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The SSFR Technical Report on Attitudes and Perspectives of Principals, Teachers, and School Site Councils:

Twin Rivers Unified School District—Survey Tables

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American Institutes for Research

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With contributions from
Mahala Archer (AIR, formerly of Twin Rivers Unified), **Matt Hill** (Los Angeles Unified), **William Bass** (Los Angeles Unified), **Charles Blankenship** (AIR), Kevin Lane (AIR), **James R. Brown** (Pivot Learning Partners), **Ray Tolleson** (Pivot Learning Partners), **Beth Bayouth** (Pivot Learning Partners), and **Denise Petrulis** (Pivot Learning Partners)

JULY 2013

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The SSFR project is funded by the Institute of Education Sciences (IES), the Hewlett Foundation, the Ford Foundation, and the California Community Foundation.

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American Institutes for Research

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Pivot Learning Partners

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Steve Jubb served as SSFR Project Director for Implementation and Director of the District Redesign Workshop.
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Jim Hollis served as technology development and training lead in TRUSD.
Denise Petrulis served as technology development and training lead in LAUSD.
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Veronica Ensign served as a task leader on the preparation of the SSFR final report.
Ray Tolleson served as an SSFR project consultant and advisor on behalf of Pivot Learning Partners in Twin Rivers Unified School District.

District Partners

Mahala Archer served as the SSFR project manager in Twin Rivers Unified School District during the course of the project. On February 22, 2013, Ms. Archer joined the SSFR team as an AIR employee.

Matt Hill, who is the Chief Strategy Officer in LAUSD, and served as the SSFR Project Director for the district.

William Bass, who is a Program and Policy Development Advisor in LAUSD, also served during portions of the SSFR project as a project liaison and manager for the district.

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The following is a list of all of the individuals involved in the SSFR Project and who have enabled us, through their participation, to complete this report. We also acknowledge the support of the many key staff members in the Twin Rivers Unified School District (TRUSD) and the Los Angeles Unified School District (LAUSD) who have contributed to this project. From TRUSD, we acknowledge: Frank Porter, former Superintendent, TRUSD; Rob Ball, Chief Financial Officer, TRUSD; Janet Balcom, Assistant Superintendent of Special Education and Student Services; Pat England, Director of Categorical Programs; Gloria Hernandez, Assistant Superintendent of Elementary Schools; Kate Ingersoll, Director of Budget Services; Barbara Mitchell, Manager of Categorical Budgets; Ziggy Robeson, Assistant Superintendent of Community Services; Patty Smart, Associate Superintendent of Human Resources; Ramona Bishop, Associate Superintendent of Curriculum and Academic Achievement; and the TRUSD principals who participated in this research. From LAUSD, we acknowledge: Ramon Cortines, former Superintendent; John Deasy, current Superintendent; Samira Estilai, former Project Manager; Karin Kusuda, former Project Manager; William Bass, current Project Manager; Matt Hill, Chief Strategy Officer; Tony Atienza, Budget Director; Megan Reilly, Chief Finance Officer; Cheryl Simpson, Fiscal Services Manager; Niru Jayaraman, Senior Administrative Analyst; Barbara Tobias, Data director, Fiscal Services; and Eric Mirano, Financial Analyst.

We would especially like to thank Mahala Archer, former Project Manager for SSFR in Twin Rivers, who provided substantial help in implementation as well as research-related activities during her tenure. She subsequently joined AIR (in 2013) to continue her work on related per-pupil budgeting issues.

We would also like to acknowledge the editorial and formatting assistance provided by Phil Esra, AIR.

ABOUT STRATEGIC SCHOOL FUNDING FOR RESULTS (SSFR)

What is the purpose of SSFR?

During the 2009–10 school year, American Institutes for Research (AIR) and Pivot Learning Partners (PLP) formed a partnership with two large California school districts—Los Angeles Unified School District and Twin Rivers Unified School District—to implement and evaluate the impact of a comprehensive approach to local school finance and governance reform that creates the conditions for improved human resource management and a more equitable distribution of both resources and student learning opportunities. The *Strategic School Funding for Results* project (SSFR) was designed to (1) develop and implement more equitable strategies for allocating resources within each district; (2) make budget and resource allocation decisions more transparent; (3) link those strategies to policies and processes designed to encourage autonomy, innovation, and efficiency; and (4) strengthen accountability for improving student outcomes.

What policies underlie SSFR?

The core reform strategy offered by SSFR includes four basic elements: equity, autonomy linked to accountability, transparency, and a culture of innovation and efficiency.

1. SSFR achieves equity by implementing a student need-based funding model, and by developing and implementing policies, processes, and tools (the Targeted Revenue Model, or TRM) that support allocating dollars, rather than staff, to schools based on the needs of the specific students they serve (e.g., low-income students or English language learners).

2. SSFR links school autonomy to accountability by offering schools discretion over how they use the dollars they receive and holding schools accountable for the results (student outcomes). SSFR includes a site budgeting tool (the Planning, Budgeting, and Allocation of Resources tool, or PBAR) that engages school decision makers in a series of activities that includes a needs assessment, goal setting, and the specification of instructional strategies and resource allocation necessary to achieve the goals with available revenues.

3. SSFR promotes increased transparency by simplifying and clarifying the processes by which resources are allocated to schools, increasing the participation of a wide range of stakeholders in the design of these processes, improving stakeholder access to information about the patterns of resource allocation and student outcomes within the revenue allocation and site budgeting tools, and simplifying the structures that support resource allocation decisions.

4. SSFR promotes a culture of innovation and efficiency. As these strategies are successfully implemented, SSFR encourages a culture of school innovation to improve performance and attract students and families; provides a structured, site-based budgeting tool in the context of a fixed revenue constraint; and encourages school leaders to operate efficiently to produce the best possible results.

What were the benefits of participation in the SSFR project?

Within the framework of the SSFR project, the AIR/PLP team provided the districts with data tools and analysis, technical assistance, coaching, and training to implement the funding strategies and evaluate their success. While common themes were promoted across the two

participating districts, each adopted its own focus and is now adapting the SSFR components to fit its unique culture and context. Each of the participating districts committed time on the part of its leadership and staff to participate effectively in this project and acknowledged that the project was a collaborative effort between the AIR/PLP and district leadership teams. The formative nature of the project allowed for a mutual learning experience among the participating districts and the AIR/PLP team and the creation of a strong partnership in successfully implementing SSFR. The SSFR project has resulted in a series of reports and guidebooks that describe the implementation of SSFR, as well as the changes in patterns of resource allocation and student outcomes that coincided with the efforts of the AIR/PLP team to implement SSFR in the two districts. For more information, see the SSFR website at www.schoolfundingforresults.org.

How was SSFR funded?

During the 2009–10 school year, the William and Flora Hewlett Foundation and the Ford Foundation provided grants to the AIR/PLP team to support the first phase of the SSFR work. August 1, 2010, marked the beginning of Phase II of the project, when the Institute of Education Sciences (IES) in the U.S. Department of Education awarded a grant of $1.67 million to the AIR/PLP team to support the development of the SSFR model for three more years. The Hewlett Foundation awarded an additional three-year grant of $1.5 million to the AIR/PLP team to extend its support of the project over the same three-year period. The Ford Foundation also contributed $200,000 to support SSFR work during 2010–11.

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INTRODUCTION AND OVERVIEW

This document contains all of the tables and graphics created as part of the Strategic School Funding for Results (SSFR) project during the 2010–11 and 2011–12 school year. The document displays each of the items from the survey of principals, teachers, and school site councils (SSCs). Most of the survey items are organized by the construct they represent, such as equity, transparency, and accountability.

Abbreviations Used in the Tables

TRUSD	Twin Rivers Unified School Districts
PBAR	Planning Budgeting and Allocation of Resources (refers to the site-based planning and budgeting tool provided to schools under the SSFR project).
SSC	School Site Council
SSFR	Strategic School Funding for Results

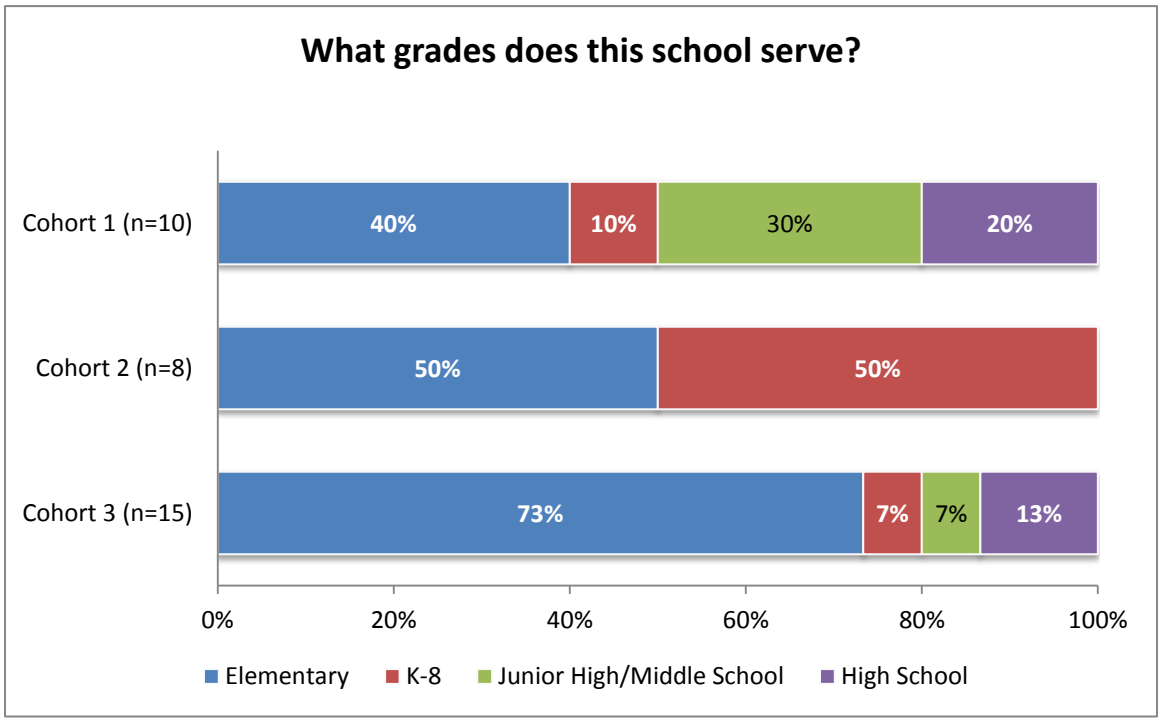
BACKGROUND INFORMATION

School Demographics

Grades Served

What grades does this school serve?

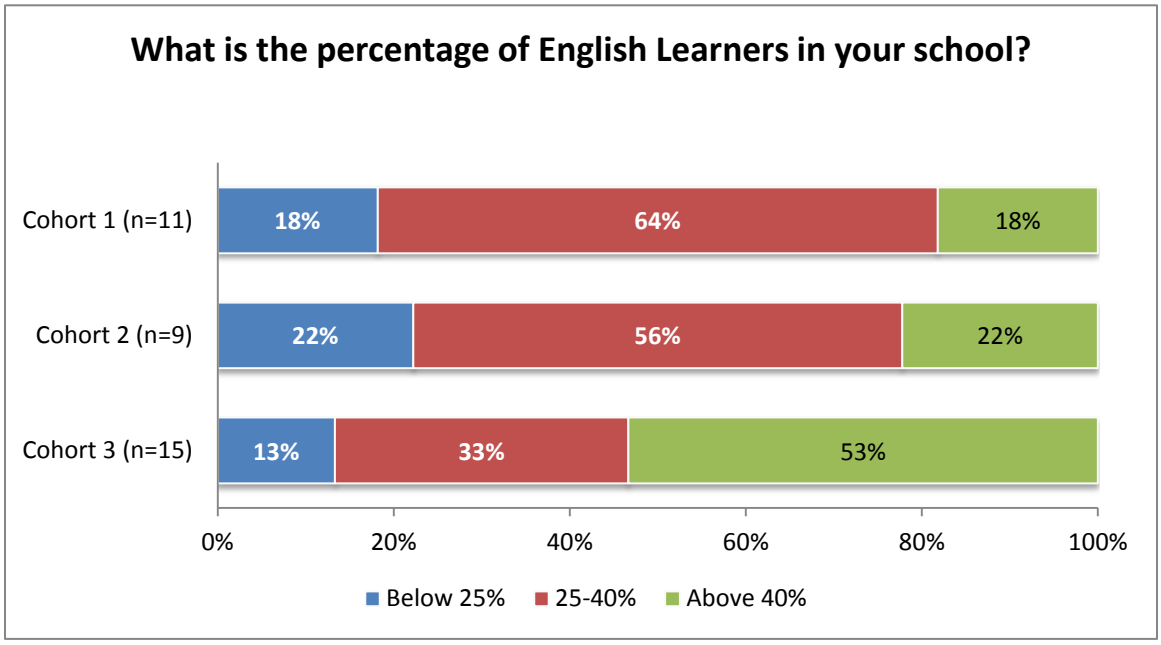
Principals (2011–12)



English Learners

What is the percentage of English Learners in your school?

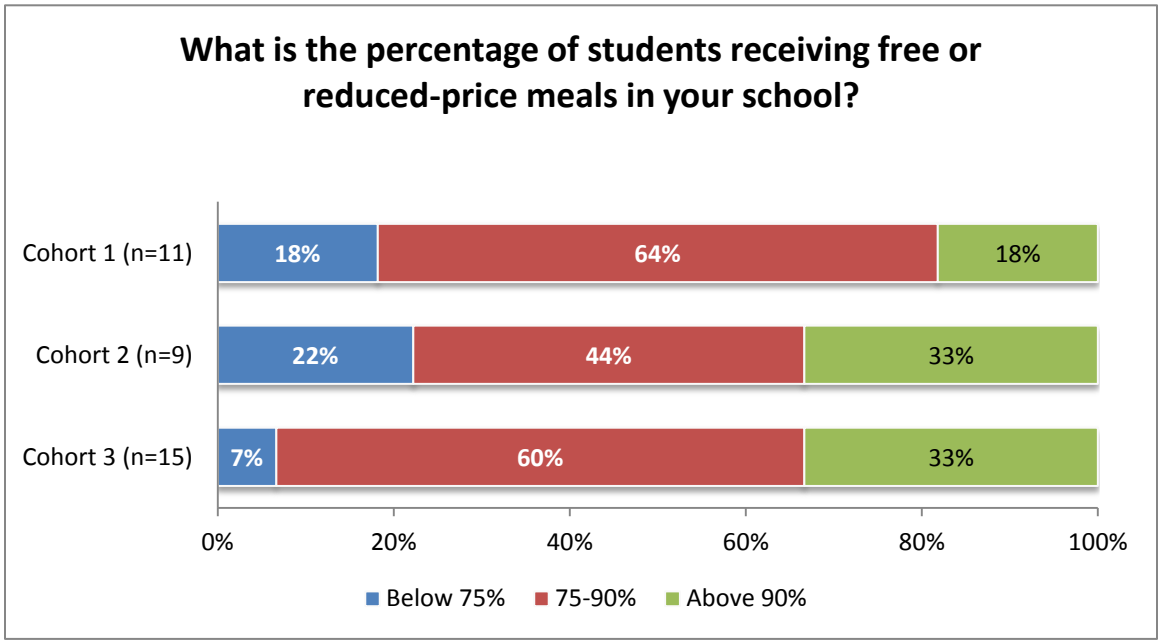
Principals (2011–12)



Free or Reduced-Price Lunch

What is the percentage of students receiving free or reduced-price meals in your school?

Principals (2011–12)

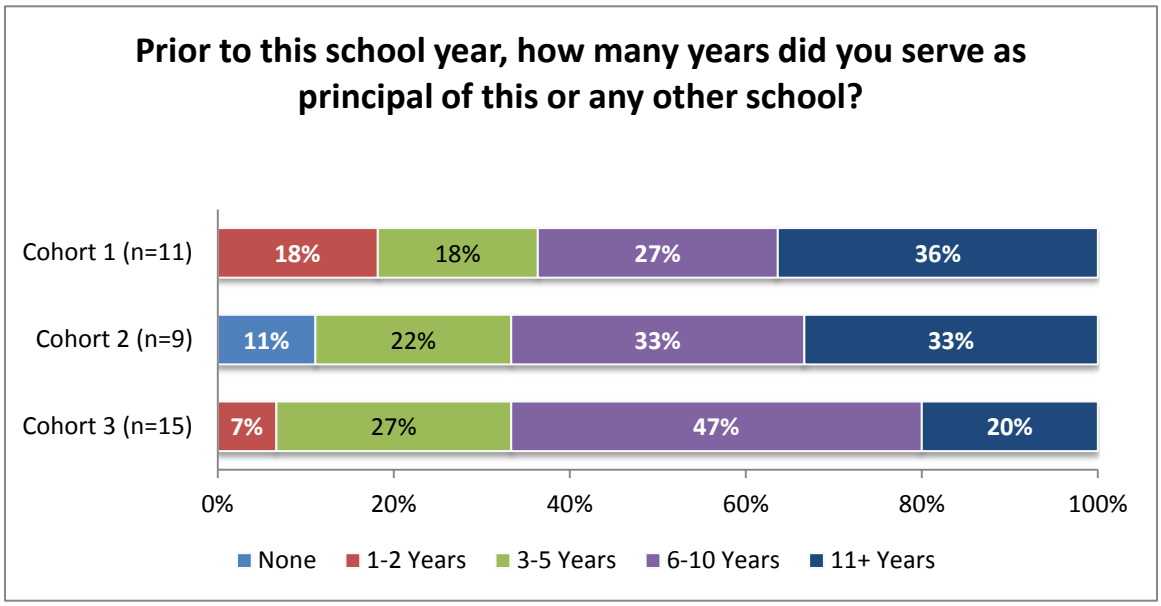


Principal and Staff Experience

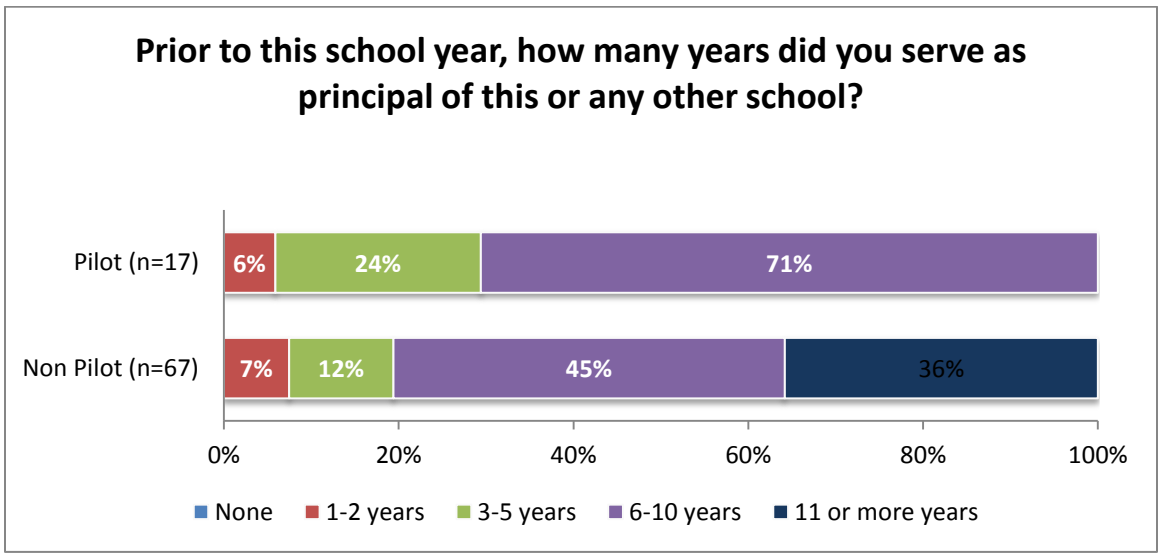
Years Employed as a Stakeholder

Prior to this school year, how many years did you serve as principal of this or any other school?

Principals (2011–12)

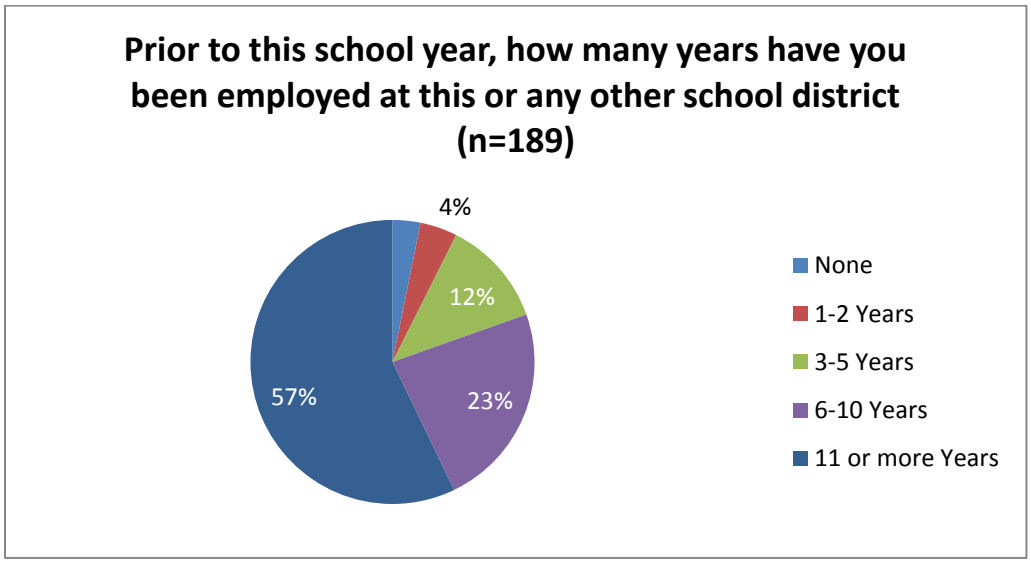


Principals (2010–11)

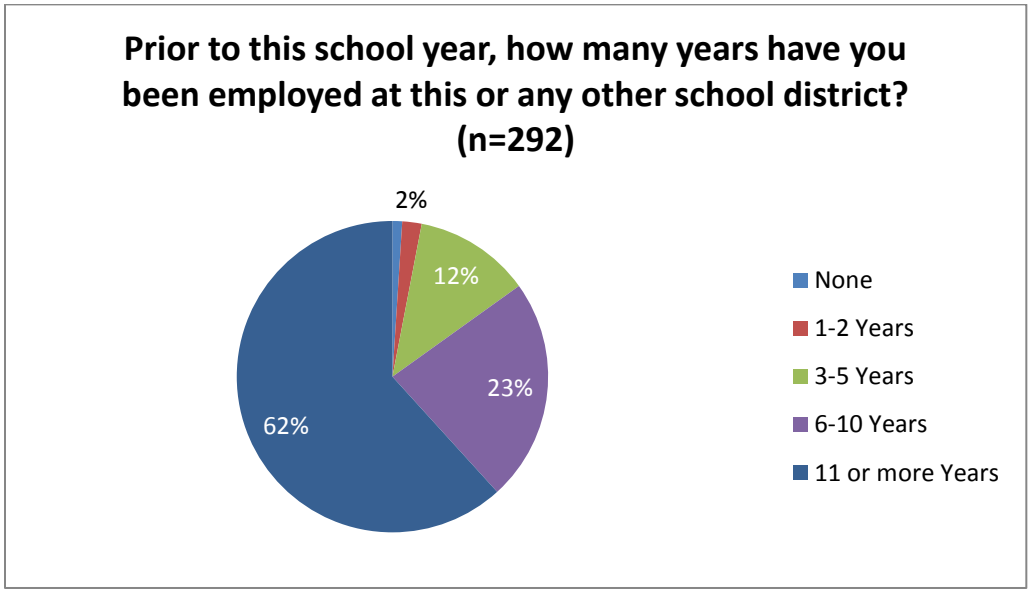


Prior to this school year, how many years have you been employed at this or any other school district?

Teachers (2011–12)



Teachers (2010–11)



About Survey Respondents

Count of Respondent Groups

Principals (2011–12)

Count of 2011–12 TRUSD Principal Respondents by Cohort		
Respondent Type	**Proportion**	**Count**
Cohort 1	29%	11
Cohort 2	24%	9
Cohort 3	39%	15
Undefined	8%	3
Total	**100%**	**38**

Principals (2010–11)

Count of 2010–11 TRUSD Principal Respondents by Pilot Status		
Respondent Type	**Proportion**	**Count**
Pilot	23%	8
Non Pilot	77%	27
Total	**100%**	**35**

Teachers (2011–12)

Count of Teacher Respondents in 2011–12 (Full-Time Teacher + Part-Time Teacher + Itinerant Teacher)	
Respondent Type	**Count**
Teacher	190

Teachers (2010–11)

Count of Teacher Respondents in 2010–11 (Full-Time Teacher + Part-Time Teacher + Itinerant Teacher)	
Respondent Type	**Count**
Teacher	392

SSC (2011–12)

Count of 2011–12 TRUSD SSC Respondents by Cohort		
Respondent Type	**Proportion**	**Count**
Cohort 1	21%	41
Cohort 2	31%	59
Cohort 3	26%	49
Undefined	22%	43
Total	**100%**	**192**

SSC (2010–11)

Count of 2010–11 TRUSD SSC Respondents by Pilot Status		
Respondent Type	**Proportion**	**Count**
Pilot	16%	32
Non Pilot	84%	166
Total	**100%**	**198**

Site

Please indicate the type of site you work at. If you work at more than one site, please select your primary site.

Teachers (2011–12)

Count of Teacher Respondents by Site in 2011–12		
Site Type	**Proportion**	**Count**
9–12 grade site (also includes 6–12 and 7–12 sites)	22%	41
Middle grades site (3–6, 5–8, 6–8, 7–8)	25%	48
Preschool through 2, 4, or 5 site	11%	21
Preschool through 6 site	19%	36
Preschool through 8 site	17%	33
Preschool through K site	1%	1
Dependent Charter site	2%	4
Adult Education site	3%	6
Not at a school site	0%	0
Not sure how to answer this question	0%	0
Total	**100%**	**190**

SSC (2011–12)

Grades Served by SSC Respondent Schools in 2011–12	
Grade	**Count**
K	123
1	123
2	123
3	123
4	121
5	120
6	120
7	81
8	81
9	44
10	47
11	47
12	45

Role

How would you classify your position at this school during this school year?

