

# Recovery and Beyond: Using Research to Support Education Finance Leaders

Technical Working Group Summary | June 27, 2022

U.S. DEPARTMENT OF EDUCATION

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# Recovery and Beyond: Using Research to Support Education Finance Leaders

## *Technical Working Group (TWG) Meeting*

June 27, 2022

National Center for Education Research  
Institute of Education Sciences  
U.S. Department of Education  
Washington, DC

This meeting summary was prepared by Bennett Lunn (Truman-Albright Fellow at the National Center for Education Research and the National Center for Special Education Research) in collaboration with Katherine Taylor (program officer at the National Center for Special Education Research) at the Institute of Education Sciences (IES). The summary draws from the slide presentations, notes taken by Robin Pu Yigh (under JDC Events' contract ED-IES-D-0003), as well as notes taken by IES program officers, Corinne Alfeld, Sarah Brasiel, and Allen Ruby. The views expressed in this document reflect individual and collective opinions and judgments of the presenters and participants at the Technical Working Group meeting and are not necessarily those of IES or the U.S. Department of Education.

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**Tammy Kolbe**, Associate Professor of Educational Leadership and Policy Studies, University of Vermont

**David Martinez**, Assistant Professor of Educational Leadership and Policies, University of South Carolina

**Christopher May**, Financial Specialist, Michigan Department of Education

**Marguerite Roza**, Research Professor and Director of the Edunomics Lab, Georgetown University

**Tim Sass**, Distinguished University Professor of Economics, Georgia State University

**Kenneth Shores**, Assistant Professor in the School of Education, University of Delaware

**Rebecca Sibia**, Founder of EdBuild and Global Policy and Advocacy Senior Program Officer, Bill & Melinda Gates Foundation

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## **Institute of Education Sciences Staff**

**Mark Schneider**, Director, Institute of Education Sciences

**Elizabeth (Liz) Albro**, Commissioner, National Center for Education Research

**Stephen Cornman**, Senior Survey Director, Financial Surveys, National Center for Education Statistics

**Bennett Lunn**, Truman-Albright Fellow, National Center for Education Research and National Center for Special Education Research

**Joan McLaughlin**, Commissioner, National Center for Special Education Research

**Marsha Silverberg**, Associate Commissioner, Evaluation Division, National Center for Education Evaluation and Regional Assistance

**Katherine (Katie) Taylor**, Program Officer, National Center for Special Education Research

## Introduction

On June 27, 2022, the National Center for Education Research (NCER) convened a technical working group (TWG) of 15 experts on education finance policy, including state- and district-level education finance professionals, researchers, and consultants. The goal of the TWG was to better understand the current and future landscape around education finance and to identify actions IES can take to support research that addresses the needs of decision makers at state and local education agencies.

Prior to the TWG, participants were asked to respond to a series of questions regarding the pressing topics in education finance, policy, and practice (see the appendix for a full list of questions). IES staff reviewed these pre-work responses to identify themes and inform the agenda topics and discussion questions.

### IES Investment in Education Finance Research

IES Director, Mark Schneider, opened the TWG by discussing IES's interest in education finance and intent to identify opportunities to better support education finance research that is useful for practice. He noted that IES's main purpose is to invest in evidence-based practices, that the agency is interested in identifying education finance practices that are effective for schools, communities, and students. However, little rigorous research has been done to demonstrate effects of education finance on outcomes, and limited data are available about how finance decisions are made. As IES considers how it can adapt to support rigorous education finance research that is useful for practice, Director Schneider encouraged the TWG to address the following questions:

1. How can IES adapt internally to provide education finance data that is both rigorous and timely?
2. How can IES support research on the role that school boards play in the decision-making processes that drive school funding and spending decisions?
3. What does the field need in order to conduct research on the relationship between fiscal decisions and student outcomes, and how can IES encourage that research?
4. How can IES help build the field's capacity to conduct rigorous education finance research?
5. How can IES and the field produce and disseminate research findings in a way that influences practice?

