

# Fund Schools Adequately to Ensure Student Success

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*This brief is part of a series that explains EdTrust's core beliefs about how states should adequately and equitably fund public schools. To learn more, visit [edtrust.org/fair-funding-policy-positions](https://edtrust.org/fair-funding-policy-positions).*

A strong, well-funded public education system is the bedrock of a thriving democratic society and ensures that all students have the tools to thrive. Therefore, it is essential that school funding systems guarantee all students have access to well-funded public schools. To achieve this, EdTrust believes that **state school funding systems must provide adequate, or enough, funding for school districts to provide enriching learning environments for all students.**

Consistently and strategically investing in public education pays off. National research shows that additional state investment in public education can reduce funding inequities between high-poverty and wealthier districts and lead to better academic outcomes for students such as [higher test scores](#)<sup>1</sup> and more [completed years of schooling](#).<sup>2</sup> These studies also show that increased investments can lead to students earning higher incomes as adults. Importantly, other studies show that increased state investment can have even greater [positive impacts](#)<sup>3</sup> on [Black students](#)<sup>4</sup> and students living in poverty — populations whom states often fail to provide equal and equitable access to high-quality educational resources.

Despite an increase in [public education spending](#),<sup>5</sup> over the last 40 years, state and local revenue — the funds that makes up the majority of K-12 funding — remains [inadequate](#)<sup>6</sup> and [inequitable](#). While this brief focuses on how states can more adequately fund public education, funding systems should ideally promote both adequacy and equity. See our *Funding Student Needs Adequately and Equitably* brief to read more about what states should do to fund public education equitably.

The school finance field typically defines adequacy as the amount of funding states need to spend to ensure all students can achieve state academic standards, such as meeting or exceeding expectations on standardized tests or graduating from high school on time.

This brief highlights a few examples that exemplify EdTrust's recommendations for how states can more adequately fund public schools.

## *Researchers and States Should Expand How They Define Adequacy*

EdTrust believes that the way most researchers and states think about adequacy sets too low of a bar for the nation's children — [researchers](#)<sup>7</sup> are acknowledging this too. A narrow focus on a funding amount that is needed to exclusively meet minimum state academic standards does not acknowledge the [social, emotional, and health supports](#) that schools should provide to ensure students are academically successful. Furthermore, some districts and schools today are providing resources that go beyond the traditional scope of academic expenses, such as teachers and classroom materials. More and more students and families are looking to schools to provide resources such as [free or reduced-price meals](#)<sup>8</sup> and physical and [behavioral health services](#).<sup>9</sup> In some districts, schools are even providing [in-school laundry services](#)<sup>10</sup> to students whose families lack the means to wash their clothes to help combat issues like chronic absenteeism.

EdTrust believes that school funding will be truly adequate when districts and schools have sufficient resources to meaningfully help students overcome the barriers that social and economic inequities impose. Schools and districts must also have the resources to prepare all students to reach rigorous academic outcomes, prepare students for postsecondary and workforce opportunities, and ensure that students are active and informed members of society.

The role and function of schools continue to expand as they step up to fill in the gaps created by our country's lack of a strong social safety net for families. The public education system alone should not bear the responsibility for supporting students, families, and communities, but until federal and state policymakers provide a stronger safety net to combat poverty, school funding will only be adequate if schools have all the resources, they need to ensure students can learn.

## How States Should Determine Adequacy

Determining what the adequate amount of funding states need to invest is complex and different approaches yield different results and have various trade-offs. States should take the following actions when determining how much funding is needed to ensure all students can succeed:

- **Use best practices, research, and data to estimate adequacy:** School finance experts have relied on one or a combination of the following common and well-regarded [approaches](#)<sup>11</sup> to estimating the amount of funding or resources needed to provide students with excellent educational opportunities. Because this is where the field is, EdTrust believes that states should rely on one or more of these approaches, with a caveat. As noted above, conventional definitions of adequacy that set the end goal for these approaches are not sufficiently ambitious. Thus, it is vital that states more comprehensively define adequacy if these approaches are going to yield estimates that could meaningfully meet the social, emotional, and academic needs of students. To understand how these methods compare, see the appendix.
  - Professional Judgement Panel (PJP): Educational professionals, such as experienced school leaders and teachers, are selected to identify the types of resources needed for all students to meet state academic performance standards.