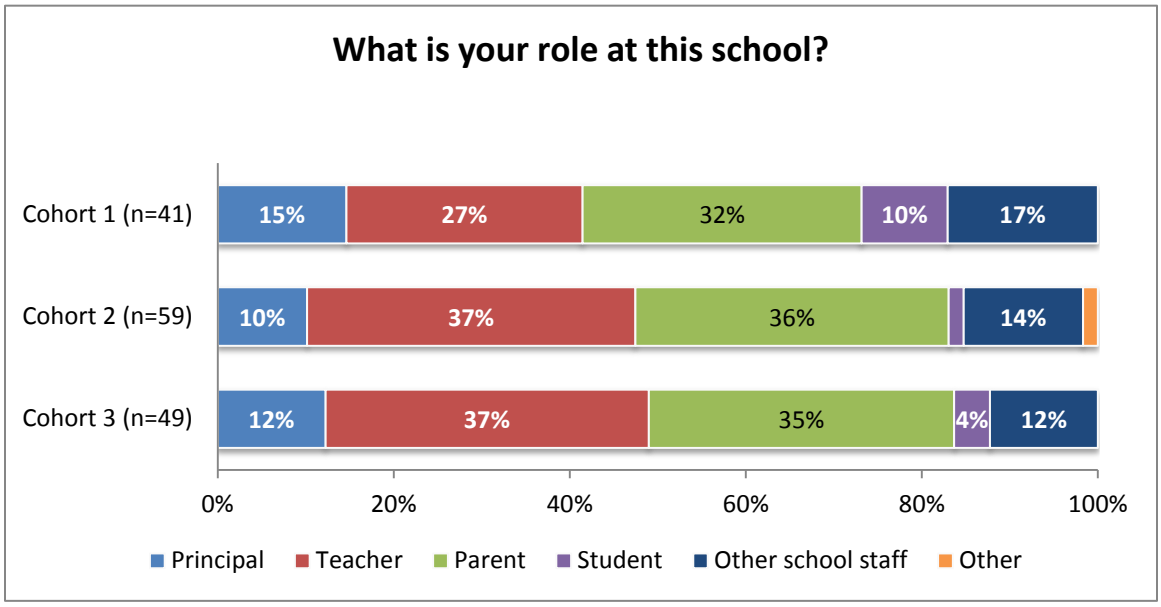
Teachers (2011–12)

Count of 2011–12 TRUSD Teacher Respondents by Occupation		
Respondent Type	**Proportion**	**Count**
Regular Full-Time or Part-Time Teacher	99%	189
Itinerant Teacher (I teach at more than one school)	1%	1
Total	**100%**	**190**

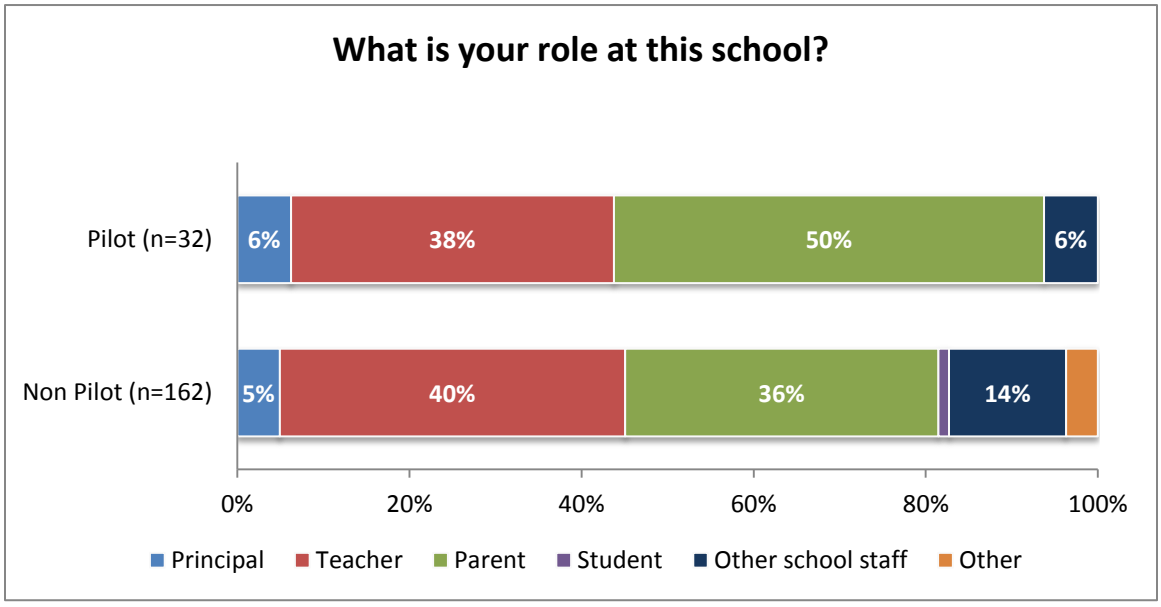
Teachers (2010–11)

Count of 2010–11 TRUSD Teacher Respondents by Occupation		
Respondent Type	**Proportion**	**Count**
Regular Full-Time Teacher	93%	366
Regular Part-Time Teacher	5%	20
Itinerant Teacher (I teach at more than one school)	2%	6
Total	**100%**	**392**

SSC (2011–12)



SSC (2010–11)



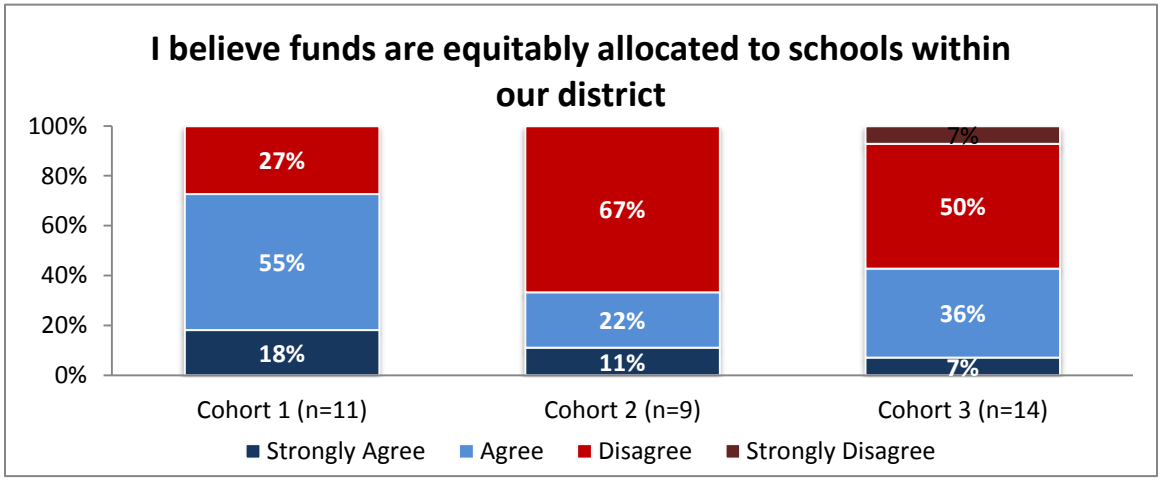
EQUITY

Distribution of Funds

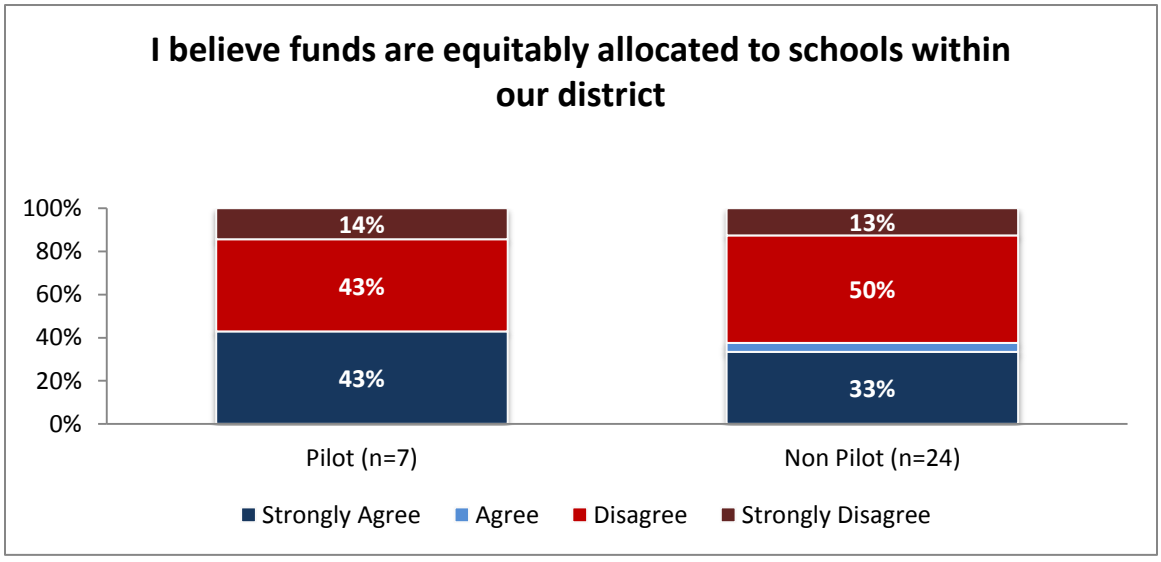
District to Schools

Please indicate how much you agree or disagree with the following statement: I believe funds are equitably allocated to schools within our district.

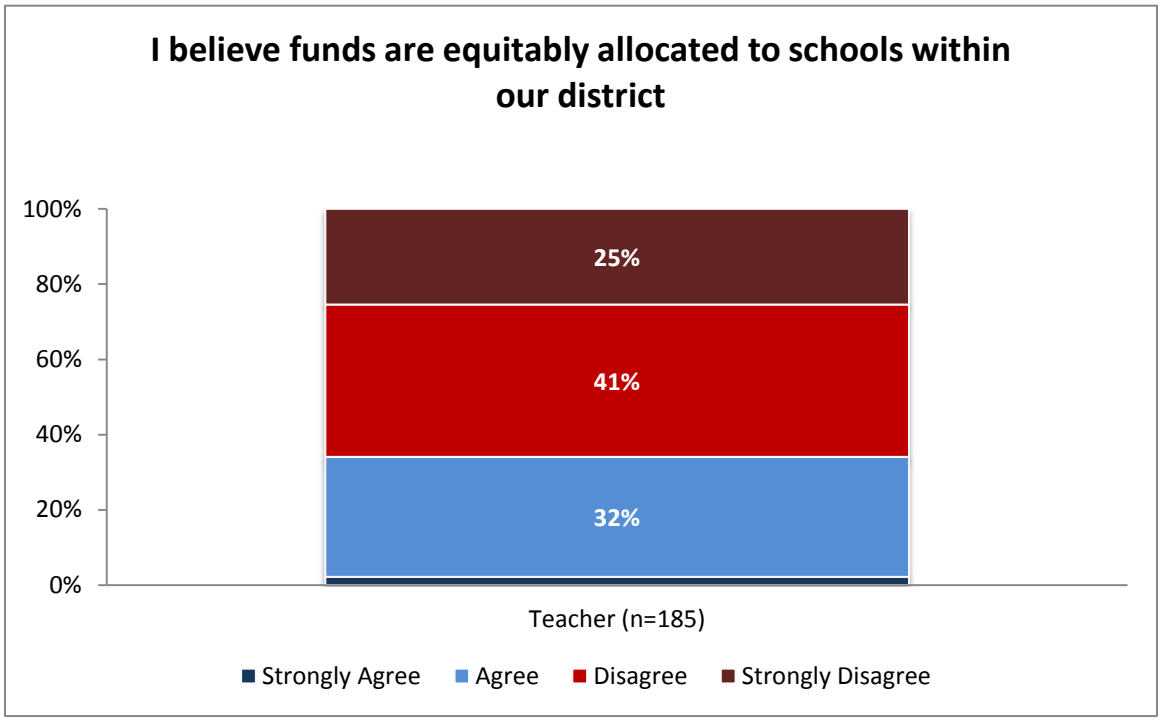
Principals (2011–12)



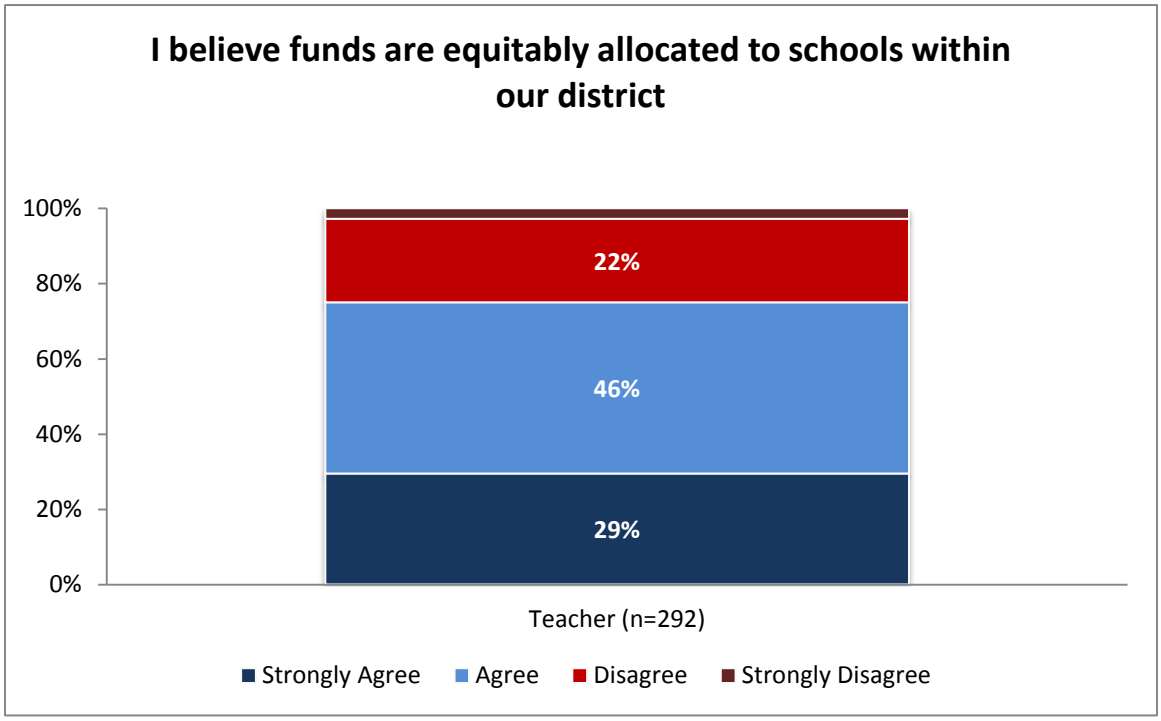
Principals (2010–11)



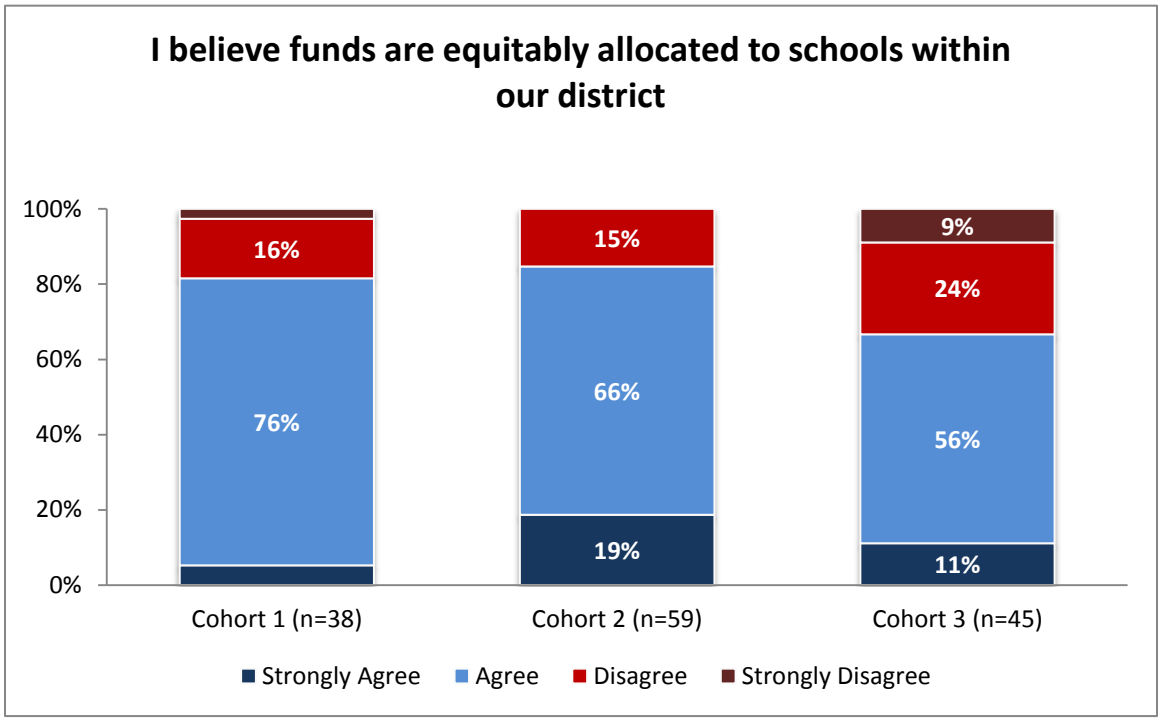
Teachers (2011–12)



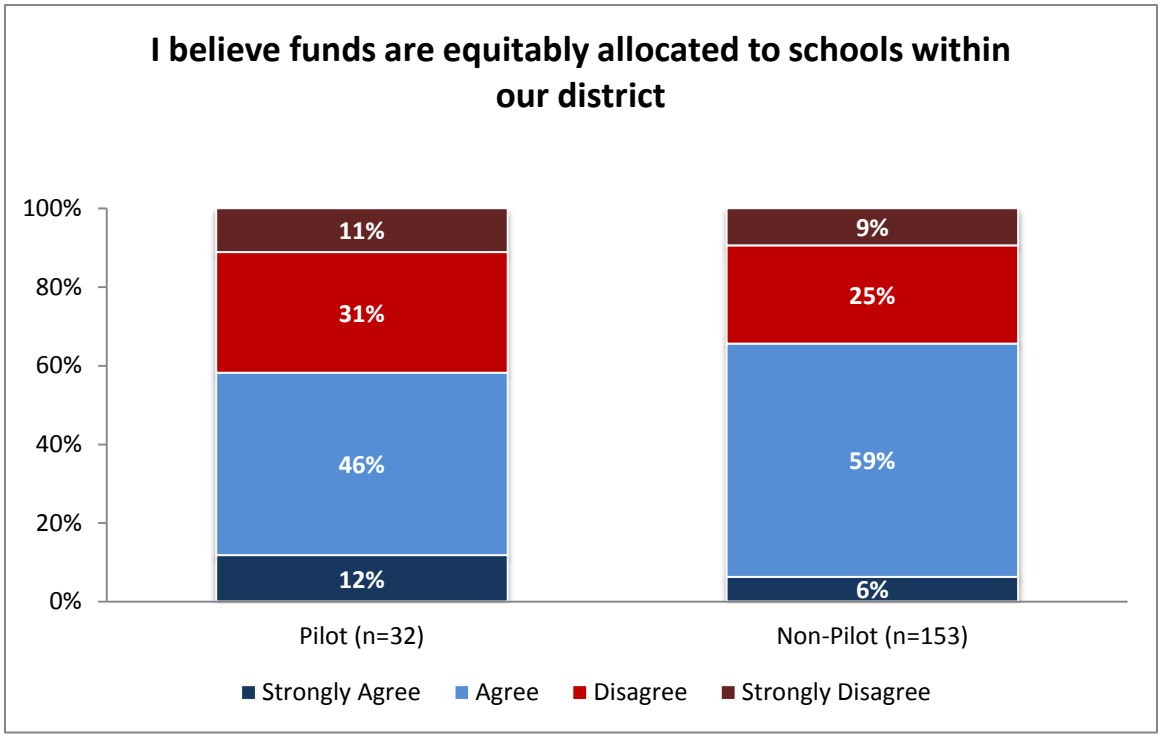
Teachers (2010–11)



SSC (2011–12)



SSC (2010–11)

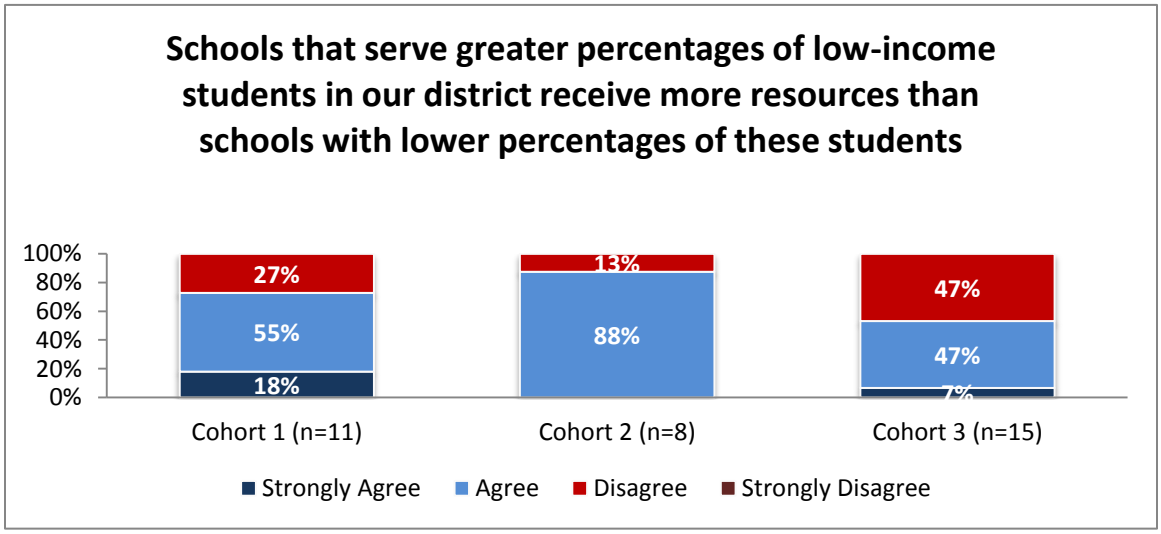


Addressing the Needs of Student Subgroup Populations

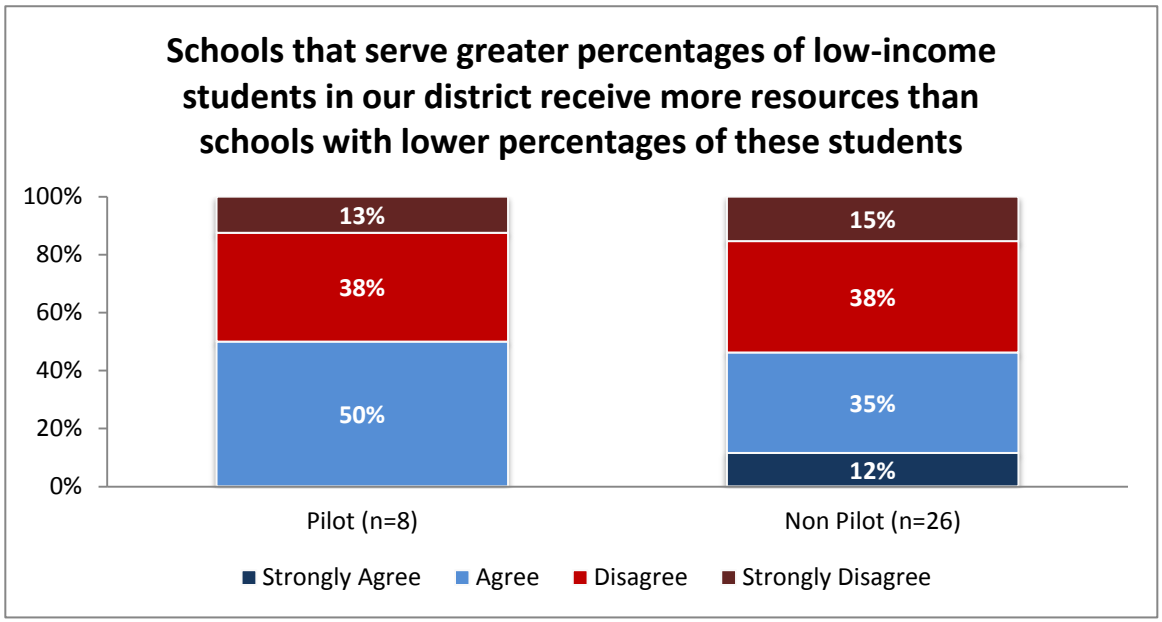
Low-Income

Please indicate how much you agree or disagree with the following statement: Schools that serve greater percentages of low-income students in our district receive more resources.

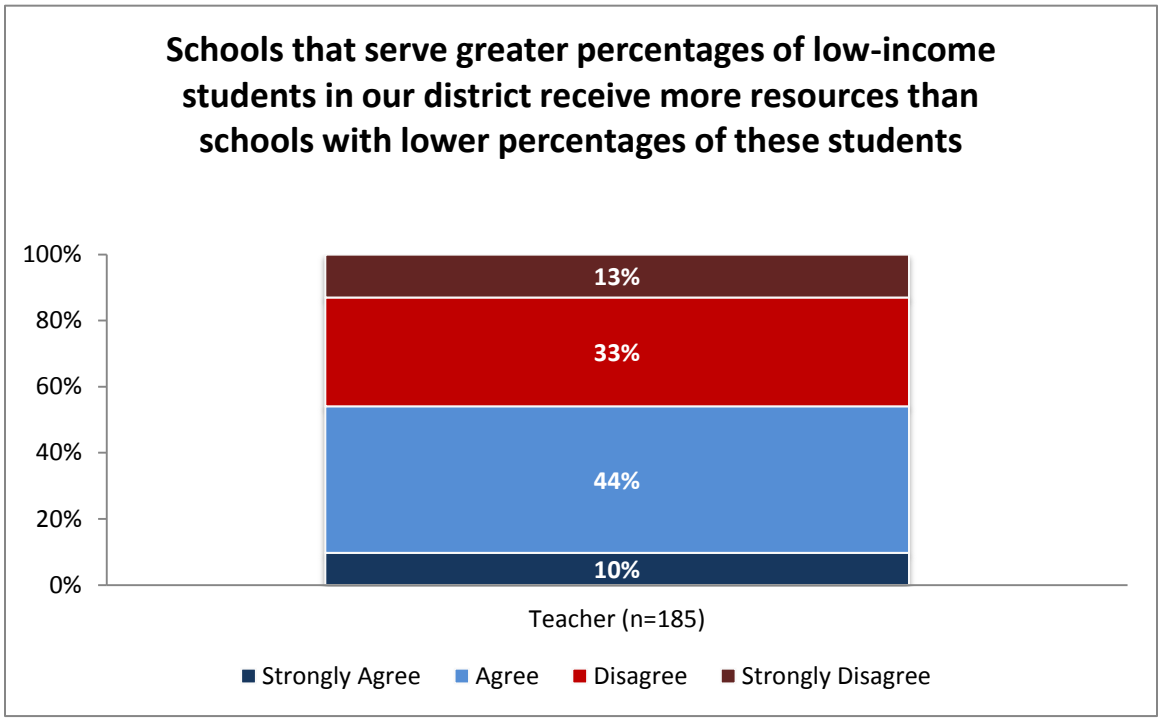
Principals (2011–12)



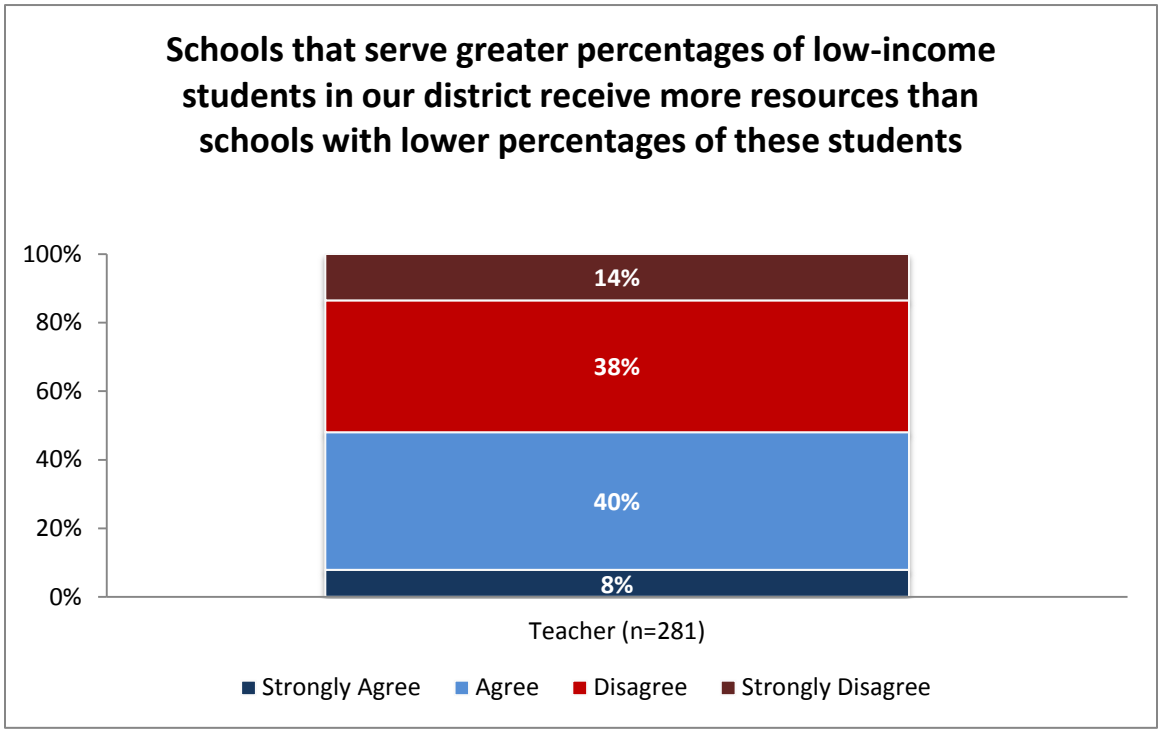
Principals (2010–11)



Teachers (2011–12)



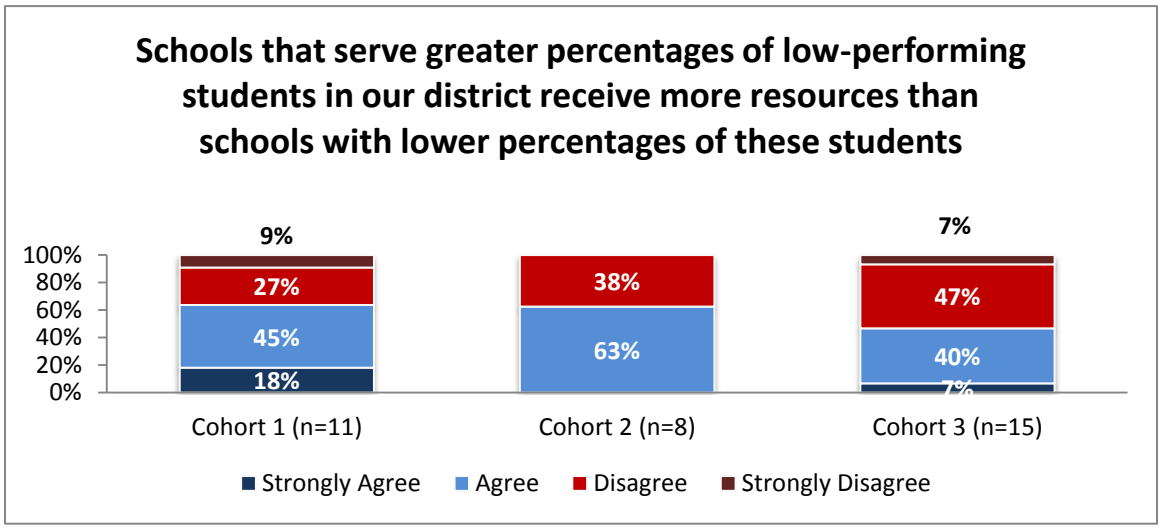
Teachers (2010–11)



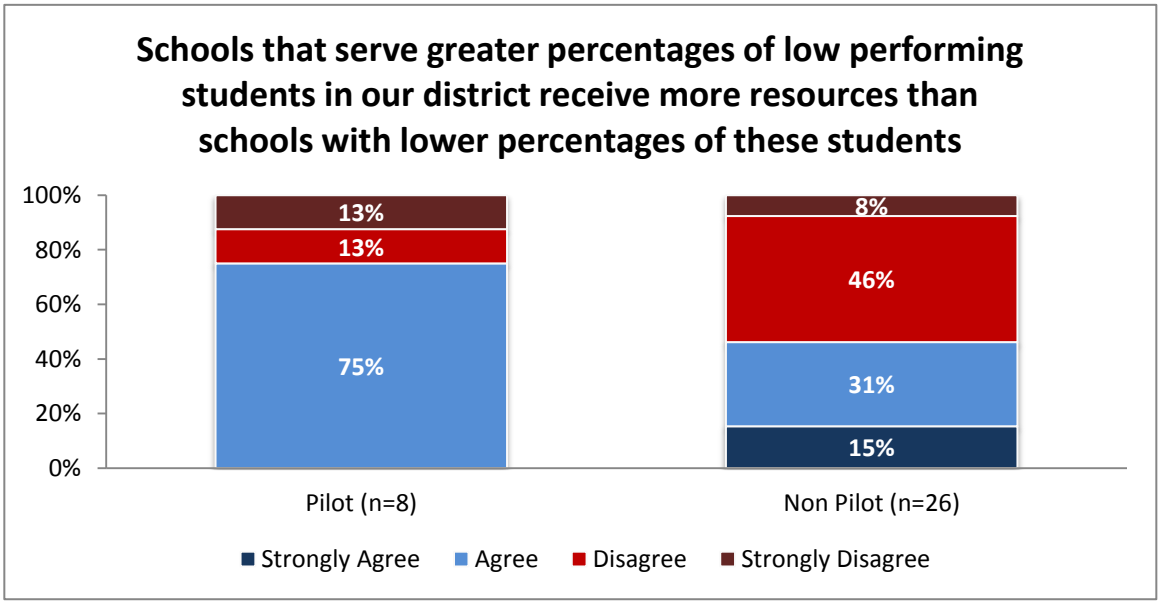
Low-Performing

Please indicate how much you agree or disagree with the following statement: Schools that serve greater percentages of low-performing students in our district receive more resources.

