

MEMORANDUM 2026-43

Education Reporting: Staff Outreach and Education Consultant

This Memorandum¹ summarizes the staff's outreach to date and proposes hiring a consultant to prepare a background report for the Commission's study on Education Reporting.² The proposed report will identify the existing universe of local education agency (LEA) compliance requirements, identify requirements that may be consolidated, eliminated, modified, or otherwise altered to increase streamlining, and recommend related statutory changes.

<i>Exhibit</i>	<i>Exhibit page</i>
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Jason Willis' resume	4

STAFF OUTREACH

Since the prior Commission meeting, the staff reached out to several stakeholders for feedback on this study, including representatives from the California School Boards Association,³ the Fresno County Superintendent of Schools, and legislative policy staff. The staff combed through thousands of Education Code sections and reviewed materials related to a Joint Informational Hearing with Assembly Education and Budget Subcommittee No. 3 on Education Finance Committees on Coherence in Education Finance & Planning⁴ in pursuit of the universe of LEA reports. While multiple sources indicated that the full set of LEA reporting requirements is likely largely known, analyzing

¹ Any California Law Revision Commission document referred to in this memorandum can be obtained from the Commission. Recent materials can be downloaded from the Commission's website (www.clrc.ca.gov).

The Commission welcomes written comments at any time during its study process. Any comments received will be a part of the public record and may be considered at a public meeting. However, comments that are received less than five business days prior to a Commission meeting may be posted after the meeting and/or without staff analysis.

² [2026 Cal. Stat. res. ch. 148](#) (ACR 168, Pacheco); with regard to background reports and consultants, see California Law Revision Commission, [Handbook of Practices and Procedures](#), §§ 850 (meeting attendance), 855 (compensation), 860 (scope of background report), 865 (form and content of background report), 870 (presentations by consultant to other persons or groups), 875 (involvement of consultant in litigation), 885 (additional funding of consultant reports), 900 (contracts and leases; consultant contracts are considered beyond typical personnel contracts and require Commission approval).

³ The [California School Boards Association](#) (CSBA) is the nonprofit education association representing the elected officials who govern public school districts and county offices of education.

⁴ California State Assembly Committee on Education, [2026 Informational Hearings](#), *Coherence in Fiscal and Programmatic Planning*, [Agenda](#), Feb. 25, 2026.

these requirements for redundancy and consolidation will be a more significant undertaking than the Commission staff previously anticipated. Each report must be analyzed not only for each data element, but for the method of transmission, timing, and how the requirements flow into the workload of subsequent LEA obligations, including but not limited to administering federal and state programs and operating schools on a day-to-day basis.

The Fresno County Superintendent of Schools appears to have assembled the most comprehensive database,⁵ which presents a consolidated calendar of both state and federal reporting requirements. Their findings report over 200 reporting requirements submitted through 36 collection methods across 17 California Department of Education (CDE) divisions.⁶ Any workable statutory recodification/consolidation will need to be cognizant of these limitations and work with CDE and other stakeholders to ensure feasible implementation.

As part of the Joint Informational Hearing’s panel on “Solutions,” Jason Willis, in his capacity as a researcher with WestEd, a nonpartisan research, development and service agency,⁷ presented research⁸ in which he quantitatively analyzed LEA compliance activities following the 2013 enactment of the Local Control Funding Formula, which changed school funding and reporting requirements.⁹ Staff reached out to Mr. Willis to discuss his research further and found that its foundation complements the Commission’s current LEA reporting project. Mr. Willis, in addition to his work for WestEd,¹⁰ is the Director of the Transformative Change Partnership at McGeorge School of Law,¹¹ and he is open to collaborating with the Commission on this study.

EDUCATION CONSULTANT

The staff recommends engaging Mr. Willis as a consultant on this project in his capacity as Director of the Transformative Change Partnership at the McGeorge School of Law, given his ongoing research, significant experience in California school policy, funding, support, and accountability systems, and existing relationships with California LEAs and the CDE.¹² The staff has met with Mr. Willis and collaborated on a proposed scope of

⁵ Fresno County Superintendent of Schools, [2025/2026 State and Federal Calendar](#).