- **Successful Schools/Districts (SSD):** Identifies districts that are currently meeting state standards and uses their spending levels to estimate what should be spent in other school districts.
- **Evidence-Based (EB):** Relies on existing education research to identify the types of resources needed for a hypothetical school to ensure all students meet state standards.
- **Cost-Function (CF):** Uses complex statistical analysis to estimate how much funding is needed for students to meet state standards. Estimates are adjusted based on district and student characteristics to account for differences in the resources needed to serve different student populations.
- **Meaningfully engage stakeholders:** State leaders should create meaningful opportunities for the public to weigh in before, during, and after making school funding policy decisions. States should prioritize hearing a diverse range of perspectives and ideas from students to educators to local government leaders to community-based organizations. Public engagement processes should also be inclusive of the geographic, racial, and linguistic diversity of school communities.
- **Regularly review and assess adequacy of formulas:** To avoid formulas becoming out of date and out of touch with changing student and resource needs, state leaders should regularly review their formulas to assess whether funding levels are sufficient for districts and schools to support the social, emotional, and academic needs of students.

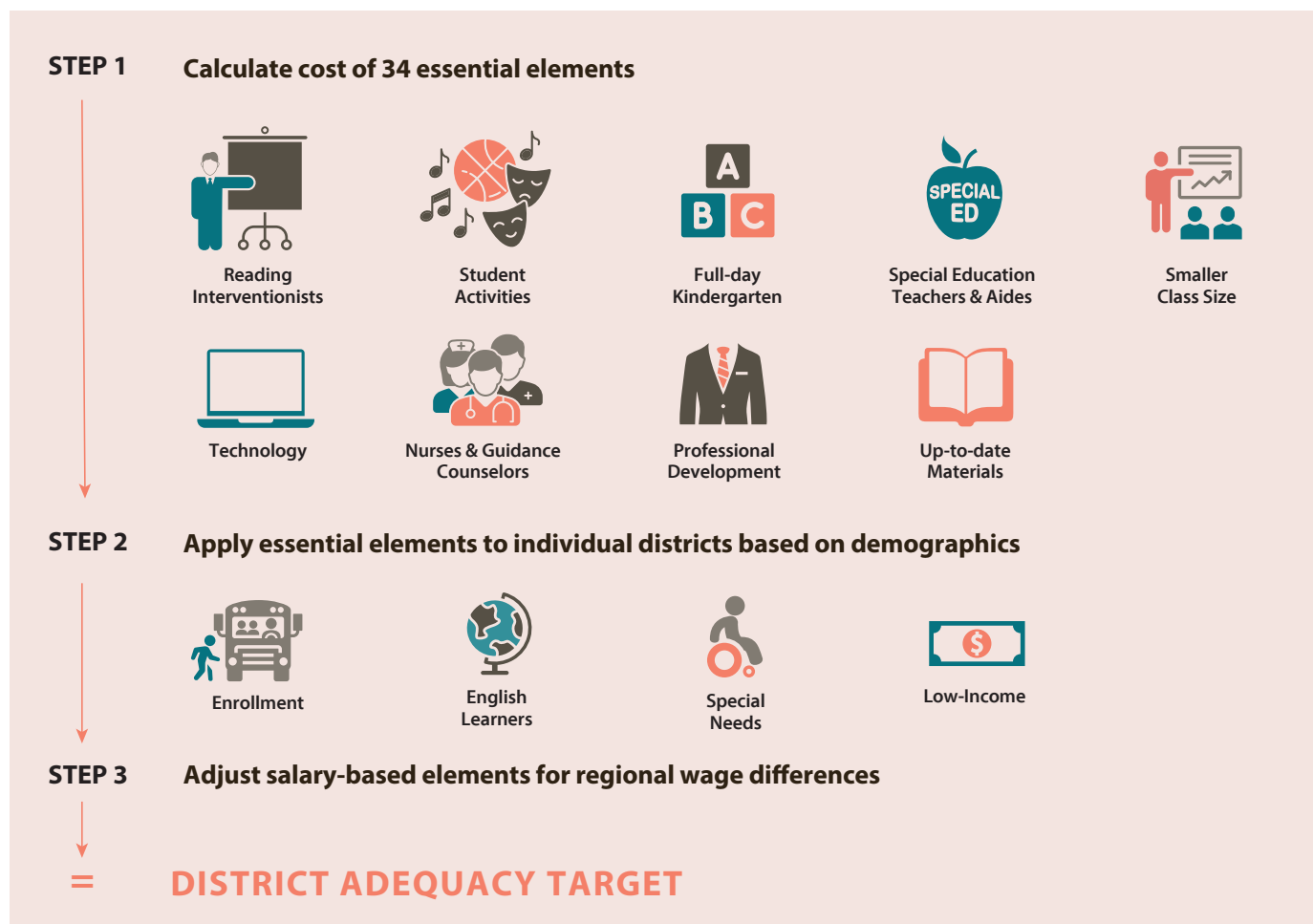
## *Using Best Practices, Research, and Data to Determine Adequacy*

