

## Martin Forrest Lueken

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### EDUCATION

**Doctor of Philosophy in Education Policy**, University of Arkansas  
*Doctoral Academy Fellow*  
Fields: Education Policy, School Choice  
Aug 2010  
to Aug 2014

**Master's Degree in Economics**, University of Missouri, Columbia  
*G. Ellsworth Huggins Fellow*  
Aug 2008  
to May 2010

**Bachelors of Science in Physical Education with Option in Athletic Training**,  
Eastern Illinois University, Charleston, IL  
Aug 1995  
to Aug 2000

### RESEARCH INTERESTS

Education finance, teacher pensions, school choice, program evaluation, *Jugyou kenkyuu* (“Lesson Study”)

### PROFESSIONAL EXPERIENCE

**Director of Finance Policy and Analysis**  
EdChoice (formerly Friedman Foundation for Educational Choice)  
August 2015  
to present

**Education Research Director**  
Wisconsin Institute for Law & Liberty  
August 2014  
to July 2015

**Research Assistant**  
Department of Education Reform, University of Arkansas  
2010—2014

**Instructor for Statistics in Nursing**  
University of Arkansas  
Spring 2013

**Research Assistant**  
Economic Policy and Analysis Research Center, University of Missouri, Columbia  
2009—2010

**Teaching Assistant**  
Mathematics Technology Learning Center, University of Missouri-St. Louis, MO  
2007—2008

**Language Instructor**  
Yashio City Board of Education, Yashio, Saitama prefecture, Japan  
Japanese Exchange Teaching (JET) Program  
Yashio Exchange Teaching Program, created *ad hominem* for me to continue working in Yashio  
2001—2006  
2001—2004  
2004—2006

### **External Work**

American Institutes for Research, Bellwether Education Partners, Josiah Bartlett Center for Public Policy, National Council on Teacher Quality, Thomas B. Fordham Institute, Walton Family Foundation, Wisconsin Institute for Law & Liberty, Yankee Institute

## **PUBLICATIONS**

“The Fiscal Effects of Tax-Credit Scholarship Programs in the United States,” (forthcoming), *Journal of School Choice*.

“Value-added in a Virtual Learning Environment: An Evaluation of a Virtual Charter School” (2015). *Journal of Online Learning Research*, 1(3), 305-335.

“Cash on the Table? A Behavioral Analysis of Refund Claimants and Annuitants in the Illinois Teachers' Retirement System” (2014), Doctoral dissertation, *University of Arkansas*

“Competition with Charters Motivates Districts” (2013). *Education Next*, 13(4) (with Anna Egalite and Marc Holley)

“Rethinking Teacher Pensions in Maryland” (2011). *The Maryland Journal*. 1(1), 77-86 (with Michael Podgursky and Evan Linn).

## **POLICY REPORTS AND POLICY BRIEFS**

“School Choice Fallacies: Disproving Detractor’s Allegations Against Tax-Credit Scholarship Programs,” *EdChoice*, July 2017 (with Michael Shaw)

“Education Savings Accounts: Empowering Kids and Saving Money in Connecticut,” Yankee Institute, October 2017 (with Lewis Andrews).

“Economic Effects of a Universal ESA Program in Texas,” Texas Public Policy Foundation, March 2017.

“Lifting the Pension Fog: What teachers and taxpayers need to know about the teacher pension crisis,” National Council on Teacher Quality, February 2017 (with Kathryn M. Doherty and Sandi Jacobs).

“(No) Money in the Bank: Which Retirement Systems Penalize New Teachers?” Thomas B. Fordham Institute, January 2017.

“The Tax-Credit Scholarship Audit: Do Publicly Funded Private School Choice Programs Save Money?” *EdChoice*, October 2016.

“Estimating the Fiscal Impact of a Tax-Credit Scholarship Program,” Show-Me Institute, July 2016 (with Michael McShane).

“Will Expansion of School Choice Make Public School Districts Worse Off? A fiscal impact of statewide voucher expansion on Wisconsin school districts,” *Wisconsin Institute for Law & Liberty* essay, June 12, 2015.

“The Cost to School Districts Due to Wisconsin’s Prevailing Wage Law,” *Wisconsin Institute for Law & Liberty* essay, May 20, 2015.

“Growth and Gaps: Comparing different types of public schools in Wisconsin,” *Wisconsin Institute for Law & Liberty* policy brief, 2(3) May 15, 2015.

“Diminishing Returns in K-12 Education” (2015). *Wisconsin Institute for Law & Liberty* policy report, April 2, 2015.

With complementary video: <https://www.youtube.com/watch?v=lw1D2c10bns>

“Doing the Math on Teacher Pensions: How to Protect Teachers and Taxpayers” (2015). *National Council on Teacher Quality* policy report, January 2015.

“Apples-to-Oranges? When comparisons are made between MPCP and MPS schools” (2015). *Wisconsin Institute for Law & Liberty* policy brief, 2(2) February 9, 2015.

“A response to members of Congress regarding their letter to the U.S. Government Accountability Office requesting a review of the Milwaukee Parental Choice Program” (2015). *Wisconsin Institute for Law & Liberty* policy brief, 2(1), January 27, 2015.

“Kids in Crisis, Cobwebs in Classrooms WILL Report on Milwaukee’s underutilized schools shows that reform is needed right now” (2015). *Wisconsin Institute for Law & Liberty* policy report, January 12, 2015.

