



“Professional Rigor, Public Engagement and Judicial Review: A Proposal for Enhancing the Validity of Education Adequacy Studies,” by Michael A. Rebel

See full article in *Teachers College Record*, Volume 109, Number 6 (June 2007)
Available online at: http://www.schoolfunding.info/resource_center/research/professional_rigor.pdf

In recent years, state legislatures, state education departments, and advocacy groups in over 35 states have sponsored education adequacy studies, which aim to determine objectively the amount of funding needed to provide all students a meaningful opportunity for an adequate education. Not surprisingly, because of their growing influence on funding decisions, these studies have now become the subject of critical commentary and judicial scrutiny, and serious questions have arisen about the validity of the methodologies used in some of the studies. By setting out to determine objectively the resource levels needed to provide all students with an adequate education—and by doing so through relatively open and transparent processes—the contemporary adequacy cost studies are vast improvements over the ad-hoc political deal-making processes of the past. Nevertheless, the validity and the reliability of these methodologies can be improved.

Cost Studies Play an Important Role in School Finance

- State legislatures, state education departments, and advocacy groups in over 35 states have sponsored **education adequacy cost studies**, which aim to determine the amount of funding needed to provide all students with a meaningful opportunity for an adequate education.
- These studies have had a **potent impact**. Many legislatures and courts have relied upon or cited cost study findings in their deliberations and rulings.
- Cost studies, being **objective and research-based**, are a sound basis for political decision-making, but the validity and reliability of cost studies should be improved.

Ways to Enhance the Validity of Adequacy Studies

- *Setting the Outcome Measures:* The **level of student achievement** of which a study is attempting to determine the cost dramatically affects the ultimate recommendation of an adequacy study. Analysts must articulate, discuss, and justify the output measures used in studies, in order to provide transparency and credibility.

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- *Accounting for Special Needs:* Cost studies often provide “weights” for the additional funding needed by students from poverty backgrounds, students with disabilities, and English learners, but little empirical work has been done to verify that these weights reflect **actual student needs**.
- *Minimizing Political Bias and Manipulations:* Sponsors of these studies – whether state agencies or advocacy organizations – have a clear interest in their outcomes, and this requires continuing efforts by the professional practitioners to maintain their **independence** and the **integrity** of the studies.
- *Multiple Methodologies:* Every costing-out study should incorporate **multiple methodologies**. Each of the common methodologies is based on series of explicit or implicit judgments, and the best way to validate cost study findings is to use multiple approaches.
- *Seeking Greater Efficiency:* Most cost studies recommend substantial increases in school funding, generating calls for greater efficiency and accountability. While cost studies are limited by having to look at current practices, they should be premised on the **prudent application of current best practices**. “Quality Education Models” (QEMs), which have been adopted by a number of states, seek to determine both the amount of money and the effective educational practices that will lead to higher student performance.

Expanded Public Engagement

- Key judgments in adequacy studies, such as the setting of output measures, should involve a **probing public engagement process**.
- Public involvement not only expands the range of **information and insight** that can be applied to the issues at hand, but it also **educates the public** and tends to promote their support for the findings.

The Necessary Role of the Courts

- In recent years, courts have played an enormously important role as the only place where there has been **focused dialogue** on cost studies, their transparency, and their flaws.
- **A continued pro-active judicial stance is vitally needed.** Cost studies constitute a critical element in developing an effective remedy in school funding lawsuits, and there simply is no other authoritative, impartial governmental entity that is capable of monitoring and regulating the delicate mixture of expert and political judgments that are involved in cost-analysis issues.