⁶ Fresno County Superintendent of Schools, [A Field Perspective: When Compliance Competes with Instruction](#), for the Joint Informational Hearing with Assembly Education and Budget Subcommittee No. 3 on Education Finance Committee, *Coherence in Fiscal and Programmatic Planning*, [Agenda](#), February 25, 2026.

⁷ WestEd, [About Us](#).

⁸ Jason Willis, [The Weight of Good Intentions](#), WestEd (February 2026).

⁹ California Department of Education, [Local Control Funding Formula](#).

¹⁰ WestEd, [Jason Willis](#).

¹¹ University of the Pacific, McGeorge School of Law, [Jason Willis](#).

¹² Mr. Willis’ CV is attached at EX 4.

work¹³ that would produce material the Commission can translate into a proposed recommendation by the end of 2028. The staff would provide ongoing support for the research and provide regular Commission updates between contract deliverables.

The staff proposes payment terms consistent with the Commission Handbook and identical to those for the Commission's Antitrust Consultant, Cheryl Johnson:¹⁴ \$20,000 per fiscal year¹⁵ (payable after deliverables 1, 2, 3, and 4) plus travel expenses for Commission meetings.

The Commission's approval is required before the Executive Director can execute a contract (other than routine operational contracts).¹⁶ In the past, the Executive Director has sought the Commission's approval before entering into a contract for expert consulting services.

Does the Commission approve the consulting services contract? If the contract is approved, the staff will take care of the formalities.

Respectfully submitted,

Sarah Huchel
Chief Deputy Director

Sharon Reilly
Executive Director

¹³ EX 1.

¹⁴ Memorandum [2023-37](#), pp. 2-4; [Third Supplement](#) to Memorandum 2024-24; Memoranda [2025-33](#), [2026-22](#).

¹⁵ Fiscal year 2026-27 would be prorated since the state is nearly four months into the fiscal year.

¹⁶ California Law Revision Commission, *Handbook of Practices and Procedures*, § 900 (contracts and leases; consultant contracts are considered beyond typical personnel contracts and require Commission approval).

Scope of Work: Consultant Services to the California Law Revision Commission, Study G-500

Statement of Scope: The Consultant, with support from Commission staff, shall supply the Commission with a multi-part Background Report that contains: (a) a reconciled universe of local educational agency (LEA) compliance requirements, (b) a validated method for identifying duplicative and obsolete statutory requirements, and (c) advice for code consolidation.

1) Parties

- a) California Law Revision Commission (Commission)
- b) Staff (Commission staff)
- c) Jason Willis, Director, Transformative Change Partnership, McGeorge School of Law (Consultant)

2) References

- a) Study: [2026 Cal. Stat. res. ch. 148](#) (ACR 168, Pacheco)
- b) [Commission Handbook of Practices and Procedures](#)
 - i) §§ 850 (Meeting attendance), 855 (Compensation), 860 (Scope of background report), 865 (Form and content of background report), 870 (Presentations by consultant to other persons or groups), 875 (Involvement of consultant in litigation), 885 (Additional funding of consultant reports), 900 (contracts and leases; consultant contracts are considered beyond typical personnel contracts and require Commission approval).

3) Deliverables/Study plan

- a) Deliverable 1: January – March 2027
 - i) A reconciled list of all California LEA compliance requirements within public education as identified in the Education Code and other relevant code sections¹ and a summary of the method of reconciliation.
 - ii) The Wave 1 statutory-candidate list of compliance requirements will be analyzed with the goal of (a) reducing administrative burden on education administrators and LEAs, (b) increasing the regular use of collected information from compliance requirements for decision-making, and

¹ As of today, approximately 200 compliance activities have been identified. For example, the School Accountability Report Card and the California School Dashboard are examples of compliance activities. These will be divided into four “waves” for analysis.