“Let’s Begin By Understanding Where We Are: A report on existing academic accountability for schools in the choice programs and public schools” (2014). *Wisconsin Institute for Law & Liberty* policy report, December 1, 2014.

“How to Fix Wisconsin’s Broken Open Enrollment Program” (2014). *Wisconsin Institute for Law & Liberty* policy brief.

### **OP-EDS**

*Forbes, Kenosha News, Wisconsin State Journal, Milwaukee Journal Sentinel, Gazette Xtra (West Virginia), Fort Wayne Journal Gazette, The Missouri Times, Las Vegas Review Journal*

### **WORKING PAPERS AND OTHER UNPUBLISHED WORK**

“Determinants of Cashing Out: A Behavioral Analysis of Refund Claimants and Annuitants in the Illinois Teachers’ Retirement System,” University of Missouri, WP 16-05 (with Michael Podgursky)

“Do K—12 Educational Choice Programs Lead to Fewer Resources for Students Who Remain in Public Schools? The Cases of Indiana and Florida” (with Benjamin Scafidi)

“The Simple Analytics of Teacher Pension Funding and Reform” (with Robert M. Costrell)

“The Politics of Defined Benefit Retirement Plans for Teachers”

“Retirement Behavior of School Leaders in Wisconsin”

“Wisconsin’s Retirement Plan for Teachers: A Simple Analysis of Risk and Incentives”

“A Political Approach to Explaining Teacher Pension Underfunding”

“Gakkou Sentakusei (学校選択制): School Choice in Japan”

“A Controlled Laboratory Experiment to Compare Learning in Standard Lecture and Online Environments” (with Cary Deck)

### **CONFERENCE PAPERS**

“Do K—12 Educational Choice Programs Lead to Fewer Resources for Students Who Remain in Public Schools? The Cases of Indiana and Florida.” Paper presented at the International School Choice and Reform conference, January 12-15, 2018, Fort Lauderdale, FL.

“Do K—12 Educational Choice Programs Lead to Fewer Resources for Students Who Remain in Public Schools? The Case of the Indiana Choice Scholarship Program.” Paper presented at the Future of School Choice: Helping Students Succeed conference, September 28-29, 2017, Program on Education Policy and Governance, Harvard University.

“The Tax-Credit Scholarship Audit: Do Publicly Funded Private School Choice Programs Save Money?” Paper presented at the 5<sup>th</sup> Annual International School Choice and Reform Conference, January 4-7, 2017, Honolulu, HI.

“To Cash In or Cash Out? An Examination of Who Receives Refund Claims in the Illinois Teachers’ Retirement System.” Paper presented at the 39<sup>th</sup> Annual Association for Education Finance and Policy conference, March 13-15, 2014 San Antonio, TX.

“Value-added in a virtual learning environment: an evaluation of the Arkansas Virtual Academy.” Paper presented at the 38<sup>th</sup> Annual Association for Education Finance and Policy conference, March 14-16, 2013 New Orleans, LA.

“A Controlled Laboratory Experiment to Compare Learning in Standard Lecture and Online Environments.” Paper presented at the 38<sup>th</sup> Annual Association for Education Finance and Policy conference, March 14-16, New Orleans, LA.

“A Systematic Review of Competition Effects from Charter Schools in the United States”. Paper presented at the 12<sup>th</sup> Annual Colloquium of the Campbell Collaboration, May 29-31, 2012 Copenhagen, Denmark

“Teacher Pension Incentives and Retirement Behavior in Wisconsin”. Paper presented at the 37<sup>th</sup> Annual Association for Education Finance and Policy conference, March 15-17, 2012 Boston, MA.

“The Simple Analytics of Teacher Pension Funding and Reform”. Paper presented at the 36<sup>th</sup> Annual Association for Education Finance and Policy conference, March 24-26, 2011 Seattle, WA.

“The Electoral College: A Misunderstood Institution That Should Remain Intact” selected for presentation at the Upper Midwest Honors Council Conference, Drake University, Des Moines, Iowa, 1998.

### **CONFERENCE POSTERS AND OTHER PRESENTATIONS**

“Click and Mortar: an Evaluation of the Arkansas Virtual Academy Charter School.” Poster presented at the 37<sup>th</sup> Annual Association for Education Finance and Policy conference, March 15-17, 2012 Boston, MA.

“Teacher Retirement Behavior in Wisconsin.” Poster prepared for the Association for Public Policy and Management conference, held November 3-5, 2011 Washington, D.C.

“Navigating Japanese Culture” presented to first-year JET Program participants, Saitama Orientation, Urawa City, Saitama, Japan, 2002.

### **NOTABLE ATTENTION**

My work has been published or mentioned in various media outlets, policy centers, and think tanks including the *New York Times*, *Wall Street Journal*, *Education Next*, *The 74*, *Education Week*, *Jay P. Greene Blog*, *Teacherpensions.org*, *PanAm Post*, *Atlanta Journal Constitution*, *The Seattle Times*, *Atlanta Business Chronicle*, *The Federalist*, *York Dispatch*, *Lexington Herald Leader*, *Journal Inquirer*, *Concord Monitor*, *Union Watch*, *Reason Foundation*, *Truth in Accounting*, *The Heartland Institute*, and *Yankee Institute*

### **INVITED TESTIMONY**

State legislatures: Missouri, New Hampshire, North Dakota, West Virginia

**Last updated: 3/1/2018**