



# Making Change

*A State Advocacy Playbook for  
Equitable Education Finance*

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- [Balancing Act](#)
- [Splitting the Bill](#)
- [Priced Out of Public Schools](#)

# Introduction

State education finance sets the stage for what is possible in schools. States provide, on average, about 47% of funding for schools, and state policy influences or even controls local funding, which makes up another 45% of school funding.<sup>1</sup> Schools serving student populations with the greatest educational needs typically receive an even higher proportion of their total funding from the state, making the role of state policy especially critical for ensuring equity and improving opportunity and outcomes for systemically marginalized students.<sup>2</sup>

However, too many state education finance systems today are inequitable, outdated, and inadequate, and there are often significant political barriers to change. Advocates for educational equity can and should play an essential role in shaping the allocation and structure of state funding for pre-K through grade 12 public schools. Despite its importance, taking on education finance reform as a policy priority can be daunting for advocates. School finance policies and systems are often complicated to understand and can take years to refine and get right. And opportunities for major finance policy change come along rarely — whether via legislative action or judicial mandate.<sup>3</sup>

**State advocates hoping to create the conditions for successful finance reforms can learn from states that have enacted major changes to their funding formulas and the advocates who worked to achieve those changes.**

We interviewed advocacy leaders in six states — **California, Connecticut, Illinois, Kansas, Maryland, and Nevada** — to learn more about the conditions that enabled and influenced big changes in their education finance systems. Leaders reflected on their policy wins and losses and offered advice to other advocates interested in pushing for funding reform.

These conversations revealed five common conditions that emerged in different ways across states and paved the way for state policy changes. In order of frequency, they were:

## COALITIONS

*A strong, diverse coalition in support of change.*

## CHAMPIONS

*Political leadership that champions funding changes.*

## RESEARCH

*A shared body of evidence demonstrating problems in the current finance system.*

## ECONOMICS

*Economic factors that necessitate state action.*

## LAWSUITS

*Pressure or judicial mandates from funding lawsuits.*

This playbook is *less* about the substantive changes made by these states and *more* about the contexts and conditions that facilitated those changes. Learning from these states could help other leaders explore changes to their own funding formulas or spot a potential window opening for policy change, with the goal of ensuring that all students receive the resources they need to thrive.

Although the focus here is on the process that leads to and through policymaking, the role of advocates doesn't end with the enactment of legislation. Once an education finance system change comes into effect, advocates must also monitor and support implementation efforts. This involves educating the public about funding changes and staying vigilant to ensure policy intentions translate into dollars-and-cents funding action, especially benefiting marginalized groups of students.

# What Are the State Conditions That Enabled Funding Reform?

The five enabling conditions — **coalitions, champions, research, economics, and lawsuits** — together can lead to a successful change in a state's education finance budget and policy.

## CONDITION 1

### *Coalitions: A strong, diverse coalition in support of change*

*State Spotlight: Connecticut, Illinois, Maryland, and Nevada*

Rarely, if ever, does the tough work of funding reform come to pass without a coalition of stakeholders in support. In states with successful funding reform efforts, groups of educators, superintendents, community leaders, and other advocates came together to highlight inadequacies in the current funding structure, co-create shared language and consistent messaging, and work from multiple angles to build momentum for change.

The success of a coalition depends on the ability of members to understand the unique role that each of them plays, as well as their ability to set aside differences and work toward a larger, common goal. In most cases in the states we studied, one or two organizations within the coalition took the lead and acted as a “backbone” coordinator throughout the campaign for funding reform. Most often, this lead organization is a group that has the content knowledge and capacity to deeply understand the funding formula and provide expertise to other groups with various constituencies.

Coalition groups do not have to comprise organizations that are aligned on all issues. In fact, an effective coalition can include groups that may or may not work together on other issues. They only need to be aligned on funding reform priorities. In the states we talked to, the push for funding reform was big enough to demand a purpose-built coalition structure. According to Jamilah Prince-Stewart, executive director of FaithActs for Education in **Connecticut**, “One thing I have learned

about coalition work is that every person should have a role. Every person should be clear about what their self-interests are and what they need to get out of being a part of a coalition, and I don't believe in coalitions in perpetuity. What we say is, ‘No permanent allies, no permanent enemies, only permanent interests.’” This often means that coalitions must come to consensus on their non-negotiable shared priorities and be clear on points where they might differ.