Principals (2011–12)



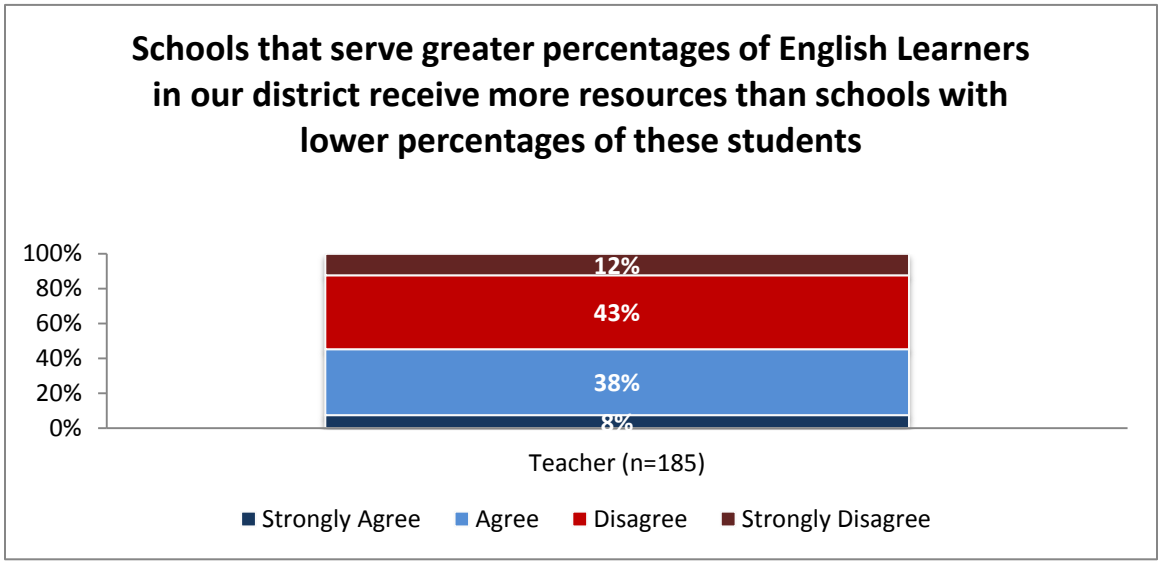
Principal (2010–11)



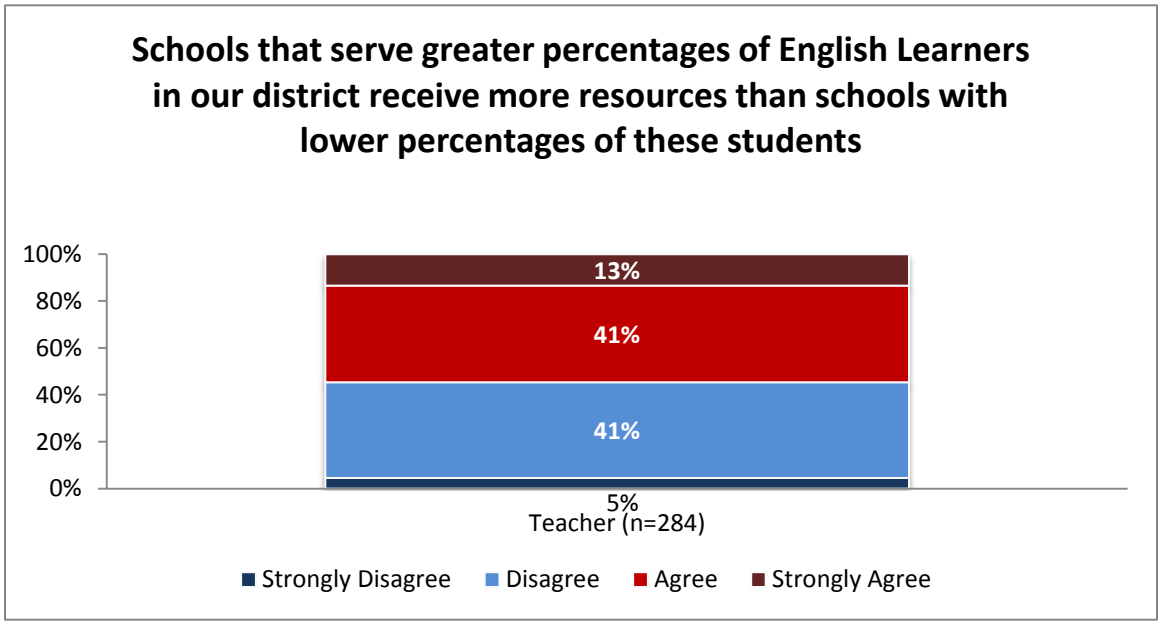
English Learners

Please indicate how much you agree or disagree with the following statement: Schools that serve greater percentages of English Learners in our district receive more resources than schools with lower percentages of these students.

Teachers (2011–12)



Teachers (2010–11)



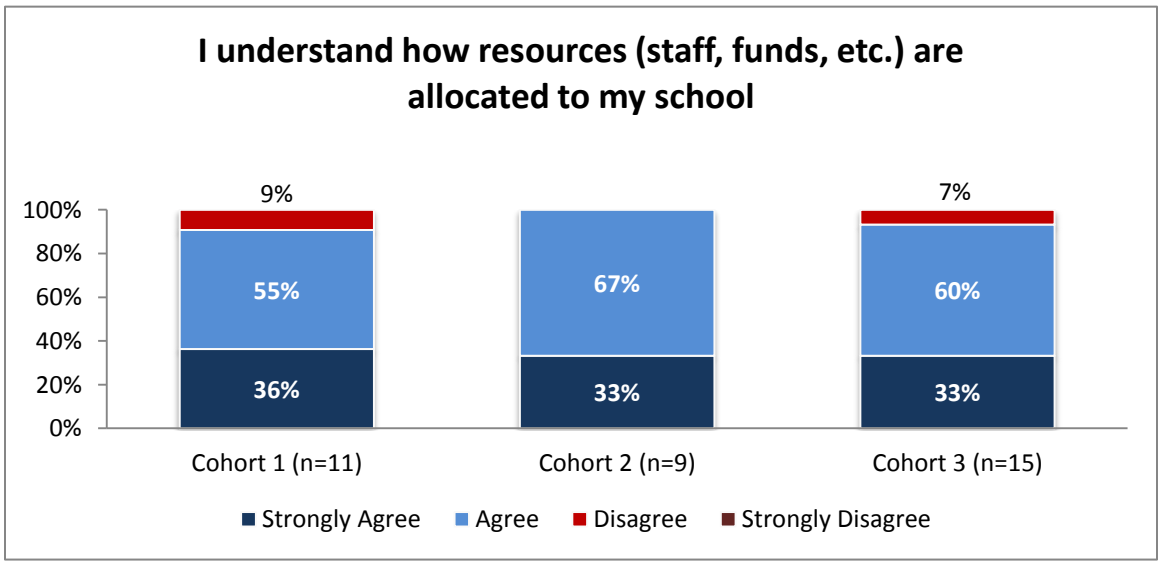
TRANSPARENCY

District to School Transparency

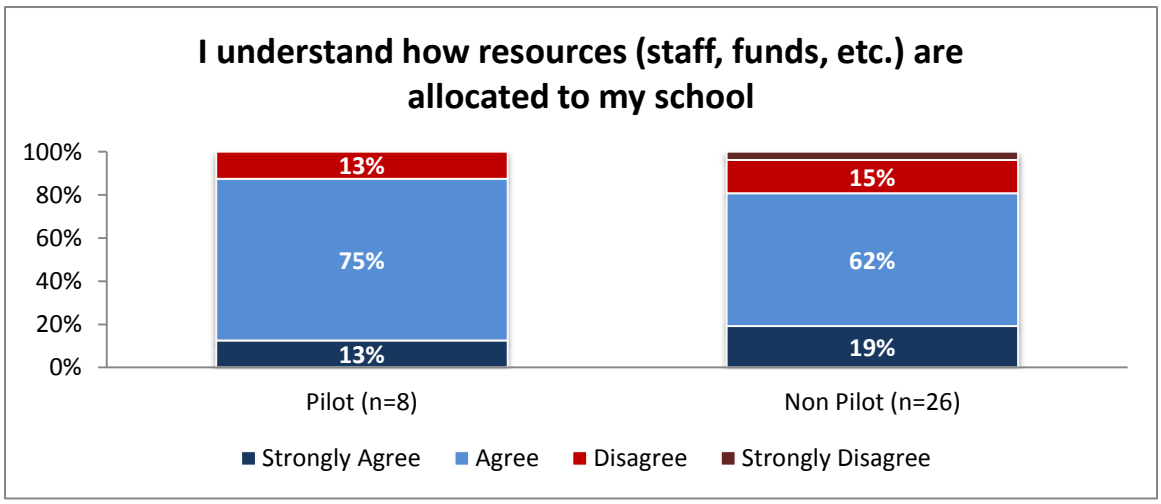
Resource Allocation

Please indicate how much you agree or disagree with the following statement: I understand how resources (staff, funds, etc.) are allocated to my school.

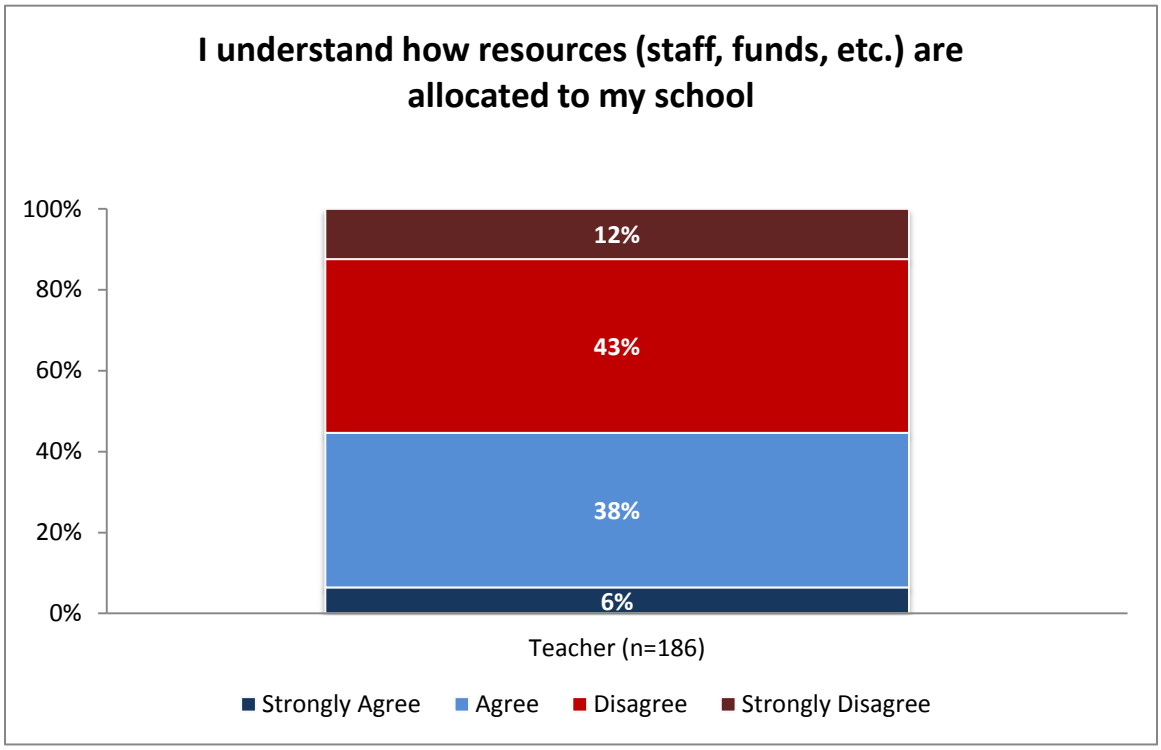
Principals (2011–12)



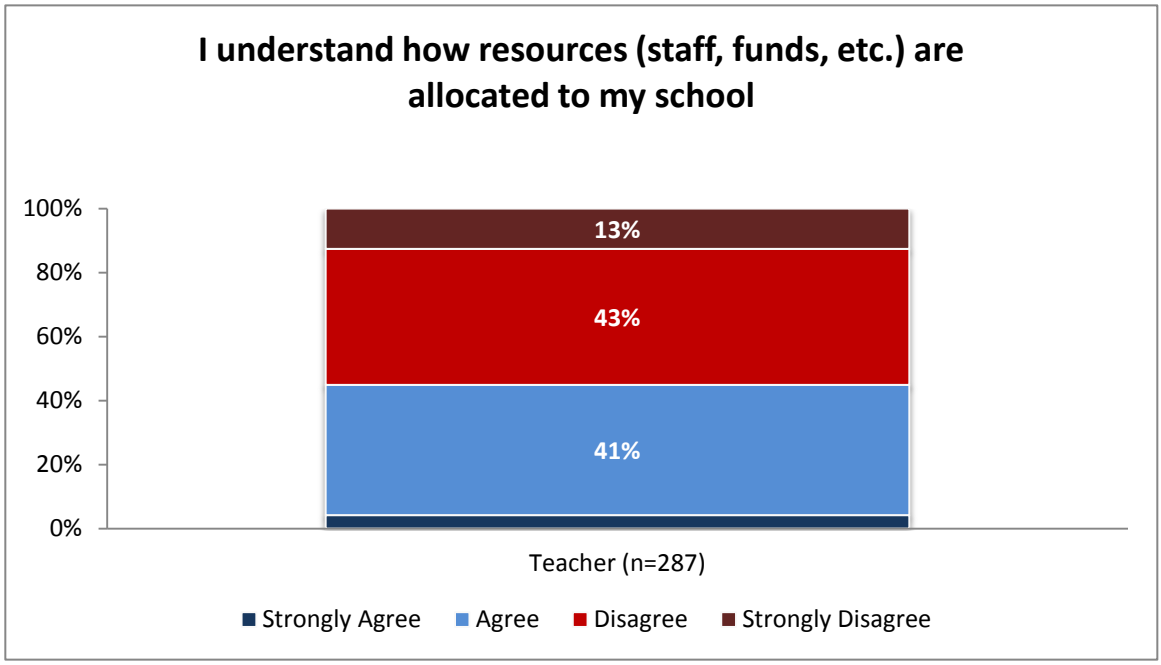
Principals (2010–11)



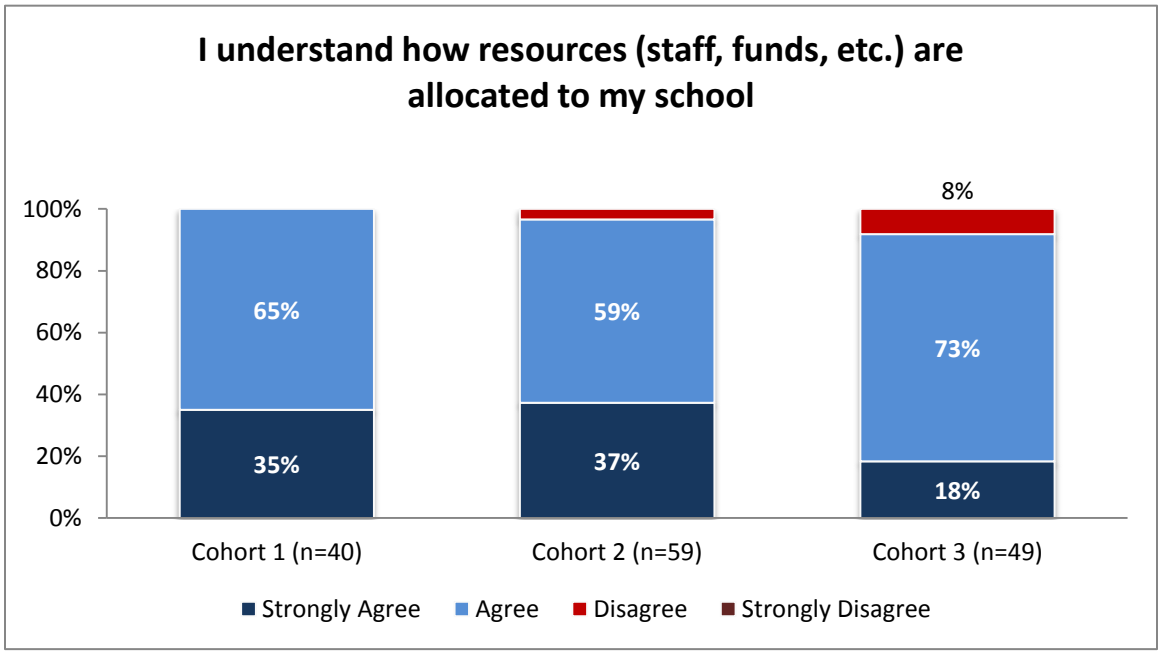
Teachers (2011–12)



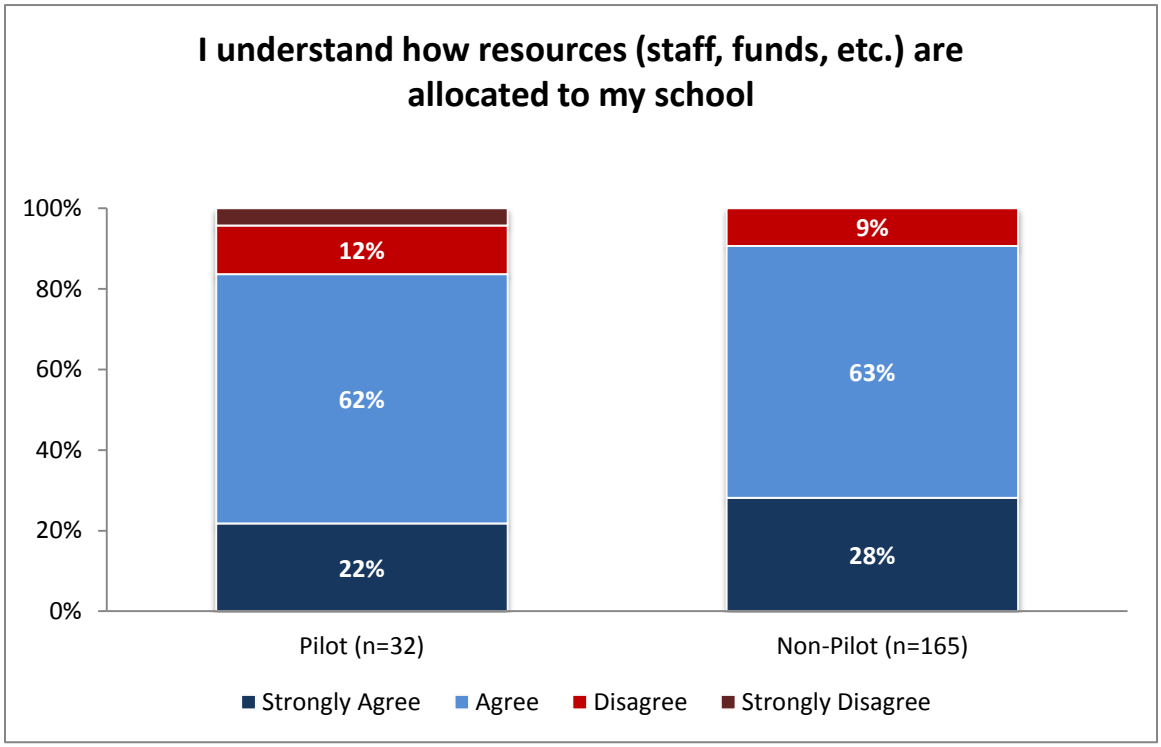
Teachers (2010–11)



SSC (2011–12)



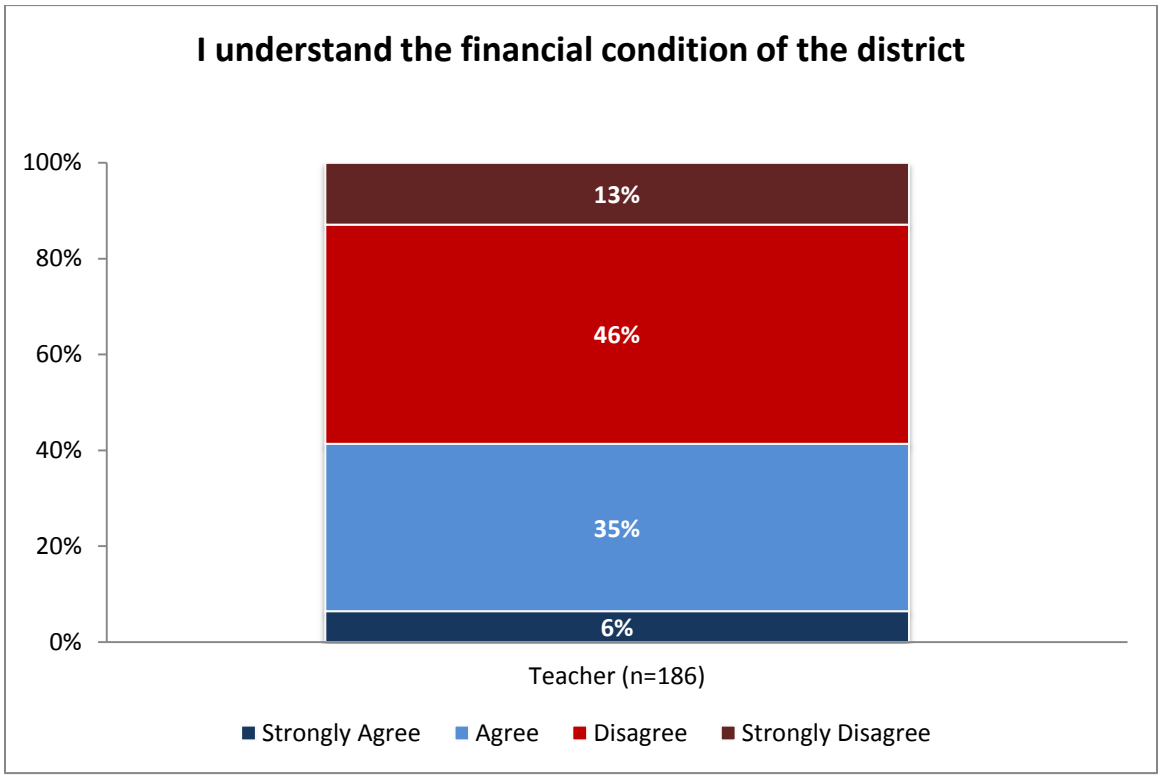
SSC (2010–11)



Financial Condition of the District

Please indicate how much you agree or disagree with the following statement: I understand the financial condition of the district.

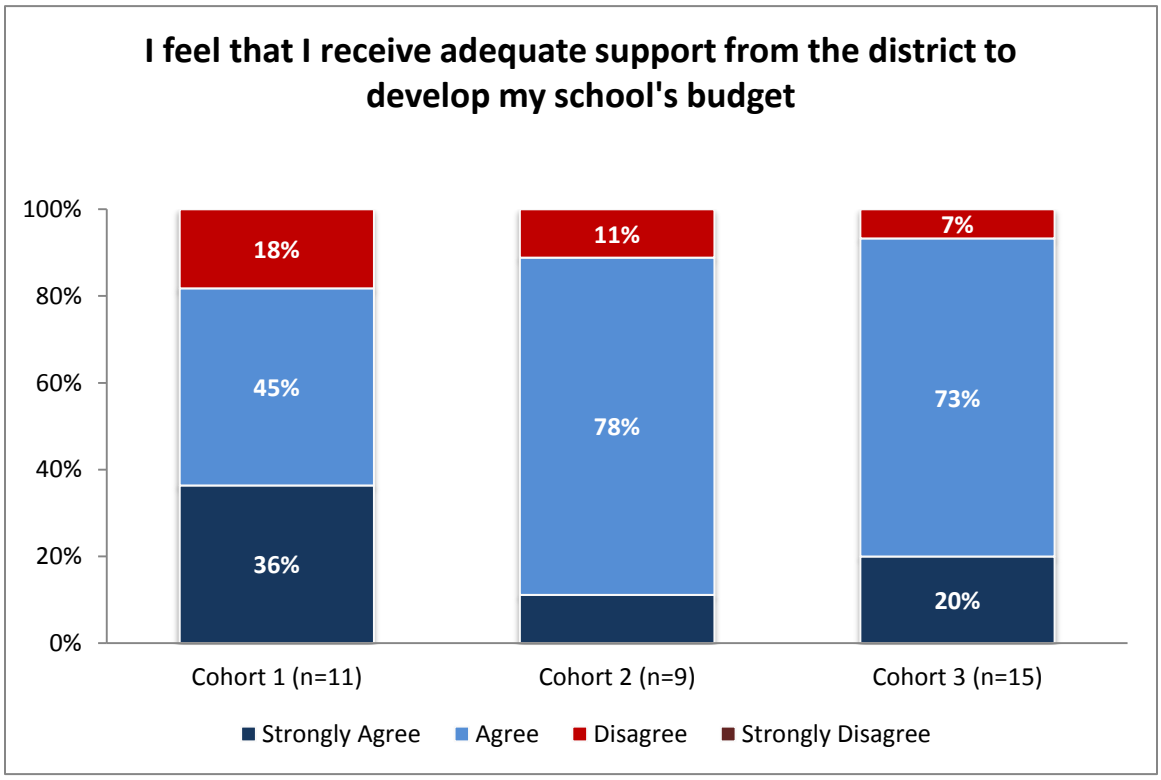
Teachers (2011–12)



Budget Support from the District to Principals

Please indicate how much you agree or disagree with the following statement: I feel that I receive adequate support from the district to develop my school's budget.