Following Director Schneider's Remarks, NCER Commissioner, Liz Albro discussed the limited number of education finance projects funded by NCER to date and the intention to support additional work in this area, particularly in light of the increased interest stemming from the pandemic. NCER has funded [six education finance projects](#), at a total cost of approximately \$6 million, since 2017. Further, Dr. Albro discussed the importance of IES coordinating education finance work across centers. With additional federal funding provided for education and new evolutions in the education landscape, interest in the area has increased since the COVID-19 pandemic, and IES intends to fund new projects that assess education spending decisions at the school, district, and state levels, and how these decisions affect student outcomes. Dr. Albro noted that there are unique issues associated with special education finance and that NCSER is interested in how to advance research in this area. Dr. Albro closed by

inviting input on how to coordinate and leverage IES resources to advance education and special education finance research.

Next, Stephen Cornman, Senior Survey Director at the National Center for Education Statistics (NCES) discussed current and planned enhancements to the IES financial surveys to capture pandemic-related revenues and expenditures. Legislation responding to the COVID-19 pandemic allocated \$282.25 billion for education funding over the next 4 to 5 years. Since the pandemic began, NCES and US Census Bureau staff have met quarterly with State fiscal coordinators and an expert panel to discuss how to maximize the variables collected while ensuring they are feasible for districts and schools to report on, with the aim of collecting data to inform policy decisions. As a result of these discussions, NCES added revenue and expenditure items to the [National Public Education Finance Survey \(NPEFS\)](#) and the [Local Education Agency \(School District\) Finance Survey \(F-33\)](#) as well as expenditure items to the [School-Level Finance Survey \(SLFS\)](#). Dr. Cornman emphasized that NCES is open to feedback on how to improve future iterations of these surveys.

Lastly, Marsha Silverberg, Associate Commissioner at the National Center for Education Evaluation and Regional Assistance (NCEE) provided an overview of the [Study of District and School Use of Federal Funds \(Resource Allocation Study\)](#) and the Study of Special Education Funding which will assess how resources are allocated and spent and how spending patterns changed during the pandemic. Policymakers are interested in how pandemic relief funds were distributed and spent across programs, in combination with State and local resources. The Resource Allocation Study will assess what Federal funds add, where the funds go, and which resources funds purchase. The study will also examine whether pandemic relief funds were distributed to areas with greatest need and how district spending patterns changed before the pandemic vs. during pandemic recovery. The Special Education Study will examine how much each district spends, how funds are spent, how much of that spending is covered by Federal funds, and what additional resources would be needed to fulfill the Federal government's promise to cover 40 percent of the extra costs for educating students with disabilities.

## **Pressing Education Finance Issues for States and Districts**

To begin this discussion, five TWG members working in state or local education agencies shared their perspectives on the most pressing topics facing education finance decision makers in a round-robin format. After the round robin, other TWG members were invited to share their perspectives on pressing issues as well as how the pandemic has changed the education finance landscape for research and decision-making among finance leaders. This section presents the broad range of issues discussed by the TWG members.

### ***Rising Needs and Costs and Personnel Shortages***

TWG members identified the increasing breadth and depth of student needs and the rising costs to meet those needs as a key issue in education finance. Needs and costs have increased because of several converging trends.

First, the pandemic has increased the need for both academic and mental health interventions across the board and particularly for students who were already at risk before the pandemic. This has necessitated significant investments in tutoring and other academic and social-emotional programs and personnel to implement those programs.

Second, the number of students identified with disabilities has increased, requiring additional services and staff. In special education, it has long been the case that federal and state funding does not cover enough of the costs needed to provide the services and supports on students' Individualized Education Programs (IEPs). More recently, advancements in disability identification have outpaced the funding that is needed to support students who are identified. There are also an increasing number of students receiving 504 plans, which are different than IEPs in that they are legally required services but do not have a dedicated federal funding stream.

As a result of these trends, there is a need for more general and special education teachers and other staff, including but not limited to teaching assistants, transportation staff, after-school specialists, and mental health providers. However, schools and districts have faced significant challenges hiring and retaining teachers and other school staff because of rising personnel costs and an inability to provide competitive salaries as well as shortages in the labor market, which are especially acute in rural areas and for special educators.

