

PENNSYLVANIA STATE EDUCATION ASSOCIATION
Job Description

Job Title: Director of Research for School Funding and Finance

Reports to: Assistant Executive Director for Program Services

Location: PSEA Headquarters - Harrisburg

Starting Salary: \$119,654

Job Summary

This position performs as an essential high-level research function for the Association. The employee has primary responsibility for the conduct of original research to shape and formulate PSEA policy in all matters of school funding and finance. This includes the development of means to model the impacts of proposed changes. The position's over-arching purpose is:

- (1) to strategize, develop, and effectively recommend Association positions on the broad spectrum of education funding and school finance reform issues (including all taxing and subsidy considerations) through drafted policy and legislation;
- (2) to assess the financial condition of school districts to support bargaining; and
- (3) analyze the impacts on Local Education Agencies (LEA) finances of changes in state revenue streams. Areas of specialization include, but are not limited to local tax reform, subsidy modeling, school district financial analysis, and school accounting.

The aforementioned work initiatives are normally directed to developing and presenting school funding and finance postures for leadership consideration that ultimately effect members and the entire school community. On such matters, the incumbent responds extemporaneously, prepares talking points and reports for legislative lobbying efforts, meetings and testimony, and develops exhibit books and delivers expert testimony at legal, fact-finding, and arbitration proceedings. The incumbent may be asked to deliver testimony at legislative hearings. Important support responsibilities involve the conduct of quantitative statistical analysis in many work applications, analyzing all education funding related legislation for impact on employee pay and public education, and overseeing and coordinating the maintenance of databases and information support systems.

The position works within parameters of extensive policy as the lead strategic expert and public education advocate in school finance and in serving as the Association's policy, legislative and regulatory, bargaining, and public relations resource. The incumbent advises, makes presentations, and consults on school funding and finance to staff, members, management, Boards and governance, other researchers (internal and external), committees, school boards, news media, communications staff, legislative staff, and external organizations. The employee is called upon from time to time to serve on various committees and work groups, perform public speaking engagements, and write articles for internal and external dissemination.

Job Duties and Responsibilities

1. **Develops and conducts independent research on school funding and finance and supports governance in development of PSEA education policy on such issues.**
 - Confers with PSEA staff, governance committees, and work groups about school funding policy issues.
 - Identifies, downloads, and merges appropriate datasets for computation/statistical analysis.
 - Conducts statistical analyses as needed.
 - Recommends policy positions and/or strategies to Field staff, Government Relations staff, governance, and management.

2. **Supports field staff in preparing for bargaining sessions and factfinding hearings.**
 - Prepares salary comparisons and standard (i.e., basic and summary) analyses of the financial condition of Local Education Agencies (LEA's).
 - Prepares and presents written and oral testimony for factfinding based on independent research and analyses.
 - Prepares non-standard (i.e., detailed and comprehensive) written analyses of the financial condition of LEA's in preparation for bargaining and/or public relations campaigns.
 - Prepares and presents oral summaries of analyses as requested.
 - Makes group and/or public presentations on LEA financial status and school funding when necessary. Critiques and formulates responses extemporaneously in various forums.
 - Offers advice and recommends strategy to UniServ Representatives, PSEA governance and local leaders on employee pay and school funding matters.
 - Requests information and clarification of records and/or school district policies from school officials and business managers.
 - Contacts appropriate state employees, federal employees, or experts in the field to obtain answers to questions from Research staff, field staff, and members concerning LEA financial status and school accounting.

- Responds to questions from PSEA staff, members, governance, management, and people outside of PSEA about school funding (including school accounting and tax reform) and the financial condition of particular LEAs.
3. **Supports Government Relations Division staff by advising them on proper responses to pending legislation.**
- Prepares analyses of school funding and local tax legislation, independently or upon demand.
 - Analyzes proposed legislation, regulations, and legal arguments pertaining to school funding.
 - Confers with PSEA staff, governance, and others outside the organization about school funding issues.
 - Recommends positions and strategies to governance and management regarding analyses performed.
 - Prepares an annual analysis of the final state budget on education.
4. **Monitors, for the Research Division, the preparation and maintenance of statistical databases and their software access modules.**
- Confers with staff about the status of the databases and programs.
 - Oversees the Research Division efforts to update the Collective Bargaining System (CBS).
 - Conveys requests from the Research Division to IT for needed programming fixes on the AS400 databases, AS400 reports, and the CBS; discusses possible options with them; and monitors the progress of requests.
 - Participates in the development of policies and administrative systems relevant to the maintenance and enhancement of the Research Division's information system.
5. **General:**
- Attends professional conferences on school finance issues.
 - Writes the Collective Bargaining/Disparity Committee's annual Disparity Report to the House of Delegates.
 - Provides expert input in the preparation of documents for use in legal proceedings.