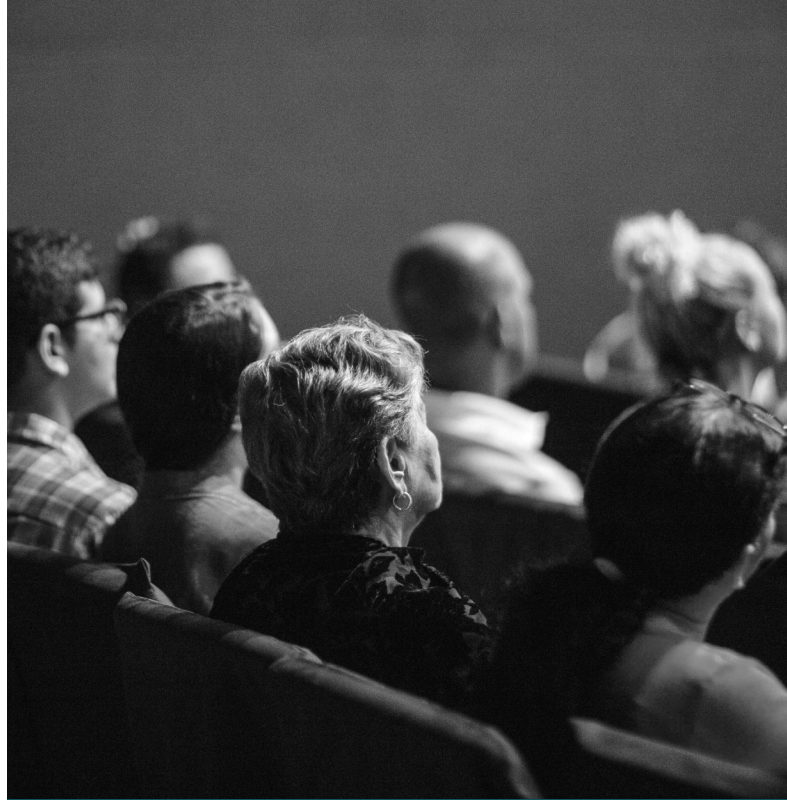
The strength and diversity of a coalition are also crucial for persuading political leaders to prioritize school funding. The specific organizational makeup of a successful coalition might vary from state to state, depending on the balance of power in the state legislature as well as the specific constituencies of students and schools who would benefit most from proposed reforms. There might be some unexpected alliances in the world of funding reform, for example, between rural and urban schools. This was the case in **Illinois**, where coalition representation from rural superintendents helped address some of the perceived divide between rural/suburban school districts and the city of Chicago. According to Jessica Handy, policy director for Stand for Children Illinois, “If we were doing a funding equity bill that was only focused on Chicago, we would have alienated some of the legislature.” In **Nevada**, organizations representing charter schools as well as teachers unions were involved in coalition efforts to reform school funding.



A critical factor behind several states' success was an effective shared communication strategy. In the case of the Funding Illinois' Future Coalition, a group that led the advocacy for passage of the state's Evidence-Based Funding for Student Success Act in 2017, coalition members interacted with different stakeholders and legislators and stayed on the same page with their messaging, even if they had differing priorities and concerns to emphasize (Sidebar 1).<sup>4</sup> The communications strategy kept members informed about the mechanics of the proposed law and helped ensure lawmakers heard a consistent and clear message from multiple angles. This strategy underscores the need to be clear in establishing the non-negotiables within a coalition so that the group can develop consistent, strong, shared messaging that conveys a unified mission and purpose.

Even with a shared message and clear priorities, coalition work can take several years to bear fruit. Being able to achieve small wins can help with the continued engagement of members over a longer time span. In **Maryland**, the Kirwan Commission was a statewide group of members appointed by Republican (R) then-Gov. Larry Hogan and the General Assembly.<sup>5</sup> The commission was a more structured, formal coalition than in other states, and it helped develop the Blueprint for Maryland's Future. The Blueprint was used to create legislation for a new school funding structure.<sup>6</sup> Commission members met from 2016 to 2020 and were intentional in helping other state advocates see that change was possible.

"The Kirwan Commission members were really focused on figuring out how to get key wins for the Blueprint. What component parts could they pass to show people that funding reform was possible? It helped people to see the small wins so that they could feel that this was possible. We had some people say that spending all your political capital on small wins was not helpful, but the commission felt it was important for the overall strategy," explained Taylor Stewart, a member of Strong Schools Maryland's advisory council, the backbone organization that led advocacy efforts for the Blueprint.



