



PODCAST SERIES
Episode 2

SYSTEMS ALIGNMENT & COHERENCE

Budgeting for Educational Equity is made possible by support from both the Sobrato Family Foundation and CASBO. 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 is designed to provide opportunities for the listener to engage in tangible, practical application of the lessons derived from each podcast episode. The brief can serve 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](#).

Now, more than ever, it is critical that schools are equipped to support the dynamic and diverse needs of their student body based on each learner's unique strengths and goals. As such, it is equally critical for district leaders

to be adept at providing resources to schools in an aligned,¹ coordinated fashion with a coherent² vision for success. In this episode, guests Cheri Doria, Director of Earlyhood Education, and Grant Schimelpfening, Assistant Superintendent of Administrative Services, of Lindsay Unified School District (LUSD) helped us take a closer look at (a) how school districts and LEAs can cultivate systems alignment and coherence through strategic planning and design and (b) what the implications are when education institutions center students and account for their diverse needs holistically. This brief focuses on some of those strategies and tools in greater detail, and it provides additional guidance

for practitioners as they seek to advance equity within their own school systems.

LUSD OVERVIEW

Situated within California's Central Valley, LUSD is a nationally recognized rural school district that currently serves about 4,200 students, preschool through 12th grade, each year.³ The large majority of students in LUSD are Latine (95.1%) and live in communities that are socioeconomically disadvantaged (90.3%), and more than a third are identified as English Learners (37.2%).⁴ LUSD also serves a significant number of students from migrant households. The district itself is a subgrantee of the federally administered Migrant

Education Program (MEP) and oversees Region 24,⁵ which has between 1,500 to 1,700 migratory youth⁶ enrolled at any given time.⁷ Through MEP, LUSD provides both supplemental instructional and safety net services in order to minimize the disruption to education. MEP’s holistic approach to meeting students’ needs has influenced districtwide system design.

PERFORMANCE-BASED SYSTEM

Although recognized for multiple innovative approaches to teaching and learning, LUSD is most widely known for being one of the only school districts in the United States to employ a performance-based system⁸ (PBS) for learners. Launched in 2007 as part of LUSD’s Strategic Design, PBS is a framework designed to elevate the individual assets and strengths of each learner by allowing students to advance at their own pace, moving forward based on demonstrating competence on measurable learning objectives rather than by grade level.⁹ Because grade levels have been eliminated, no one “fails” out of the school system or loses out on opportunities to be competitive for college admissions. Thus, the question is no longer “Is this student ready for the 5th grade?” Rather, educators can ask, “What learning outcome is this student ready for now?” and design the student’s learning accordingly.¹⁰

Since LUSD’s implementation of its PBS, LUSD student outcomes have improved significantly across a variety of measures. The Public Policy Institute of California reported that the

district’s “high school graduation rates rose from 67% to over 90% in 2019–20; four-year college matriculation rose from 21% to 56% as of 2017–18; and proficiency rates in English language arts and math are close to the statewide average—and above the statewide average for low-income students.”¹¹

Although LUSD’s design draws on the strengths of each learner, broader socioeconomic forces may limit or devalue the efforts of students and their home communities. For this reason, it is important that the individual strategies to support each student also be “nested” within larger, mutually reinforcing policies such that societal issues such as access to food and housing, transportation insecurity, socioeconomic disadvantage, lack of access to Wi-Fi, or other challenges do not undermine the integrity of the system. For this reason, LUSD employs several districtwide initiatives such as the Healthy Start Family Resource Center referenced in the episode, which acts as a central hub for students and their families to access supports for basic needs, receive county energy assistance, learn about upcoming events, and connect with external resources.

STRATEGIES TO SUPPORT ALIGNMENT AND COHERENCE

Research has shown that when districts have an aligned set of policies, practices, and goals, district leaders are more adequately prepared to allocate resources to support those goals explicitly.¹² Moreover, although there are various ways to foster coherence

within a school system, all of them require regular structured collaboration across departments and school sites and a relationship based on a shared vision of what practices and goals are necessary for success.¹³ LUSD leaders Cheri Doria and Grant Schimelpfening outlined several of the critical features that helped their teams establish and maintain alignment and coherence within their district.

Strategy 1: Interdepartmental collaboration: Establish routine interdepartmental meetings and data review with the chief business officer.

Throughout the episode, Cheri and Grant spoke to the various ways they work with each other and with others in their district and community. They emphasized the importance of promoting a culture of collaboration and systematizing it through their practices. A key strategy they offered that may be helpful for chief business officers (CBOs) working toward systems alignment and coherence is to establish routine group and individual meetings with other department or center leads in order to coordinate services and provide multidisciplinary perspectives.

In speaking about their particular practice, Cheri and Grant shared that they meet monthly to assess data, review spending sheets, discuss funding requests, and provide each other with feedback. They reported that drawing on their shared expertise and experience through this process supports their ability to better serve students and allocate resources effectively.

Strategy 2: Systems improvement thinking: Envision the ideal program or system first, and then assess and scale to the available funding.

As a CBO, a philosophy that Grant employs in collaboration with LUSD’s other leaders is to first try to “design the program that learners need” and then determine how and to what extent it can be financed. The intention of this approach is to avoid designing interventions based purely on funding. Using this approach—often referred to as “reorienting the planning mindset” (Figure 1)—leaders are able to fully imagine what an ideal or successful program might look like rather than think only within the confines of budgetary limits, compliance, or grant timelines. This approach is a planning strategy that mimics facets of the business practice of gap analysis¹⁴ and aspects of science and technology research¹⁵ and design-based research.¹⁶

Strategy 3: Holistic and long-term analysis: Build in time to visit classrooms, consider benefit time horizons of investments, and assess the larger picture.