- (c) publicly stated priorities for California’s public education system from state public education agencies.
- iii) Commission staff will confirm that every compliance requirement is traced to its elements, a primary governance benefit, and a section of California code.
- iv) Each compliance requirement or group of requirements will contain the specific finding, the proposed change (repeal, consolidate, relocate, or other determined action), the governance benefit, deadline for delivery, where the finding will be preserved, and drafting guidance.
- b) Deliverable 2: April 2027 – September 2027
 - i) Same as Deliverable 1, but Wave 2 contents will consist of different compliance requirements.
- c) Deliverable 3: October 2027 – February 2028
 - i) Same as Deliverable 1, but Wave 2 contents will consist of different compliance requirements.
- d) Deliverable 4: March – June 2028
 - i) Same as Deliverable 1, but Wave 2 contents will consist of different compliance requirements.
- 4) Data ownership
 - a) The Master Activity Register, crosswalk, element registry, timelines, and associated analysis tools remain the Consultant's research instruments; the Commission receives a copy for its record and may publish the portions incorporated in deliverables.
 - b) All material submitted to the Commission becomes public record; the Consultant shall submit only validated material.
- 5) Disclosures
 - a) Consultant enters into this agreement in his capacity as the Director of the Transformative Change Partnership at the University of the Pacific, McGeorge School of Law, and attests that there are no conflicts with any work he may perform on behalf of WestEd for the State of California.
- 6) Provisions for missing deadlines
 - a) Consultant will make best efforts to meet the timelines described in this document. If Consultant is not able to meet a deadline, Consultant shall consult with Commission staff as soon as practicable, and the terms of this agreement will be adjusted accordingly.

Schedule

Period	Study-related events	Consultant deliverable
Oct 2026	Oct 30 Commission meeting: Memo	Scope memo, brief intro to Commission.

	2026-43 study update and study plan; consultant approval	
Nov – Dec 2026	December 10 Commission meeting; Commission staff memo framing the Background Report	Content to be included in the framing for the Background Report
Jan – Mar 2027		• Wave 1 compliance activities identified • Expert panel 1 held (Fresno CSS, LEAs,² CDE seat) • Deliverable 1 completed with administrative appendix as appropriate (by March 2027)
Apr – Sep 2027	CDE §33126.7 report due Aug 31	• Wave 2 compliance activities identified; • Expert panel 2 (Fresno CSS, LEAs; CDE seat); • Deliverable 2 completed with administrative appendix as appropriate (by September 2027)
Oct 2027– Feb 2028	Commission staff initial- recommendations memo; draft statutory language	• Wave 3 compliance activities identified; • Expert panel 3 (Fresno CSS, LEAs; CDE seat); • Deliverable 3 completed with administrative appendix as appropriate (by February 2028)
March – Jun 2028		• Wave 4 compliance activities identified; • Expert panel 4 (Fresno CSS, LEAs; CDE seat); • Deliverable 4 completed with administrative appendix as appropriate (by June 2028)

² The Consultant and Staff will reach out to various LEAs to seek their participation in the expert panels, including Los Angeles Unified School District.

Jason D. Willis

[REDACTED] | [linkedin.com/jason-david-willis](https://www.linkedin.com/jason-david-willis) | Ph: [REDACTED]

Career Summary

Jason Willis is a practitioner-scholar in K–12 education finance, governance, and accountability with more than two decades of experience spanning urban district leadership, national policy research, and state finance reform. He has advised the executive and legislative branches of more than 20 states on the design and implementation of school funding and governance policy — work grounded in evidence and cost analysis that has redirected tens of billions of dollars toward students, children, and families — and has advised the National Governors Association, the National Conference of State Legislatures, the Urban Institute, and the National Equity and Excellence Commission.

His analytic work centers on what education policies cost and whether they deliver, with particular attention to resource allocation for students from low-income backgrounds, students with disabilities, and English learners. He has led cost-function, adequacy, and funding-distribution studies for legislatures and state agencies in New York, North Carolina, Kansas, Utah, and Maryland, along with California's two-part special education funding study. Most recently, Willis conducted several research projects through Stanford University's Getting Down to Facts III project, applying quasi-experimental methods to California's finance and accountability systems — including a study quantifying the scope and cost of compliance activity in public schools and an impact analysis of the state's Differentiated Assistance intervention. Across this agenda, his focus is increasingly on formal economic evaluation: pairing the measured costs of policy interventions with credible estimates of their effects, so state and local leaders can judge whether the investments are worth making. At the McGeorge School of Law he is extending and expanding his current research which digs deeper into the costs of compliance, state accountability, and teacher preparation programs in public education.