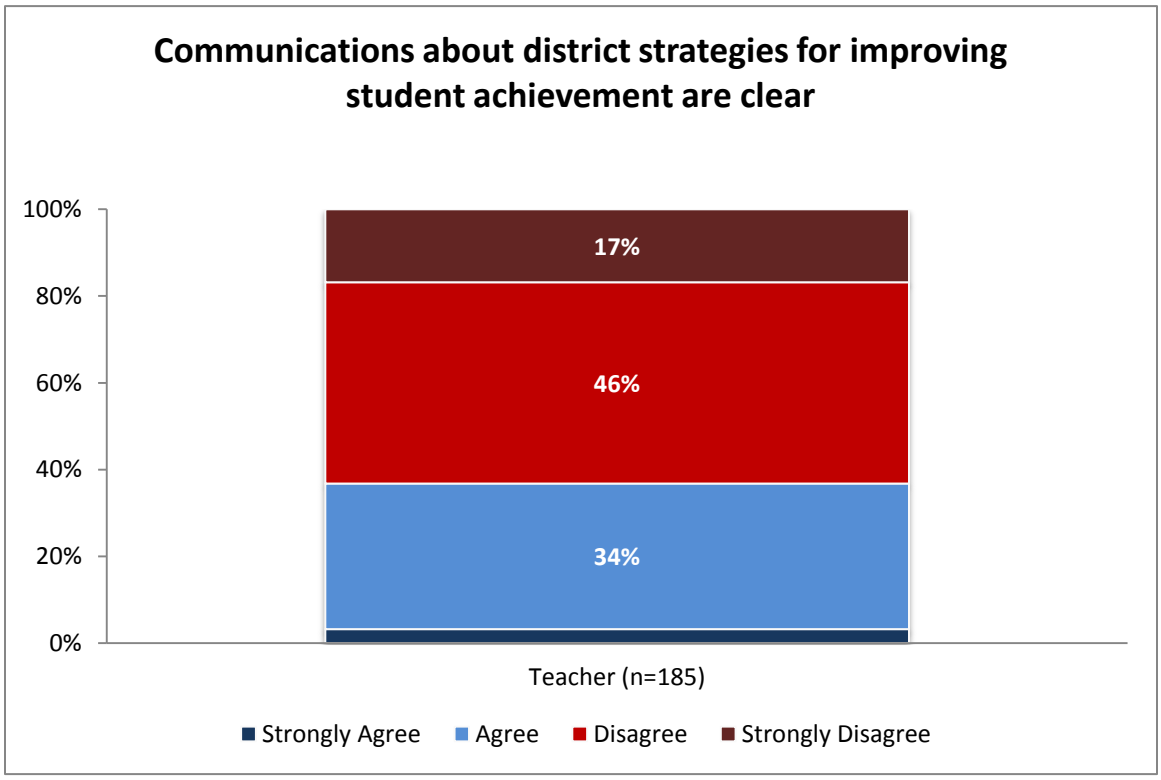
Principals (2011–12)



Strategies for Improving Student Achievement

Please indicate how much you agree or disagree with the following statement: Communications about district strategies for improving student achievement are clear.

Teachers (2011–12)

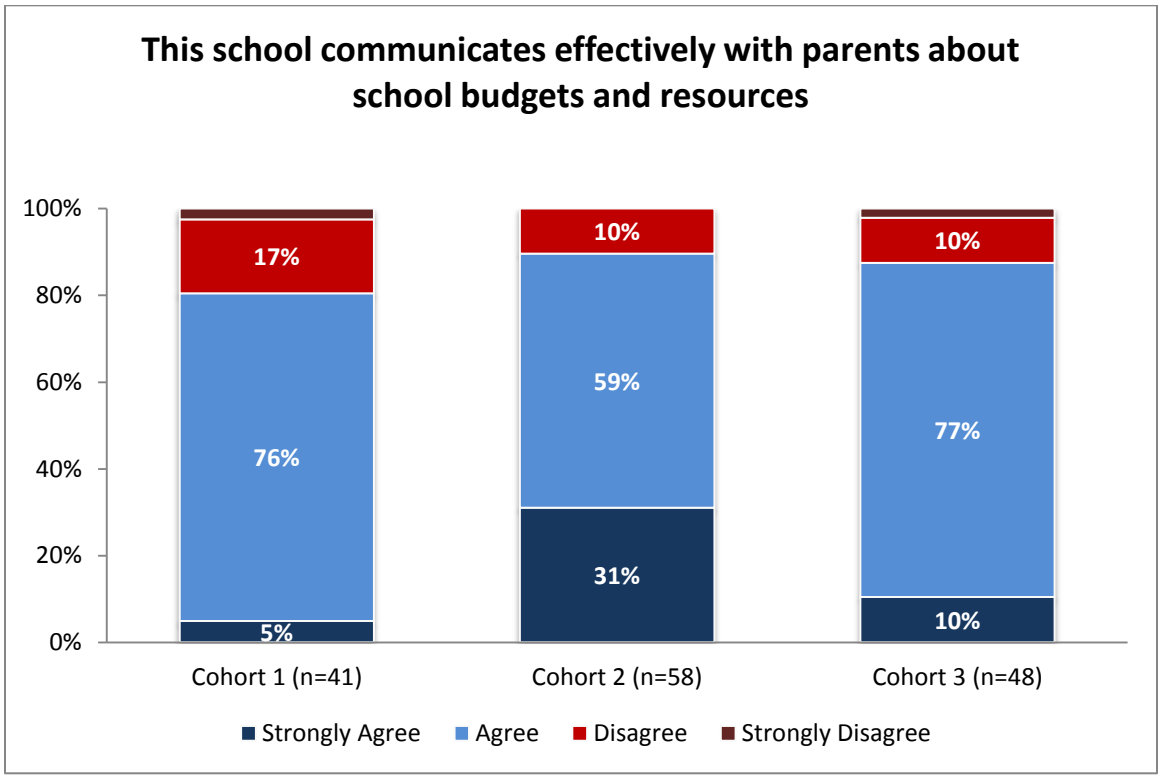


School to Community Transparency

Communication—School Budget and Resources

Please indicate how much you agree or disagree with the following statement: This school communicates effectively with parents about school budgets and resources.

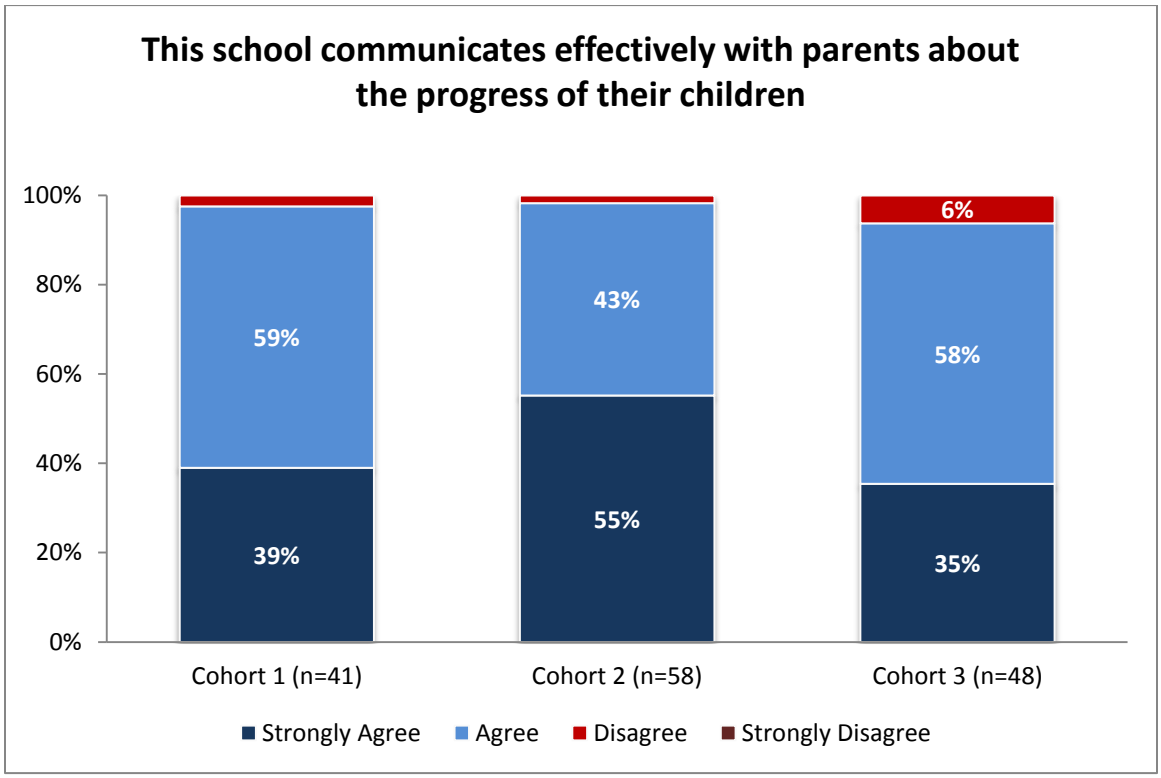
SSC (2011–12)



Communication—Child Progress

Please indicate how much you agree or disagree with the following statement: This school communicates effectively with parents about the progress of their children.

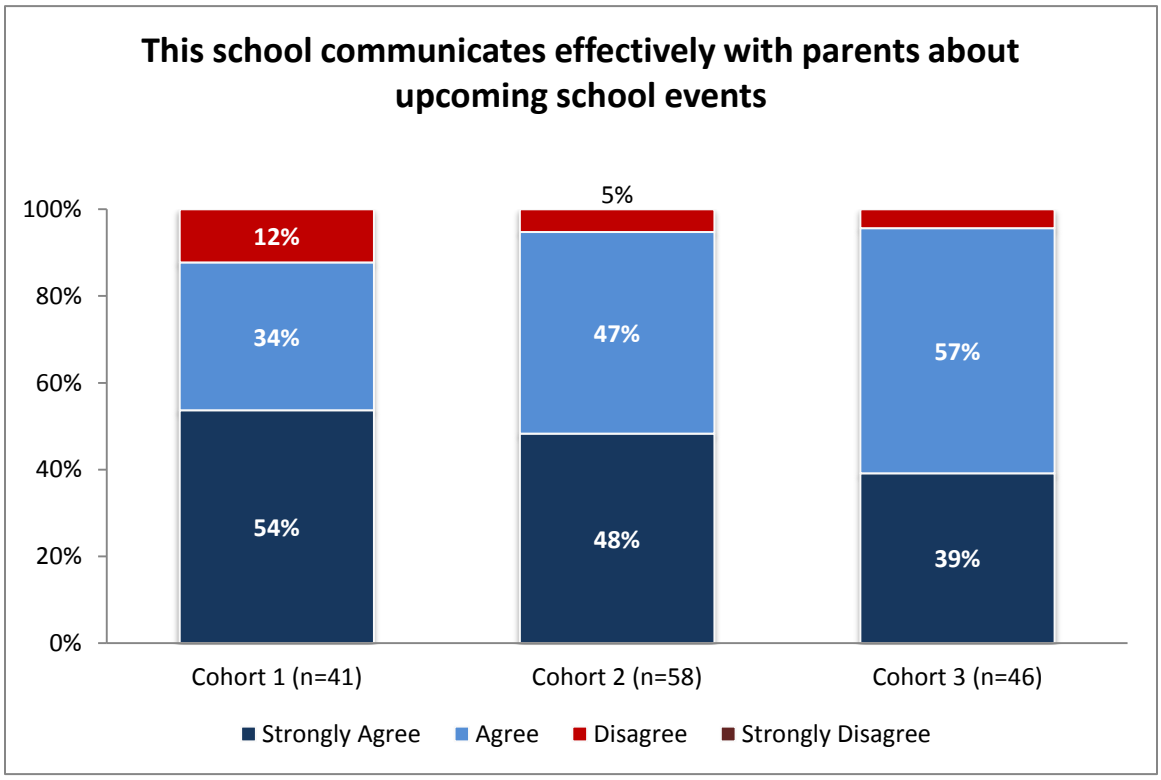
SSC (2011–12)



Communication—School Events

Please indicate how much you agree or disagree with the following statement: This school communicates effectively with parents about upcoming school events.

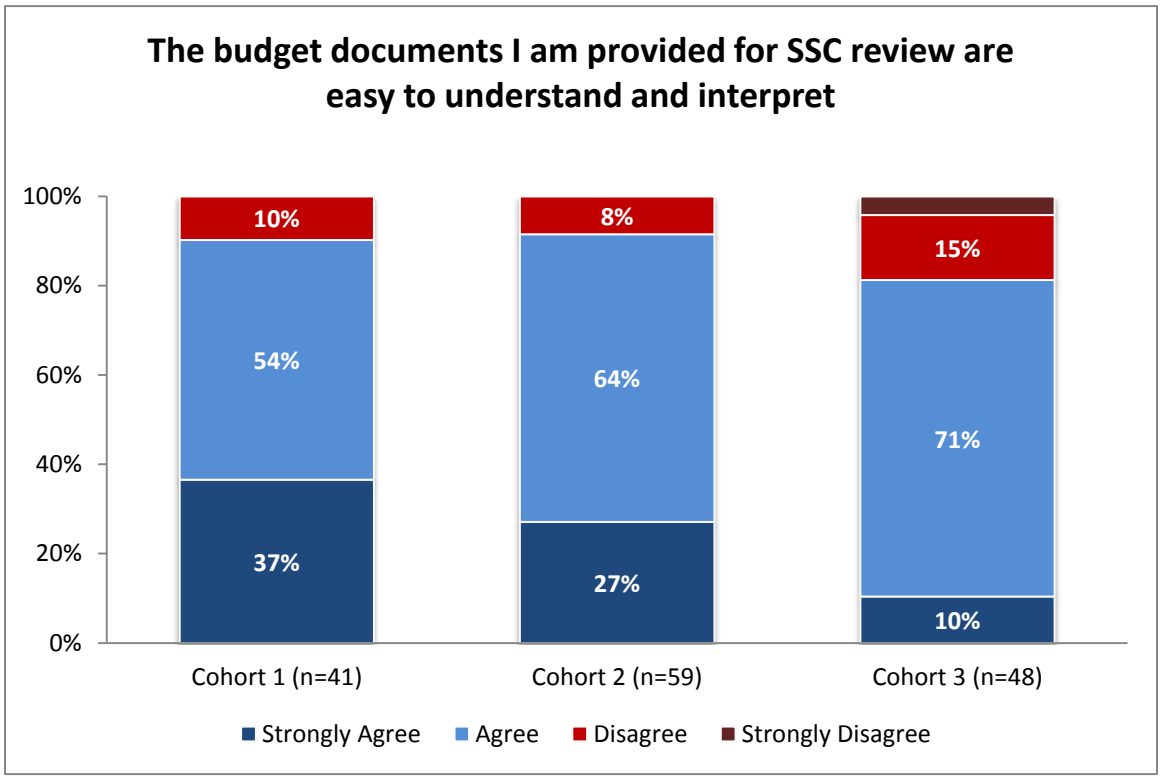
SSC (2011–12)



Clarity of Budget Documents

Please indicate how much you agree or disagree with the following statement: The budget documents I am provided for SSC review are easy to understand and interpret.

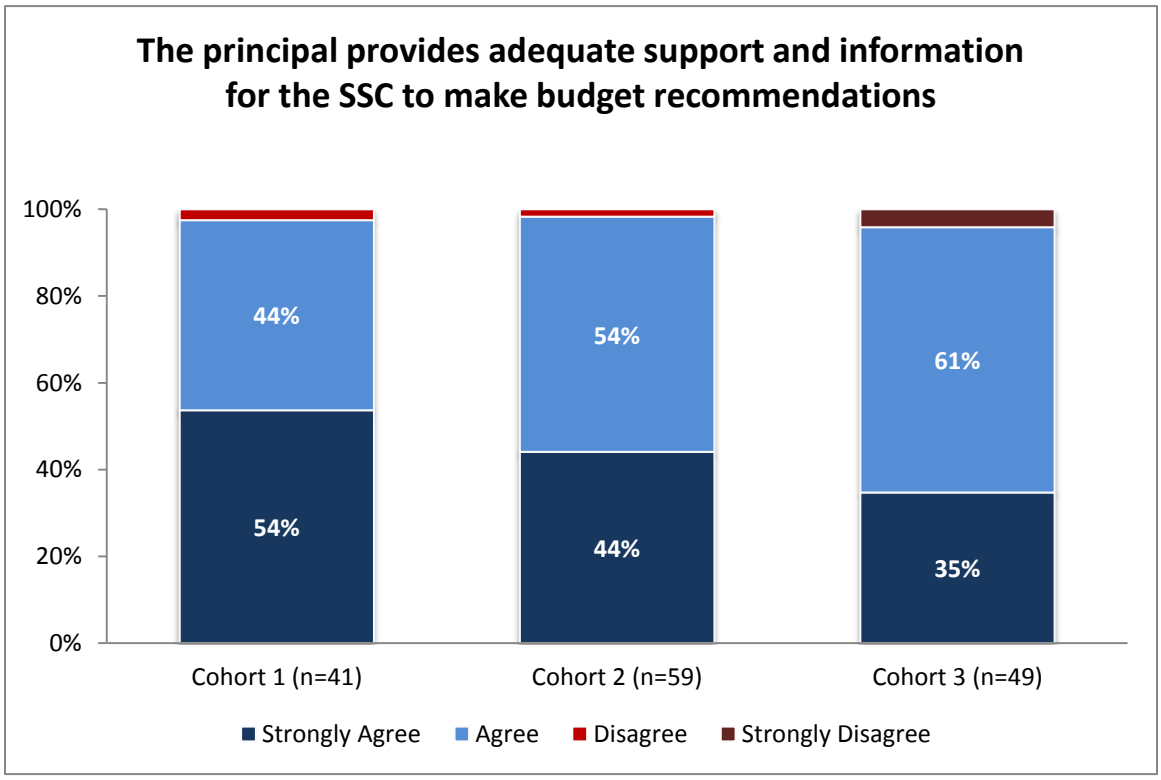
SSC (2011–12)



Budget Support from the Principal to the SSC

Please indicate how much you agree or disagree with the following statement: The principal provides adequate support and information for the SSC to make budget recommendations.

SSC (2011–12)



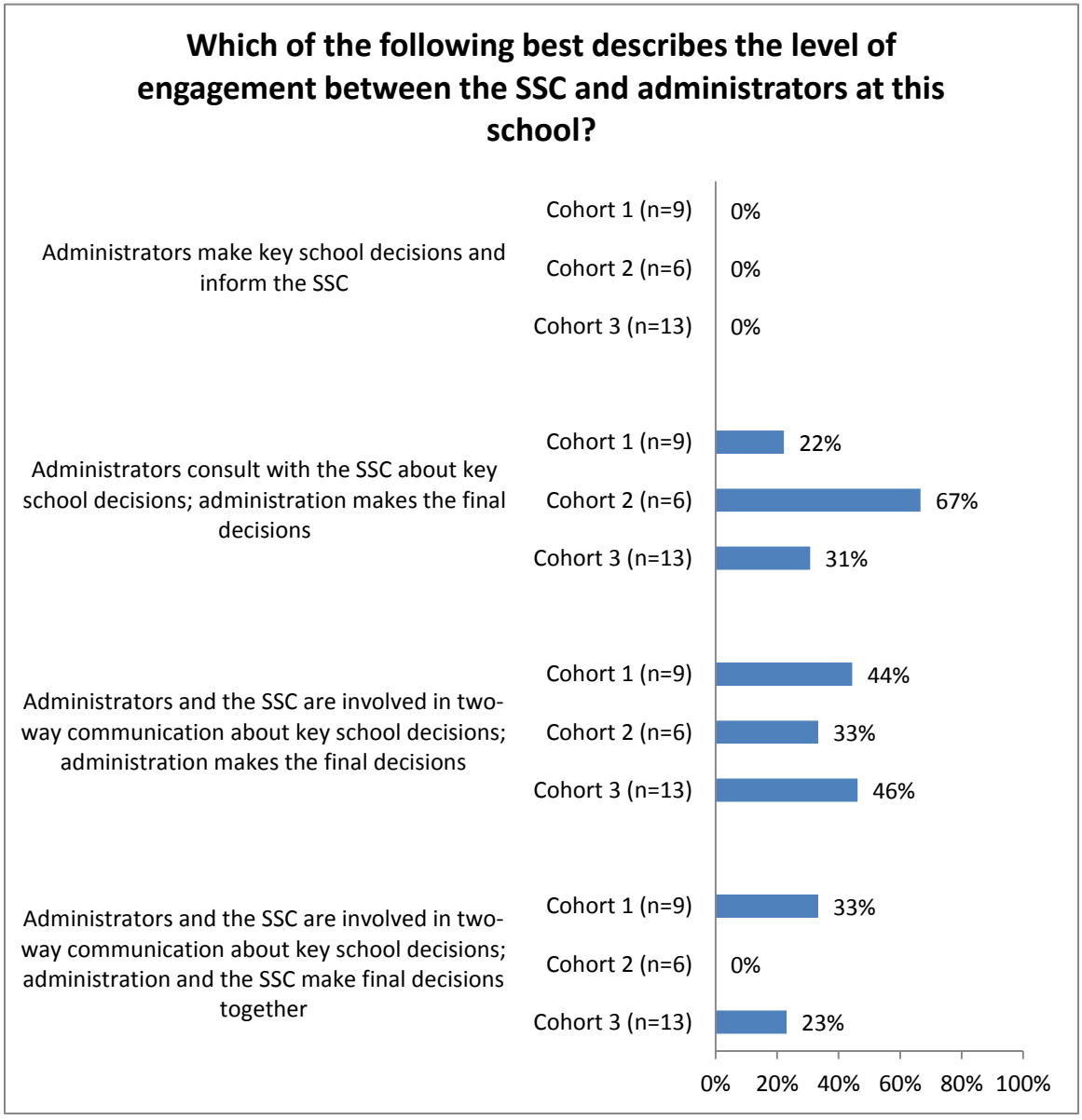
STAKEHOLDER ENGAGEMENT

Administrator to SSC Engagement

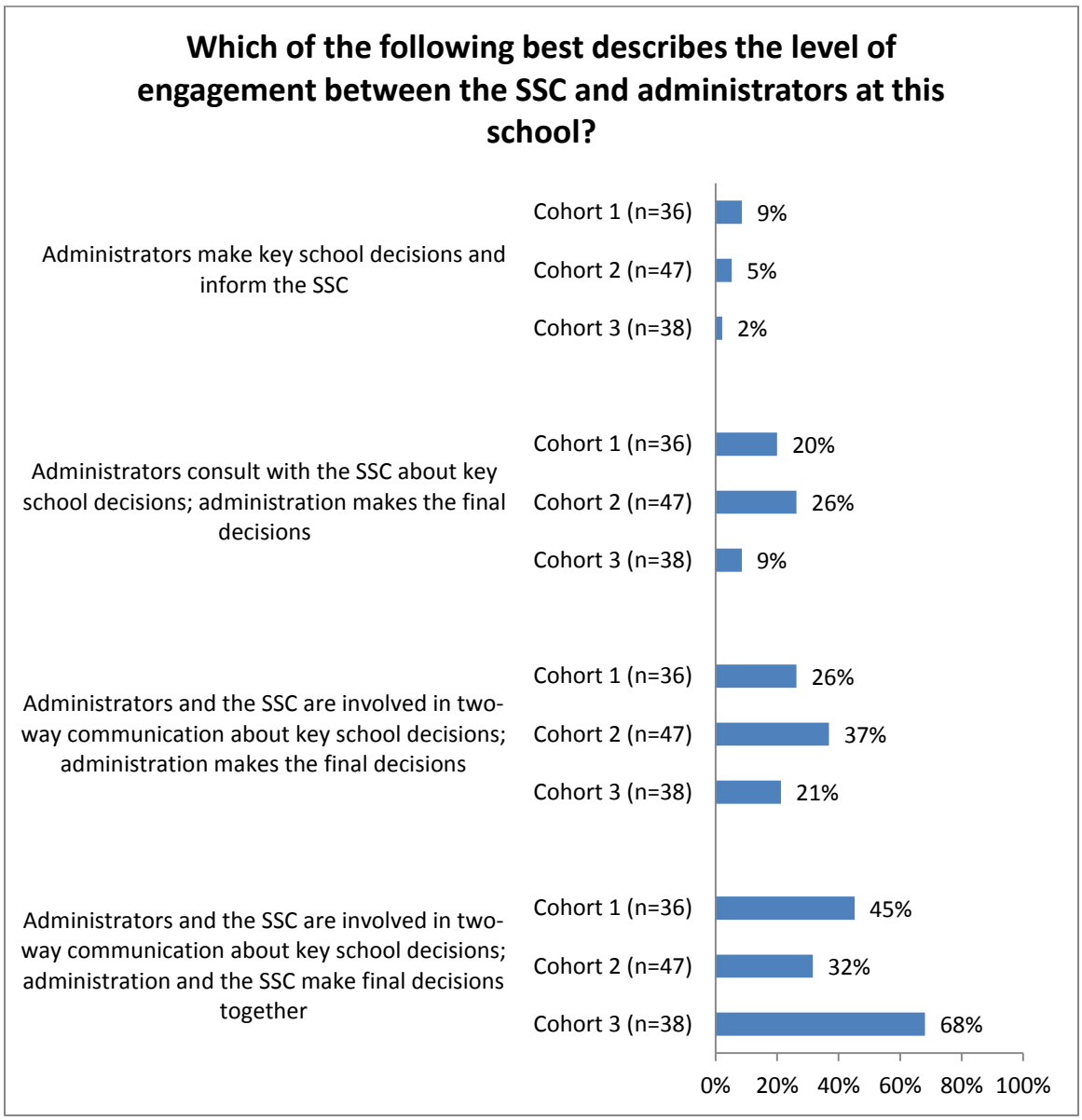
Level of Engagement

Which of the following [presented in the exhibit below] best describes the level of engagement between the SSC and administrators at this school?

Principals (2011–12)

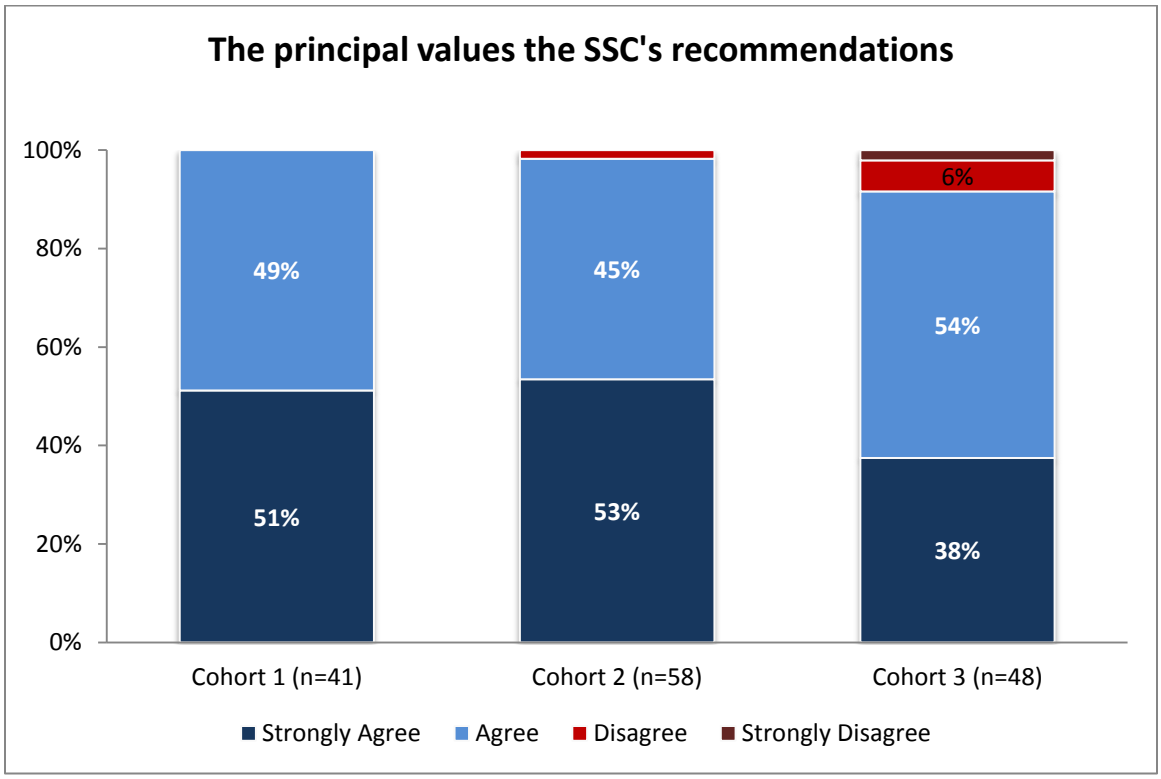


SSC (2011–12)


Which of the following best describes the level of engagement between the SSC and administrators at this school?
Administrators make key school decisions and inform the SSC
Cohort 1 (n=36) 9%
Cohort 2 (n=47) 5%
Cohort 3 (n=38) 2%
Administrators consult with the SSC about key school decisions; administration makes the final decisions
Cohort 1 (n=36) 20%
Cohort 2 (n=47) 26%
Cohort 3 (n=38) 9%
Administrators and the SSC are involved in two-way communication about key school decisions; administration makes the final decisions
Cohort 1 (n=36) 26%
Cohort 2 (n=47) 37%
Cohort 3 (n=38) 21%
Administrators and the SSC are involved in two-way communication about key school decisions; administration and the SSC make final decisions together
Cohort 1 (n=36) 45%
Cohort 2 (n=47) 32%
Cohort 3 (n=38) 68%
0% 20% 40% 60% 80% 100%

SSC Perception of Value

Please indicate how much you agree or disagree with the following statement: The principal values the SSC's recommendations.

