



PODCAST SERIES
Episode 5



COHERENCE ACROSS PLANS

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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 provides opportunities for the listener to engage in tangible, practical application of the lessons derived from Episode 5. The brief can be used as a launching point for cultivating discussions about equity within communities and school district administrative offices. Episodes can be found on the [Budgeting for Educational Equity Podcast Series webpage](#).

INTRODUCTION

Agencies and departments across California's K-12 education system are required by federal, state, and local laws to adhere to various accountability measures and to develop and implement assorted achievement plans.

With the onset of COVID-19, new requirements to develop and submit plans have emerged, such as American Rescue Plan Act (ARPA) spending plans and Safe Return to In-Person Instruction plans. While some of these plans can be integrated into existing processes, developing these documents and complying with the new requirements that accompany them have

added complexity to school and district administrators' roles, further complicating their efforts to provide succinct, clear visions for how to serve schools and students in an equitable manner.

With this challenge in mind, over the past month, the Budgeting for Educational Equity team has taken time to connect with multiple school and district administrators across California to gather their experiential wisdom regarding how to juggle myriad compliance and planning obligations while still centering equity. In this brief, we highlight the insights of one particular administrator, Dr. Marguerite Williams. She sat down with



us at the beginning of summer 2021, and again just before schools reopened in fall 2021, to discuss how to establish coherence across planning and how that planning has been a lever for equitable system design and program implementation within her charter school district.

Dr. Williams is currently the Chief Business Officer (CBO) of Griffin Technology Academies in Vallejo, California, where she oversees the budget and business operations for four charter schools across two campuses serving over 1,400 students. Previously, Dr. Williams served as the Assistant Superintendent of Instruction with Adelanto Elementary School District (AESD) in San Bernardino, California, and as the Senior Director of Equity & Diversity with the Association of California School Administrators. Throughout her more than 20 years of experience in education, Dr. Williams has served at every level of the K–12 education system in California—as a teacher, principal, instructional director, assistant superintendent, and in her current role as a CBO. These collective professional experiences allow her to provide a holistic perspective on how to deliver high-quality, equitable educational experiences to students while maintaining fiscal solvency.

In our conversation, Dr. Williams reflected in particular on her experiences while serving in her previous role in AESD during the 2020/21 school year and how she worked to create systems

across planning for School Plans for Student Achievement (SPSAs) that would align with the district’s Local Control and Accountability Plan (LCAP) and support the establishment and maintenance of equitable practices across her district.

LESSONS FROM THE FIELD

Located in San Bernardino, California, AESD is home to about 8,000 students in 17 schools across grades K–8.¹ In her role with AESD, Dr. Williams oversaw the Office of Student Services, the Office of Special Education, and the Office of Instructional Technology. As part of her responsibilities, she also supported the development of AESD’s LCAP, Learning Continuity & Attendance Plan, and SPSAs for schools throughout the district.

During the 2020/21 school year, to ensure equity across each of these plans, Dr. Williams used her role to conduct a comprehensive review process for each school’s individual SPSA.

Over the course of two months, as schools were preparing their SPSAs, Dr. Williams and her AESD team collaborated with each school site, providing training and technical support to ensure that each SPSA was developed with the following elements in mind:

- leveraging existing school achievement and attendance data

- analyzing data to identify areas of need within student population subgroups
- pinpointing unique interventions that are responsive to trends in data

Once the SPSAs were finalized, Dr. Williams and staff across several departments conducted a two-day review process in which each school administrator met with four groups of AESD staff with expertise across the following domains:

- Cabinet leaders
- Business Department
- Human Resources
- Academic Services

These review teams were able to assess the SPSAs for alignment with the intended purposes of the funds and programs as designated by the district in its annual LCAP.

Next, a summary of these plans was given to the school board so that the board could more deeply understand key performance indicators, data points, and goals for each school to help inform how they develop the budget for the subsequent school year.

Finally, Dr. Williams and her team collected feedback from principals and school staff to understand what was helpful, what was difficult, and how AESD leadership can continue to support school planning in the future.

PODCAST SERIES Episode 5: Coherence Across Plans

Through this example, Dr. Williams provided a practical illustration of how to work collaboratively across divisions to ensure that we are enacting policies that will best serve our students at the school level. As she said, “Equity is also

coherence...where we are making sure that it is coherent...that we are not saying one thing in our strategic plan, another in our LCAP, and another in our SPSAs. We need to have that coherence across all of our plans.”

We hope that this example is a useful reference point to consider as you support your own planning processes and as you adapt to the ever-evolving challenge of advancing equity within school systems.

¹ California Department of Education. (2020). *Local Control Funding Formula – Funding Snapshot [Adelanto Elementary]*. <https://ias.cde.ca.gov/lcfff/snapshot/snapshot.aspx?FY=2018&ID=wJ1uld1d3d0ITBW5ebiz7aMPkAbdz+VMKciuo/TlpTa4AkgHRqMKnf16/fz0d+4F&CameFrom=wJ1uld1d3d0ITBW5ebiz7aMPkAbdz+VMKciuo/TlpTa4AkgHRqMKnf16/fz0d+4F>