That research agenda is anchored in practice. At WestEd, where he is now a Senior Policy Fellow where he focuses on forward-thinking changes in public education to better advance student achievement through system design. Willis built the agency's school finance and governance practice from 2 to 24 staff and from \$1 million to \$9.6 million in annual work, supporting California's implementation of the Local Control Funding Formula — the statute governing nearly \$140 billion in annual school funding. He previously served as Assistant Superintendent in San Jose Unified, Chief Business Official in Stockton Unified, and Budget Director in Oakland Unified, where he implemented one of the nation's first weighted-student budgeting systems. He has twice served on several Institute of Education Sciences technical working groups, including one that examined district uses of education dollars and weighted student funding.

Willis is Faculty Director of the Stanford | CASBO Strategic School Business Academy. He guest lectures at the Yale School of Management, UC Berkeley Graduate School of Education, and USC School of Education. He served as a Clinical Professor of Public Policy at the McGeorge School of Law, University of the Pacific. He holds an MA in education policy, with an emphasis in school finance and law, from Teachers College, Columbia University, and a BA from The Catholic University of America.

Professional Experience

McGeorge School of Law, University of the Pacific

Sacramento, CA

Clinical Professor of Public Policy

2023–Current

- Oversee the University's Transformational Change Partnership in collaboration with Stanford University and several other nonprofit organizations, supporting cross-agency county leaders to advance improvements in systems.
- Teaches juris doctorate (JD) and graduate (MA/PhD) students on Systemic Change, Building Societal Capacity, Public Finance, and the culminating Capstone course.

WestEd

San Francisco, CA

Senior Policy Fellow

2023–Current

- Provide thought leadership for the agency through articles, policy briefs, and research articles. Recently influential pieces included topics such as block grants, the impact of Medicaid on school supports, declining enrollment, and highly mobile youth.
- GDTF III research leadership, specific policy paper impact, advisory roles, major convenings led

Director, Strategic Resource Planning and Implementation

2016–2023

- Oversee, guide, and build the agency's school finance, governance, and complex policy implementation practice, including research and technical assistance to state and local agencies to reconstruct infrastructure to support school and child-serving systems reform.
- Helped support California's implementation of the Local Control Funding Formula (LCFF) – the law managing nearly \$140 billion in public school funding annually.
- Supported additional major policy implementation initiatives, including the Master Plan for Early Learning and Care, and the California Youth Behavioral Health Initiative (CYBHI).
- Grown the content area substantially in the last six years, demonstrating annual public policy impacts in financing design, team members (from 2 to 24), and revenue (\$1M to \$9.6M annually).

San Jose Unified School District

San Jose, CA

Assistant Superintendent, Engagement & Accountability

2011–2016

- Guided the development and implementation of the 2012-2017 strategic plan, including significant reforms in teacher evaluation, compensation, and performance management systems, driving an annual \$382M operational budget.
- Oversaw 175 staff within the school district, including information services, research and accountability, strategic planning/implementation, student services, and charter schools.

Stockton Unified School District

Stockton, CA

Chief Finance & Business Official

2009–2011

- Closed a \$32.5M budget gap within a \$475M general fund budget to ensure fiscal solvency in collaboration with the Board of Education, administration, community, and bargaining units.
- Leadership and oversight of all non-instructional operations, including 425 staff in finance, facilities, information technology, transportation, food services, and procurement.

Oakland Unified School District

Oakland, CA

Budget Director

2007–2009

- Managed an annual \$490 million budget, including operating, facilities, and early childhood funds.

- Established a balanced adopted budget and met the required minimum reserve for economic uncertainty for the first time in 5 years as a school district under state financial receivership.
- Implemented one of the nation's first weighted-student budgeting systems, Results-Based Budgeting, to assist principals in linking strategic planning with resource allocations.

