

Marguerite Roza, Ph.D.

Research Associate Professor

College of Education

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Education:

University of Washington, 1992-1995

Ph.D. and Masters in Education: Leadership and policy studies with emphases in economics of education, finance policy, fiscal accounting, and quantitative methods.

Duke University, 1984-1988

B.S. Math, Economics Minor

Magna Cum Laude

Studies Abroad/Other

The London School of Economics, semester abroad in international economic policy

University of Amsterdam, semester abroad in global economics

Teacher's Certificate in Secondary Mathematics

Areas of Specialization:

Fiscal and economic aspects of public education policy, productivity in education, financial data and modeling for strategy, policy analysis, and economics of education.

Professional Experience:

University of Washington

Senior Scholar, Center on Reinventing Public Education

2003-present

Research Associate Professor, College of Education

2007-present

Research Assistant Professor, Daniel J. Evans School of Public Affairs

2003-2007

- Research and analysis aimed at better understanding public education finance systems and the interplay of fiscal policies from different governmental layers. Fiscal analysis that models costs per unit (student, teacher, school) illustrates how de facto spending policies often conflict with stated strategies. Analysis of educational productivity measures highlights both the complexity of public education outcomes and the need for new indicators to relate investments to outputs.
- Research in these areas has stimulated and informed policy reform in many urban districts, some states, and now at the federal level in preparation for re-authorization of NCLB.
- Several major districts, including NYC, Chicago, Philadelphia, and others are now considering new finance models created directly from this work.
- Past and current funders include the Bill & Melinda Gates, Annie E. Casey, Smith Richardson, and Broad Foundations.

Independent Consultant

June 1998-present

- Providing policy analysis in an informational role for dozens of policymakers' groups at all levels, from grassroots or schools, to districts, states, and federal lawmakers seeking finance reform.

Education Development Center, Inc.

Senior Research and Development Associate

1995-1998

- Senior Researcher for several projects, including the Pew Network for Standards-Based Reform and Iowa State Department of Education's Blue Ribbon Commission on Education Reform.

U.S. Navy, Naval Nuclear Power School

1988-1992

Lieutenant, Director, Instructor, Thermodynamics Department

- Directed a teaching division providing technical instruction at undergraduate and graduate levels to 1000 students annually. Created and revised curriculum, designed and administered examinations, evaluated and provided training for teachers. Awarded two Navy Achievement medals and **Instructor of the Year** from the school's 220 instructors for this effort.

Selected Appointments:

- The Brookings Institute, Non-Resident Senior Fellow (2009 to present)
- Education Sector, Non-Resident Senior Fellow (2005 to present)
- Advisor to Chancellor Joel Klein on proposed finance model (2006)
- Seattle Superintendent's Community Advisory Group on District Finance (2005-06)
- Consultant to Philadelphia Mayor's Education Advisory Task Force (2006-present)
- Advisor to Washington State's Superintendent of Public Instruction (2007)
- Texas Public Education Legislative Roundtable, Recommendations for State Policy (2007)

Selected Publications:

Books

Roza, M. *Tightening the Link Between School Spending and Student Outcomes*. Urban Institute Press. (Forthcoming 2009).

Refereed Journal Articles

Roza, M., Guin, K., Gross, B., and DeBurgomaster, S. (2007). Do Districts Fund Schools Fairly? *Education Next*. Fall 2007. V. 7, n. 4; pp. 68-73.

Roza, M. and Swartz, C. (2007). School Spending Profiles: A Framework to Enlighten Resource Allocation Decisions. *Public Budgeting and Finance*. Spring 2007. V. 27, n. 1; pp. 69-85.

Miles, K. H. and Roza, M. (2006). Understanding Student-Weighted Allocation as a Means to Greater School Resource Equity. *Peabody Journal of Education*. V. 81, n. 3; pp. 39-62.

Miller, L., Roza, M., and Swartz, C. (2005). A Cost Allocation Model for Shared District Resources: A Means for Comparing Spending Across Schools. *Developments in School Finance: 2004*. NCES # 2005-865.

Roza, M. and Hill, P. (2004). Pennywise and Pound Foolish in Education. *Public Administration Times*. V. 27, n. 9.

Miles, K. H., Ware, K., and Roza, M. (October, 2003). Leveling the Playing Field: Creating Funding Equity Through Student-Based Budgeting. *Phi Delta Kappan*. V. 83, n. 2; pp. 114-119.

