North Carolina Weighted Student Funding Formula Study

Work Group 1 | Meeting Summary

DATE
Wednesday, October 21, 2026

TIME
10:00 a.m. – 12:00 p.m. ET

FORMAT
Virtual

ORGANIZATIONS REPRESENTED
The North Carolina Department of Public Instruction (NCDPI); BEST NC; the North Carolina Collaboratory (NC Collaboratory); Basis Policy Research (Basis)

Purpose and Objectives

1. Adopt Shared Commitments.
2. Provide an overview of the research study, including scope, timeline, and workstreams.
3. Review and align on stakeholder lists, Subject Matter Experts, and associated processes.
4. Align on a communications strategy, including key decision points and timeline.
5. Preview next steps for data and research.

Participants

Name	Organization
Sarah Barnett	BEST NC
Brenda Berg	BEST NC
Chris Candelaria	Basis
Geoff Coltrane	NCDPI
Jeni Corn	NC Collaboratory

Name	Organization
JP Powell	Basis
Liza Rodler	NC Collaboratory
Claire Ruegg	Basis
Alexis Schauss	NCDPI
Matt Springer	Basis

Meeting Notes

I. Welcome & Introductions

Work Group members introduced themselves, and the NC Collaboratory gave a brief presentation on the legislatively mandated research study (Session Law 2026-41, § 8.22). The study will be conducted independently and follow rigorous research protocols, with the Work Group and Subject Matter Experts (SMEs) advising the research team at key decision points. The study has no predetermined outcome or agenda.

II. Shared Commitments

The Work Group reviewed and offered feedback on a set of Shared Commitments to guide engagement in this study. Shared Commitments address research confidentiality, best practices for conducting research and analyzing data, and a collaborative, solutions-oriented approach throughout the process. Please refer to the Shared Commitments document linked on the study webpage for more details.

III. Study Overview

Basis presented an overview of the research study, including a timeline and key workstreams. Please refer to the Study Overview document linked on the study webpage for more details.

IV. Communications

The Work Group agreed to provide public summaries of each of its six meetings no later than two weeks after each meeting. These summaries will be posted on the study webpage hosted by Basis. Those interested in learning more about or engaging with the study may also complete the study interest form at the bottom of the study webpage.

V. In-Depth Stakeholder Interviews

The Work Group discussed plans to conduct up to 50 stakeholder interviews to inform the study. Interviews will prioritize perspectives from across North Carolina's education community, including individuals with relevant experience in school finance, education policy, district operations, and implementation. The Research Team will also seek input from experts with experience in weighted student funding models in other states to bring additional insights into formula design, transition, implementation, and accountability. Individuals interested in participating in a virtual interview may complete the interest form at the bottom of the study webpage. Given the limited number of interviews, participants will be selected based on the expertise and perspectives needed to inform the research. Not all interested individuals will be interviewed, but everyone who completes the form will be kept informed of the study's progress.

VI. Subject Matter Experts

Basis shared a strategy to engage a variety of Subject Matter Experts (SMEs) to support the research study. This strategy is being finalized, and SMEs will be identified and engaged on an ongoing basis. Please refer to the SME document linked on the study webpage for biographies on our first set of SMEs.

VII. Comparison States

Basis presented a proposed set of states for comparative case studies. These states have adopted, revised, or implemented student-based funding systems, or have addressed specific funding challenges relevant to North Carolina's legislative charge. Rather than identifying a single model to replicate, the case studies will examine how other states approached similar policy and implementation decisions, the tradeoffs and accountability systems involved, and the lessons their experiences offer North Carolina. The Work Group also discussed the importance of examining specific programs in depth to understand how they might fit within a weighted student funding formula.

Work Group Members

North Carolina Department of Public Instruction

BEST NC

North Carolina Collaboratory

Basis Policy Research

References

Current Operations Appropriations Act of 2026, N.C. Sess. Law 2026-41, § 8.22 (2026). https://www.ncleg.gov/EnactedLegislation/SessionLaws/HTML/2025-2026/SL2026-41.html