Standard & Poor's

New York, NY

Assistant Product Manager

2003–2007

- Co-author of the *Resource Adequacy Study* for the New York State Commission on Education Reform, which directed \$6.7 billion of additional funds into New York's public school system.
- Built the state and school district financial profiles of the School Matters platform, the first national clearinghouse for academic, demographic, and financial information in public education.
- Led efforts to design and implement the Municipal Analytical Platform, a web-based platform aimed at allowing data comparisons of public entities by S&P's Public Finance clients.

Education

Teachers College, Columbia University, New York, NY <i>M.A in Education Policy with emphasis in School Finance and Law</i>	2003–2005
The Catholic University of America, Washington, D.C. <i>B.A. in Educational Studies and B.A. in Psychology. Cum Laude.</i>	1999–2003

Certifications

Certified Public Accountant (CPA)	In Progress
Certificate in Education Finance, Edunomics Lab, Georgetown University	2020
Public Education Leadership Program (PELP), Harvard Graduate School of Education	2015
Teacher Certification, Multiple Subjects, California Teachers Commission (CTC), State of California	2013
Residency in Urban Education Management, The Broad Center for the Management of School Systems	2009
Chief Business Officer (CBO) Certification, California Association for School Business Officials (CASBO), State of California	2008

Selected Appointments

- Board Member. Executive Committee. Education for Change (EFC) Charter Schools. Oakland, CA. October 2025—Present.
- Board Member. Diabetes Reversal Group (DRG). Austin, TX. 2025—Present.
- Finance Chair. Board Member. Alder Graduate School of Education. Palo Alto, CA. 2017—2026.

- Sustainability Financing Advisor. Oakland Thrives. Oakland, CA. 2022—2026.
- Fund Manager. Generation Fund. Oakland Children’s Initiative. Oakland, CA. 2018—2025.
- Harvard Business Review (HBR) Advisory Council. Cambridge, MA. 2024—2025.
- Technical Working Group Member. *National Study of District and School Uses of Education Dollars*. Institute for Educational Sciences. U.S. Department of Education. Washington, DC. 2019–2022.
- Strategic Financing Advisor. BayEd Fund. Oakland, CA. 2021.
- Advisory Board Member. California Office for Reforming Education. Sacramento, CA. 2017–2020.
- Technical Working Group Member. *National Study on Impact of Weighted Student Funding Systems*. Institute for Educational Sciences. U.S. Department of Education. Washington, DC. 2016–2018.
- District Data Use Working Group Advisory Committee Member. Data Quality Campaign. 2013–2015
- Testimony before the National Equity and Excellence Commission. April 2011. U.S. Department of Education, on *Effects of Implementing Results-Based Budgeting in School Systems*.
- Advisory Committee Member. *Deregulating School Aid in California: How Local Educators Allocate Flexible Dollars and Stimulus Funds*. RAND Corporation and PACE. Sacramento, CA. 2009-2011.

Selected Awards

- Paul D. Hood Award for Distinguished Contributions to the Field. WestEd. 2022. *Research and Technical Assistance in the Field of Education Finance in the United States*.
- Paul D. Hood Award for Distinguished Contributions to the Field. WestEd. 2021. *A Study of Cost Adequacy, Distribution, and Alignment of Funding for North Carolina’s K-12 Public Education System*.
- Excellence in Innovation Award. Standard & Poor’s. 2006. *New York State Adequacy Study*.

Teaching

- Guest Lecturer, UC-Berkeley Graduate School of Education, *Educational Equities* (2026).
- Guest Lecturer, Broad Center at Yale School of Management, *Effective Resource Use Seminars* (2022-Present).
- Guest Lecturer, USC Rossier School of Education, *Cost Pressures, Constraints, and Maximizing Opportunity for Students* (2024-Present).
- Faculty, Business Executive Leadership (BEL) Program, California Association of School Business Officials (CASBO), California (2022-2026).
- Guest Lecturer, *Public Finance Principles: Accounting for Impact*, School of Public Policy, Northeastern University (2025).
- Faculty, Chief Business Officer (CBO) Mentor & Certification Program, Fiscal Crisis Management Assistance Team (FCMAT), California (2015-2020).

