald earned a bachelor’s degree from Trinity College and a doctoral degree in educational finance from the University of Washington.

Session 1

Dr. Stan Thompson serves as co-chair of the Institute of Politics Education Policy Committee and is the director of The Heinz Endowments’ Education Program, which works with schools and community-based organizations to improve student achievement and promote high-quality learning, instruction, and educational leadership in the Pittsburgh region. Before joining the Endowments in September 2008, he was the executive director of Times2 Academy for Engineering, Mathematics, Science and Technology, a charter school in Providence, RI. Before becoming executive director of Times2, Dr. Thompson was the school’s academic dean for K-12 education. His diverse professional background also includes working as a middle and high school English teacher; a middle and high school principal; a senior associate with the Coalition of Essential Schools, which was formerly based at Brown University; director of a career and technical center in Rhode Island; and associate director of high schools for the New England Association of Schools and Colleges in Massachusetts. He holds a bachelor’s degree in English literature from Wheaton College, a master’s in English literature from The State University of New York at Stony Brook, a master’s in educational administration from Harvard University and a doctorate in educational leadership from Nova Southeastern University.
Dr. William Hartman is a professor at the Pennsylvania State University's College of Education. His areas of research include public school finance, economics of education, financial management of schools, technology applications in educational administration, and data analysis for student performance improvement and decision making. Recent research topics include the impact of fiscal crisis on school district finances, resource allocation in education, school-level data collection and reporting, school finance equity, special education funding, school district budgeting practices, financial modeling applications, and quality management in education. Dr. Hartman has served as a consultant or advisor to state school funding projects in California, Florida, Idaho, North Carolina, Ohio, Pennsylvania, and Vermont. He obtained a bachelor's degree in mechanical engineering at the University of Florida, master of business administration in management control and marketing at Harvard University, and a doctorate in educational finance and administration at Stanford University.

Dr. Timothy Shrom has served the past 33 years as the business manager at the Solanco School District in Quarryville, Pennsylvania. Prior to his work at Solanco, he served in the Lancaster County banking sector as both a loan officer and branch manager. He has served as president of the Pennsylvania Association of School Business Officials, and represented the Association of School Business Officials International as a member of the National Center for Education Statistics' School Facilities Task Force. For the Pennsylvania Association of School Business Officials, he serves as chair of the Statewide Health Care Task Force and as a member of the Pension Review Task Force. This year he serves as one of nine school finance experts on a review panel for the U.S. Department of Education's Office of Planning, Evaluation & Policy Development. This is a national study conducted by The American Institute for Research for school financial reporting. Dr. Shrom holds a B.S. in business from Elizabethtown College, a master's and PhD in educational leadership from Pennsylvania State University, where he also has done graduate work in the MBA program. His doctoral thesis was awarded The Donald J. Willower Dissertation Award in Educational Leadership at PSU, and the National Educational Finance Conference's award for Outstanding Dissertation of the Year.

Dr. Maureen W. McClure is associate professor in the Department of Administrative and Policy Studies in the School of Education at the University of Pittsburgh, and is a senior research associate in the Institute for International Studies in Education. She is also the director of the Global Information Networks in Education and an affiliated faculty member in the Ford Institute for Human Security and Global Studies. She currently serves as principal investigator for the Decentralized Basic Education Quality of Teaching and Learning/DBE-2 project in Indonesia, focusing on building sustainable partnerships between schools and universities. Her primary emphasis involves research, teaching and technical assistance on issues of 'glocal' strategic networks for education and human security in complex conditions, such as economic fragility and natural disasters. She has worked with Indonesia-related projects for over fifteen years with USAID and the U.S. State Department, the British Council, and the Asian Development Bank. She earned a B.A. in English and master's degree in secondary education from Allegheny College, as well as a master's of educational administration, a master's of business administration in applied economics in the non-profit sector, and a doctorate in educational finance and policy from the University of Rochester.

Mr. Rick Stafford is a distinguished service professor of public policy at Carnegie Mellon University and a member of the Pennsylvania Policy Forum. Before his appointment at CMU, he served as CEO for the Allegheny Conference on Community Development and its affiliated regional development organizations, the Pennsylvania Economy League-Western Division, Greater Pittsburgh Chamber of Commerce, and the Pittsburgh Regional Alliance. During his tenure from 1991 to 2003, the Conference stressed the need for the greater Pittsburgh region to work across organizational and political jurisdictions and address challenges and opportunities as an economic region. Prior to joining the conference, Stafford worked in state government. He served as secretary of legislative affairs in the cabinet of Pennsylvania Governor Dick Thornburgh during the governor's first term and as chief of staff for the last year and one-half of his second term. Previously, he worked for the Port Authority of Allegheny County, the Urban Systems Institute of Carnegie Mellon University, and Westinghouse Research Laboratories. He holds a B.S. in mathematics and M.S. in public management from Carnegie Mellon University.