There is wide variation in how states may attempt to calculate funding adequacy. Below is an example of how one state, Illinois, used the EB approach to identify an “adequacy target” for each district.

In 2017, Illinois [overhauled](#)<sup>12</sup> its funding formula by adopting a new formula, the Evidence-Based Funding (EBF) model. One of the core components of the EBF is the “[adequacy target](#)”<sup>13</sup> which the state defines as an estimate of the minimum amount of funding a district needs to provide an adequate level of resources to boost student achievement. This target is based on 34 “[essential elements](#)” that research shows are “necessary to improve student success, improve academic performance, and close achievement gaps...” Elements include resources such as core subject and specialist teachers, principals, librarians, guidance counselors, classroom technology, central office services, building maintenance, after school programs, and summer school programs.

Each year, the Illinois State Board of Education (ISBE) [calculates](#)<sup>14</sup> each district’s adequacy target, which is the total cost of all 34 elements in a district based on the district’s total student enrollment. When calculating a district’s adequacy target, ISBE also factors in student characteristics, in this case English learner status, disability status, and student poverty status to estimate the costs of certain elements. This adjustment is so that the formula gives districts more funding to meet the educational needs of students who face steeper barriers to learning. ISBE also adjusts districts’ targets for regional differences in salaries to account for the higher cost of living in some areas of the state.

**Figure 1. How ISBE Calculates Each District's Adequacy Target**



Source: [Center for Tax and Budget Accountability](#)

EdTrust highlights Illinois' EBF model not because it is the ideal or perfect model, but because it showcases how state efforts to more adequately fund schools should be driven by evidence and research. Some states are already doing this, while others have more work to do. As states endeavor in figuring out how much funding is needed to meet all students' needs, EdTrust recommends that states:

- **Use quality and meaningful data to drive funding estimates, including quantitative and qualitative data.**
- **Ensure that the state's definition of "adequacy" or "adequate education" reflects the [full spectrum](#)<sup>15</sup> of resources that students need today to not just succeed but thrive.**

Advocates should know that regardless of a state's approach to adequacy, achieving adequate school funding does not occur overnight and requires persistent and strategic pressure from a diverse coalition of advocates. Some states, like Maryland and Illinois, use a years-long phase-in approach to fully funding their public school systems after reform. Long ramp-up windows make it difficult for students to experience — and for researchers and policymakers to be able to measure — the full benefit of the reform. To avoid drawn out implementation, states leaders should raise necessary revenues to adequately fund public schools.

## Meaningfully Engage Stakeholders

Determining how much funding is necessary to support the success of all students is a large and complex task. Given the enormity of the task and how much state leaders' decisions impact people's lives, it is essential that state leaders thoroughly and equitably engage diverse stakeholders. Meaningful engagement can help build trust and buy-in, facilitate innovation, and help guard against policy decisions that unfairly disadvantage communities, such as communities of color.

While states have made some progress, state leaders need to do more to engage the public because many state policies still do not reflect the needs and priorities of marginalized communities. State leaders must ensure that public engagement opportunities both empower all communities to participate and result in passage and implementation of school funding changes that positively impact students, families, and school and district staff.