- Adjunct Faculty, *School Site Finance and Resources*, Principal Leadership Institute, Graduate School of Education, University of California, Berkeley (2009-2011).
- Guest Lecturer, The Broad Center Academy & The Broad Center Residency, *Effective Resource Allocation and Budgeting in Urban School Districts* (2009-2011).

Policy Research

Hahnel, C. & **Willis, J.** 2026. *Declining enrollment in America's public schools: How states can respond strategically*. Bellwether; WestEd.

Harrington, H., **Willis, J.**, Bishop, J., & Cazares-Minero, M. January 2026. *Highly Mobile Youth: How State Policy and Local Implementation Integrate to Support Youth*. WestEd; Center for the Transformation of Schools, School of Education & Information Studies, University of California, Los Angeles.

Willis, J., Francis, L., Estes, E., Wright, K., Lieberman, T. June 2025. *Integrated Policymaking for California's Youth: Keeping the Whole Child Central from the Start*. Breaking Barriers California. Sacramento, CA

Breaking Barriers. February 2023. *Working Paper: California's Children & Youth Behavioral Health Ecosystem*. Authored by a multidisciplinary team led by Breaking Barriers California. Sacramento, CA.

Doutre, S.M., **Willis, J.**, Krausen, K., Barrett, T., Ripma, T., & Caparas, R. July 2021. *California Special Education Funding System Study, Part 2: Findings and Considerations for Changes to Special Education Funding in California*. WestEd. San Francisco, CA.

Hahnel, C., Hough, H., & **Willis, J.** November 2020. *Securing Resources to Fund Education in California*. Policy Analysis for California Education. Palo Alto, CA.

Willis, J., Doutre, S.M., Krausen, K., Barrett, T., Ripma, T., & Caparas, R. April 2020. *California Special Education Funding System Study, Part 1: A Descriptive Analysis of Special Education Funding in California*. WestEd. San Francisco, CA.

Willis, J., Jacobson, A., Ennis, J., Silverstein, J., Brown, A., & Fermanich, M. January 2020. *Utah Education Funding Study*. WestEd and Augenblick, Palaich and Associates. San Francisco, CA.

Willis, J., Krausen, K., Berg Jacobson, A., Taylor, T., Caparas, R., Lewis, R., & Jaquet, K. April 2019. *A Study of Cost Adequacy, Distribution, and Alignment of Funding for North Carolina's K-12 Public Education System*. WestEd. San Francisco, CA.

Willis, J., Doutre, S.M., & Berg Jacobson, A. 2019. *Study of the Individualized Education Program (IEP) Process and the Adequate Funding Level for Students with Disabilities in Maryland*. WestEd. San Francisco, CA.

Hough, H., **Willis, J.**, Grunow, A., Krausen, K., Kwon, S., Mulfinger, L., & Park, S. November 2017. *Continuous Improvement in Practice*. Policy Analysis for California Education. Palo Alto, CA.

Taylor, L., Berg-Jacobson, A., Atchison, D., **Willis, J.**, & Levin, J. 2018. *Cost Differentials Across School Districts in Florida: Report*. WestEd. San Francisco, CA.

Taylor, L., **Willis, J.**, Berg-Jacobson, A., Jaquet, K., & Caparas, R. March 2018. *Estimating the Costs Associated with Reaching Student Achievement Expectations for Kansas Public Education Students: A Cost Function Approach*. Prepared for the Kansas Legislature. WestEd. San Francisco, CA.

Cox, W., Durante, R., Stewart, M., Gazzerro, P., Hampel, M., **Willis, J.**, Sharp, A., Skuthan, N. March 2004. *Resource Adequacy Study for the New York State Commission on Education Reform*. Standard & Poor's. New York, NY.

Selected Peer-Reviewed Research Articles

Systems Change Advancing Learning & Equity (SCALE). 2026. *California's Balance Between State and Local Control*. Research Brief. Part of Getting Down to Facts III: Review of California's Public Education System. Stanford University. Palo Alto, CA. Contributing Author.