### ***Pandemic Relief Funding and the Fiscal Cliff***

TWG members noted that the influx of federal relief funding and the uncertainty that it has created is another pressing issue. On one hand, there are concerns about how to spend these funds wisely in a short amount of time especially given staffing shortages (particularly in special education), supply chain delays, and limitations around how funds can be used. And on the other hand, this one-time funding will create a "fiscal cliff" such that districts and schools may be unable to maintain the programs that have been adopted and the staff that have been hired using relief funds once they run out. Therefore, planning for sustainability of these supports or their possible elimination is top of mind for state- and district-level finance professionals. Some TWG members commented that districts are supplanting their existing funding with pandemic relief funds in an attempt to save some money and prepare for the fiscal cliff. However, this makes it difficult to determine the return-on-investment for federal relief funding, as they are unable to report how much of the relief funds were spent specifically on student learning loss. And being able to demonstrate the impacts of these one-time funds is also a critical issue for states and districts.

### ***Declining Enrollment***

Another significant issue facing districts is sustained enrollment decline which will likely lead to reduced funding from states in future years. Although declines are happening across the board, they have been particularly severe in large urban districts that serve a higher proportion of students from low-income communities. As local revenue for education declines this can trigger reduced state funding, which can be especially problematic for low-income communities that rely more heavily on state funding because of limited local revenue to begin with. As a result, reductions in state funding caused by declining enrollment perpetuate existing inequities between schools and districts in higher- and lower-income communities. These reductions are also likely to occur within the next three years in many states, which will mean that districts grappling with the increased costs to address learning loss will have less ongoing funding to address these needs. As one TWG member noted, it would be bad enough if any one of the abovementioned situations were happening, but they are all happening at the same time.



### ***Inequities in Funding and Resource Allocation***

TWG members identified inequities and inadequacies in funding and resource allocation as a perennial issue. Funding for districts and schools in low-income and rural areas is insufficient and inequitable due in large part to a reliance on property taxes and state funding formulas that do not necessarily ensure that states equitably supplement local tax contributions. Ultimately this translates to insufficient funding to provide additional resources to students with the highest needs. TWG members noted particular concerns around the under-funding of special education, with respect to the insignificant portion of special education costs covered by Federal funds from the Individuals with Disabilities Education Act (IDEA) and the inequities in how the Federal government distributes IDEA funding to states, and by extension, districts.

Weighted student funding, which allocates funding based on individual student need, is one method to promote greater equity. In this type of model, students receive a baseline amount of funding which is adjusted, or weighted, based on certain student-level characteristics, such as disability, English learner, or free and reduced-price lunch status. However, the field has not settled on adequate baseline amounts nor on what weights should be used for different types and combinations of need. TWG members also asserted that the weights often do little to account for the way need changes with intersecting vulnerabilities that students experience or the variability in need within a particular category of students. In addition, there are concerns about the adequacy of weights given the impact that the pandemic has had on students. Although most students are experiencing greater needs because of the pandemic, funding models need to account for the fact that students who previously required the most support before the pandemic will require even more post-pandemic.

Title 1, which is a program that provides funding to schools and districts with a high percentage of students from low-income families, is another lever for increasing equity. The funding is meant to help schools provide additional educational supports to students. Yet, TWG members pointed out that because of the restrictions on how Title 1 funds can be used, the increased funding often does not correlate with better outcomes. As one TWG member noted, there are ways to hide inequity. For instance, per pupil funding levels may look higher in certain schools, namely Title 1 schools, because of declining enrollment not because of greater resources. A Title 1 school could get the same amount of funding as a magnet school, but the nature of the resources differs because Title 1 funding has to be used in specific ways while other types of funding can be used more flexibly.

Lastly, TWG members mentioned blending and braiding federal funds from Title 1 and IDEA and state funding as a strategy for better addressing the needs of students with intersecting needs. Although a best practice, the opportunities and flexibilities in these funding systems is not well understood by many state and local education finance leaders and out of concern for compliance they avoid implementing this strategy.