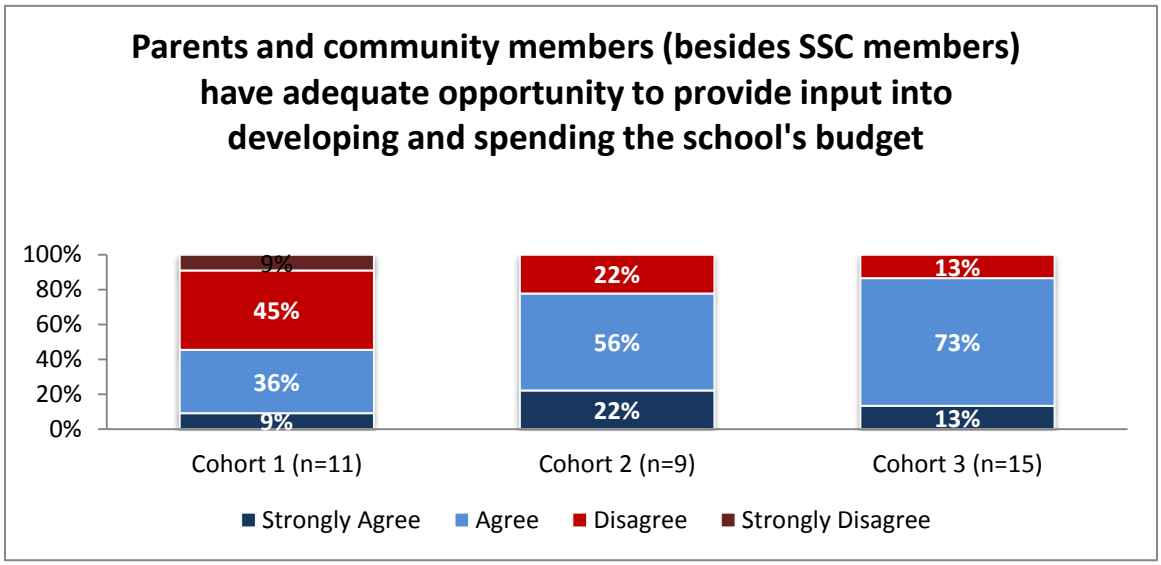


Stakeholder Input on Budget Spending and Development

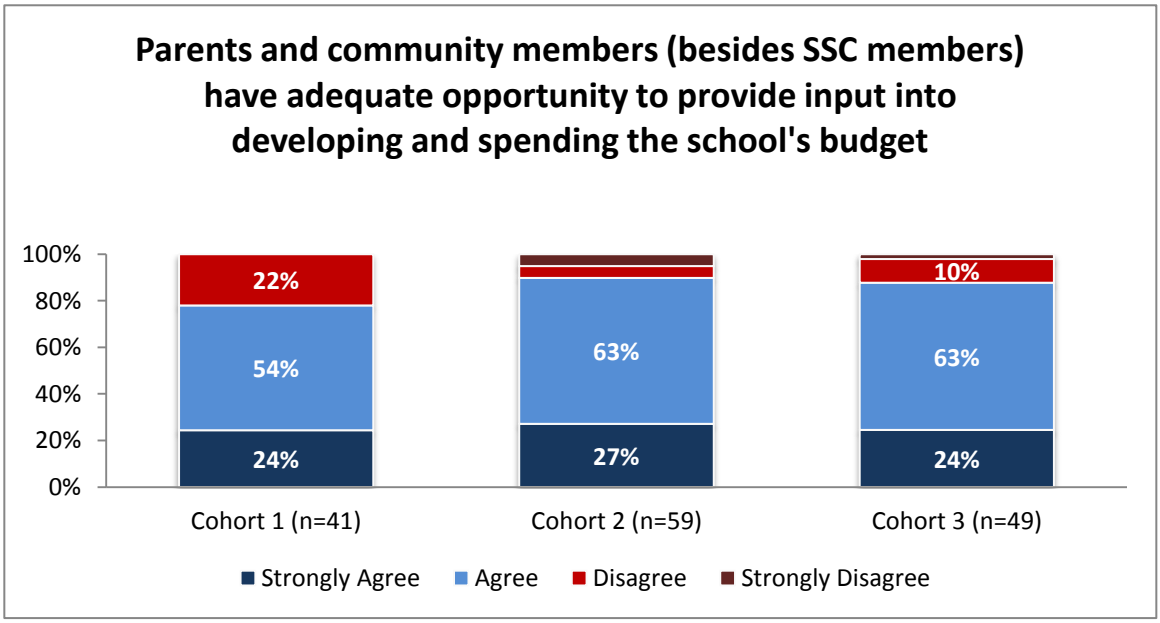
Parent and Community Input

Please indicate how much you agree or disagree with the following statement: Parents and community members (besides SSC members) have adequate opportunity to provide input into developing and spending the school's budget.

Principals (2011–12)



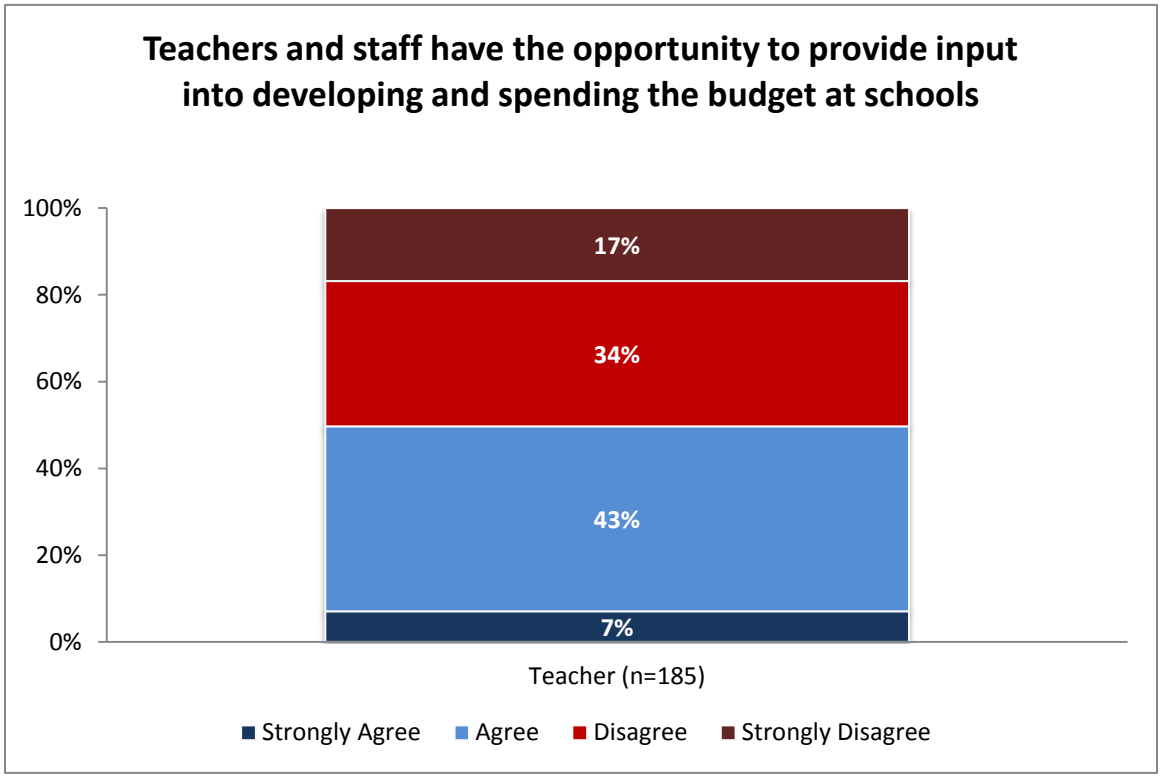
SSC (2011–12)



Teacher and Staff Input

Please indicate how much you agree or disagree with the following statement: Teachers and staff have the opportunity to provide input into developing and spending the budget at schools.

Teachers (2011–12)

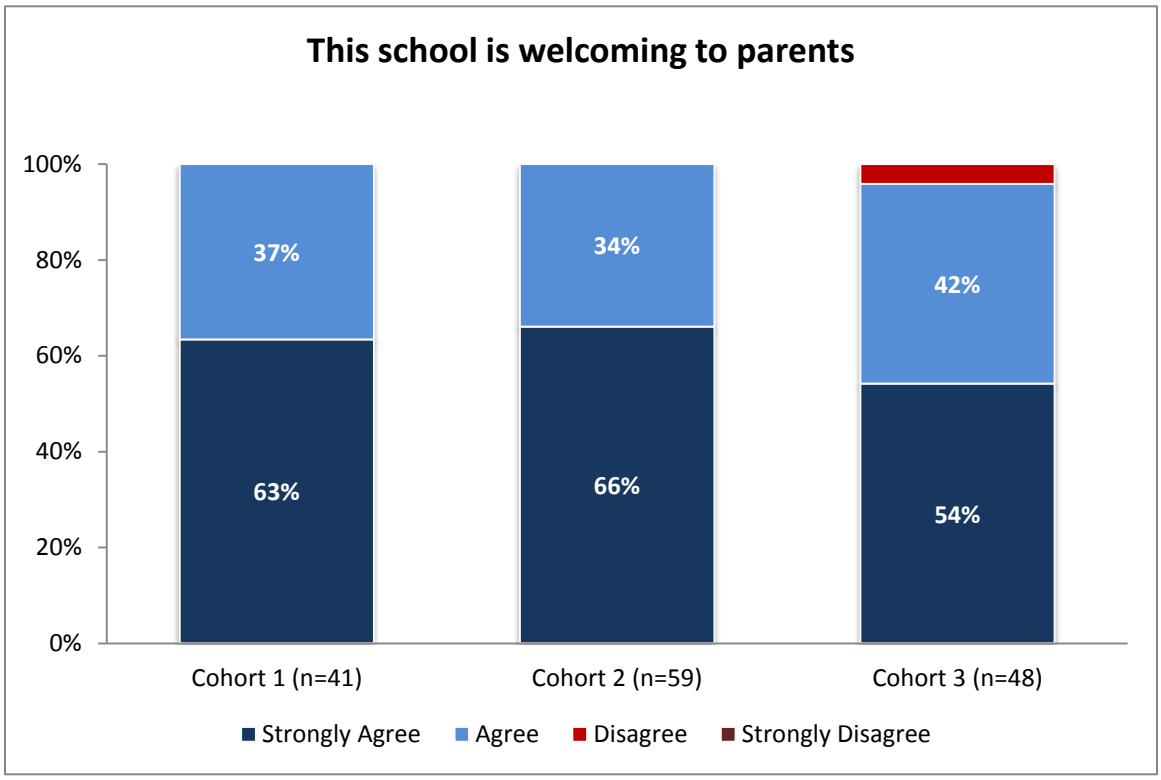


School-Community Collaboration

Regarding Parent Environment

Please indicate how much you agree or disagree with the following statement: This school is welcoming to parents.

SSC (2011–12)



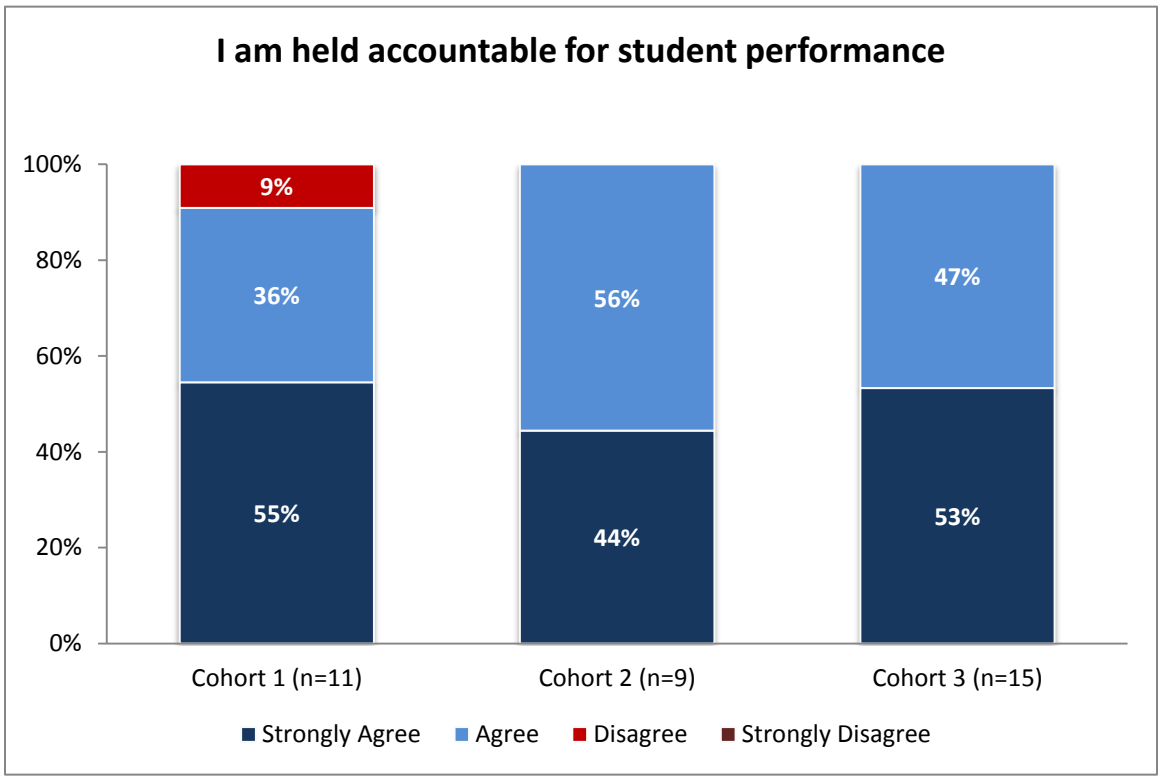
AUTONOMY AND ACCOUNTABILITY

Accountability by Subgroup

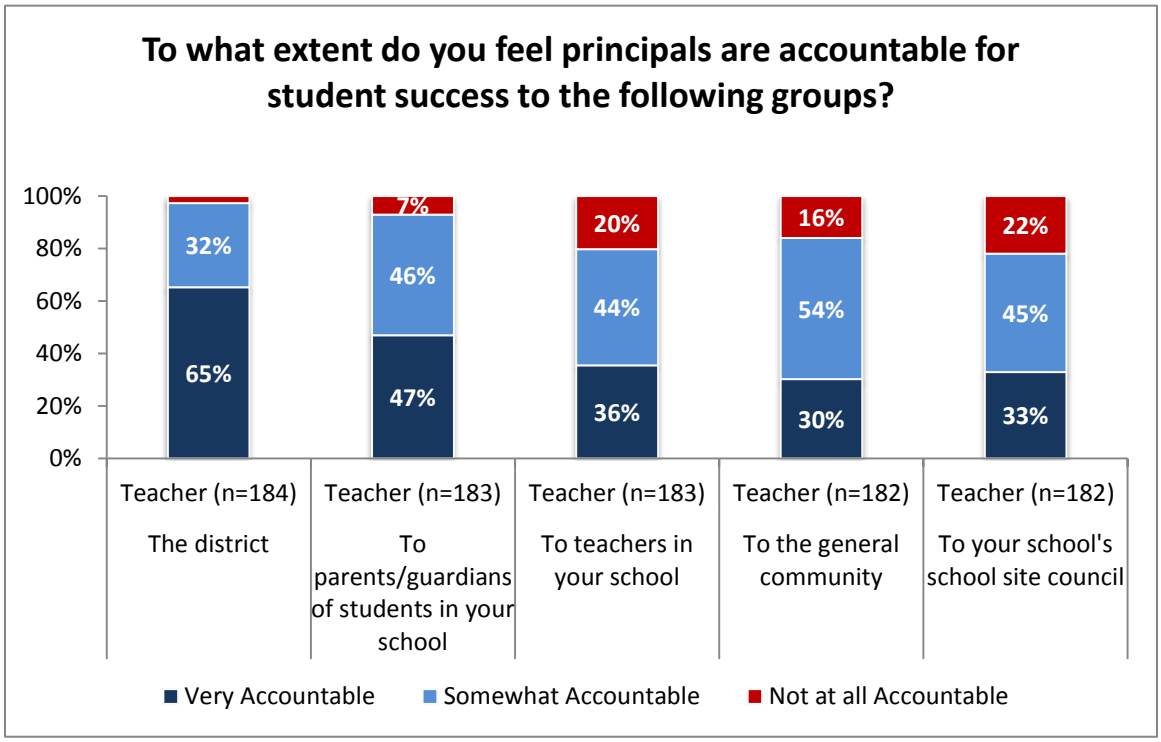
Principal Accountability for Student Performance

Please indicate how much you agree or disagree with the following statement: I am held accountable for student performance.

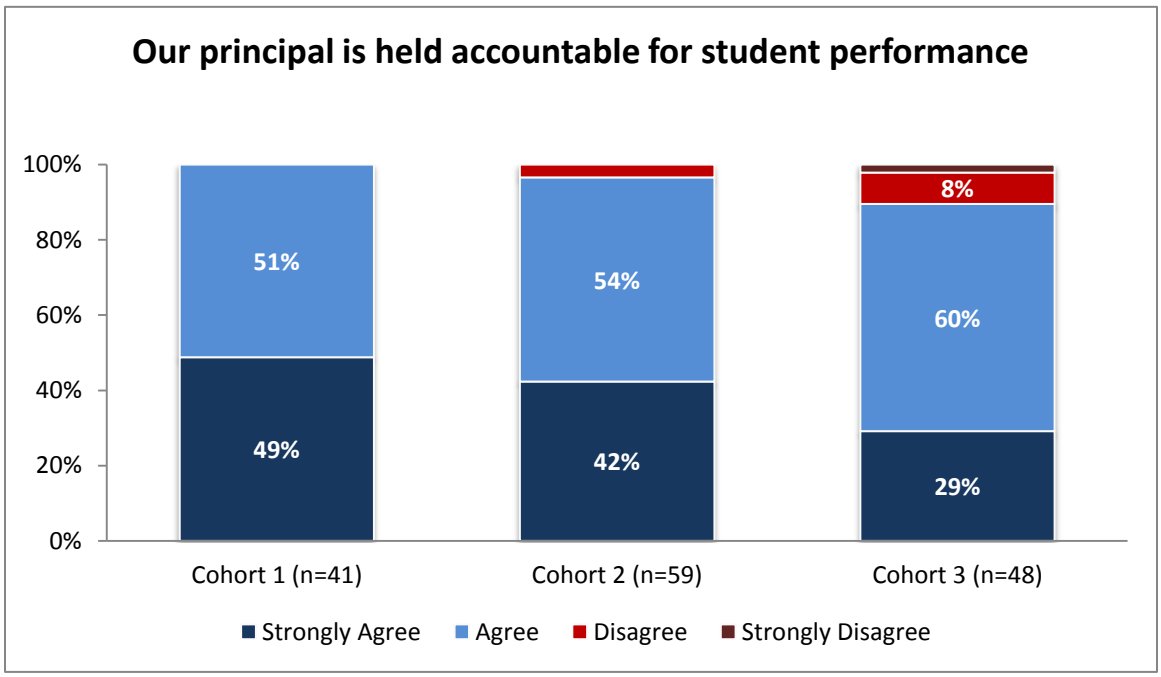
Principals (2011–12)



Teachers (2011–12)



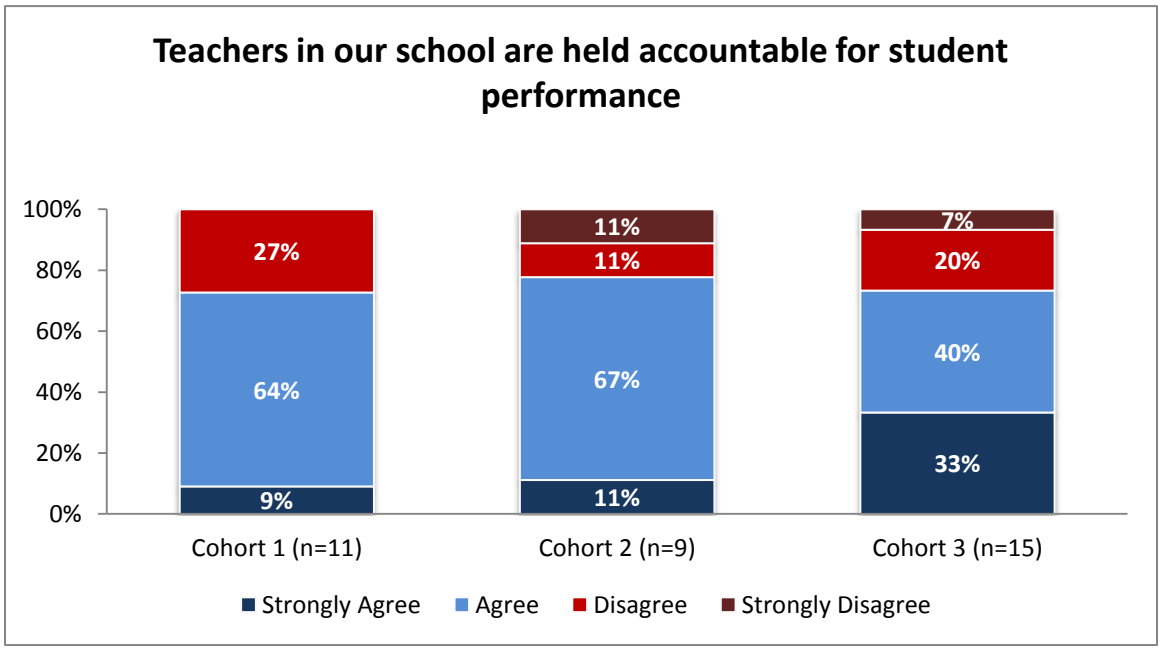
SSC (2011–12)



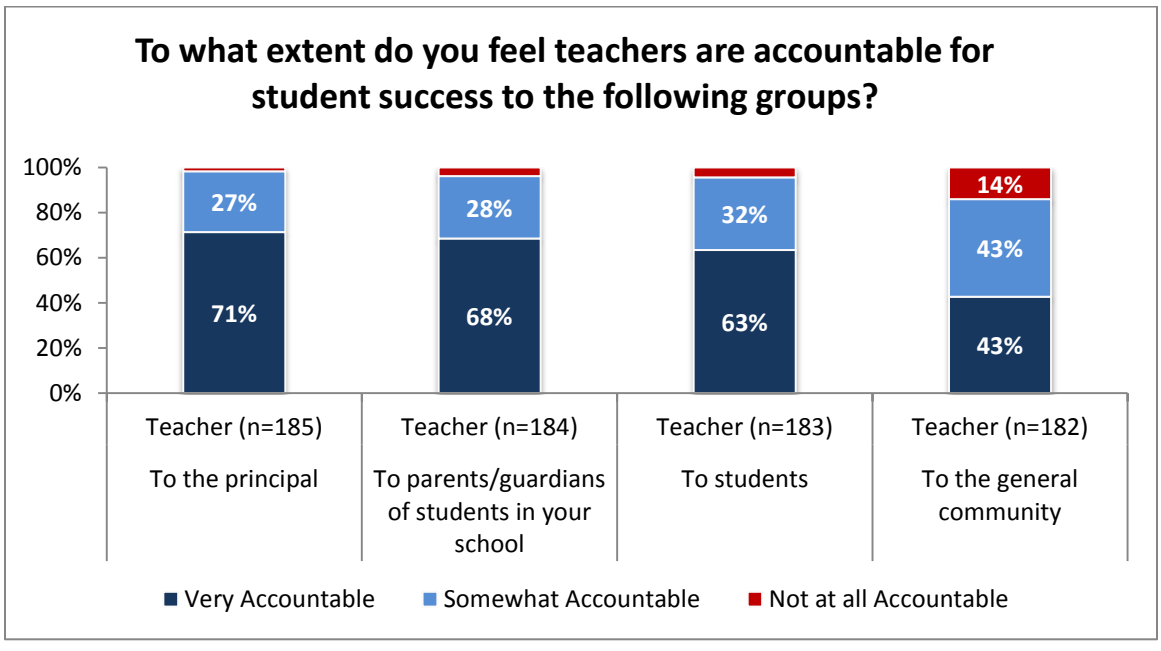
Teacher Accountability for Student Performance

Please indicate how much you agree or disagree with the following statement: Teachers in our school are held accountable for student performance.

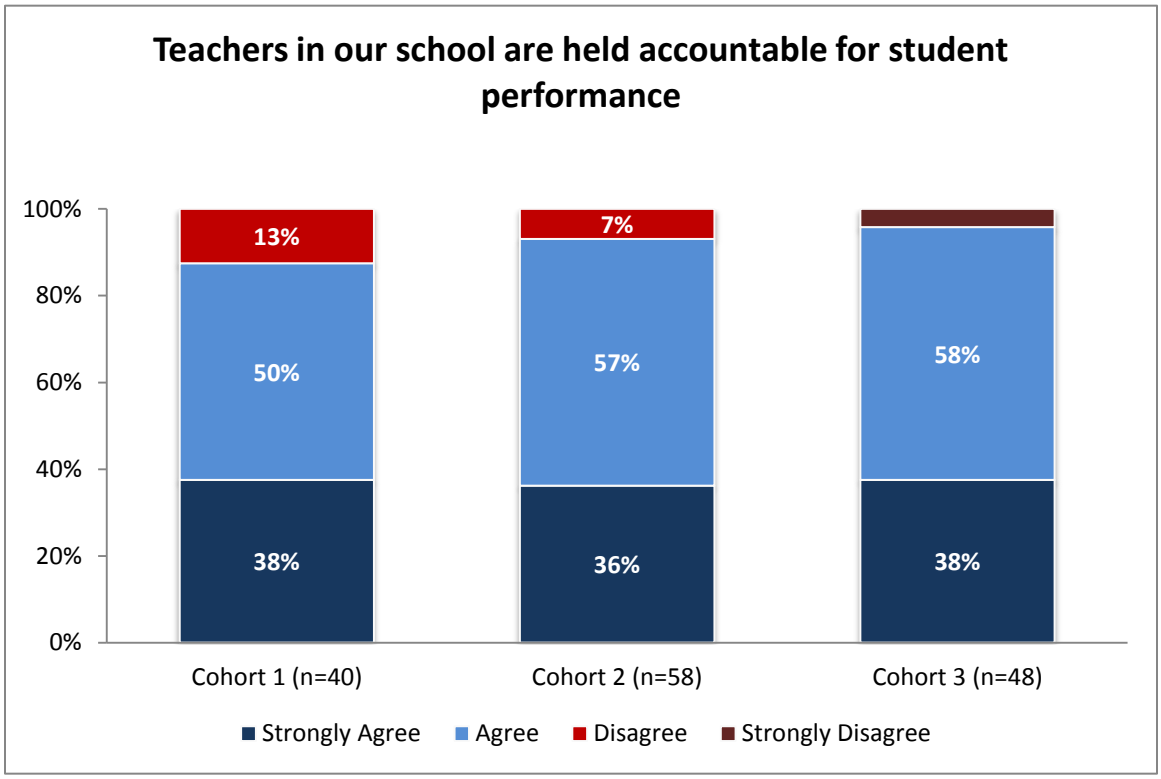
Principals (2011–12)



Teachers (2011–12)



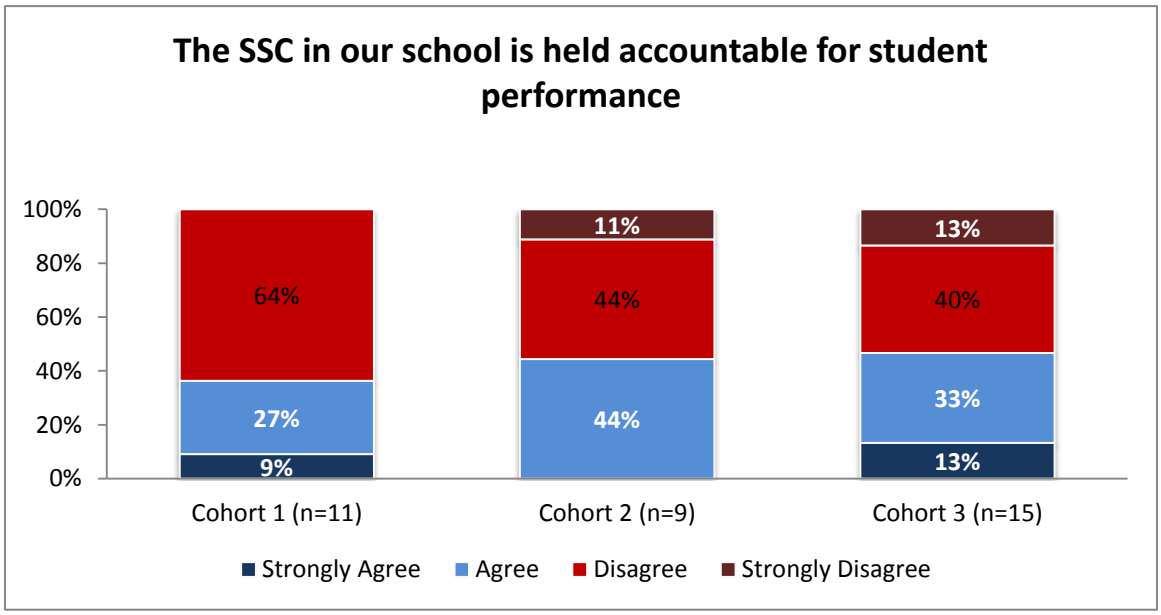
SSC (2011–12)


Teachers in our school are held accountable for student performance
100%
80%
60%
40%
20%
0%
13%
50%
38%
7%
57%
36%
58%
38%
Cohort 1 (n=40)
Cohort 2 (n=58)
Cohort 3 (n=48)
Strongly Agree
Agree
Disagree
Strongly Disagree

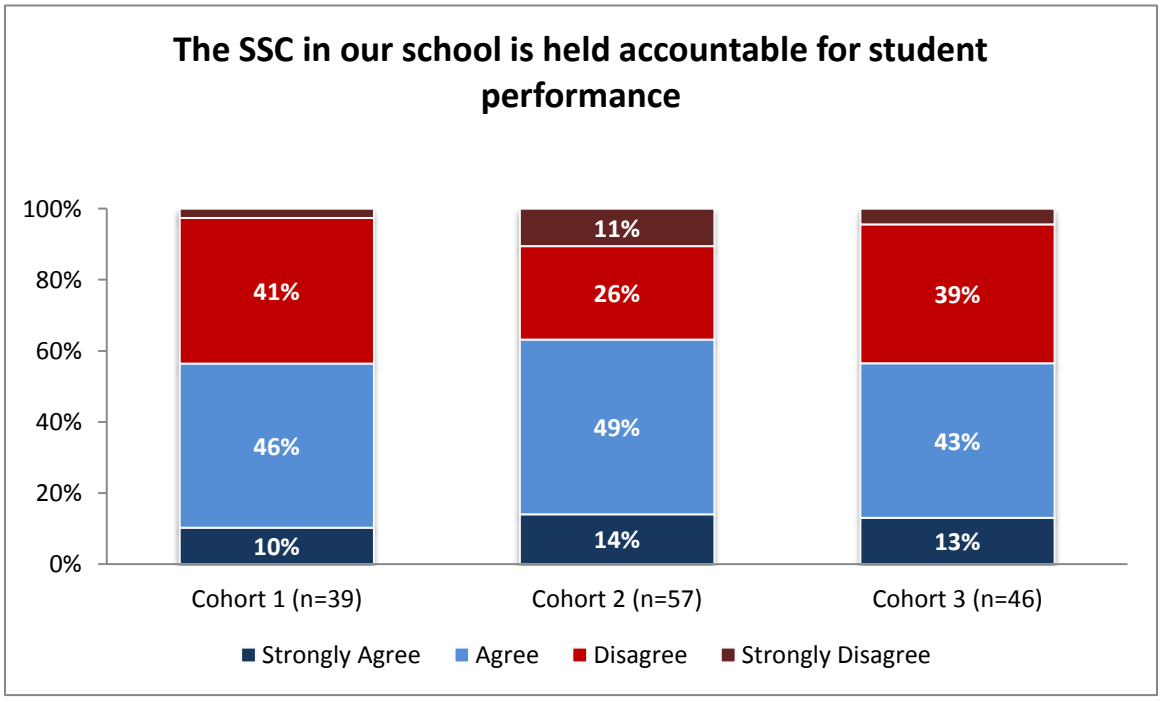
SSC Accountability for Student Performance

Please indicate how much you agree or disagree with the following statement: The SSC in our school is held accountable for student performance.