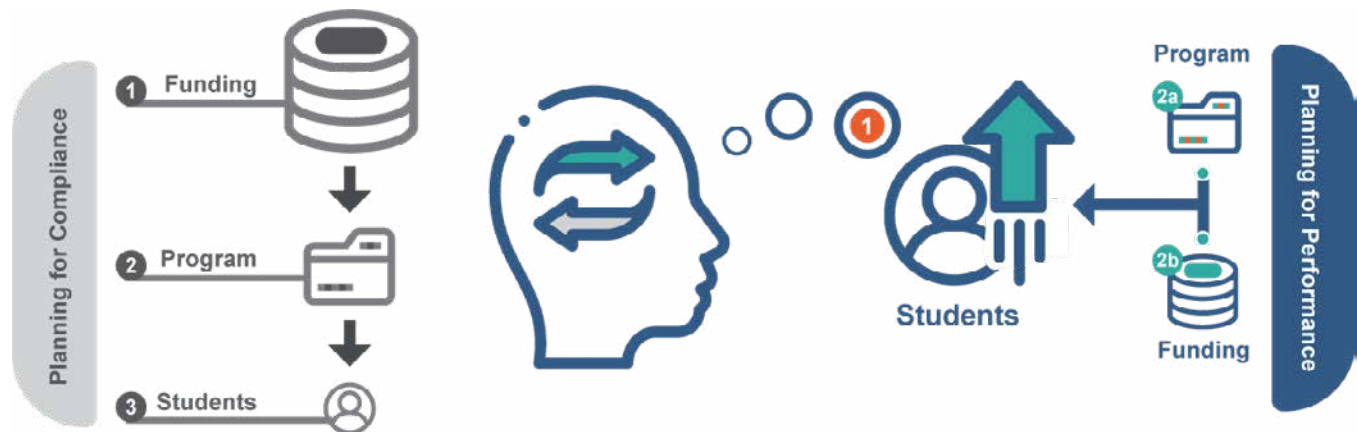
After reviewing data and observing classrooms directly, Cheri and Grant identified a need to expand preschool services to Lindsay families. They wrote additional preschool seats into their local control and accountability plan (LCAP) in order to support this augmentation, supplementing existing state-funded preschool and transitional kindergarten programs. The primary motivation for this decision was based not only on their own lived experiences and data, but also on the body of research that suggests that investments in early learning are fiscally sound and cost effective both for typically developing learners and learners with individual education plans (IEPs).¹⁷

Strategy 4: Whole child approach: Institutionalize processes and policies to intentionally identify and address all of a learner’s developmental needs.

Taking a whole child approach requires that LUSD collaborates effectively across departments internally and with external agencies to ensure that learners are able to make progress based on their needs and assets. Cheri and Grant explained that this begins even before the moment a family first enrolls their student in preschool or transitional kindergarten, utilizing three methods in particular:

- Cheri keeps a month-to-month list of children aged birth to 3 within the district who are receiving services through an individualized family service plan (IFSP). Cheri’s team invites each of these children and their families to a transition meeting. Held each Friday, transition meetings offer a 90-minute mock

FIGURE 1. REORIENTING THE PLANNING MINDSET



- preschool setting in which parents are allowed to join with their children in the learning experience and staff are able to assess needs appropriately and in collaboration with parents and guardians.
- In addition, Cheri’s team utilizes the Ages & Stages Questionnaires, Third Edition (ASQ-3), a developmental screening tool that identifies developmental progress in children and helps educators understand the ideal learning environment for each child.
- Finally, upon enrollment, each family fills out a needs form that holistically assesses both academic needs and basic family needs and challenges. Upon identifying these needs, LUSD seeks to provide support for families beyond the classroom and connects them with partner agencies such as their local family resource center, which can provide essential services, goods, and products to help sustain family well-being.

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- 1 Within this brief, *alignment* refers to when policies, practices, processes, and roles in a system work together in similar or consistent ways. For more information, see WestEd’s [Alignment & Coherence Guide](#).
 - 2 Within this brief, *coherence* refers to integration and interconnection among the parts of the system in a way that mutually reinforces shared understanding and overall progress toward a clear vision and set of goals. For more information, see WestEd’s [Alignment & Coherence Guide](#).
 - 3 Education Data Partnership. (2023). *Lindsay Unified student demographics: Cumulative enrollment, 2017–18 through 2021–22*. <http://www.ed-data.org/district/Tulare/Lindsay-Unified>
 - 4 California School Dashboard. (2022). *District performance overview: Lindsay Unified*. <https://www.caschooldashboard.org/reports/54719930000000/2022>
 - 5 California Department of Education. (n.d.) *MEP regions and direct-funded districts*. <https://www.cde.ca.gov/sp/me/mt/mepsub-grantees.asp>
 - 6 “A child is considered ‘migratory’ if the parent or guardian is a migratory worker in the agricultural, dairy, lumber, or fishing industries and whose family has moved during the past three years. A ‘qualifying’ move can range from moving from one residence to another or across school district boundaries due to economic necessity. A young adult may also qualify if he or she has moved on his own within the past three years to engage in qualifying work or sought to obtain qualifying work (with a history of qualifying moves).” For more information, visit the California Department of Education’s [Overview of Migrant Education in California webpage](#).
 - 7 Lindsay Unified School District. (n.d.). *Migrant program*. <https://www.lindsay.k12.ca.us/migrant-program-c994b05e>
 - 8 Research literature commonly refers to a PBS as competency-based learning.
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