Below is an example of how the 2019 Commission to Study School Funding in New Hampshire attempted to more meaningfully engage stakeholders as part of its charge to research and recommend changes to make public education funding more adequate.

### New Hampshire: Public Engagement Workgroup

The state's Commission to Study School Funding, led by the Carsey School of Public Policy, created a [public engagement-focused](#)<sup>16</sup> working group coordinated by New Hampshire Listens, a civic engagement initiative within the school. The goal of this working group was to publicize the goals and activities of the Commission and to create meaningful opportunities for members of the public to inform the Commission's recommendations for how the state could fund schools more adequately.

To guide their work, the workgroup used the following three key questions to ensure that a wide range of perspectives were captured and meaningfully leveraged to inform the Commission's work. Those questions included: 1) What stakeholders do we need to engage in focus groups? (e.g., by position, advocacy area, interest area, diversity of racial and social identities), 2) What are the questions we want to ask stakeholders?, and 3) What data do we need to share with stakeholders so they can provide meaningful input?

In total, the workgroup consulted 16 focus groups with municipal and school leaders, youth, elderly residents, and taxpayer associations, statewide surveys, a student voice summit, and statewide conversations. The workgroup compiled a report of their findings with the purpose of achieving three goals: 1) share common themes across feedback, 2) inform the work of the workgroup charged with evaluating recommendations in the adequacy study conducted by American Institutes for Research (AIR) and another workgroup charged with determining the fiscal policies needed to achieve adequate funding, and 3) ensure policy recommendations responded to people's lived experiences.

The workgroup also included additional information about stakeholder concerns that did not fall into the group's main findings in the report. For example, it was noted that students and teachers believed that funding levels were

not reflective of how education and teaching has changed and were inadequate to provide resources students need to pursue diverse career and college pathways. Lastly, the workgroup identified additional stakeholders the Commission should engage to build public knowledge about how school funding works in the state. This list included stakeholders such as parent and family groups, youth leaders, groups representing under-represented communities, higher education groups, and educators and school district leadership.

New Hampshire's approach to public engagement shows how states can be more intentional in their approach to public engagement. Furthermore, intentional public engagement should extend beyond a commission setting, take different forms, and be accessible to as many people as possible. To more meaningfully engage stakeholders, EdTrust believes states should create opportunities that:

- **Develop a set of goals to guide how stakeholders are identified.** One of those goals should include ensuring that stakeholders are representative of multiple perspectives, identities, roles expertise, geographic locations, and more. States should also identify and be prepared to fund the types of resources (e.g., childcare or transportation) some stakeholders may need to effectively participate. Lastly, states should reflect on the extent to which potential stakeholders have historically been included or excluded and should prioritize those who have not yet had a seat at the table.
- **Build trust, share power, and develop a shared sense of belonging** by viewing the lived experiences of communities of color, economically disadvantaged communities, and other communities that have been most harmed by inadequate school funding as [assets](#)<sup>17</sup> to the policymaking process. States should engage communities in ways that are mutually beneficial and are not extractive or paternalistic while also acknowledging the differences in power and positionality of people in the space. Additionally, states should establish [shared norms](#)<sup>18</sup> around participation and transparent mechanisms for addressing disagreement or conflict.
- **Span the spectrum of community engagement** which includes [many ways](#) to engage community members: informing, consulting, involving, collaborating, and empowering the public. Providing opportunities across the spectrum can make public engagement less performative and provide space for state leaders to clearly communicate how they will incorporate and adopt the public's ideas and recommendations.
- **Eliminate barriers to participation** by providing supports such as language translation or interpretation services, in-person engagement opportunities hosted in geographically diverse areas, hybrid and virtual meetings that are recorded and accessible online, diversified ways of sharing and receiving information with the public (for example, text messaging or voicemails). In addition, engagement opportunities should be hosted in the evenings and/or over the weekend when feasible.

## *Regularly Review and Assess Adequacy of Formulas*

Some states have laws that require periodic or regular reviews of their funding systems to ensure public investments are adequate and investments are leading to better student outcomes.