Invited Book Chapters

Roza, M. (2006). "How Districts Shortchange Low-Income and Minority Students." In *The Education Trust Funding Gaps, 2006*. The Education Trust.

Roza, M. and Hill, P. (2006). "How Can Anyone Say What's Adequate if Nobody Knows How Money Is Spent Now?" In E. Hanushek (Ed.), *Courting Failure: How School Finance Lawsuits Exploit Judges' Good Intentions and Harm Our Children*. Hoover Press.

Hill, P. and Roza, M. (2007). "Resource Management." In P. Petersen (Ed.), *Reforming Education in Florida: A Study Prepared by the Koret Task Force on K-12 Education*. Hoover Press.

Roza, M. (2005). "Apples-to-Apples Fiscal Comparisons." In R. Lake and P. Hill (Eds.), *Hopes, Fears, & Reality: A Balanced Look at American Charter Schools in 2005*. National Charter School Research Project, Center on Reinventing Public Education, University of Washington.

Roza, M. (2005). "District Fiscal Practices and Their Effect on School Spending." Prepared for the Aspen Institute's 12th Congressional Program: *The Challenge of Education Reform: Standards, Accountability, Resources and Policy*.

Roza, M. (2004). "Rethinking Data Capacity." In P. Hill and J. Harvey (Eds.), *Making School Reform Work*. Brookings Institute.

Roza, M. and Hill, P. (2004). "How Within-District Spending Inequities Help Some Schools to Fail." In D. Ravitch (Ed.), *Brookings Papers on Education Policy 2004*. pp. 201-218.

Selected Research and Technical Reports:

Roza, M. (2009). *Seniority-Based Layoffs Will Exacerbate Job Loss in Public Education*. Center on Reinventing Public Education, University of Washington.

Roza, M. and Miles, K. H. (2008). *Taking Stock of the Fiscal Costs of Expanded Learning Time*. Center for American Progress.

Roza, M. (2008). "What if We Closed the Title I Comparability Loophole?" In *Ensuring Equal Opportunity in Public Education*. Center for American Progress.

Carey, K. and Roza, M. (2008). *School Funding's Tragic Flaw*. Center on Reinventing Public Education, University of Washington.

Timar, T. and Roza, M. (2008). *A False Dilemma: Should Decisions About Education Resource Use Be Made at the State or Local Level?* University of California Davis.

Roza, M. (2007). *Frozen Assets: Rethinking Teacher Contracts Could Free Billions for School Reform*. Education Sector.

- Guin, K. and Roza, M. (2007). "Lessons from the Headlines: Key Questions for Districts Attempting to Close Schools." *American School Board Journal*. Oct. 1, 2007.
- Roza, M. (2007). *Allocation Anatomy: How District Policies that Deploy Resources Can Support (or Undermine) District Reform Strategies*. School Finance Redesign Project Working Paper 24, Center on Reinventing Public Education, University of Washington.
- Cross, C. and Roza, M. (2007). *How the Federal Government Shapes and Distorts the Financing of K-12 Schools*. School Finance Redesign Project Working Paper 1, Center on Reinventing Public Education, University of Washington.
- Roza, M., Davis, T. and Guin, K. (2007). *Spending Choices and School Autonomy: Lessons from Ohio Elementary Schools*. School Finance Redesign Project Working Paper 21, Center on Reinventing Public Education, University of Washington.
- Roza, M., Guin, K., and Davis, T. (2007). *What is the Sum of the Parts? How Federal, State, and District Funding Streams Confound Efforts to Address Different Student Types*. School Finance Redesign Project Working Paper 9, Center on Reinventing Public Education, University of Washington.
- Hassel, B. and Roza, M. (2007). *Funding the Child: Getting Results in South Carolina Through Weighted Student Funding*. South Carolina Policy Council.
- Hansen, J. and Roza, M. (2005). *Decentralized Decision-Making for Schools: New Promise for an Old Idea?* Rand Occasional Papers. OP153.
- Roza, M., Miller, L., and Hill, P. (2005). *Strengthening Title I to Help High-Poverty Schools: How Title I Funds Fit Into District Allocation Patterns*. Center on Reinventing Public Education, University of Washington.
- Roza, M. with Celio, M. B., Harvey, J., and Wishon, S. (2003). *A Matter of Definition: Is There Truly a Shortage of School Principals?* Center on Reinventing Public Education, University of Washington.