### ***Lack of Flexibility and Attention to Student Outcomes in the Budgeting Process***

TWG members pointed out several issues with the budgeting process, including a lack of flexibility, short-term planning, and limited attention to whether investments are working. One TWG member referred to the process as a “budget dance” that is deeply embedded in district routines and offers little room to consider data on whether prior investments were successful for improving student outcomes. Most budgets are just repeating the prior year’s budget and there are only minor tweaks. Part of this is because staff expenses make up the largest line item on most district and school budgets and are

subject to contracts and union agreements that make them difficult to change. In addition, there are several disincentives to using data on student outcomes to determine whether investments are working or need to be changed. First, education finance leaders do not typically have access to timely and useful data to determine whether investments are working. Existing financial accounting systems are not structured in ways that allow leaders to track how funds are spent and connect spending with outcomes. Second, education leaders are not evaluated based on managing budgets; they are evaluated on test scores. TWG members emphasized the need to better align incentives and evaluation criteria with using data and other best practices in budgeting. Third, leaders must balance the interests of numerous stakeholders, including parents, teachers, and school boards, and the interests of these stakeholders often play a stronger role in informing spending decisions than evidence on what works to improve student outcomes. In essence, there are multiple decision makers, with school boards being a key one. And these decision-makers are often more heavily swayed by stories than data. It is also important to consider who is telling those stories and is most likely to have influence. According to TWG members, it is often not stakeholders from the communities most impacted by financial decisions, but lobbyists and salespeople advocating for their own financial interests. Lastly, the rate of turnover at the administrator, superintendent, and school board levels, can lead to short-term mindsets, making it more difficult to budget for the long term or build the infrastructure for continuous improvement. All of these factors lead to an inflexibility in budgeting that can make it difficult to ensure that a school or district budget reflects evidence-based spending practices.

## **Education Finance Research Priorities**

TWG members raised a variety of foundational questions about how the field should craft a research agenda that provides useful knowledge that can impact practice, including what research topics are the most important to invest in, which questions should be asked, at what level (state or local) should research be conducted, and what data are needed to do the research. This section summarizes the research priorities discussed by the TWG members.

### ***Education Finance Data and Data Systems***

TWG members noted that having access to better, more real-time finance data and data systems that allow for linkages between spending and student outcomes is critical to advancing education finance research and practice. The finance data collected through NCES, while an important source of information, have several weaknesses that limit their use for research purposes. For example, data are released multiple years after they are collected, there is limited information on property taxes and the share of tax revenue that is used for funding education (which is important for questions around equity), and finance data are difficult to link to student outcomes.

In addition to federal data, TWG members also noted the need for better data and data systems at the school and district levels. Not unlike the weaknesses mentioned above for federal(?) data, there is often a lag in data availability. Some TWG members commented that other fields have figured out ways to work with vendors to get access to data more quickly to see if investments are working. Another issue is that data systems are siloed and not set up to allow connections between spending and student outcomes. Thus, systems would be needed that allow leaders to track programmatic spending, the students that participate in the programs of interest, and outcomes for those students.

### ***Equity in Education Finance***

TWG members noted several directions for advancing research related to equity in education finance. First and foremost, a universal definition of equity is needed to guide conversations and refine metrics related to equity. Throughout the TWG, many participants noted that a common notion of equity in funding is essential, but that funding is not the only thing driving equity. While equitable funding may be considered a necessary pre-condition, resource equity is equally important. In other words, conversations about equity must include what the money is used to purchase and if those resources are reducing achievement gaps.

TWG members also emphasized the need for research on how differing funding models, such as weighted student funding models, impact equity. Research is also needed to better understand what funding levels and weights are both adequate and equitable to support students. It is typical to allocate funding by student need, but how much is the “right” amount for certain types of students?

Lastly, TWG members highlighted the importance of the methods in equity-related research. Education finance research should not ignore the individuals behind the data, and TWG members suggested that qualitative research methods be used to include more voices and better account for the individual, historical, and political context. In particular, more research is needed on communities that have historically received less funding and been disadvantaged by funding systems. The field would also benefit from greater diversity among education finance researchers. Specifically, more needs to be done to build pipelines of education finance researchers who reflect the identities of the communities most impacted by inequitable school funding.