Systems Change Advancing Learning & Equity (SCALE). 2026. *Successes, Challenges, and Opportunities in California School Finance*. Research Brief. Part of Getting Down to Facts III: Review of California's Public Education System. Stanford University. Palo Alto, CA. Contributing Author.

Willis, J. and Loeb, S. 2026. *The Hidden, Guiding Hand of Compliance in California Public Schools*. Technical Report. Part of Getting Down to Facts III: Review of California's Public Education System. SCALE at Stanford University. Palo Alto, CA.

Willis, J. and Tanner, S. 2026. *The Impact of Intervention: LCAP, Differentiated Assistance, and Resource Effectiveness in California School Districts*. Technical Report. Getting Down to Facts III: Review of California's Public Education System. SCALE at Stanford University. Palo Alto, CA.

Grunow, A., Hough, H., Park, S., **Willis, J.**, & Krausen, K. 2018. *Towards a Common Vision of Continuous Improvement in California*. Technical Report. *Getting Down to Facts II: Policy Analysis for California Education*. Technical Report. Getting Down to Facts II: Review of California's Public Education System. Stanford University. Palo Alto, CA.

Willis, J., Krausen, K., Nakamatsu, E., & Caparas, R. 2018. *Leading in the Local Control Funding Formula Era: The Shifting Role of California's Chief Business Officers*. Technical Report. Getting Down to Facts II: Review of California's Public Education System. Stanford University. Palo Alto, CA.

Willis, J., Peresie, J., Waldref, V., Stockmann, D. Spring 2003. *The Student's Role in Community-Based Research*. Michigan Journal of Community Service-Learning. Special Edition on Community-Based Research. Ann Arbor, MI.

Marullo, S., Cooke, D., **Willis, J.**, Rollins, A., Bonilla, P., Burke, J., Waldref, V. *Assessment Outcomes for the Community-Based Organization*. Michigan Journal of Community Service-Learning. Special Edition on Community-Based Research. Ann Arbor, MI.

Books

California Association of School Business Officials (CASBO). Forthcoming-2027. *Education Finance and School Business: A Textbook for Chief Business Officials*. Sacramento, CA. Editor.

Policy Papers

Willis, J. November 2026 [forthcoming]. *The Weight of Good Intentions*. WestEd. San Francisco, CA.

Willis, J. October 2025. *Shifting Sands: Declining Enrollment in California and How Leaders Can Respond*. WestEd. San Francisco, CA.

Willis, J. March 2025. *Faced with Less: How Coalition Building Among Government Agencies Can Do More to Serve the Public*. WestEd. San Francisco, CA.

Willis, J. February 2025. *An old idea for a new age? Aligning block grants to achieve state goals and improve outcomes for students*. WestEd. San Francisco, CA.

Bishop, J. & **Willis, J.** March 2025. *Advancing Educational Stability, Continuity, and Success: A Policy Agenda for Highly Mobile Youth in the U.S.* UCLA Center for the Transformation of Schools and WestEd. Los Angeles, CA.

Valdez, A., Bell, A., Derby, K., Dolle, J., Fitzpatrick, R., Rovins, M., Walrond, N., & **Willis, J.** 2024. *Systems change at WestEd: Six guiding principles*. WestEd. San Francisco, CA.

Justus, M., Krausen, K., Eisenberg, L., & **Willis, J.** 2023. *Put your money on the table: Interagency coordination to address the crisis in student mental and behavioral health*. WestEd. San Francisco.

Krausen, K., Caparas, R., McClellan, P., **Willis, J.**, & Perez, A. 2023. *Is there a “fiscal cliff” on the horizon for California school districts? Planning for financial sustainability in an uncertain time*. WestEd. San Francisco, CA.

Breaking Barriers. California Alliance of Child and Family Services, WestEd, Santa Clara County Office of Education. March 2022. *Supporting California’s Children Through a Whole Child Approach: A Field Guide for Creating Integrated, School-Based Systems of Care*. San Francisco, CA.

Willis, J., Krausen, K., & McClellan, P. June 2021. *Meeting the Moment: How Education Leaders Can Maximize Federal COVID Relief Aid to Support More Equitable Student Learning*. WestEd. San Francisco, CA.