All state leaders should adopt formal review processes so that they can be responsive to student needs and the changing demands of their public education system. This could look like doing comprehensive adequacy studies as well as smaller-scale reviews. For example, in [Arkansas](#), every two years, the House and Senate Education Committees must "assess, evaluate, and monitor the entire spectrum of public education across the state to determine whether equal educational opportunity for an adequate education is being substantially afforded to Arkansas' school children and recommend any necessary changes." Whereas in New Jersey, the Governor and the

Commissioner of Education are required to view select components of the formula [every three years](#).<sup>19</sup>

Without regular review processes and a commitment to updating formulas as needed, decades may pass before states make changes to their formulas. For example, before Tennessee and Mississippi reformed their formulas in 2022 and 2024, respectively, their models were 30 years old. Below is an overview of the review process that Illinois state leaders adopted as part of their overhaul of the state's funding formula.

## Illinois' Professional Review Panel

Every five years, a [Professional Review Panel \(PRP\)](#) is required to publish a comprehensive assessment of whether the EBF formula is achieving state goals, including whether the formula is leading to improvements in student achievement, funding adequacy, and equity. PRP members include legislative members, school board members, superintendents, principals, teachers, district leaders, and advocacy organizations. The study must assess:

- Whether the 34 essential elements driving districts' adequacy targets accurately reflect and are meeting the needs of students living in poverty or schools in high-poverty communities.
- How racial equity can be advanced through the formula.
- How the legislators' target of a \$300 million annual funding increase is improving adequacy and reducing inequities between wealthy and high-poverty districts and how long it will take the state to reach its goal of all districts being funded at 90% of their adequacy target.

The [law](#)<sup>20</sup> gives legislative members and ISBE the authority to determine what gets studied, but the PRP Chairperson may direct the group to study additional topics such as the employee benefit costs, the formula's hold harmless provision, college and career acceleration strategies, special education, and early childhood investments via sub-committees. ISBE provides research support to by helping design the study, develop research questions, and collect and analyze data.

All PRP meetings are open to the public, and members of the public can access all PRP's materials including agendas, presentations, and reports on [ISBE's website](#).<sup>21</sup>

Ensuring that funding systems are adequate should involve ongoing, deliberative, and evaluative processes. With student needs rapidly changing and the demands of the public education system increasing, it is essential for states to meaningfully monitor how well their funding systems are responding to such changes. While states do not need to do comprehensive adequacy studies regularly, there should be meaningful processes in place to evaluate the adequacy of the investments they are making in their public education system. EdTrust recommends that states should:

- **Regularly review state formulas for adequacy and effectiveness** by enshrining a requirement in state law or establishing regulatory rules that require the legislative branch or department of education to conduct regular reviews and recommend policy changes. In determining how often to review funding formulas for adequacy and effectiveness, states should consider that formulas need sufficient time to be implemented and adhered to before they are likely to yield meaningful changes in resource allocation. Assessing a formula too often, such as yearly or every two years, may be too frequent. But allowing decades or more to pass without



reviewing and modifying a formula to reflect students' rapidly evolving needs is unacceptable. Thus, states should identify a cadence that will yield the most useful, and actionable data.

- **Ensure that the funding formula is based on actual costs districts have and keeps up with inflation** by maintaining quality financial data systems, using quality financial data to estimate funding needs, and appropriating enough funding in state budgets.

State leaders need to ensure that public education systems are fully funded, and that districts and schools are setting up all students, regardless of their race, zip code, or disability status, for success in the classroom and beyond. To do this well, states should expand how they define an “adequate” education and leverage evidence-based research, data, and intentional community engagement. States should also establish regular review processes to ensure that funding systems keep up with the evolving needs of students over time.

EdTrust analyzed and rated the four common adequacy approaches according to a set of criteria that aligns with the organization's priorities. An approach was rated green if it fully met the criterion, yellow if it partially met the criterion, and red if it did not meet the criterion. We also included brief explanations to contextualize the ratings.

Importantly, no single approach met all our criteria. They each possess strengths and weaknesses that should be considered. Many school finance consultants have [combined methods](#)<sup>22</sup> to meet the adequacy study charges put forth by states. EdTrust believes that leveraging the strengths of each method is a better way of estimating adequacy than relying on a single approach.