The Honorable Patrick M. Browne is co-chair of the Basic Education Funding Commission and has represented the citizens of the 16th Senatorial District and Lehigh County since April 2005. Prior to joining the Senate, he represented the 131st District for 10 years as a member of the House of Representatives. Senator Browne was elected by his colleagues in the Senate Republican Caucus to serve as Majority Whip for the 2013-2014 legislative session. He is the author of numerous state laws and drafted key portions of Act 120 of 2010, which fundamentally reformed Pennsylvania's public pension systems and created an independent office to monitor state spending and the budget process. Senator
Browne recently completed his role as co-chair of the Special Education Commission, which culminated in a new funding system for additional money allocated for special education. Prior to his legislative service, Senator Browne was employed by the accounting firms Cooper & Lybrand and Price Waterhouse as a tax manager and senior tax associate. He is a member of the Pennsylvania Institute of Certified Public Accountants. Senator Browne received a bachelor's degree in business administration from the University of Notre Dame and law degree from Temple University.

**The Honorable Donna Oberlander** is a member of the Basic Education Funding Commission and was sworn in to serve her third term in the Pennsylvania House of Representatives in January of 2013. She represents the 63rd legislative district, which includes Clarion County and parts of Armstrong County. During the 2013-14 session, Representative Oberlander was selected to serve as a House Republican Deputy Whip, Republican chair of the Pennsylvania House Gas and Oil Caucus, Republican chair of the Pennsylvania House Diabetes Caucus and on the following standing committees: Appropriations, Children and Youth, Environmental Resources and Energy, and Local Government. Prior to her work in the state legislature, Representative Oberlander served on the Clarion County Board of Commissioners. She holds a bachelor's degree in political science from Clarion University.

**The Honorable Matt Smith** is a member of the Basic Education Funding Commission and has represented the 37th Senatorial District, which includes parts of Allegheny and Washington counties, since 2012. Prior to his work in the Pennsylvania Senate, he served three terms in the House of Representatives, where he was assigned to the Appropriations Committee throughout his tenure. Senator Smith is the Democratic Chairman of the State Government Committee and serves on the Finance Committee; Community, Economic & Recreational Development Committee; Consumer Protection & Professional Licensure Committee; and the Game and Fisheries Committee. He also is a member of the Early Childhood Education Caucus, Military Installation Protection Caucus, Women’s Health Caucus, Bicameral International Commerce Caucus, and the LGBT Equality Caucus. He earned a B.A. in history from Rollins College and a law degree from Duquesne University, where he served on the Duquesne Law Review.

**The Honorable Jake Wheatley** sits on both the Pennsylvania House Education and Appropriations Committees. Since 2002, he has represented the 19th Legislative District, which includes a large part of the city of Pittsburgh. A former United States Marine, Representative Wheatley is a combat veteran of Operation Desert Storm and recipient of the Combat Action Ribbon, National Defense Service Medal and the Kuwait Liberation Medal. Issues that he has championed include economic development, mass transit, education funding and academic advancements, as well as affordable and accessible health care. Representative Wheatley holds a bachelor’s degree in political science from North Carolina Agricultural and Technical State University and a master’s of public administration from the University of Pittsburgh.

**Ms. Nichole F. Duffy** is the deputy secretary of the Office of Administration for the Pennsylvania Department of Education, and a member of the Basic Education Funding Commission. She previously served as director of the Department of Education’s Bureau of Budget and Fiscal Management, which includes the Division of Budget and School Facilities; Subsidy, Data and Administration; School Food Services; and the Audit Group. Prior to working at the Department of Education, Ms. Duffy was manager of the Division of Education in the Governor’s Budget Office, where she developed policy, legislation and budget recommendations on education, administrative, and pension related issues. In addition to her experiences with the Commonwealth, Ms. Duffy has held various positions in both higher and K-12 education. She holds a B.A. from Susquehanna University in political science and a master’s in educational leadership from Lynchburg College in Virginia.

**Session II**

**Mr. Bill Flanagan** is executive vice president of corporate relations for the Allegheny Conference on Community Development and its affiliated organizations: the Greater Pittsburgh Chamber of Commerce, the Pennsylvania Economy League of Greater Pittsburgh, and the Pittsburgh Regional Alliance. In this capacity, Mr. Flanagan supervises investor relations activities for the conference and affiliates, including fundraising, membership services, and educational programming. He also oversees organizational communications, including serving as host of “Our Region’s Business” a Sunday morning business affairs program the Conference produces in partnership with WPXI-TV. Prior to joining the Conference in 2011, Mr. Flanagan covered the economy of southwestern Pennsylvania for almost 20 years, spending most of this time as the money editor of KDKA-TV and the host of “The Sunday Business Page.” He earned a bachelor of science degree from Northwestern University and a master’s degree in journalism from the University of Missouri-Columbia.
Ms. Eva Tanksy Blum is senior vice president and director of Community Affairs for PNC Bank, as well as chairwoman and president of The PNC Foundation. In this role, she directs the company’s philanthropic programs, including PNC Grow Up Great, a ten-year, $100 million program to support quality early childhood education. Ms. Blum joined PNC’s legal division in 1977. She became vice president in 1986 and was elected senior vice president and chief compliance counsel in 1990. She served as senior vice president and deputy general counsel/director of regulatory affairs for PNC, and recently served as senior vice president and director of comprehensive risk management and compliance. She was named to her current position in July 2002. Ms. Blum is a member of both the Pennsylvania and Allegheny County bar associations. She serves on the board of directors of the Business Civic Leadership Center, a national business organization that studies industry issues and provides a forum for discussion. She received a bachelor of arts degree and law degree from the University of Pittsburgh.