## SIDEBAR 1

### Illinois Advocates Got Their Coalition Messaging on the Same Page

Advance Illinois, a statewide policy and advocacy nonprofit, served as the backbone organization of the Funding Illinois' Future Coalition, a group that included teachers, students, families, superintendents, and civil rights groups.<sup>7</sup> During the legislative session preceding the passage of the state's funding reform bill, this coalition held more than 40 town halls to educate the public about the need for a new funding formula.<sup>8</sup>

The coalition also met regularly with lawmakers. One way that the coalition built momentum was by developing a strong communication strategy. "One thing that was critical to [the coalition's success] was agreeing to guiding principles. ... We lived by those guiding principles and made sure to keep people engaged using social media. We got people down to the capital and to the hearings," explained Robin Steans, president of Advance Illinois.



Even robust coalitions may reach an impasse, especially in the messy process of crafting and passing a bill. This was the case in **Nevada**, where state lawmakers passed a law in 2019 to revise the state's funding formula. The Fund Our Future Coalition formed to help support passage of this law had two goals: modernizing the state funding formula and investing resources to implement it well. The backbone organization that led this coalition was Educate Nevada Now, a statewide nonpartisan policy organization.<sup>9</sup> During the legislative process, disagreements emerged within the coalition. Some members believed that the bill, which included weights for different student needs, did not provide enough funding to be effective. This ultimately caused some fracture within the coalition; however, the bill still passed. Afterward, some coalition members regrouped, with the support of Educate Nevada Now, to form a new coalition called Empower Nevada's Future.<sup>10</sup> This coalition urged lawmakers to increase the funding in the state's new formula so that students with greater needs would receive more support.<sup>11</sup>

In reflecting on the funding coalition work that is still ongoing in **Nevada**, Amanda Morgan, executive director of Educate Nevada Now, shared the need to be clear about the purpose of a coalition and what success looks like: "If I could do it all over again, I would have been more upfront that this work is complex. At the end of the day, we might not all agree. The victory for the coalition was that by the end of it, we had a packed room testifying, and we changed Nevada's 50-year-old formula. Even if we didn't all agree on its details, we accomplished the main goal of the coalition. We are not all going to fall on the same page at the end of the day, but I think a lot of people walked away like, 'Oh, the coalition fell apart,' or 'It was a failure because we all didn't agree in the end.' I still wince when I hear that because I don't think we were always meant to all agree, but I don't think we communicated that well enough with the coalition itself."

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## *Champions: Political leadership that champions funding changes*

State Spotlight: California, Connecticut, and Maryland

Overhauls to state school funding formulas require both policy revision and budgetary support. Because of the magnitude of the budgetary impact of changes to school funding formulas, these two processes — policymaking and state budget development — are often inextricably linked in the reform process.

**Regardless of the policy path pursued for funding reform, coalitions of advocates need political champions who can shepherd proposed changes to a school funding system through state policy and budgetary processes in the legislature.**

These political champions can also help advocates navigate the often-complicated process of policymaking, which in turn creates greater engagement between political leaders and the public.

It is important for advocates to remember that state legislators have a broad array of responsibilities, and most statehouses must also contend with tight staff capacity and frequent turnover in elected leadership. Even though pre-K through grade 12 funding is a big chunk of any state's budget, many state legislators lack the time and capacity to build a deep understanding of how these complex education finance systems work. Instead, they rely on a few trusted colleagues, advocates, or other experts in the state apparatus to guide their decision-making. In this context, an effective political champion for funding reform can be a make-or-break asset to a coalition.

Our conversations with state advocates revealed some criteria that were helpful in deciding how to identify and activate potential political champions. First, these individuals needed to be in a position of influence over education policymaking and budgeting, whether it was an elected political official like a governor or statehouse speaker, or someone in a non-elected role

with considerable sway, such as a policy adviser to the governor or a state commissioner of education. Second, a political champion needed to be bought into the idea of funding reform as a tool for improving equity in schools. Third, a political champion needed to be willing to spend some of their political capital and exert influence to persuade their colleagues to support funding reform as well.