- Acts as an “expert witness” to board committees, school boards, non-school board employers, legislative staff, fact-finders, and arbitrators.
- Provides information on school funding subjects to the Communications Division upon request.
- Participates in work groups and committees as assigned.
- Performs related work as required.

Knowledge, Skills, and Abilities

- Knowledge of advanced principles, methods, concepts, practices, and statistical applications used in educational finance research.
- Knowledge of advanced developmental applications, principles, methods, concepts, and practices of state-of-the-art taxing, research, and financial modeling.
- Knowledge of advanced techniques used in policy research and program analysis.
- Knowledge of the school accounting systems.
- Specialized knowledge of current educational policy, finance, and advocacy issues.
- Knowledge of EA and ESP Compensation and Salary Structures.
- Knowledge of factfinding principles, practices, and methods.
- Knowledge of recognized research, labor, economics, education finance and related field journals, texts, publications, and other reference sources in education finance and labor.
- Familiarity with union contract structures, the labor movement, and common union issues in collective bargaining.
- Base understanding of tax reform and trends as it relates to school funding.
- Awareness of the current educational, legislative, and political action agenda as it relates to the area of specialization.
- Possess mental and interpersonal aptitudes that lend to effective extemporaneous response, presentation of Association policies and postures, and delivery of expert testimony.
- Skill in organizing research initiatives and applying complex quantitative and very deep analytical methodology in conduct of original research and innovatively coordinating

information, and critiquing education-finance related legislation for quality and financial results.

- Skill in identifying and correcting methodological research flaws in the specialty.
- Skill in leading teamwork with PSEA staff and others outside the organization in all areas of responsibility.
- Strong verbal (both in dialogue and group presentations) and professionally written communications skills.
- Skill in applying advanced PC statistical packages, such as SAS or STATA in the specialty.
- Skill in effective organization of work and handling multiple priorities effectively.
- Ability to plan, organize, and conduct research and evaluation studies in the field of education finance.
- Ability to develop original ideas, models, new approaches and solutions, and assemble and present information for ambiguous and confrontational situations.
- Ability to formulate research hypotheses and structure research designs to account for relevant variables and the issues to be studied.
- Ability to marshal facts and arguments to persuade friendly and unfriendly organizations to accept PSEA's education and finance proposals.
- Ability to prepare and persuasively deliver talking points, testimony, training programs, and speeches on assorted educational policy, reform, and finance subjects.
- Ability to learn relevant bargaining, labor, and fair labor standards laws.
- Ability to consult effectively with leaders, members, and all levels of Association management, staff, Boards, and governance.
- Ability to strategize, develop, posture, and effectively recommend Association positions and policy on a wide spectrum of education funding and finance reform issues.
- Ability to assess the financial strength and vitality of school districts and correlate findings to educational delivery or collective bargaining issues in dispute.
- Ability to assess interpersonal dynamics, bases of influence, undisclosed agenda, and motives of key players, advocates, or media representatives in varied meetings and proceedings by reacting responsibly, quickly, and decisively to the issues put forth in their presentations and position statements.

- Ability to assess conditions quickly, alter one's decisions and actions, and know when not to respond to inquiries, in the face of changing facts and complex and sensitive circumstances.
- Ability to quickly learn PSEA, school district, government and community-based organizations and their policies, cultures and regulations.
- Possess attributes of a leader who supports the values, goals, and mission of PSEA, which includes the tenets of unionism, quality education, and appropriate compensation and benefits, professional development, and working conditions for all members.

Education, Experience, and Special Requirements

A Master's Degree in Statistics, Finance, Economics, a Social Science discipline, or related field and experience and/or specialized training in public school finance and funding, econometrics, or advanced statistical modeling is required.

Preference given to candidates who possess a Doctoral Degree in an aligned discipline.

Possession of a valid driver's operating license.

If you are interested in applying for this position, send a letter of interest and resume not later than July 18, 2021, to: jobs@psea.org.

PSEA is an Equal Opportunity/Affirmative Action Employer

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