Mr. Michael R. Dunleavy is the business manager for the International Brotherhood of Electrical Workers Local Union No. 5. He began his affiliation with Local 5 in 1975 working summers as a helper while attending the West Virginia University. He was sworn into the I.B.E.W. in 1980 and worked in the industry as a journeyman-wireman and foreman. His career included leadership roles with Sargent Electric Company, where he held positions of general superintendent, manager of the commercial division, and manager of the service maintenance division. He has held various leadership positions with Local 5, and has served or currently serves with the following organizations: Three Rivers Workforce Investment Board, United Way Board of Directors, Port of Pittsburgh Commission, Sports & Exhibition Authority Board, Allegheny County Labor Council Executive Board, Builders Guild of Western PA Executive Board, and the Pennsylvania State AFL-CIO, among others.

Mr. David J. Malone is president and chief executive officer of Gateway Financial, a national independent insurance advisory firm based in Pittsburgh. He is a member of various industry associations and is involved in the community on local, regional, and state levels. Mr. Malone serves as chairman of the Greater Pittsburgh Chamber of Commerce, chairman of the Pennsylvania Workforce Investment Board, is a member of the Allegheny Conference on Community Development’s Executive Committee, and is also on the Board of Directors of FNC Corporation, the Western PA Surgery Center, the Technology Collaborative, YouthPlaces, Boy Scouts of America, and the Multiple Sclerosis Society. He earned his bachelor of science degree in economics from Allegheny College and a chartered financial consultant degree from the American College at Bryn Mawr.

The Honorable John Pippy serves on the Board of Fellows for the University of Pittsburgh Institute of Politics and is chief executive officer for the Pennsylvania Coal Alliance, a trade organization representing the interests of over 250 member companies and 41,500 workers in the coal industry. Prior to his work with the alliance, he served in the Pennsylvania General Assembly for 16 years, beginning in the House and concluding with his retirement from the Senate, where he represented the 37th district, in 2012. Prior to his political career, he worked at the U.S. Steel Clairton Coke Works. He currently holds the rank of Lieutenant Colonel in the Pennsylvania Army National Guard and served overseas on active duty in Iraq and Kuwait. He has been awarded numerous medals recognizing his military achievements including the U.S. Army Bronze Star for meritorious service and the U.S. Army Engineer Regiment’s Bronze De Fluer Medal for outstanding service. He is a graduate of the United States Military Academy at West Point with a bachelor’s degree in environmental engineering.

Mr. Richard W. Taylor is chief executive officer for Imbue Technology Solutions, Inc. (ImbuTec), a lighting installation company that provides energy efficient solutions for their client base. With over 17 years of experience in business and governmental affairs, Mr. Taylor’s career includes appointments in both state and federal government, serving as legal counsel and director of knowledge management for consolidated natural gas company of Pittsburgh (CGC), director of communications for Equitable Resources, Inc., and CEO of Macedonia Development Corporation. Mr. Taylor serves on the boards of the Port Authority of Allegheny County, the Pennsylvania Environmental Council and Macedonia Development Corporation. He received his undergraduate business degree from Georgetown University and juris doctorate from Tulane University.

Concluding Remarks

Ms. Terry Miller has served as director of the University of Pittsburgh Institute of Politics since 2005. In this capacity, she is responsible for the overall operations of the institute and the development and implementation of programs de-
signed to provide education and discourse for elected officials, foundation executives and community, civic and business leaders on the critical public policy issues that affect the region. Ms. Miller is also a member of the Pennsylvania Policy Forum. She has served as a consultant on special initiatives to the Pittsburgh Foundation, Allegheny County Department of Human Services, and most recently to the Power of 32 Regional Visioning Initiative. She is an adjunct faculty member at the University of Pittsburgh School of Social Work and the Graduate School of Public and International Affairs. Prior to her tenure at the Institute of Politics, she was co-founder and first executive director of POWER, the Pennsylvania Organization for Women in Early Recovery, a non-profit organization she established in Allegheny County to provide gender- and culturally-specific treatment services to women who are in early recovery from addiction to alcohol and other drugs. She has a bachelor’s degree in social work, and a master’s degree in social work from the University of Pittsburgh.