### ***Special Education Finance***

TWG members highlighted special education finance as an important topic for further research. TWG members emphasized that instruction for students with disabilities often occurs in the general education classroom, and therefore, is supported by multiple funding streams. Similarly, budgetary decisions related to special education impact students without disabilities as well. Even so, there are certain research questions and opportunities that are specific to special education. For example, TWG members noted that significant data is already collected on special education costs and services, but research needs to do a better job of leveraging that data in a way that is useful for practice. For example, one participant suggested that special education finance researchers build out statewide data systems that allow researchers to analyze IEPs and 504 plans, explore the range of services offered, their costs, and their impacts on student outcomes, as well as how these things differ by disability category, race and ethnicity, and socioeconomic status.

### ***Financial Decision Making***

TWG members commented on the need for research on the human side of education finance, including financial decision-making processes, incentives that motivate education finance decision-makers, and interventions that promote use of data and evidence in the decision-making process. Finance research has mostly focused on whether the amount spent per student matters. However, findings have revealed that the amount that is spent only accounts for a small portion of variation in outcomes. Instead, a more fruitful line of research may be to explore the human factors that influence the relationship between spending and outcomes. Descriptive research is needed on financial decision-making processes. For instance, school boards have a strong influence on financial decisions, yet they are rarely studied. Additionally, research to develop and test interventions for education finance

leaders on how best to use certain funding streams (and not just on how to stay in compliance), how to determine what programs to spend money on, and how to use data on outcomes to inform decision making is needed.

### ***Cost and Cost-Effectiveness Research***

In addition to research on the process of financial decision making, research is needed on the costs and benefits of education programs and practices that could be used to inform financial decisions. There is a research gap on the costs and cost-effectiveness of educational programs and practices. One TWG recommended identifying the most used programs and practices in schools and districts and commissioning studies to evaluate their effects, costs, and other benefits. Another TWG member cautioned never to study the cost of an intervention without a comparison intervention as leaders need information that will help them choose among programs. In addition to research on what works and how much it costs, leaders also need practical and accessible tools for finding and interpreting this evidence.

Not only do leaders need to be able to identify evidence-based, cost-effectiveness programs to adopt, but they also need information on whether the programs they are currently implementing are working - in other words - their return-on-investment. Such information could be useful in determining whether to continue funding or discontinue a particular program or to inform continuous improvement. Although it can be challenging to disentangle the impact of one program or practice from other simultaneously impacted activities, there are methods, like program value-added analysis, that have potential. However, these types of methods require data on which students are participating in which activities, data that are not often available in typical school data systems. Therefore, education leaders also need data systems that include all the information they need to connect programmatic spending to student outcomes and make informed budgeting decisions.

### ***State- and Local-Level Research***

In addition to questions about the best topics to focus on education finance research, TWG members provided different viewpoints on the level at which education finance should be studied. A few researchers argued that more research is needed on states and specifically on the nature, stability, and adequacy of state-level funding; how they allocate funds to districts; and how state-level policies influence district spending. Others felt that there is more leverage at the district level compared to the state where decisions are more heavily influenced by politics and less amenable to change. TWG members did acknowledge that changes at the state level would be smaller, but that these small changes could provide opportunities to overcome political challenges. Ultimately, research on education finance is needed at all levels of the system.

## **How Can IES Better Support Education Finance Research?**

In the final part of the meeting, IES staff asked for recommendations on how IES can better support education finance research and dissemination. TWG member recommendations are organized according to the five themes described below.

### ***Improve IES Data Systems***

TWG members stressed the importance of having access to finance data in real-time. While the TWG acknowledged NCES's finance surveys as the gold standard of finance data, they noted that it would be

helpful to collect and report finance data more quickly, perhaps with a smaller sample that is not nationally representative. The state- and district-level education finance professionals in the meeting noted that such real-time data would be tremendously helpful for making decisions during the yearly budget process.

In considering adaptations to existing data collection or new data collection in the area of education finance, TWG members suggested that IES engage in ongoing conversations with finance professionals at state and local education agencies and education finance researchers. For example, IES could consider establishing a working group that meets frequently to gather feedback on future data collection efforts, including what would be feasible and most useful for decision makers at that state and local levels.