Willis, J., Krausen, K., & McClellan, P. July 2021. *Three Strategies for Investing One-Time Federal Relief Aid to Make a Lasting Difference: Sustainable Financing of Education Innovations*. WestEd. San Francisco, CA.

Krausen, K., Caparas, R., Ripma, T., & **Willis, J.** 2020. *Strategic Resource Allocation for the 21st Century: How State Leaders Can Address the Silent Recession*. WestEd. San Francisco, CA.

Willis, J., Krausen, K., & Outlaw, L. 2020. *Managing public education resources during the coronavirus crisis: Practical considerations for school district leaders*. WestEd. San Francisco, CA.

Willis, J., Tanner, S., & Silverstein, J. June 2020. *Loosening the reins: Evidence and considerations for lifting restrictions on school resources*. WestEd. San Francisco, CA.

Willis, J., & Tanner, S. June 2020. *Fair and equitable reductions to state education budgets: Evidence and considerations for the 2020-21 fiscal year*. WestEd. San Francisco, CA.

Willis, J., Krausen, K., Caparas, R., & Taylor, T. 2019. Resource allocation strategies to support the Four Domains for Rapid School Improvement. The Center on School Turnaround. WestEd. San Francisco, CA.

Krausen, K., Caparas, R., & **Willis, J.** 2018. Education Budget Strategies for Challenging Times: How California School Districts are Addressing the Silent Recession. WestEd. San Francisco, CA.

Baumgardner, C., Frank, S., **Willis, J.,** & Berg-Jacobson, A. November 2018. Finding a Path Toward Equity: What States Can Learn from the Transformation of California's School Funding Model. WestEd; Education Resources Strategies. San Francisco, CA.

Krausen, K. & **Willis, J.** April 2018. Silent Recession: Why California School Districts Are Underwater Despite Increases in Funding. Technical report, WestEd. San Francisco, CA.

Hough, H., **Willis, J.,** Grunow, A., Krausen, K., Kwon, S., Mulfinger, L., & Park, S. November 2017. Continuous Improvement in Practice. Policy Analysis for California Education. Palo Alto, CA.

Willis, J. 2011. *Effects of Implementing the Results-Based Budgeting System in an Oakland Unified School District*, Testimony before the National Equity and Excellence Commission, U.S. Department of Education, San Jose.

Willis, J. & Hill, M. 2010. Budgeting to Support Student Achievement: New Strategies for Central Office. *Voices in Urban Education*. Annenberg Institute for School Reform. Providence, RI.

Willis, J., Gazzerro, P., Durante, R. 2006. *Towards Effective Resource Use: The Case for the Resource Management Service. Prepared for the National Working Group on Funding School Success*. Project of the School Finance Redesign Project. University of Washington. Seattle, WA.

Durante, R. & **Willis, J.** November 2005. *The benefits dilemma: Rising healthcare and pension costs are squeezing education resources*. School Business Affairs. Association for School Business Officials International: Reston, VA.

Select Keynotes, Panels, and Podcasts

Willis, J., Dill, E., & Schiel, M. April 2026. *The Hidden, Guiding Hand of Compliance*. Keynote Address. CASBO Annual Conference. Sacramento, CA.

SBO Perspectives. December 2025. Better Together, Never Alone: The Impact of Authentic Leadership. [Guest]. Podcast. Washington, DC.

Willis, J. & Pietrowski, S. April 2025. Shifting Sands: Declining Enrollment in California and How Leaders Can Respond. Keynote Address. CASBO Annual Conference. San Jose, CA.

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Willis, J. November 2016. *Implications for Weighted Student Funding Systems in our Public School Systems*. Future of Education Finance Summit. Baltimore, MD.

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Willis, J. 2012. *Using Data to Inform Strategic Decision-Making*. Presented at the National Governors' Association (NGA) Resource Reallocation Policy Academy. Phoenix, AZ.

Willis, J. 2011. Judge, *Los Angeles Unified: Budgeting for Student Achievement* Case. Haas Education Leadership Case Competition, University of California, Berkeley, CA.

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