Principals (2011–12)



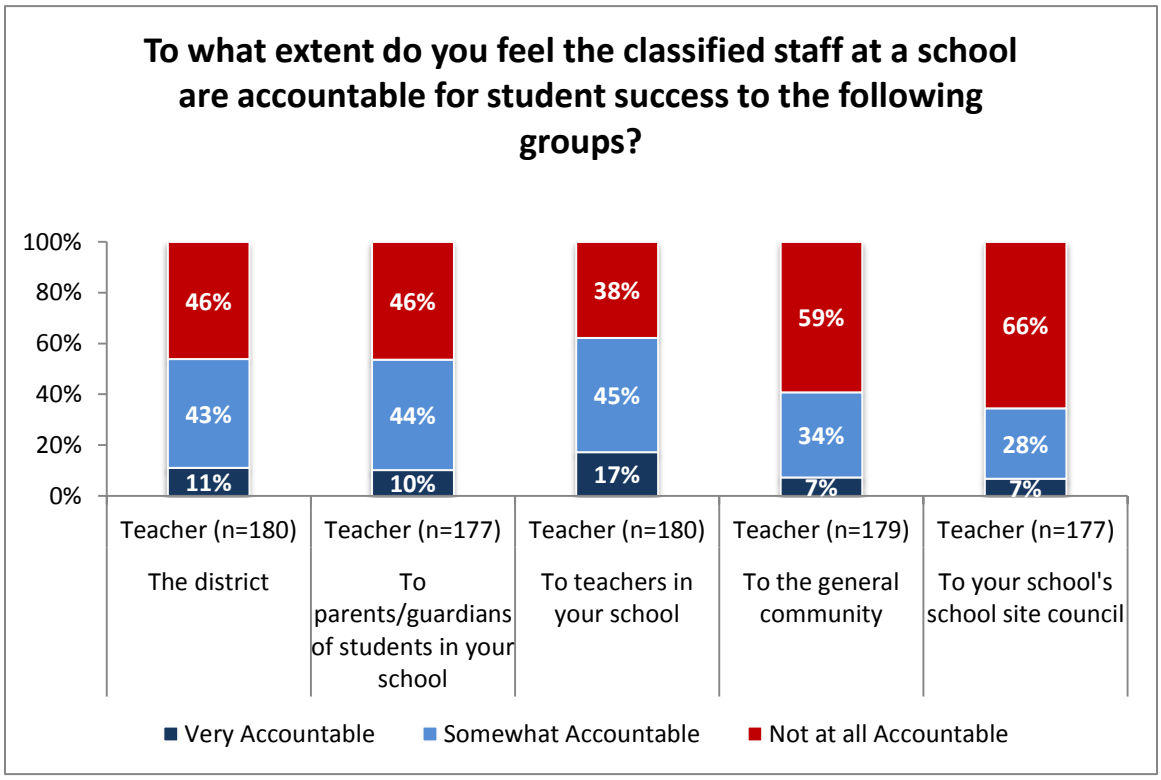
SSC (2011–12)



Classified Staff Accountability for Student Performance

To what extent do you feel the classified staff at a school are accountable for student success to the following groups?

Teachers (2011–12)

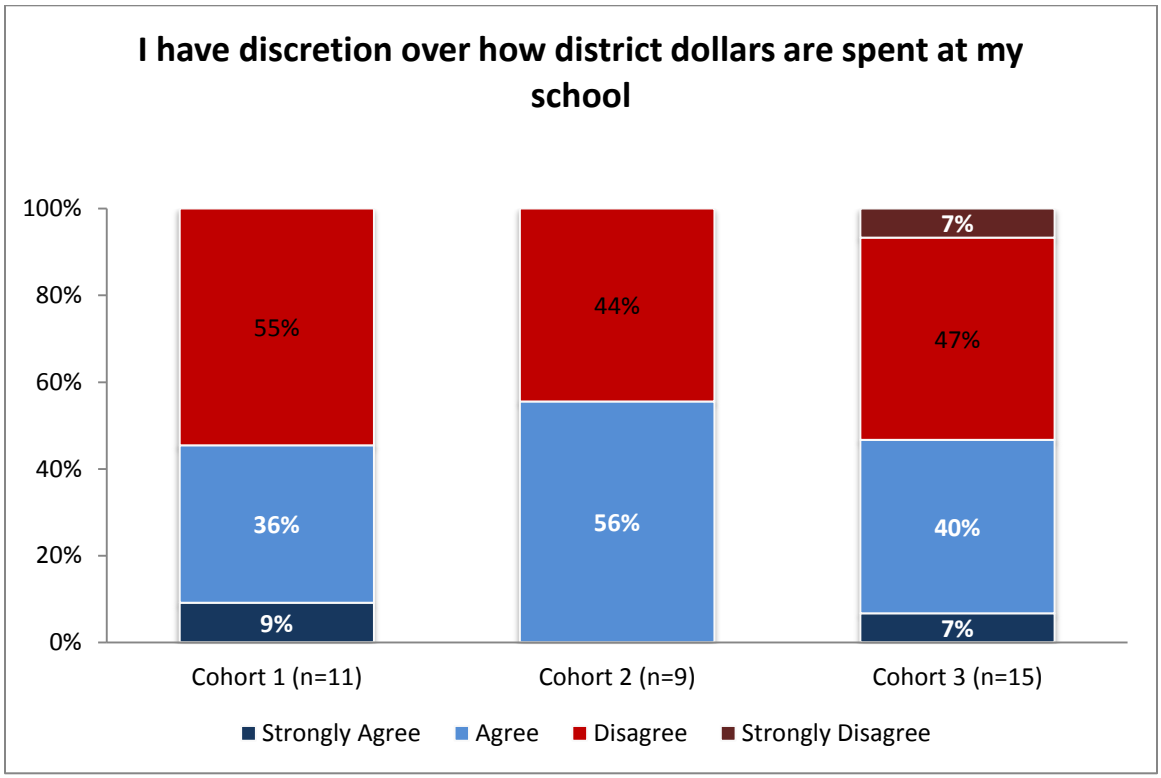


Resource Allocation

Control Over District Funds

Please indicate how much you agree or disagree with the following statement: I have discretion over how district dollars are spent at my school.

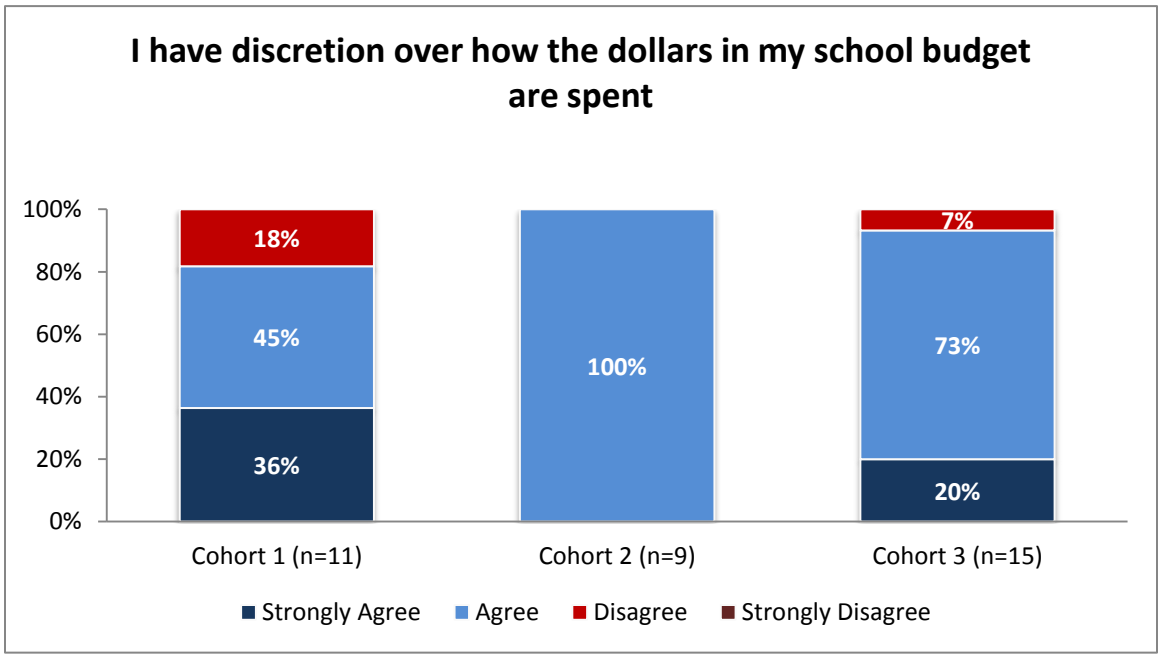
Principals (2011–12)



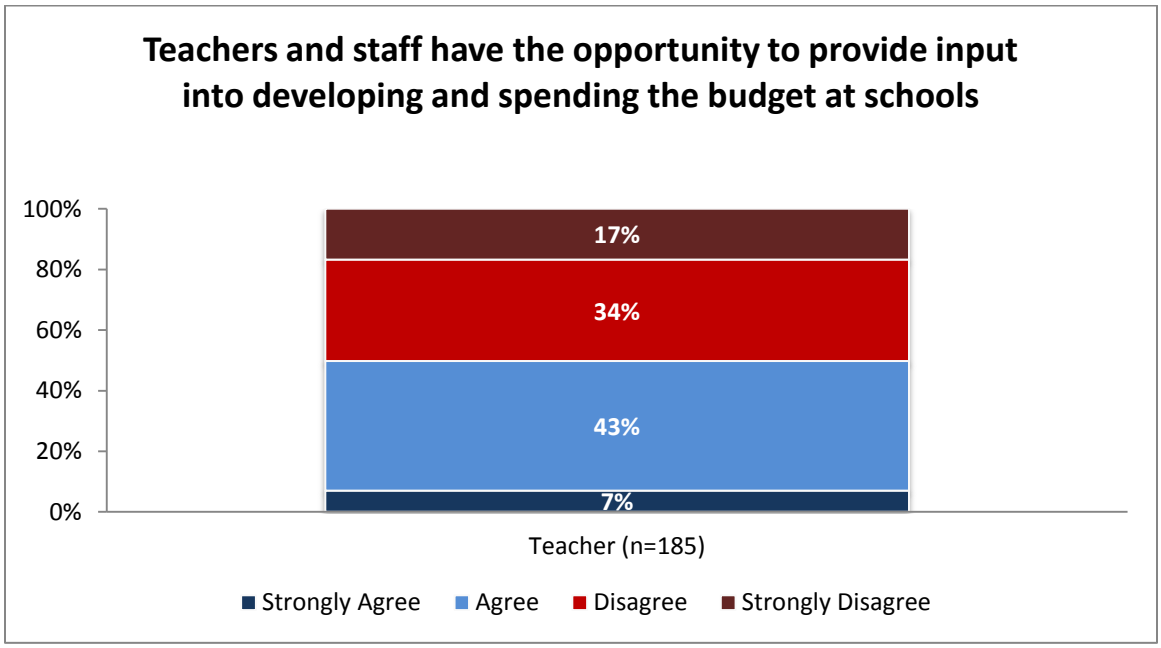
Control Over School Funds

Please indicate how much you agree or disagree with the following statement: I have discretion over how dollars in my school budget are spent.

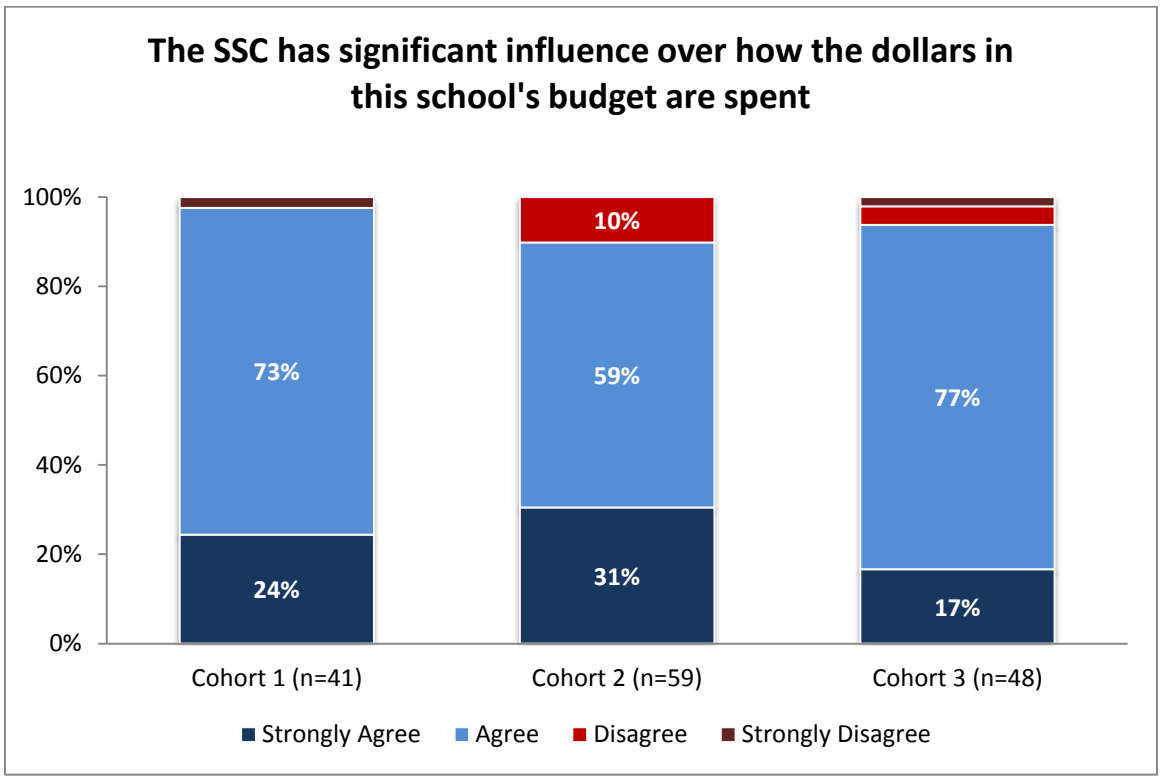
Principals (2011–12)



Teachers (2011–12)



SSC (2011–12)

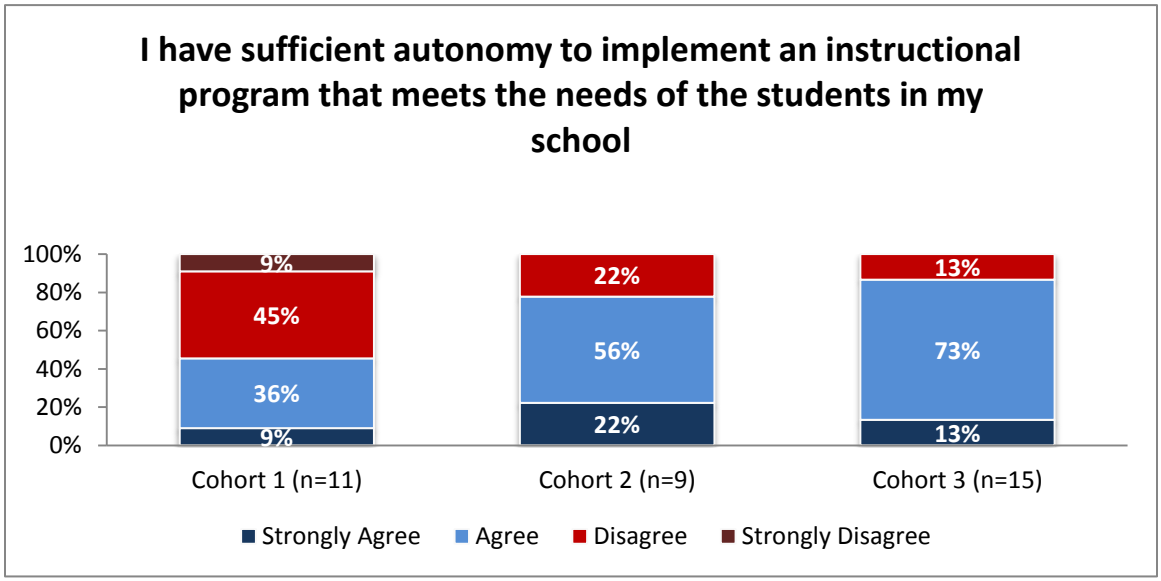

The SSC has significant influence over how the dollars in this school's budget are spent
100%
80%
60%
40%
20%
0%
73%
24%
10%
59%
31%
77%
17%
Cohort 1 (n=41)
Cohort 2 (n=59)
Cohort 3 (n=48)
Strongly Agree
Agree
Disagree
Strongly Disagree

Instruction

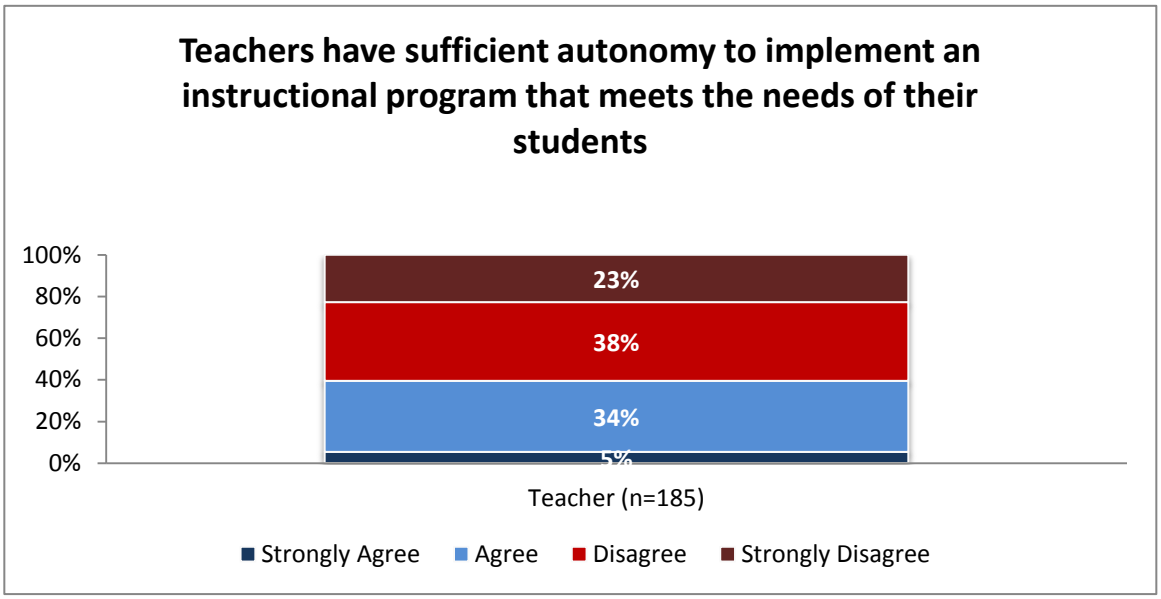
Instructional Program

Please indicate how much you agree or disagree with the following statement: I have sufficient autonomy to implement an instructional program that meets the needs of the students in my school.

Principals (2011–12)



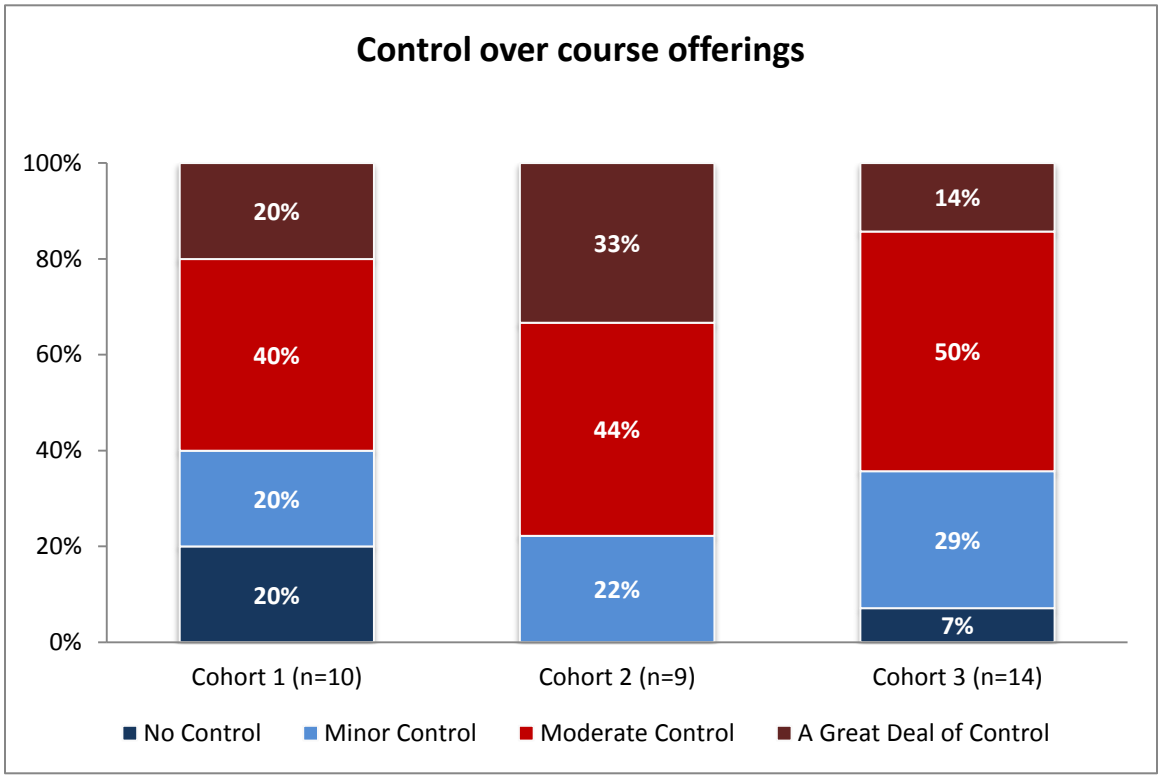
Teachers (2011–12)



Course Offerings

How much control do you feel you have over course offerings in your school this year?

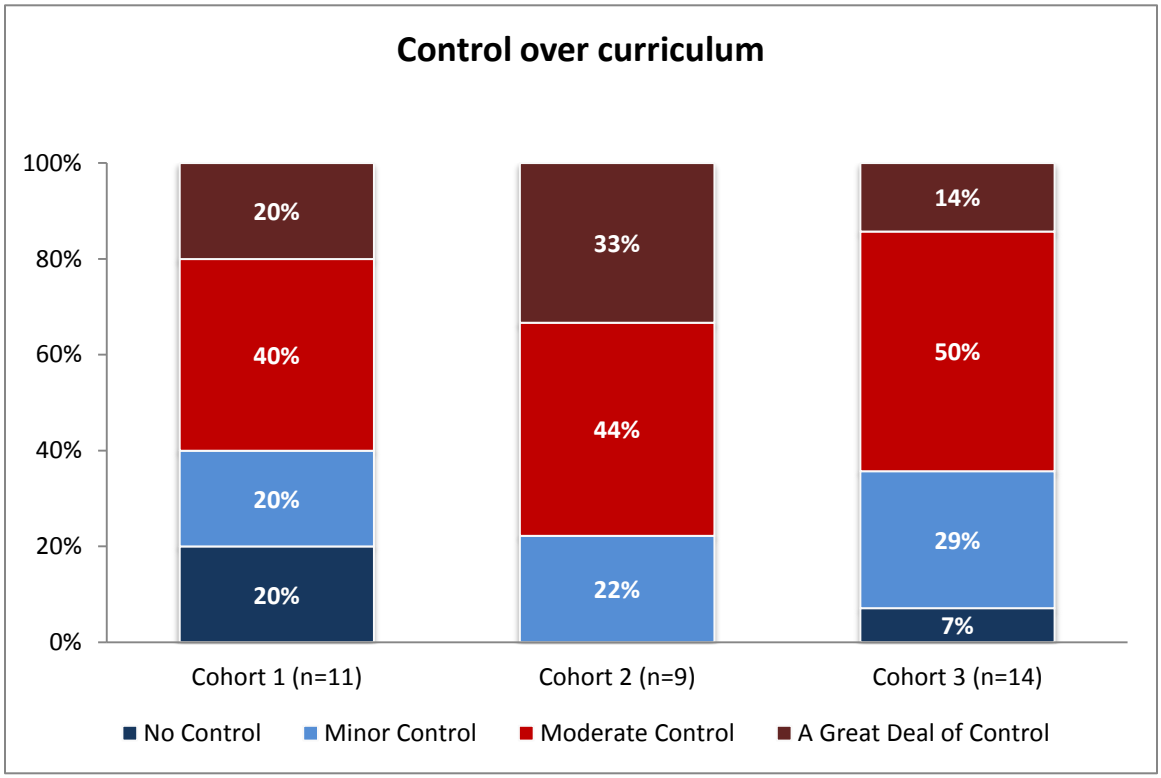
Principals (2011–12)



Curriculum

How much control do you feel you have over the curriculum in your school this year?