The process of identifying political champions sometimes requires years of cultivating leadership, building relationships, and developing knowledge. Sometimes, political champions tap advocates to help push for funding reform, as was the case in **California**. In 2013, state lawmakers passed the Local Control Funding Formula (LCFF), which dramatically changed the funding structure in the state by giving local districts more flexibility over how funds are used to support schools.<sup>12</sup> The LCFF was championed by Democratic (D) then-Gov. Jerry Brown, but another key architect of this law was Michael Kirst, who served as the president of the California State Board of Education from 1974 to 2019. Kirst met Brown in 1974 when he was first elected governor, and the two worked closely on education policy issues, especially school funding.<sup>13</sup> Between the two leaders, they had decades to understand California's funding system and its shortcomings and discuss possibilities for change with multiple stakeholders.<sup>14</sup> During Brown's second stint as governor, Kirst approached advocacy leaders about helping support an overhaul of the state funding formula. According to Samantha Tran who previously served as the senior managing director of education policy at Children Now, "[Kirst] reached out to Children Now and asked us to lead the work around communicating the benefits of the LCFF. During the height of the LCFF campaign, we had weekly calls with the governor's administration. We worked to educate the public about the vision and impact of LCFF and helped engage legislators."

Identifying the right political leaders to champion school funding policies also depends on the local context of each state. Governors typically play a key role in stewarding changes to the funding system, largely because of their role in proposing state budgets in most states. Governors in **Connecticut** and **California** were instrumental in helping push for major funding reform in their states.<sup>15</sup> However, other political leaders in state legislatures or in other policymaking positions can also play an important role in enacting policy changes. One example is **Maryland**, where state legislators supported a funding bill and overrode a veto from the governor to ensure passage in February 2021 (Sidebar 2).

## SIDEBAR 2

### Maryland Advocates Were Strategic in How They Engaged Political Leaders

Approved in February 2021, the Blueprint for Maryland's Future was a landmark pre-K through grade 12 public education law that included expanded pre-K, improved rigor for teacher preparation programs, and increased funding for schools.<sup>16</sup> The Blueprint also created more resources for English learner (EL) students and a new concentration of poverty grant. The Blueprint did not have the support of then-Gov. Larry Hogan (R) because he was concerned about its cost, especially during the COVID-19 pandemic.<sup>17</sup> But the coalition behind the Blueprint worked with other policymakers in the state Legislature who were instrumental in helping the law pass, including Bill Ferguson (D), the state Senate president, and Adrienne Jones (D), speaker of the House. The General Assembly passed the Blueprint in 2020, and Hogan vetoed it in May 2020. The General Assembly overrode this veto in 2021, and the Blueprint went into effect shortly after.

The Blueprint coalition recognized early on that the governor's opposition did not necessarily mean that pursuing funding reform in the state was impossible. By engaging with state lawmakers, the coalition ensured that support for the Blueprint was broad. According to Shamoyia Gardiner, executive director of Strong Schools Maryland, "[It's important to] look at the actual structure of how your state government operates and find where the power is as opposed to where the power seems to be. We looked around at the power that exists within the state legislature and figured out how we can leverage that to our benefit overall."



## *Research: A shared body of evidence demonstrating problems in the current finance system*

*State Spotlight: Connecticut and Nevada*

To build public understanding and create political will for change, coalitions must demonstrate that a severe problem exists in the education finance status quo.

**The ability to use rigorous data and research to help define the problem and identify potential remedies can help build a compelling, evidence-based case for why policymakers should act.**

Coalitions can also play an important role in amplifying this research to the public and providing shared language to advocates on what key findings to highlight. By sharing coordinated, accessible messaging about this research base, coalitions can help persuade lawmakers about the need for action. In **Nevada**, state policymakers commissioned research demonstrating the need for reform, which echoed findings from national research and made it hard to ignore the results (Sidebar 3). Advocates could then leverage those research findings to persuade policymakers to act.

Sometimes the research spurring on finance change involves both financial analysis and analysis of student achievement. One key lesson from states that enacted funding reform is that research should be actionable and driven by how to support better and more equitable outcomes for students. If research consistently demonstrates inequity in student outcomes, addressing inequities in financial resources for schools is one way state legislators can act. This means grounding reforms in relevant data about student need and distributing funds to schools and districts that serve higher proportions of marginalized students.

In **Connecticut**, the School and State Finance Project played a key role in producing and disseminating such research. Founded in 2015, the School and State Finance Project is a nonpartisan, nonprofit organization

whose primary goal has been to improve the state's education finance system by creating a more equitable, logical, and transparent system.<sup>18</sup> The organization has served as a knowledge and policy hub and is now seen as the go-to resource for state advocates and policymakers. This positioning of the organization as a respected source of knowledge and insight for the public and policymakers took a lot of intentional work.