### ***Build Researcher Capacity***

TWG members recommended that IES play a role in building a pipeline of researchers with an interest and expertise in education finance. The need for more economists was highlighted at several points in the conversation. However, one TWG member noted that many education finance researchers operate from an economic perspective, but that research would benefit from a better understanding of the individual, historical, and political context. In particular, additional training and expertise on the political processes and incentives that influence financial decision making would be useful.

### ***Promote Researcher-Practitioner Partnerships***

Numerous TWG members agreed that IES should support partnerships that center research around the needs of state and local decision makers. One TWG member recommended embedding finance researchers in districts and creating a network of districts that researchers could work with as they make real financial decisions. Researchers could build research capacity in the district and collaborate across the network to address more high-level issues. Such partnerships could help finance teams at the district and state level determine what works and advocate for it to overcome the tendency for decision makers to make decisions that are not based on evidence and may not be in the best interest of students. Additionally, emphasis was placed on the need for IES to build opportunities for education finance research centered on marginalized/minority communities that incorporates the voices and perspectives of community members and is conducted by researchers whose identities reflect those of the focal communities. These communities are often the most impacted (or disadvantaged) by financial decisions and policies and least heard; therefore, it is important that their experiences and stories are elevated.

### ***Develop or Adapt Research Programs***

TWG members provided feedback on how the research grant programs could be improved to encourage more education finance research. Members flagged that IES' requirement to measure student outcomes can limit opportunities for education finance research, as finance data is generally difficult to connect to student outcome data. Further, the types of research that could answer the important education finance questions discussed throughout the TWG, such as research that is more descriptive in nature or research that is focused on high-level decision makers like school boards, may not naturally fit with research that is focused on student outcomes.

Several members brought up the [Using Longitudinal Data to Support State Education Policymaking](#) grant program as a potential model for future research on education finance. This program is designed

to expand state agencies' use of their State Longitudinal Data Systems (SLDS) to generate evidence in support of education policy decisions. TWG members suggested that the grant program be expanded to include district-level partnerships and noted that districts and states are eager to take part in research that helps develop tools that they can continue using, like data dashboards. In general, the TWG recommended that IES support the development of more practical tools and resources that finance leaders can use to inform decision-making.

### ***Expand Dissemination Strategies***

Several TWG members noted that IES could do more to ensure that research findings are made available and accessible to policymakers and state and local decision makers. One way to do this would be to build closer ties with professional organizations and associations (such as the Association of School Business Officials, the Government Finance Officers Association, and the National Association of Federal Education Program Administrators), as they are a trusted source of information for state and local decision makers. These types of intermediary organizations could translate research into lessons and takeaways for different non-technical audiences and, in turn, provide information back to IES on the types of research and resources that would be useful for their members. TWG members also suggested that IES better leverage existing resources at its disposal, including the [Regional Educational Labs](#) (RELs) and [practice guides](#), to share information that could inform evidence-based decision making related to education finance.

## Appendix: Prewrite Questions

### For Everyone:

1. Identify (in rank order) the most pressing funding and budgeting issues facing state (SEA) or local/district (LEA) education agencies (feel free to include up to ten issues).
2. Identify 2-3 budgeting, spending, or funding best practices and describe any barriers that may impact their use in practice?
3. How has pandemic funding and the exigent need for learning acceleration changed the funding and budgeting landscape? How do you expect it will look 5-7 years from now?
4. What resource equity issues are LEAs and SEAs currently facing and how will they evolve over the next 10 years?

### For State- and District-level Education Finance Professionals:

1. What information do you and other education finance leaders need to make decisions around budgeting and school finance?
2. Where do you and other education leaders go to find information around budgeting and spending strategies? What resources have you and other education leaders historically relied upon?
3. How can researchers conduct and disseminate education finance research that is timely, accessible, relevant, and useful for you and other education finance leaders?

### For Researchers:

1. Identify (in rank order) the most significant obstacles to conducting education finance research (feel free to include up to ten obstacles).
2. Describe how IES can best a) support research that will produce the information education finance leaders need and b) make the research findings easily available to them?
3. What current and future education finance research can best inform the work of state- and district-level leaders?