Other Publications:

- Roza, M., Goldhaber, D., Hill, P. "The Productivity Imperative: Getting More Benefits From School Costs in an Era of Tight Budgets." *Education Week*. January 5, 2009.
- Hill, P. and Roza, M. "Financing Schools for Results." *School Business Affairs*. September 2008.
- Roza, M. "Must Public Education Suffer from Baumol's Disease?" *The Denver Post*. August 1, 2008.
- Roza, M. and Hill, P. "The End of School Finance As We Know It." *Education Week*. April 30, 2008.
- Roza, M. "Does This Spending Help Students?" *The Providence Journal*. January 25, 2007.

- Roza, M. "Must Enrollment Declines Spell Fiscal Chaos for Districts?" *Education Week*. August 30, 2006.
- Roza, M. and Hill, P. "Comparability: What It Does (and Doesn't Do!) for Equity." *Title I Monitor*. March 2006.
- Roza, M. and McCormick, M. "Where the Money Goes: District Allocations and High Poverty-Schools." *School Business Affairs*. 72(1). January 2006.
- Roza, M. and Hill, P. "Equalizing Education Dollars." *The Washington Post*. August 21, 2005.
- Hansen, J. and Roza, M. "Trying Decentralization for Real This Time." *Education Week*. August 10, 2005.
- Roza, M. and Hill, P. "Why Equal Education Funding Isn't as Easy as Apple Pie." *The Christian Science Monitor*. March 7, 2005.
- Roza, M. "The Challenge for Title I." *Education Week*. April 4, 2001.
- Roza, M. "It's the Teachers, Stupid." *Christian Science Monitor*. April 19, 2001.
- Roza, M. "Policy Inadvertently Robs Poor Schools to Benefit the Rich." *Seattle Post Intelligencer*. September 24, 2000.
- Roza, M. (1998). "A Toolkit For Using Data to Improve Schools." Education Development Center, Inc. Newton, MA

Selected Presentations:

- Roza, M. (2007). Keynote Speaker, National Comprehensive Center for Teacher Quality's Annual Issue Forum.
- Roza, M. (2007). "Adequacy Lawsuits: Is the Adequacy Principle Dead?" Presented at the Association for Public Policy Analysis and Management (APPAM) Annual Conference.
- Roza, M. (2007). "How District Allocation Practices Result in Fiscal Instability Amidst Enrollment Declines." Paper presented at the American Education Research Association's (AERA) Annual Conference.
- Roza, M. (2006). "Designing Finance Systems That Accommodate School-Based Reform." Presented at the Education Writers Association's Annual Conference.
- Roza, M. (2005). Research presented to members of Congress at the Aspen Institute's 12th Congressional Program: *The Challenge of Education Reform: Standards, Accountability, Resources and Policy*.
- Roza, M. (2004). "Where Is the Money Going?" Presentation to the Annual Meeting of the Business Roundtable.

- Roza, M. (2004). "Decoding District Spending." Presentation to the Annual Meeting of the Education Writers Association.
- Roza, M., Miles, K. H. (2004). *The Implications of Student-Based Budgeting on Resource Allocation*. Paper presented at the American Education Research Association's Annual Conference.
- Roza, M. (2004). Symposium Chair for the American Education Finance Association's Symposium on the Implications of Studying Within-District Spending. Presented *The Role of Centrally Controlled Spending in Understanding Within-District Spending Patterns*.
- Roza, M. and Hill, P. (June, 2003). "How Within-District Spending Inequities Help Some Schools to Fail." Presented at the 2003 Brookings Institute's Education Policy meeting.
- Roza, M. and Swartz, C. (April 2003). *Principal Shortages: Fact or Fiction?* Paper presented at the annual meeting of the American Educational Research Association, Chicago.
- Roza, M. and Miles, K. H. (2003). *Student-Based Budgeting: A Means to More Strategic Spending and Greater Equity*. Paper presented to the American Education Finance Association.
- Roza, M., Miles, K. H., and Folley, E. (2003). *Within-District Spending: A Set of Practical Tools for Unmasking Funding Inequities Across Schools*. Paper presented to the American Education Finance Association.
- Roza, M. (2002). *Using Data to Close the Achievement Gap*. Presentation at the Center for Education Leadership's Principals' Institute.