### SIDEBAR 3

#### **Independent Research on Nevada's Funding Formula Helped Persuade Lawmakers**

In 2018, the Nevada Department of Education released an independent study about the state's school funding system, a follow-up to a 2012 report.<sup>19</sup> Both these state-commissioned public studies added local heft and detail to a body of national research that placed Nevada near the bottom of all states for student achievement and funding equity. A group of advocates called the Fund Our Future Coalition used this research to educate and activate the public on the inadequacy of the existing school funding system.<sup>20</sup>

This public pressure spurred lawmakers to pursue policy changes. According to Jen Loescher, senior policy fellow for Teach Plus Nevada, "The knowledge of the research regarding the inadequacy of the school funding system grew to a critical tipping point, empowering newly informed constituents to contact their legislators about this inequity. We reached a point where image-wise, Nevada had a black eye."

"The first thing we did was to build the credibility of the organization and provide unbiased information about how the current funding system worked. At that time, the conversation in the state was not focused on what was currently happening in terms of challenges and potential solutions," explained Katie Roy, founder of the School and State Finance Project.

The organization spent a lot of time educating the broader public about these challenges and potential solutions. The project also provided technical assistance to policymakers, including modeling dozens of potential revisions to the state formula to determine their impacts on the state budget and local communities.<sup>21</sup> More state advocates are building their own capacity to model policy solutions down to the district level, in addition to defining the contours of the problem (Sidebar 4). This work paid off in **Connecticut**. In 2017, state lawmakers made changes to the Education Cost Sharing (ECS) school funding formula. The ECS specifies weights for students based on need and includes a new way to distribute funding, so that towns with the least ability to fund their public schools with locally generated funding receive the most state aid.<sup>22</sup>

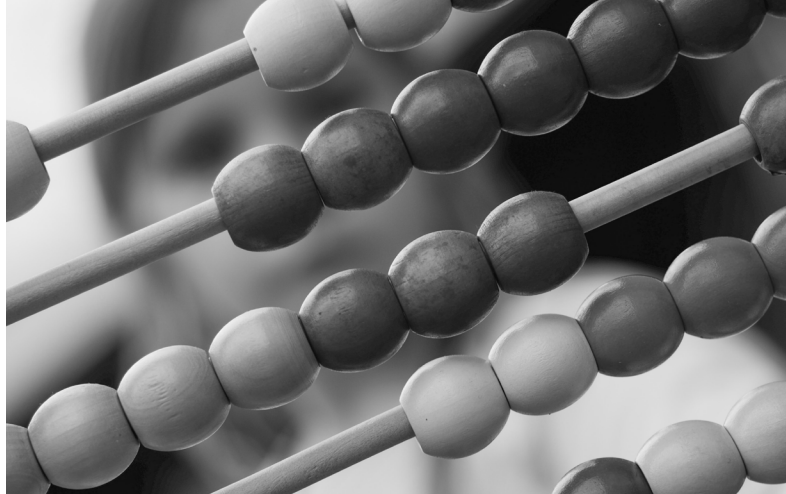
In states where there are no organizations focused on researching and modeling school funding issues, there are other ways to build capacity. For example, national organizations (including, but not limited to Bellwether) can help advocates build initial expertise in the current state funding structure as well as opportunities to improve it.<sup>23</sup> National organizations should also focus on enabling in-state leaders to take the lead as experts, and act as credible resources for state policymakers, especially because national organizations usually lack the relationships, local knowledge, and trust needed to persuade local political leaders.

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#### SIDEBAR 4

##### State Advocates Expanded Their Capacity to Model Policy Solutions to Funding Problems

Once research and data demonstrate a problem in the funding formula, the best next step would be to assess and model solutions, as the School and State Finance Project did in Connecticut. Research on existing challenges combined with data-driven policy solutions can help state advocates make a compelling case to lawmakers.

In the past, state advocates with good ideas for funding policy reform too often didn't have the persuasive data to demonstrate how those ideas would tangibly affect state budgets or specific school districts. For the past two years, Bellwether's School Finance Equity Training Center has worked with cohorts of advocates and other stakeholders in eight states to understand their states' finance systems, identify key problems, and model potential policy solutions using their states' real funding data.<sup>24</sup> This analytic capacity supports each stage of policy reform — enabling stakeholders to work together to develop, test, and refine solutions as they craft goals and build coalitions and to respond effectively in real time as policy proposals evolve in fast-moving legislative processes. By modeling potential solutions, state advocates can be more effective partners at the table in funding reform conversations and demonstrate their proposals' impact in real dollars and cents at the state and local levels.