### For Consultants:

1. What research and information do you use to inform your work with education finance leaders? What current and future education finance research can best inform the work of these leaders?
2. How can researchers conduct and disseminate education finance research that is timely, relevant, and useful for education finance leaders?

## Appendix: TWG Meeting Agenda

### Recovery and Beyond: Using Research to Support Education Finance Leaders

June 27th, 2022

10:00 AM - 5:00 PM Eastern Time

Virtual Meeting

| Time              | Agenda Topic   |
|-------------------|--|
| 10:00am - 10:45am | <p><b>Welcome &amp; Meeting Overview (45 min)</b></p> <ul style="list-style-type: none"> <li>• Introduction to TWG meeting &amp; logistics (Bennett Lunn)</li> <li>• Director’s welcome (Mark Schneider)</li> <li>• IES investment in education finance research (Liz Albro, Stephen Cornman, and Marsha Silverberg)</li> <li>• Panel member introductions</li> </ul>  |
| 10:45am - 11:45am | <p><b>Pressing Topics in Education Finance (60 min)</b></p> <ul style="list-style-type: none"> <li>• Round robin with state and local education finance leaders (3 min/person):               <ul style="list-style-type: none"> <li>• What are the top education finance issues that need to be studied?</li> </ul> </li> <li>• Open discussion (introduced by Jonathan Travers):               <ul style="list-style-type: none"> <li>• From a research perspective, what are the top education finance issues that need to be studied?</li> <li>• How has the pandemic changed the education finance landscape for research and decision-making among finance leaders?</li> </ul> </li> </ul> |
| 11:45am - 12:00pm | Break  |
| 12:00pm - 12:30pm | <p><b>Existing Research &amp; New Opportunities (30 min)</b></p> <ul style="list-style-type: none"> <li>• Open discussion (introduced by Marguerite Roza):               <ul style="list-style-type: none"> <li>• What research and resources are currently available for education finance leaders to draw upon?</li> <li>• What new opportunities for education finance research have emerged in recent years?</li> </ul> </li> </ul>  |
| 12:30pm - 1:00pm  | Lunch Break - East Coast   |
| 1:00pm - 2:30pm   | <p><b>Supporting Education Finance Research (90 minutes)</b></p> <ul style="list-style-type: none"> <li>• Open discussion (introduced by Tammy Kolbe &amp; Rebecca Sibia):               <ul style="list-style-type: none"> <li>• How can research best inform the work of state and local education finance leaders?</li> <li>• What research models and methods produce the most useful information for education finance leaders?</li> <li>• How can research be disseminated in a way that is most helpful to education finance leaders?</li> </ul> </li> </ul>  |



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|-----------------|---|
|                 | <ul style="list-style-type: none"> <li>• Open discussion (introduced by Kenneth Shores and David Martinez): <ul style="list-style-type: none"> <li>• What barriers do researchers face in conducting high-quality education finance research?</li> <li>• What are potential strategies for overcoming these barriers?</li> </ul> </li> </ul>  |
| 2:30pm - 3:45pm | <p><b>Equity in Education Finance (75 min)</b></p> <ul style="list-style-type: none"> <li>• Open discussion (introduced by Ivy Smith Morgan): <ul style="list-style-type: none"> <li>• What would equitable funding and spending look like?</li> <li>• How can research on education finance address inequities in funding and spending at the state, local, and school levels?</li> </ul> </li> </ul>                                  |
| 3:45pm - 4:15pm | Lunch Break - West Coast  |
| 4:15pm - 5:00pm | <p><b>Moving Forward &amp; Final Thoughts (45 min)</b></p> <ul style="list-style-type: none"> <li>• Round robin with all panelists (2 min/person) (introduced by Liz Albro): <ul style="list-style-type: none"> <li>• What is one key takeaway for the members of the panel and one key takeaway for IES?</li> </ul> </li> <li>• Opportunities for continued feedback (Bennett Lunn)</li> <li>• Closing thoughts (Liz Albro)</li> </ul> |