

Budgeting for Educational Equity

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PODCAST SERIES
Episode 3



PLANNING FOR CHANGE

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Budgeting for Educational Equity is a podcast series that explores how education resources can be allocated to better meet the needs of all students. This brief was developed to provide opportunities for listeners to engage in tangible, practical application of the lessons derived from each episode. The brief can be used as a launching point for discussions about equity within communities and school district administrative offices. It can also be used to support existing ongoing work such as the Local Control Accountability Plan or district budget development. Episodes can be found on the [Budgeting for Educational Equity Podcast Series webpage](#).

ENGAGEMENT AS A PLANNING TOOL

In Episode 1, we established that moving school fiscal systems toward equity is effective in increasing student achievement and has real economic value in the long run. Then, we worked toward establishing a context-specific definition of equity drawing from both research and practitioner perspectives. In Episode 2, we operationalized our working definition of equity using data to understand where a school system's most pressing equity gaps are within its student population through the Data-Based Reform activity. In Episode 3, we will take our accumulated wisdom about what equity looks like and where to find gaps in our

own systems and begin to form plans that can tangibly advance toward a more equitable future.

In thinking about how to bridge the equity gaps that exist within school systems, it is not enough to simply be aware of the problems and their magnitude. To move from understanding the needs to identifying solutions requires thoughtful engagement with the district and school staff who will be implementing the priorities identified by the budget. Using the collective analysis and input of those who interact with students and who understand their dynamic needs helps us to identify feasible, sustainable strategies for implementing effective reform.

FIGURE 1. STEPS INVOLVED IN BUDGETING FOR EDUCATIONAL EQUITY



In Episode 3, Sanger Unified School District (SUSD) Superintendent Adela Madrigal Jones provides an in-depth perspective of how she works with her staff to engage in thoughtful data review and develop plans at each school site with a shared purpose and understanding. Episode 3, and the work in SUSD described below, focuses on the third step in Budgeting for Educational Equity: Collaborate and Plan for Change (see Figure 1).

WHAT THE EXPERTS HAVE TO SAY: ENGAGING PRINCIPALS THROUGH ANNUAL DISTRICT SUMMITS IN SANGER

Located in the heart of California's Central Valley, SUSD is home to over 12,000 students, 65 percent of whom qualify for free or reduced-price meals and 15 percent of whom are English learners.¹ For nearly two decades, SUSD has held annual Principal Summits, events in which principals engage in the following:

- Conducting a complete analysis of their school data, including allocated dollars

• Listing actions that they are going to take to address the needs of the students and make progress toward equity, including the following:

- Advancing toward academic achievement for all
- Closing opportunity gaps
- Providing social-emotional wellness supports

Using data and their own needs assessment, principals present their plan to ensure that their students meet their goals and the goals of the district. After that, participants have discussions about increasing resources if needed. As follow-up, schools are monitored three times throughout the year based on the goals and plans developed in the summit.

This process of engaging principals to reflect on the resources they need to get things done makes them more aware of how they are currently spending their dollars. It also gives them a voice to advocate for where they want the money to go in the future in order

to meet their students' needs. The Principal Summits highlight the ways in which dollars are invested and enable principals to take stronger ownership over how the resources that they were allocated get used.

However, while this example provides a strong model for how equity can be practiced districtwide, it is not always easy to see how and where improvement can be made. Superintendent Jones spoke to examples of where she has seen equitable practices applied easily and where it has been more difficult:

- **A straightforward area for implementing equity-focused practices:** "For English learners, we could monitor our reclassification rates and build the capacity of our teachers to ensure that English language development is not only taking place, but it is effective and done with high-quality teaching. Being able to lean on 'What are best practices when it comes to teaching English learners?' has been an easy way to implement and monitor [support for English learners]."

- **A difficult area for implementing equity-focused practices:** “It is difficult to get to the root cause of lack of outcomes and results in our students. We are a strong PLC [professional learning community] district where our teachers are given time built in during the week to discuss data and talk about what are the needs of the kids. So, it is not always easy to understand what could be the root cause that you can actually then take actions toward.”

Overall, as suggested by the Principal Summits in Sanger, effective, equitable school systems should be informed by both their existing data (to inform where improvement can be made) and the feedback of key stakeholders (which can help to set appropriate budget priorities for the following school year). With this in mind, the next section focuses on reflecting on communication strategy and how to maximize an effective collaborative atmosphere when planning for change.

SOLICITING FEEDBACK AND COMMUNICATING STRATEGICALLY

In the context of fiscal planning, there is not just one way in which to solicit feedback. However, it is critical that feedback be gathered early enough

in your fiscal calendar that it can be meaningfully considered before a budget is fully formed. Furthermore, while SUSD relied on feedback from principals through the district’s annual summits, there are many other stakeholders who can be included in the budget development process depending on the capacity and input needs of your district, including teachers, parents, and local community organizations. Some city and local governments use a process known as participatory budgeting in which members of the public collectively decide how to spend a portion of the budget. This approach is used as a way of centering equity and bringing in as many representative voices as possible to the fiscal planning process.²

Regardless of the level at which you are engaging in shared decision-making among large groups of stakeholders, equitable and effective strategic communication should always be bidirectional. That is, the communication should be set up to enable all education stakeholders to accurately and compellingly describe what the district’s objectives are, articulate their roles in working toward the district’s objectives, and provide feedback to those in power.

When strategic communication is aligned and coherent, the following characteristics are present:

- District leaders provide clear and consistent messaging about how their education initiatives work together. Further, that messaging is tailored for stakeholders (e.g., parents, educators, health care providers, policymakers).
- Communication is strengths based. It includes a focus on the assets and aspirations of students, families, and communities as well as their needs.
- All stakeholders understand the district’s reasons for implementing its various initiatives and policies.
- All stakeholders communicate using common language and terminology to explain the district’s initiatives and their conceptual underpinnings.
- All stakeholders provide honest and transparent feedback to leaders.
- Leaders incorporate feedback from stakeholders in their decision-making.
- Leaders capture and disseminate effective practices related to implementation.³



With these key characteristics in mind, reflect upon the following questions as you consider how to effectively collaborate and plan for change in your agency:

- Which stakeholder groups can/should we include in the planning process? How do we ensure equity of voice among stakeholders?

- Which apparent strengths can we emphasize as we come together in each phase of the planning process?

- How has our agency generally engaged the public in past situations?

1 California Department of Education. (2021). *District profile: Sanger Unified*. <https://www.cde.ca.gov/sdprofile/details.aspx?cds=10624140000000>

2 Lodewijckx, L. (2021). *8 steps to participatory budgeting*. CitizenLab. <https://www.citizenlab.co/blog/civic-engagement/steps-to-effective-participatory-budgeting/>

3 Walrond, N., & Romer, N. (2021). *Serving the whole person: An alignment and coherence guide for state education agencies*. WestEd. <https://www.wested.org/resources/serving-the-whole-person-an-alignment-and-coherence-guide-for-state-education-agencies/>