## *Economics: Economic factors that necessitate state action*

State Spotlight: California and Connecticut

Economic factors, especially big shifts in state revenue, can impact funding reform efforts in two ways. First, when states have additional revenue to invest, policymakers are more amenable to pursuing funding changes. The availability of additional revenue makes it less likely that district “losers” will be in a funding proposal, typically a non-starter for lawmakers. This was the case in **California** and the passage of the LCFF in 2013; a ballot measure increased state revenue, which helped create a more conducive environment for change (Sidebar 5).

Conversely, a negative revenue shock can also force states to examine funding formulas and invest in schools differently or help create a sense of urgency for action. When the state has less money to allocate to schools, it can force action to ensure those limited funds are spent in the most effective way for students. This is a more difficult proposition than proposing reforms in the context of increased revenue, but budget crises can create the potential for change.

In **Connecticut**, for example, state lawmakers made changes to the school funding formula law in 2017. At the time of this law’s passing, the state had been experiencing severe budget deficits for several years. These deficits helped give state policymakers some cover in pursuing funding reform. According to Hamish MacPhail, policy and research director at ConnCAN, “Budgetary constraints, along with the realities of state litigation, allowed us to get things done in a quick fashion. The phased-in implementation of our funding law was also done in the context of really tight budgetary constraints at the time. We were in deficits every single year and really struggling to balance our budget. This provided a way to see a path forward for the law without school districts having to take a huge hit in the first year.”

### SIDEBAR 5

#### California Revised Its Formula After Voters Approved Additional State Funds

In 2012, California voters approved Proposition 30 (Prop 30).<sup>25</sup> This referendum temporarily increased the state sales tax rate for all taxpayers and the personal income tax for very wealthy residents.<sup>26</sup> Revenue from the increased sales tax rate was used to support K-12 public schools.<sup>27</sup> After the passage of Prop 30, K-12 spending per student increased by about 14% from 2012 to 2016.<sup>28</sup> The sales tax component from Prop 30 expired in 2016, but it was an important precedent that enabled then-Gov. Jerry Brown (D) and state lawmakers to pursue funding reform through the passage of the LCFF in 2013.

The LCFF wasn’t the first attempt by state lawmakers to make changes to the funding formula. In 2012, before Prop 30, Brown proposed a weighted student funding formula, through which every district would receive a base dollar amount as well as a “weighted” supplemental grant for students with additional needs.<sup>29</sup> This weighted student funding formula ultimately was not included in the governor’s budget because of several concerns, including whether the state could adequately fund any additional investments in education due to budget shortfalls.<sup>30</sup>

However, Prop 30’s passage a few months later opened the window for the LCFF to be considered. “We couldn’t have done LCFF without Prop 30. If you go back and compare the two proposals, the first proposal that the governor put forward and the second proposal the second year, the first proposal was going to take from one district and redistribute the dollars to another district and that wasn’t politically palatable,” explained California Policy Collaborative’s Founder & Executive Director, Samantha Tran. Whereas with the additional revenue from Prop 30, California could distribute its funds more equitably based on student enrollment, with extra resources for ELs, students from low-income families, foster youth, and districts with areas of concentrated need, without the perception of widespread cuts.



A phase-in or hold harmless structure within policies, as in **Connecticut**, can help mitigate the immediate effects of funding reallocation pains in the transition to a new formula. It can be a political compromise that leads to legislative success.

**But advocates should be cautious not to end up in a situation with seemingly endless implementation delays, overly complex phase-in structures, or permanent hold harmless provisions that make the actual policy functionally meaningless.**

Advocates should also not rely solely on economic factors to guide funding reform strategy, because factors like recessions or budget surpluses are well outside their control. Funding reform is a long game. If coalitions have spent many years demonstrating that a problem exists, educating the public, developing political champions, and building coalitions, when economic conditions (positive or negative) open a window for reform, they must be prepared to take advantage.