# Appendix

Figure 2. Four Common Ways School Finance Researchers Seek, “How Much Funding is Enough”

Approach	Evidence-Based (EB)	Professional Judgement Panel (PJ)	Cost-Function (CF)	Successful Schools / Districts (SSD)
<b>Description</b>	School finance consultants use findings from existing research studies to recommend the resources a hypothetical or prototypical school needs to have to help students meet state standards and any other identified goals	School finance consultants rely on the expertise of researchers, educators, and other stakeholders to identify the types of resources and the amount of those resources needed to achieve state standards and any other identified goals	A complex statistical approach where school finance consultants analyze state and local spending and student performance data to identify how much funding is needed to achieve performance outcomes identified by the state.	School finance consultants calculate per-student spending levels of select schools or districts that are currently performing at the level desired by the state to determine the per-student amount that needs to be spent in all schools or districts
<b>Criteria to assess quality of adequacy method</b>	Fully meets criterion	Fully meets criterion	Does not meet criterion	Fully meets criterion
	<p>Easy to understand by everyday people</p> <p>Straightforward in that evidence-based inputs and educational strategies and their associated costs serve as the basis for estimating adequacy</p>	<p>Straightforward in that selected stakeholders are asked to produce a list of resources they believe all students need to achieve state standards and any other identified goals</p> <p>Resources are identified, and the costs of those resources are totaled to determine how much money states need to spend</p>	<p>A highly technical and complex process that is mostly understood by academics and quantitative researchers</p>	<p>Straightforward in that the estimated adequate per-student amount is based on how much schools meeting or exceeding desired state standards and any other identified goals are spending</p>
	<p>Does not meet criterion</p> <p>Primarily input-based model</p> <p>Does not explore a direct link between student outcomes and spending within the state, though recommended evidence-based inputs have demonstrated success in boosting student outcomes</p>	<p>Does not meet criterion</p> <p>Primarily input-based model, therefore this model does not explore a direct link between student outcomes and spending</p>	Fully meets criterion	Fully meets criterion
	<p>Driven by research and data on student outcomes and spending</p>	<p>Partially meets criterion</p> <p>Primarily input-based model, therefore this model does not explore a direct link between student outcomes and spending</p>	<p>Analyzes actual student outcome and spending data to predict the spending levels associated with achieving state standards and any other identified goals</p>	<p>Student outcome data are used to identify a sample of schools or districts in a state that meet desired state standards. The average per-pupil of these districts or schools is considered adequate</p>
<p>Analyses and recommendations account for differences in student and district needs (e.g., socioeconomic status and geography)</p>	<p>Partially meets criterion</p> <p>The identified research-based inputs may not be generalizable across districts and different student groups</p> <p>The approach over- or underestimates the costs and number of resources needed across district size and regionality and student demographics</p>	<p>Partially meets criterion</p> <p>Whether differences in student and district needs are accounted for depends upon the diversity of students and districts represented by the selected participants</p>	Fully meets criterion	Does not meet criterion
	<p>Partially meets criterion</p> <p>Some EB studies include professional judgement panels (PJ) to validate or modify the inputs in the proposed EB model</p> <p>Whether there is diverse presentation among PJP participants depends upon selection criteria consultants use</p>	<p>Partially meets criterion</p> <p>Whether there is diverse presentation among participants depends upon selection criteria consultants use</p>	<p>The goal of this method is to accurately estimate the cost of providing an adequate education to all children with different backgrounds (e.g., students from low-income backgrounds) and in different settings (e.g., rural districts) to achieve a common, desired level of achievement</p>	<p>Designed to focus on per-student base funding level of providing resources to students without additional needs – consultants must use an additional approach to estimate additional costs for students with needs and districts with certain characteristics</p> <p>A common decision, removing large urban districts or small rural districts from the analysis, often leads to a recommended funding level that is too low for these districts</p>
	<p>Consults and includes the perspectives of stakeholders across race, socioeconomic status, and geography who hold different role in the community (for example, caregivers, school and central office staff and community based organizations)</p>	<p>Partially meets criterion</p> <p>Whether there is diverse presentation among participants depends upon selection criteria consultants use</p>	<p>Does not meet criterion</p> <p>This method is not designed to be shaped by stakeholder input</p>	<p>Does not meet criterion</p> <p>This method is not designed to be shaped by stakeholder input</p>

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