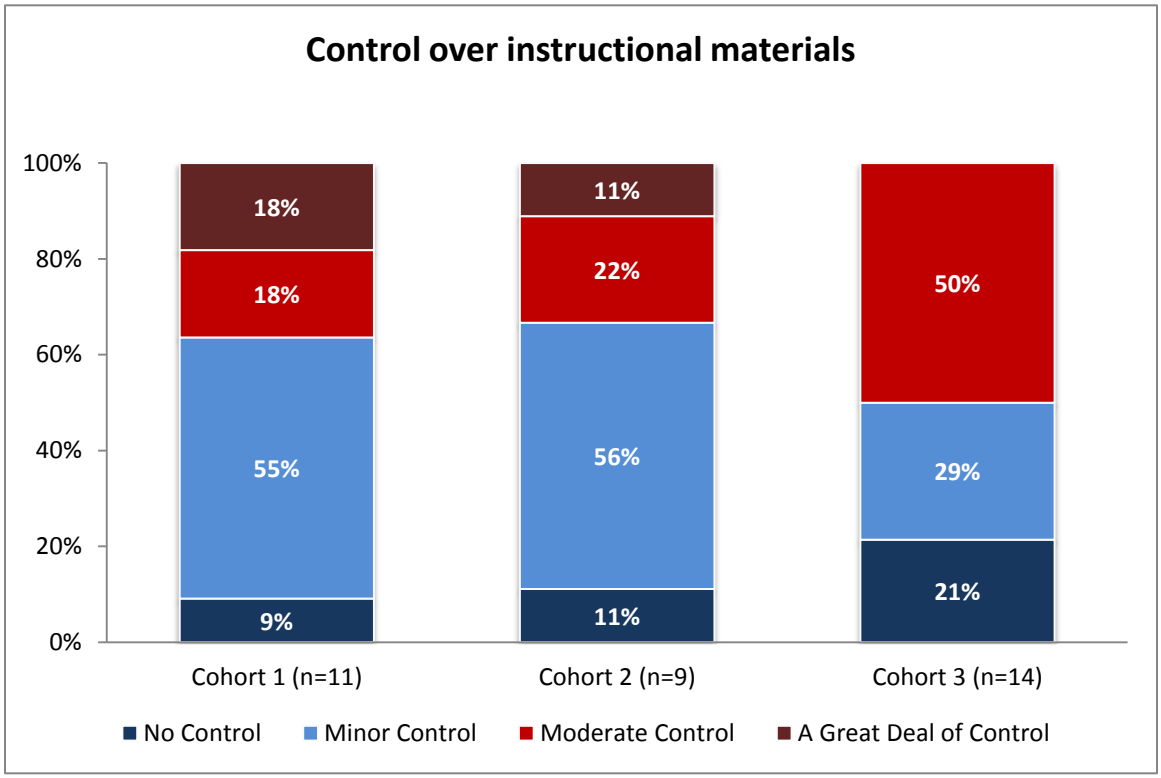
Principals (2011–12)



Instructional Materials

How much control do you feel you have over instructional materials in your school this year?

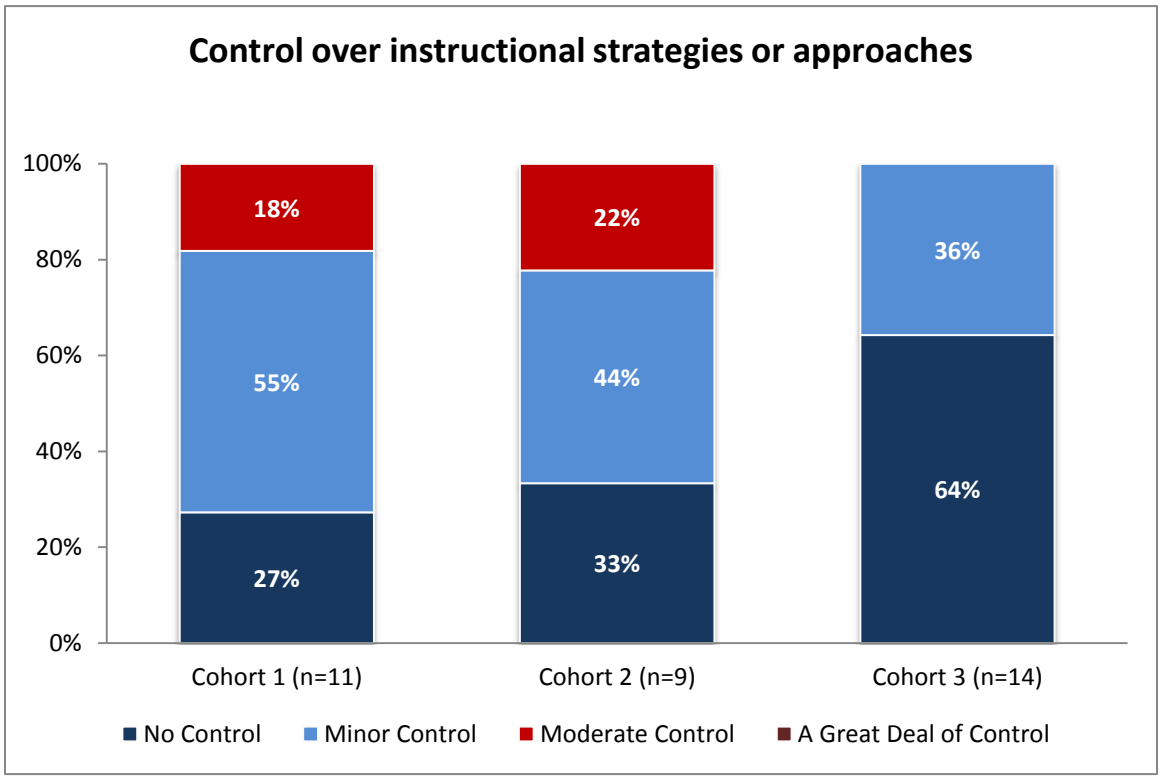
Principals (2011–12)



Instructional Strategies or Approaches

How much control do you feel you have over instructional strategies or approaches in your school this year?

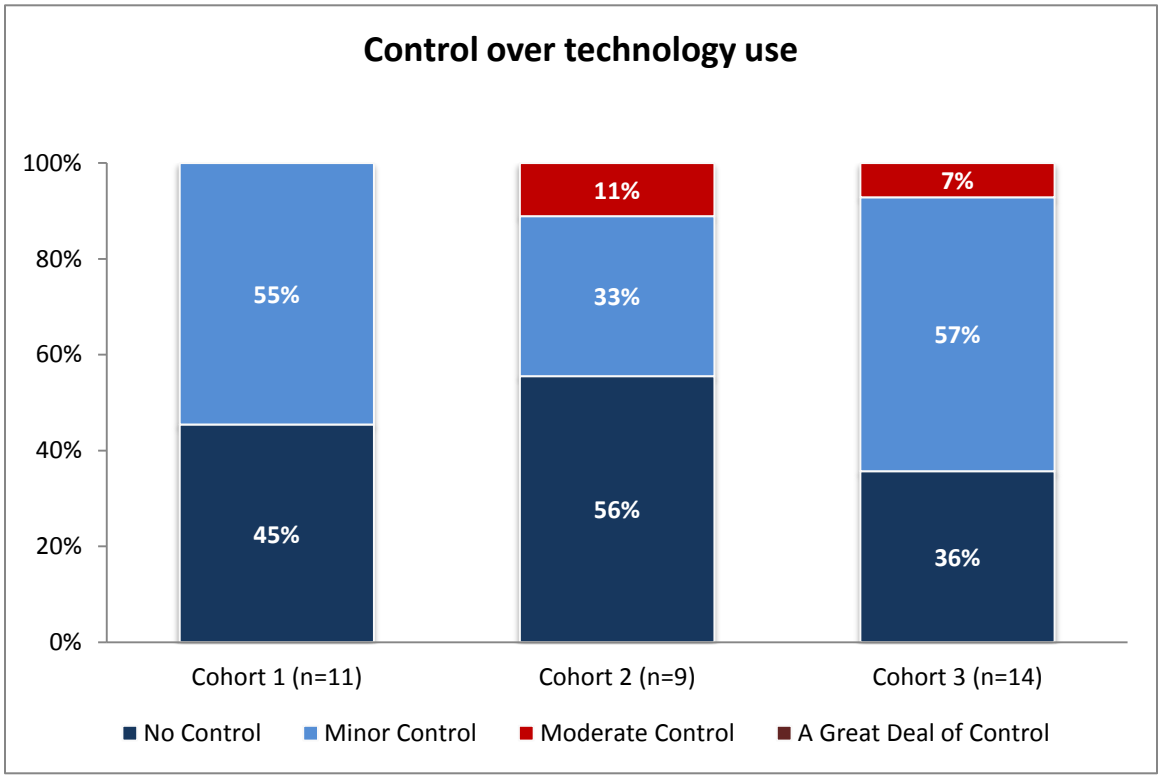
Principals (2011–12)



Technology Use

How much control do you feel you have over technology use in your school this year?

Principals (2011–12)

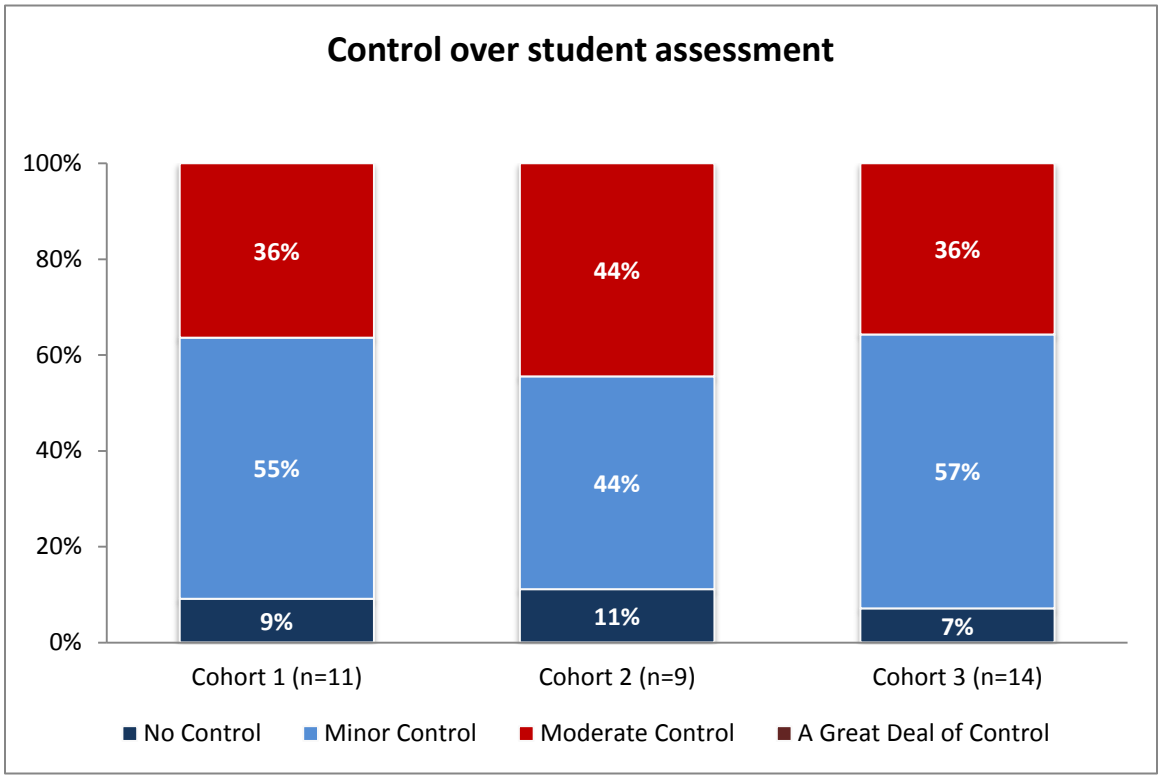


Data and Assessment

Student Assessment

How much control do you feel you have over student assessment in your school this year?

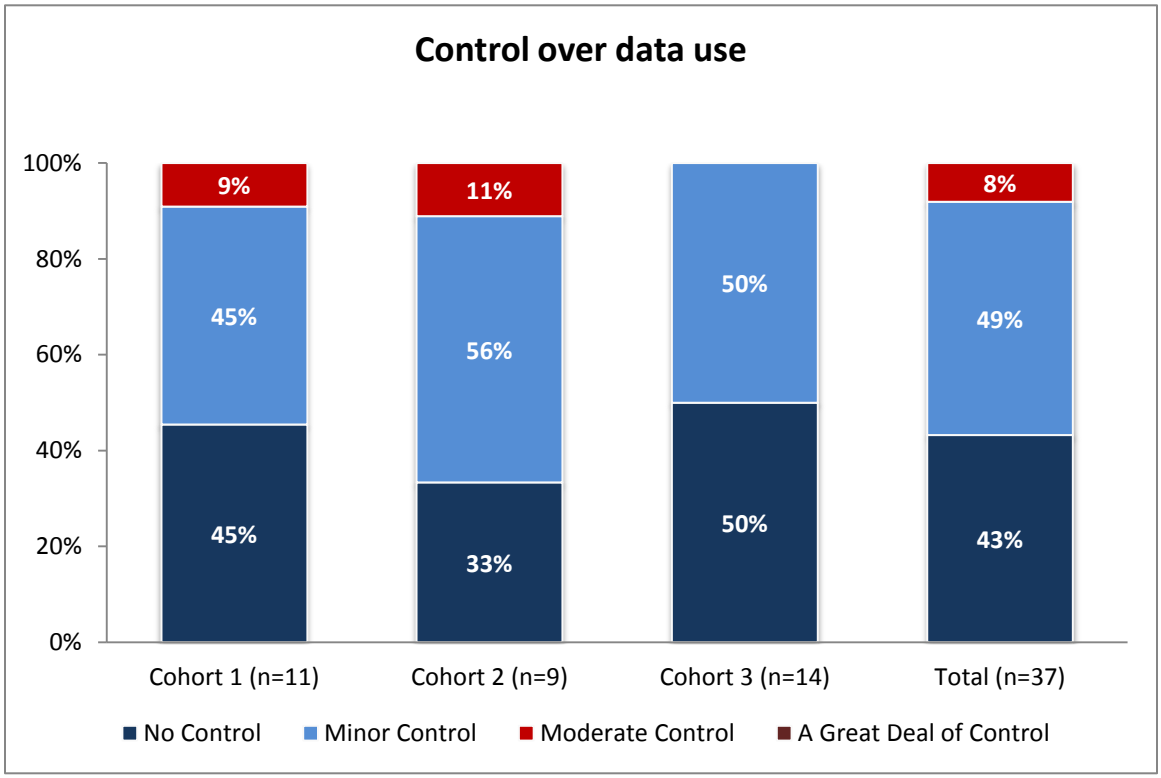
Principals (2011–12)



Data Use

How much control do you feel you have over data use in your school this year?

Principals (2011–12)

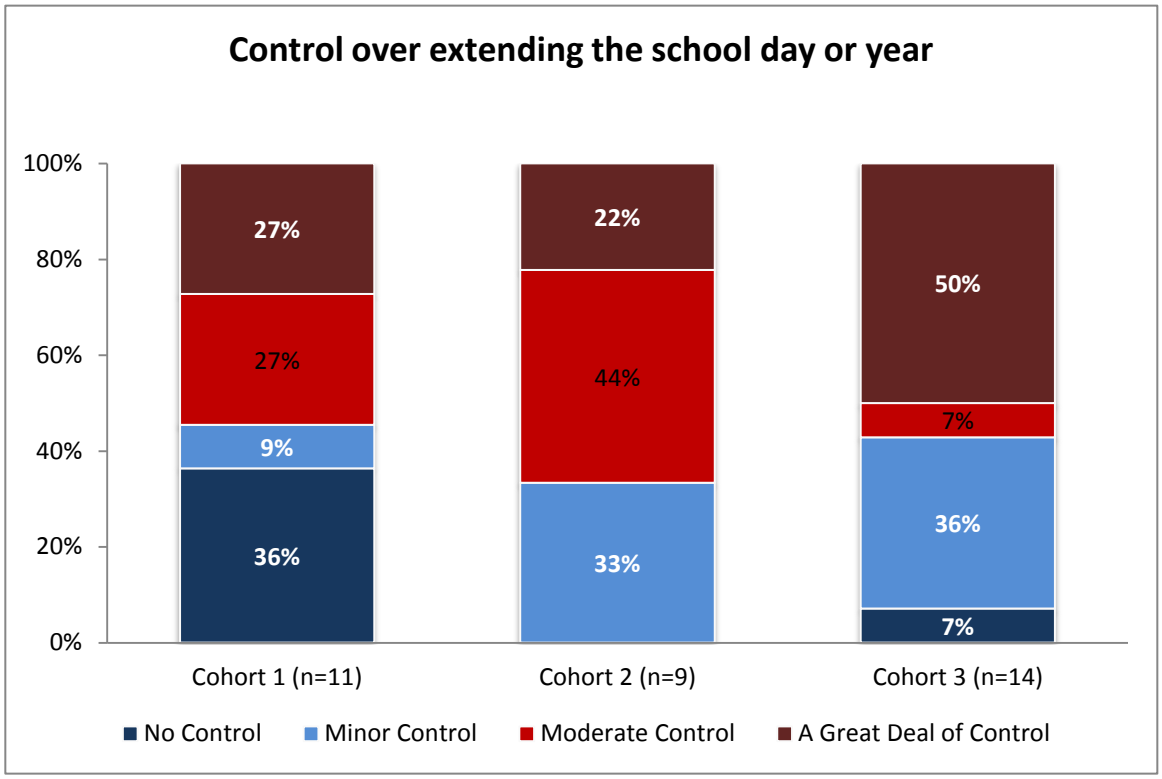


School Administration and Programs

Extending the School Day or Year

How much control do you feel you have over extending the school day or year in your school this year?

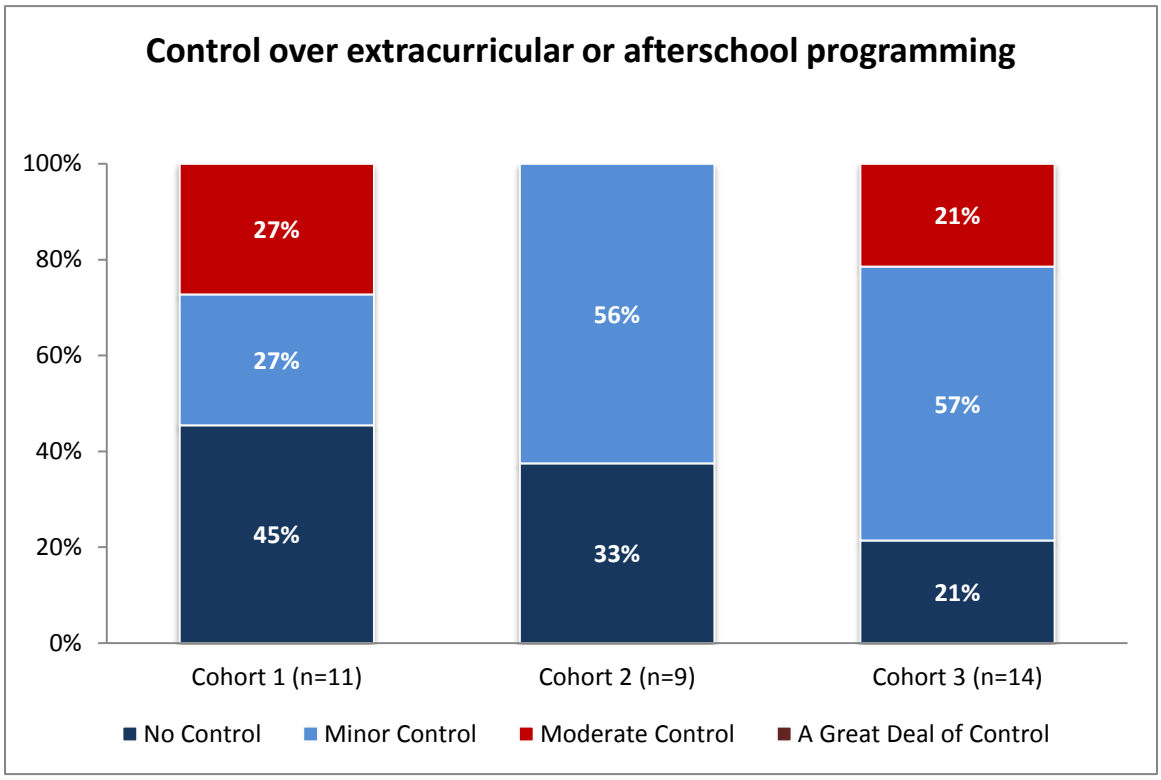
Principals (2011–12)



Extracurricular or Afterschool Programming

How much control do you feel you have over extracurricular or afterschool programming in your school this year?

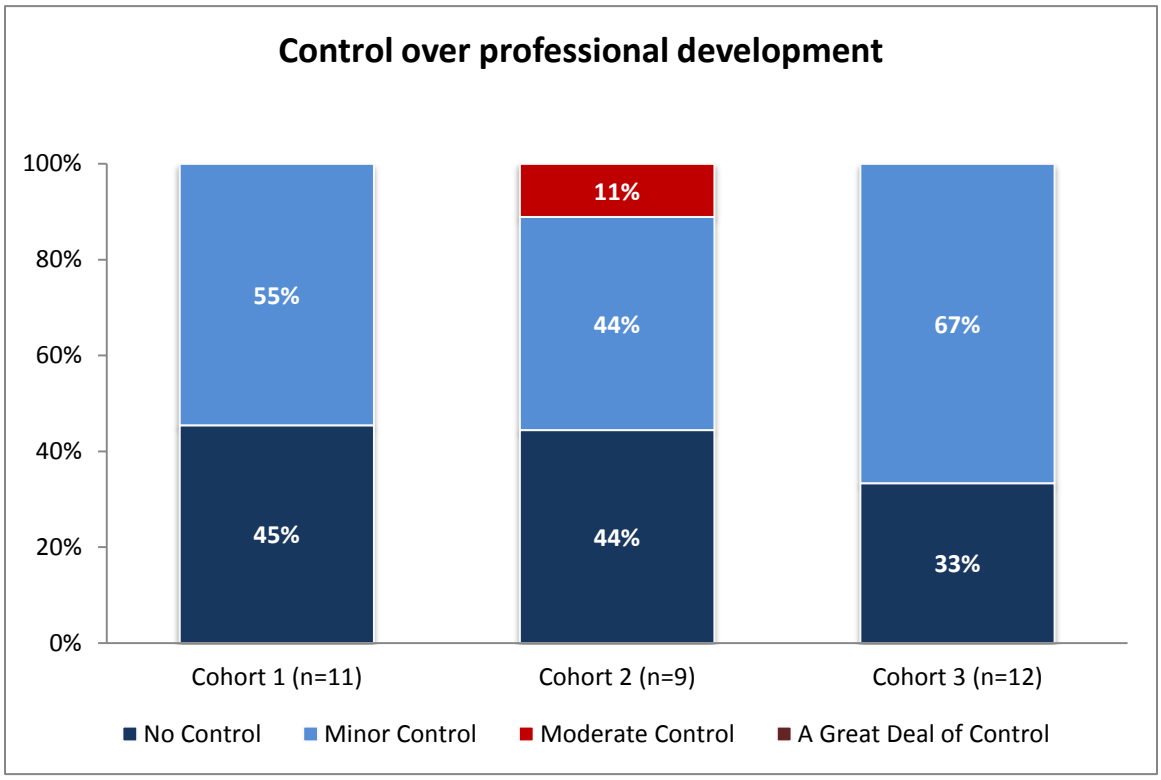
Principals (2011–12)



Professional Development

How much control do you feel you have over professional development in your school this year?

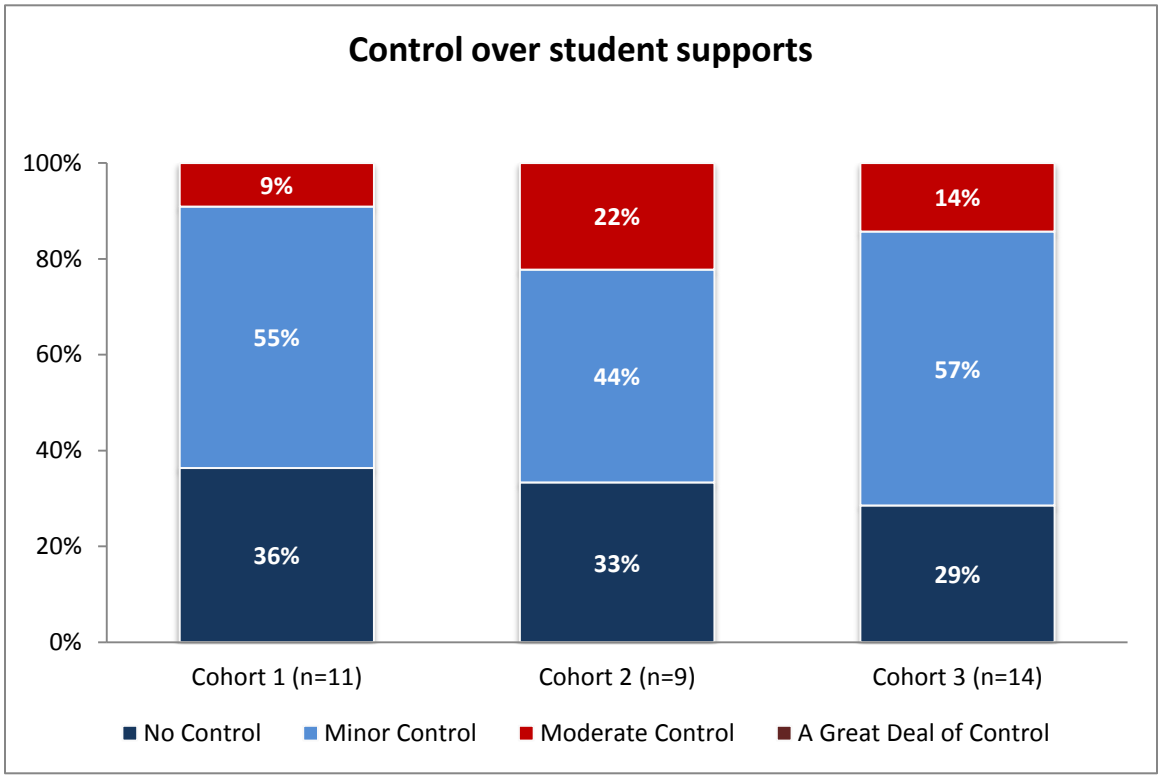
Principals (2011–12)



Student Supports

How much control do you feel you have over student supports in your school this year?

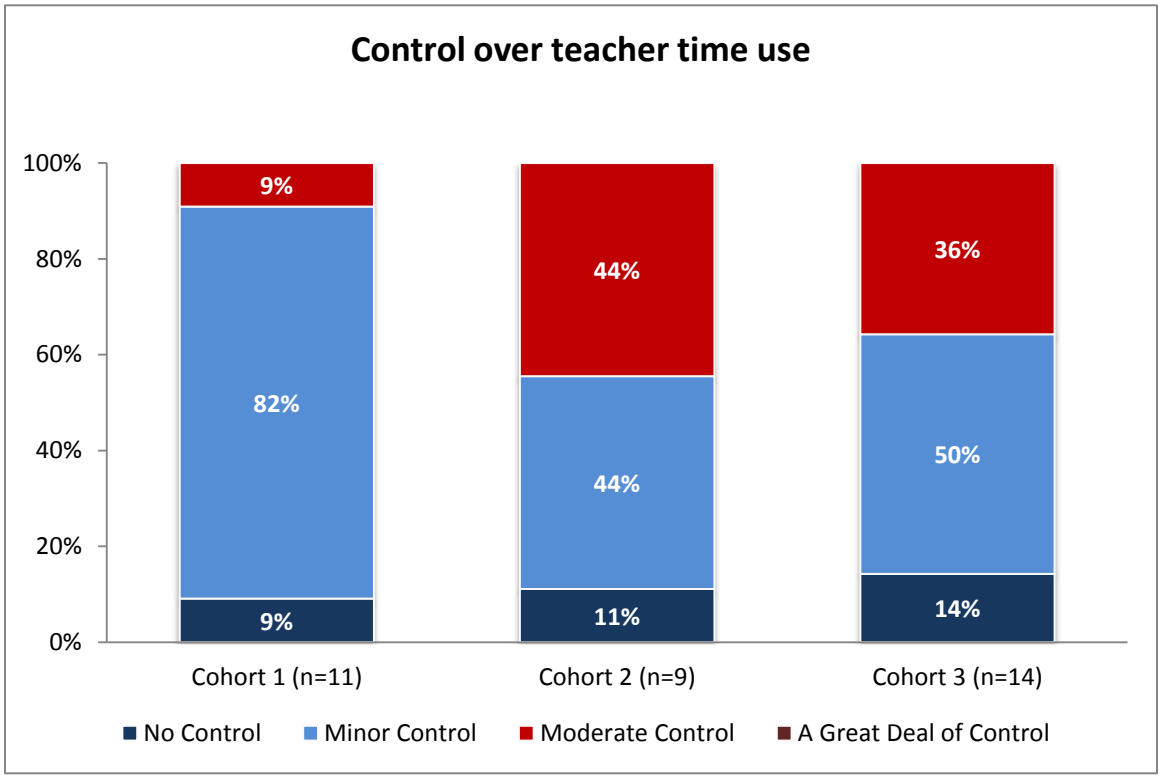
Principals (2011–12)



Teacher Time Use

How much control do you feel you have over teacher time use in your school this year?