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—HAMISH MACPHAIL, CONNCAN

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## *Lawsuits: Pressure or judicial mandates from funding lawsuits*

State Spotlight: Connecticut and Kansas

Funding reform doesn't always move through the statehouse — sometimes, it comes through the courts. Many coalitions have found success either directly or indirectly through lawsuits that compel or persuade state lawmakers to take action. Some lawsuits resulted in court-ordered policy changes. Where lawsuits didn't directly result in changes to the law or dragged on, lawsuits or the threat of litigation prodded policymakers who were interested in policy changes into action.

This was the case in **Connecticut**, where a state Supreme Court ruling pressured policymakers into enacting new funding legislation (Sidebar 6). The court ruling also came at an interesting time for the state. In 2017, the state Senate was evenly split between Democrats and Republicans and then-Gov. Dannel Malloy (D) was serving his final term in office. This created a political climate where compromise was possible, since both parties needed a win they could tout publicly. The pressure from the state Supreme Court to make changes to the state's funding formula provided even more cover to lawmakers.

Even if lawsuits sometimes lead to desired change, advocates should act with caution. Litigation often requires years of investment of time and effort and considerable resources.<sup>31</sup>

**There is also no guarantee that the remedy offered by courts is one that will lead to equitable reform of state school finance systems.**<sup>32</sup>

Another challenge with relying on courts for relief is that in 22 states, voters elect judges in either partisan or nonpartisan elections.<sup>33</sup> This process of judicial selection could create instability in the composition of courts, which in turn could lead to an unpredictable policy environment. This is the case in **Kansas**, where the state Supreme Court has been instrumental in pushing for



### SIDEBAR 6

#### **Connecticut Courts Put Pressure on State Policymakers to Take Action**

In 2016, a Connecticut Superior Court judge ruled that the state's funding formula was widening gaps between wealthy and less wealthy school districts.<sup>34</sup> The formula was also cited for not being based on student need. This ruling required state policymakers to address these challenges, which led to changes to the state's funding formula to make it more equitable. Connecticut lawmakers made changes to the state's ECS formula the following year.

In 2018, the Connecticut Supreme Court overturned this 2016 decision, ruling that the funding formula was adequate, which was guaranteed in the state constitution. By the time the Connecticut Supreme Court ruling was released, the state had already passed a law making changes to the funding formula. This back and forth illustrates the unpredictability of judicial action as a linear path to policy change and the potential for legal action to serve as a catalyst for policy change.

greater adequacy in the state's school funding system.<sup>35</sup> According to Daniel Klaassen, education policy advisor for Kansas Action for Children, "The [state] Supreme Court has been crucial in upholding these two words, adequacy and equity, in our constitution for education funding." However, the state Supreme Court has also become an increasingly politicized institution because of a 2019 ruling that the state constitution protected the right to an abortion, a move that was affirmed by voters in a referendum.<sup>36</sup> Six of the seven Supreme Court members were up for reelection in the November 2022 midterms, and while they all won their retention campaign, advocates worried about education funding being jeopardized when new justices are inevitably appointed in the future.<sup>37</sup> Because of the state Supreme Court's controversial ruling on abortion, these retention elections became more contested, which created a risk that judges who had traditionally supported greater oversight of education funding in **Kansas** could lose

their seats. While this did not happen, this risk was concerning to advocates. "Those six staying on the bench [continuing] to uphold funding for education is crucial because the court has really been the backstop for a lot of these education decisions," said Klaassen.

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—DANIEL KLAASSEN, KANSAS ACTION FOR CHILDREN

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## What Role Can Advocates Play During the Implementation Stage of Funding Reform?

The five enabling conditions above — **coalitions, champions, research, economics, and lawsuits** — together can lead to a successful change in a state's education finance budget and policy. But, even after years of work, the process of advocacy doesn't end with passing a law. In fact, engaging in the adoption of rules and regulations that will govern the law's implementation, monitoring the impact of changes to the funding formula, listening to feedback from impacted communities, and being responsive to future changes are all equally important for advocates to achieve their ultimate goals for educational equity. Policymakers tend to have short memories (or short terms in office), so it is important for advocates to be longer-term watchdogs; they must monitor state implementation efforts, lift up the results of policy changes, and ensure that policies are responsive to community needs.

According to Amanda Morgan of Educate Nevada Now, "One important lesson for advocates is that it doesn't end with the passage of the formula. Implementation is its own animal, and you have to stay on top of that because a lot of people in the community aren't really paying attention to things, so we are going through the process of educating them on what's happening." In **Nevada**, for example, the coalition that advocated for changing the state's funding formula morphed into a new group that wanted lawmakers to allocate more funding into the implementation of this formula so that it could be successful.

In addition to educating the public on what funding changes might mean for their schools, state advocates should also use the implementation process to continue advocating for additional improvements.



"One thing that advocates go into this work thinking is that there's only one bite at the apple — that's not true. [In **Connecticut**], 2017 was the starting point of bills that subsequently passed and made the system incrementally stronger. You have to be willing to go back and add things that you want or take out things that don't work. Don't plan to get everything you want in one fell swoop," explained Roy, founder of the School and State Finance Project.

This was the case in **Kansas**, where advocacy organizations have continued to monitor legislative proposals that were created in response to state Supreme Court decisions (Sidebar 7). The experience of Kansas advocates underscores the reality that finance reform can be a multistep, non-linear process, but staying vigilant can help a coalition maintain a sense of urgency on behalf of all students.

Effective implementation also involves building capacity among advocates to stay involved and engaged. Some states relied on backbone organizations in the coalition to keep coalition members updated on implementation and ways to provide input. Strong Schools Maryland, the lead organization in the statewide coalition for funding reform, relies on a Teams of 10 model. In this organizing model, community members sign up to be part of a small group of 10 who receive information about Blueprint implementation, meet with **Maryland** education leaders, and develop their own advocacy skills.<sup>38</sup> The Teams of 10 model enables coalition leaders to keep members engaged and ensure that the input of advocates is well represented in the implementation and regulatory phase of a state's funding law.

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—AMANDA MORGAN, EDUCATE NEVADA NOW

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## SIDEBAR 7

### Kansas Advocates Continue to Monitor Implementation of Funding Reform Efforts

State Supreme Court rulings have largely guided the Kansas policy landscape on school finance. Starting in the early '90s, the state Supreme Court has issued rulings on the adequacy and equity of existing school funding systems.<sup>39</sup> In response to these decisions, the Legislature has repeatedly made changes to these systems. In the latest decision in 2018, *Gannon v. State*, the Kansas Supreme Court ruled that the latest legislative proposals met constitutional adequacy and equity standards but retained jurisdiction to ensure that these proposals were faithfully implemented.<sup>40</sup>

A local coalition of advocates that includes school superintendents from more than 50 districts actively continues to monitor Kansas education funding efforts and push the state to meet its constitutional responsibilities to schools and students.<sup>41</sup> Kansas illustrates the longer-term role advocates can play to continue pushing for change and improvements even after a court decision or legislative action has passed.

# Conclusion

States bear the primary responsibility of ensuring that all students receive the resources they need to be successful. About half of the nearly \$800 billion in revenue for pre-K through grade 12 public schools in the U.S. comes from state sources, and the current system of funding does not do enough to direct more funding to students who need it the most.<sup>42</sup> Because of the critical role of these funding systems, state advocates recognize the unique position they hold in educating the public and policymakers about the need for funding reform. But this is time-consuming and complex work. Lessons learned from advocates in other states who have successfully led funding reform efforts are a critical resource for states looking to build momentum for change. Context and conditions on the ground can be the determining factors for advocacy success, including:

## COALITIONS

*A strong, diverse coalition in support of change.*

## CHAMPIONS

*Political leadership that champions funding changes.*

## RESEARCH

*A shared body of evidence demonstrating problems in the current finance system.*

## ECONOMICS

*Economic factors that necessitate state action.*

## LAWSUITS

*Pressure or judicial mandates from funding lawsuits.*

Each of these conditions by itself does not lead to funding reform. Advocates in all six states profiled — **California, Connecticut, Illinois, Kansas, Maryland, and Nevada** — shared how a combination of these factors opened a policy window that allowed them to pursue changes. While these conditions can lay the groundwork to enact policies, advocates must also prepare themselves to protect wins through political change and continue advancing their goals by monitoring implementation in the longer term. This work is challenging and can take years to achieve, but the potential rewards are high for schools and students most in need of resources to achieve success. When advocates are ready and the conditions are right, funding reform can ensure that all students receive the resources they deserve in order to thrive. ✨

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## About Bellwether

Bellwether is a national nonprofit that exists to transform education to ensure systemically marginalized young people achieve outcomes that lead to fulfilling lives and flourishing communities. Founded in 2010, we work hand in hand with education leaders and organizations to accelerate their impact, inform and influence policy and program design, and share what we learn along the way. For more, visit [bellwether.org](https://bellwether.org).

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