Principals (2011–12)

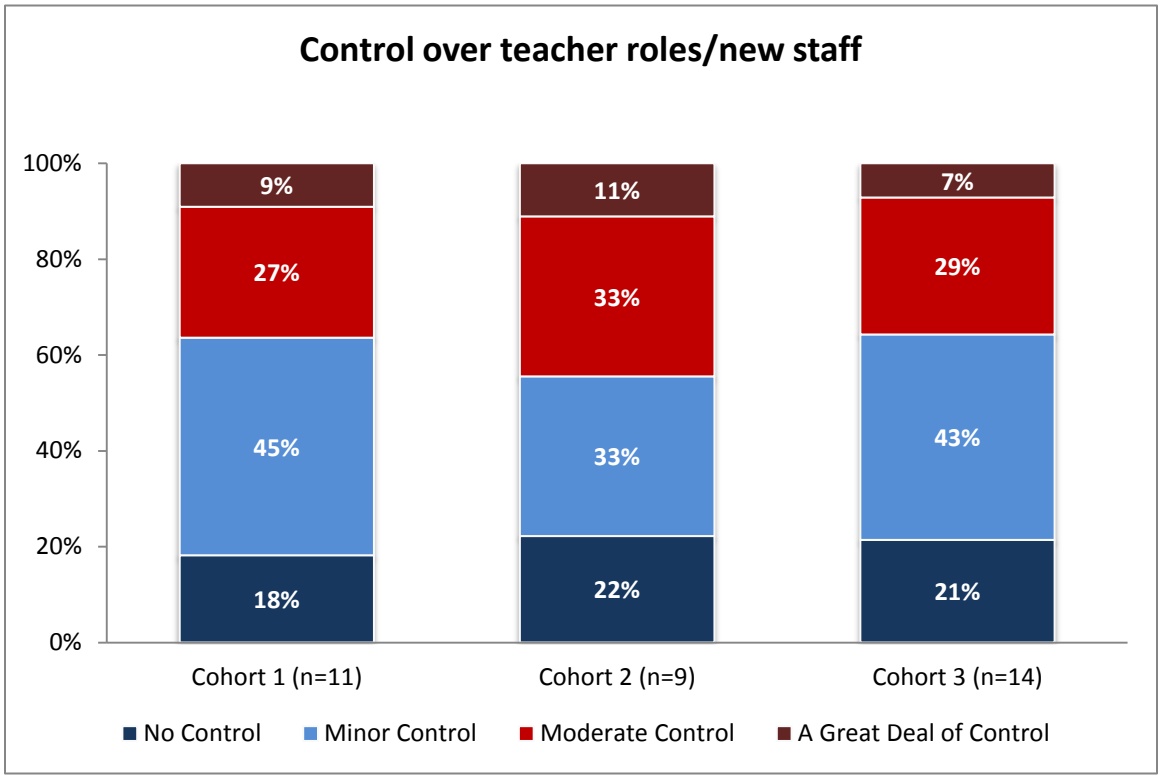


Staffing

Teacher Roles/New Staff

How much control do you feel you have over teacher roles/new staff in your school this year?

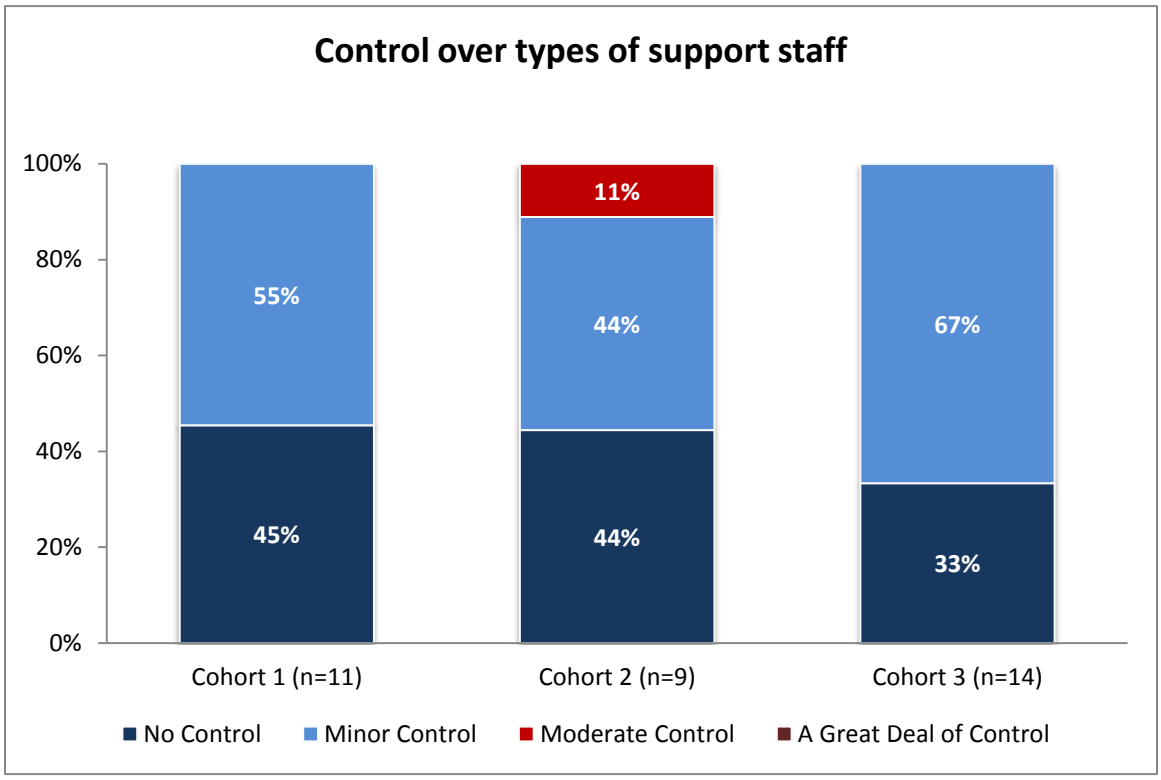
Principals (2011–12)



Support Staff

How much control do you feel you have over types of support staff (learning coaches, paraprofessionals, vice principals, etc) in your school this year?

Principals (2011–12)

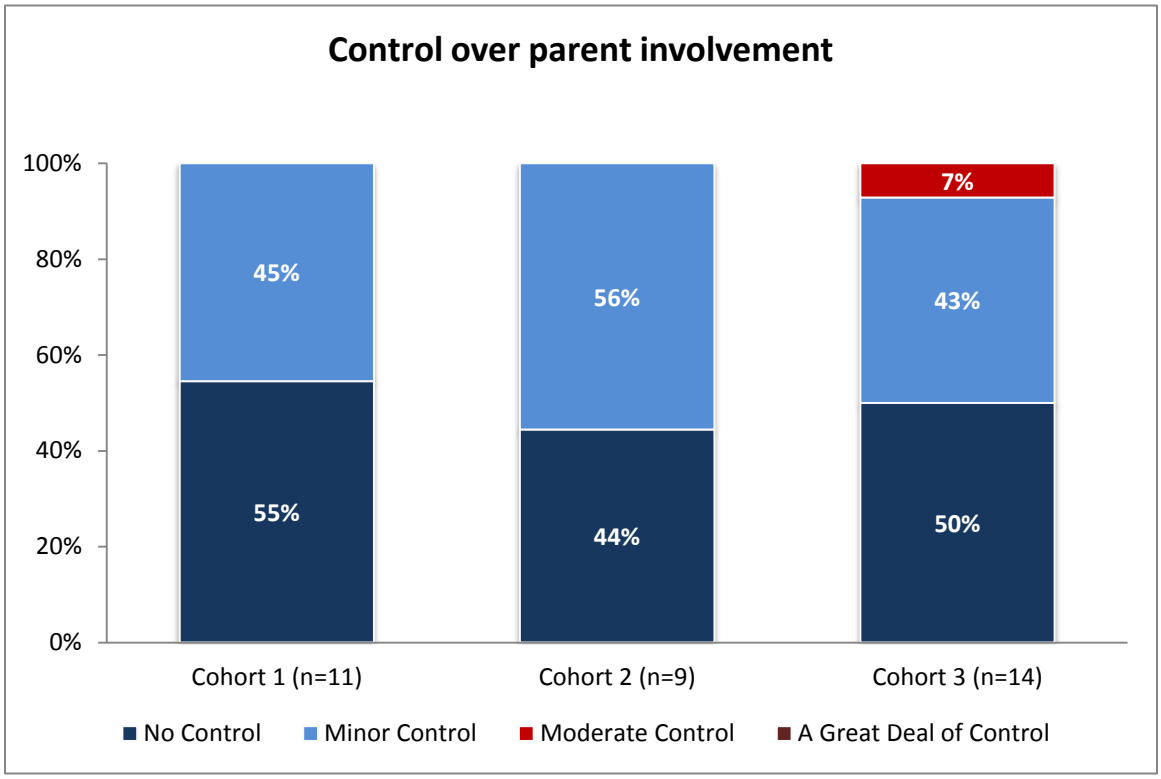


Community Involvement

Parent Involvement

How much control do you feel you have over parent involvement in your school this year?

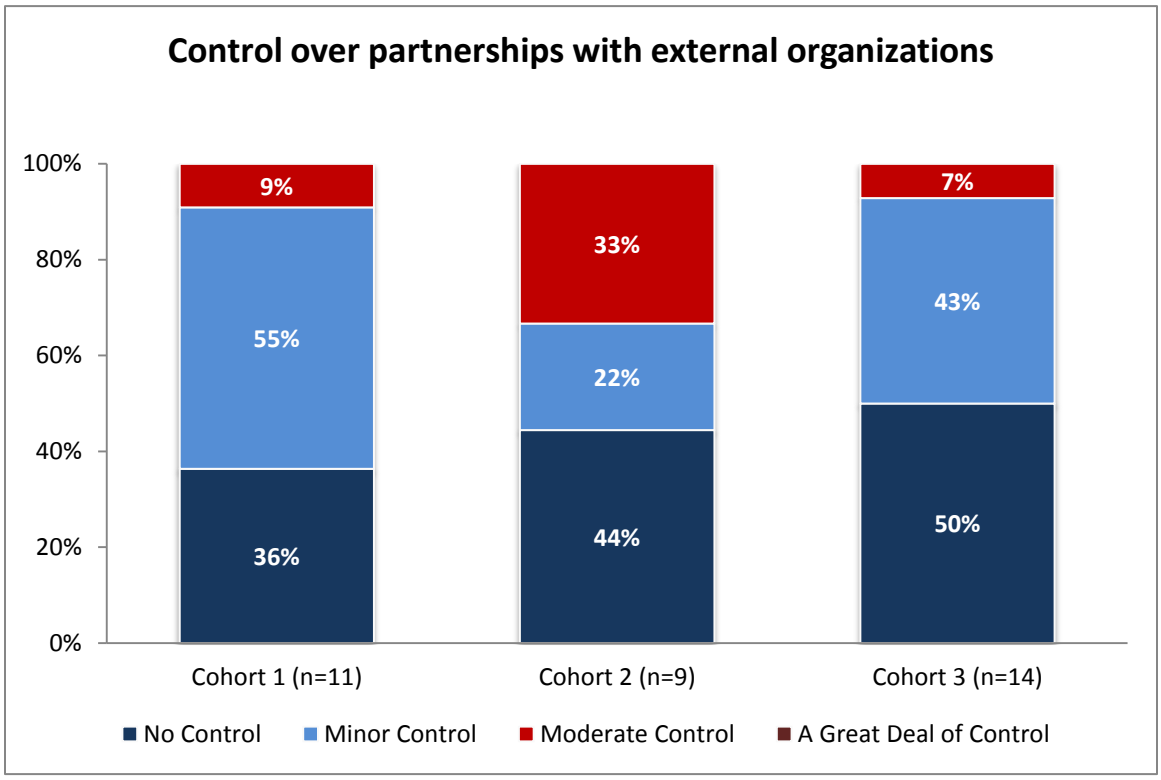
Principals (2011–12)



Partnerships with External Organizations

How much control do you feel you have over partnerships with external organizations in your school this year?

Principals (2011–12)



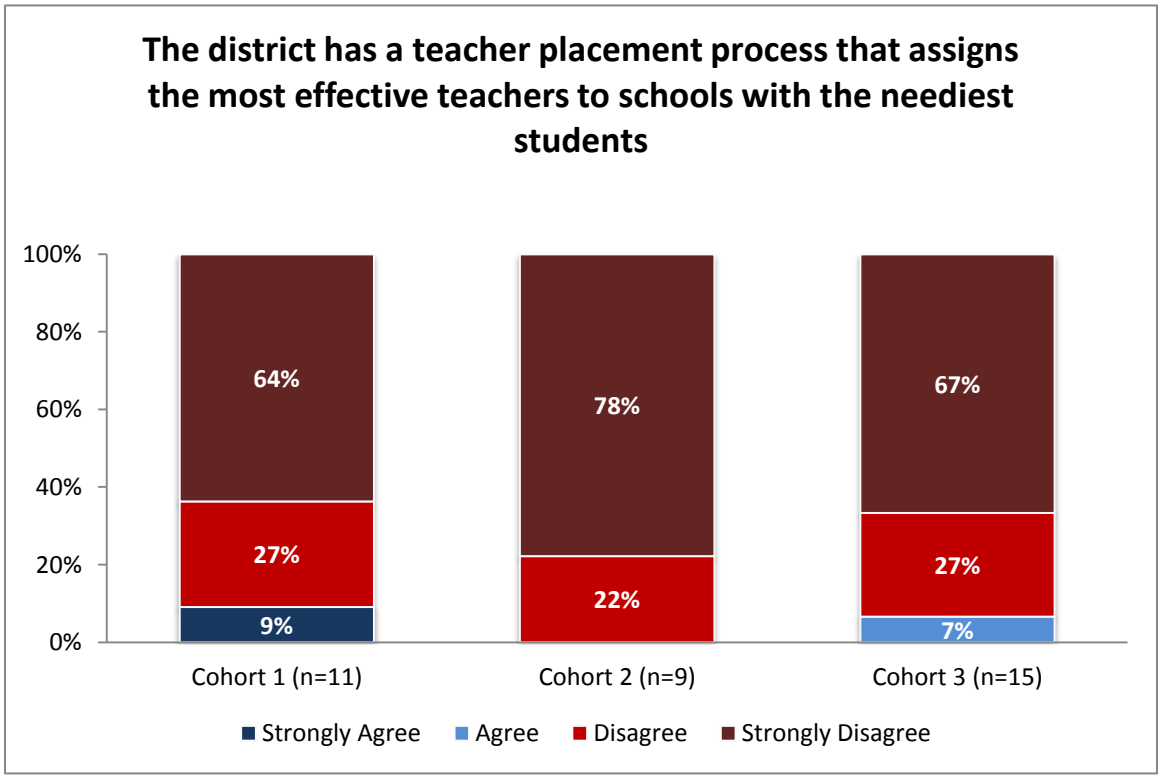
INNOVATION AND EFFICIENCY

Resource Allocation

Teacher Placement

Please indicate how much you agree or disagree with the following statement: The district has a teacher placement process that assigns the most effective teachers to schools with the neediest students.

Principals (2011–12)

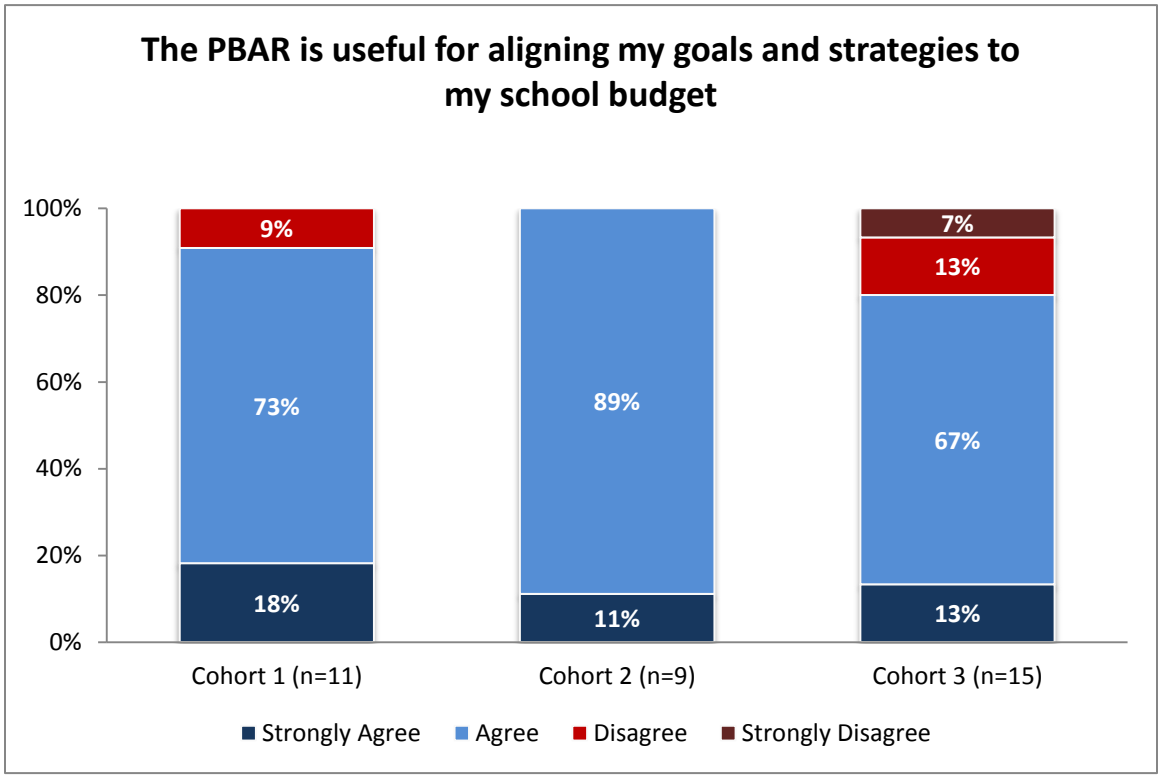


Goals and Strategies

PBAR—School Budget Alignment

Please indicate how much you agree or disagree with the following statement about the Planning, Budgeting, and Resource Allocation (PBAR) tool: The PBAR is useful for aligning my goals and strategies to my school budget.

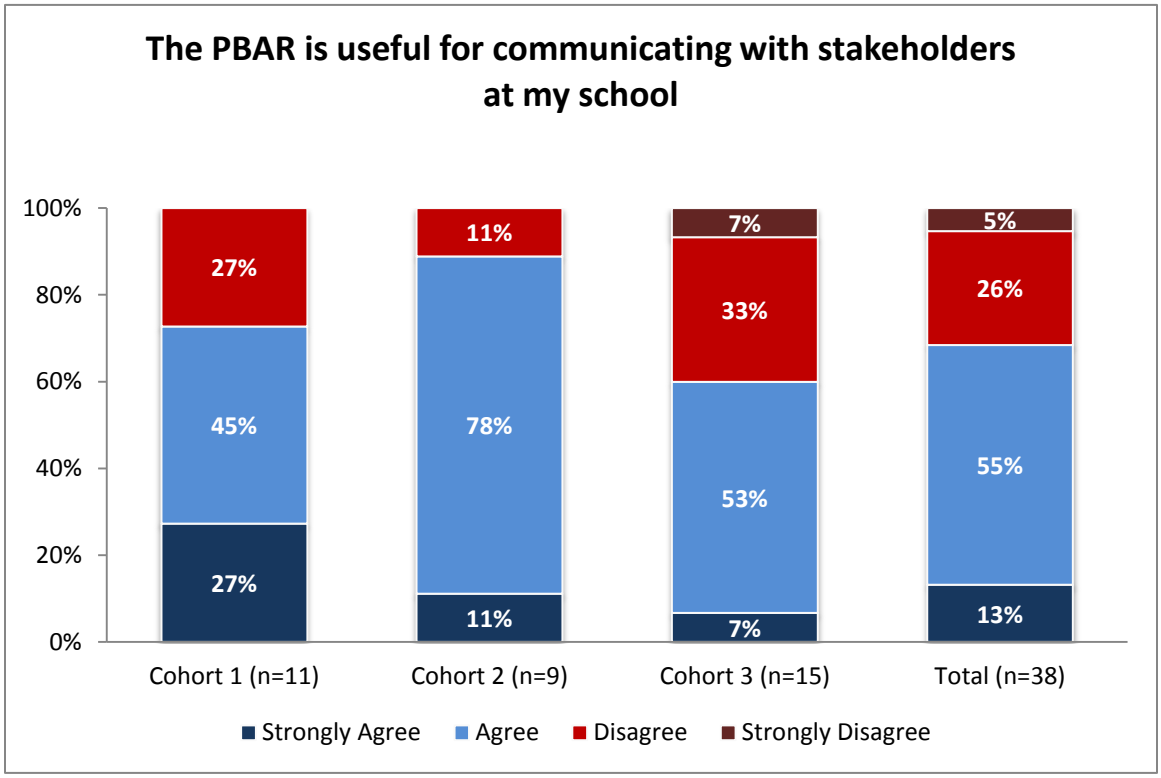
Principals (2011–12)



PBAR—Stakeholder Communication

Please indicate how much you agree or disagree with the following statement about the Planning, Budgeting, and Resource Allocation (PBAR) tool: The PBAR is useful for communicating with stakeholders at my school.

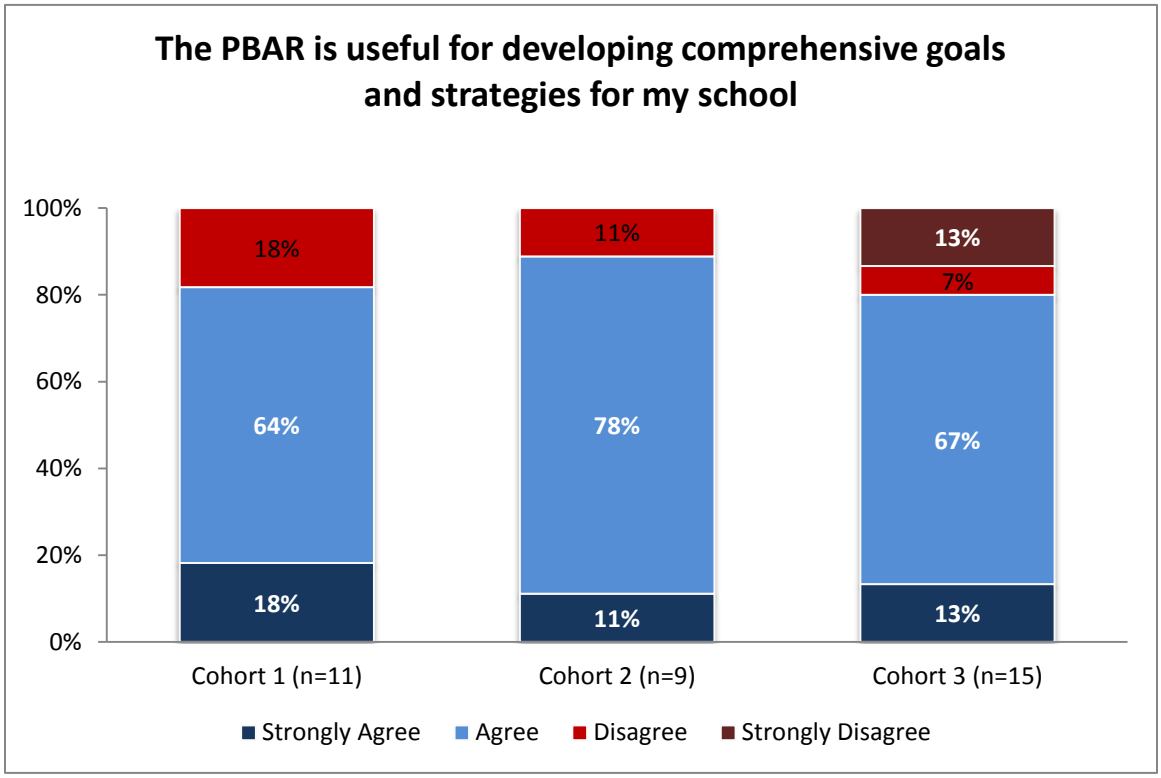
Principals (2011–12)



PBAR—Development of Goals and Strategies

Please indicate how much you agree or disagree with the following statement about the Planning, Budgeting, and Resource Allocation (PBAR) tool: The PBAR is useful for developing comprehensive goals and strategies for my school.

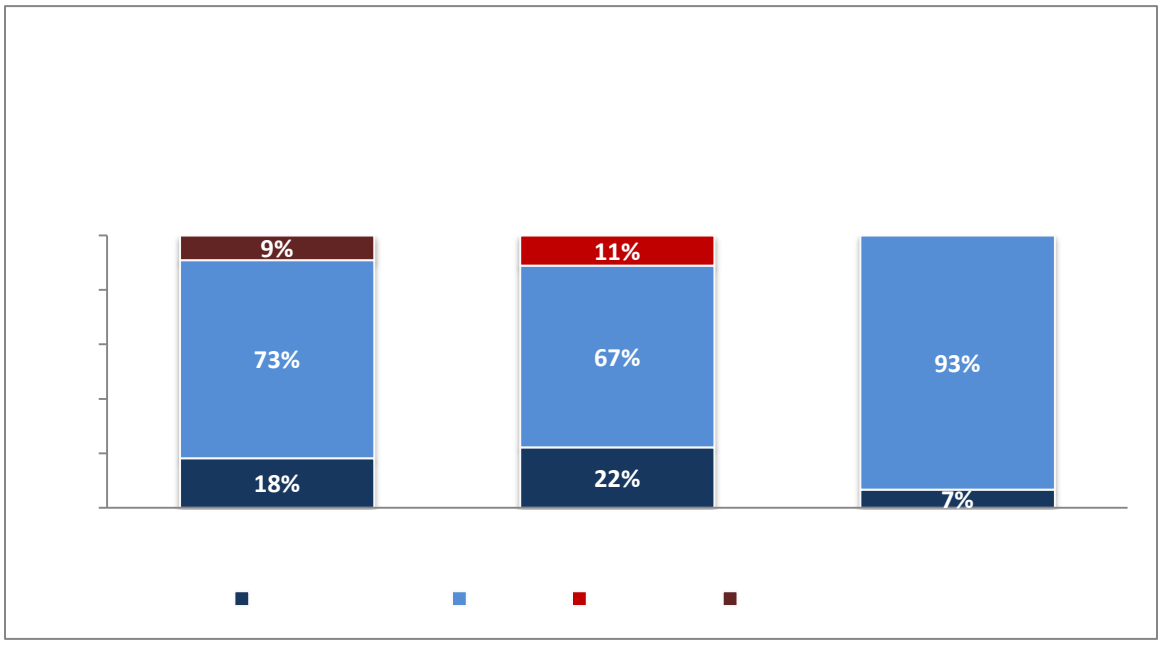
Principals (2011–12)



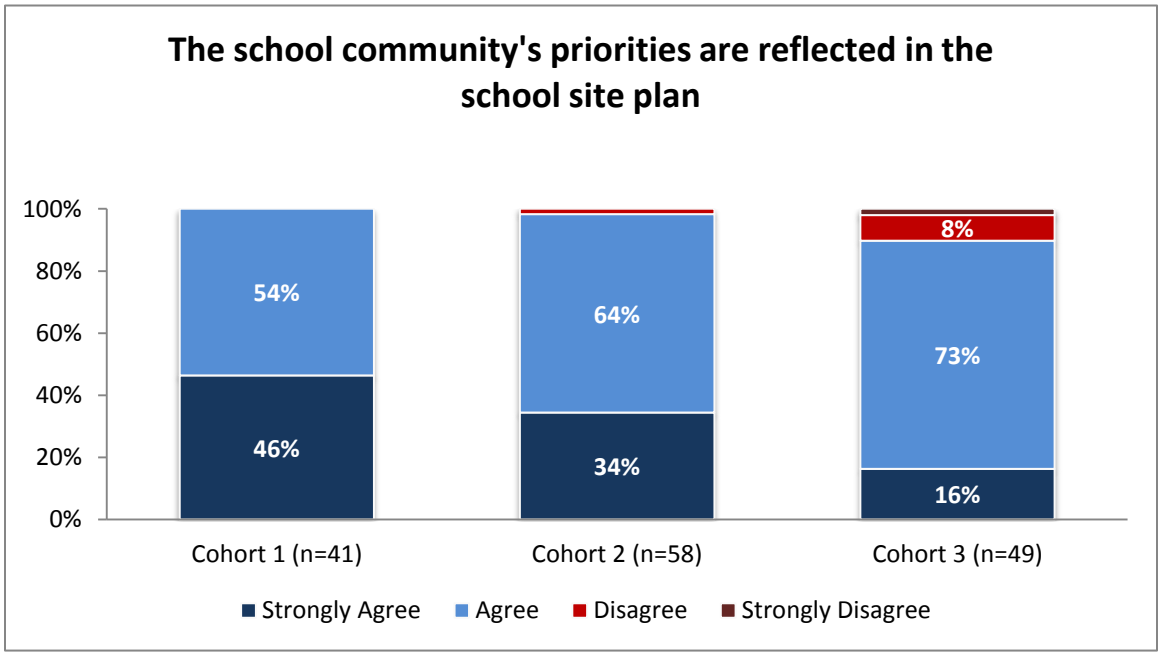
School Site Plan

Please indicate how much you agree or disagree with the following statement: The school community's priorities are reflected in the school site plan.

Principals (2011–12)



SSC (2011–12)

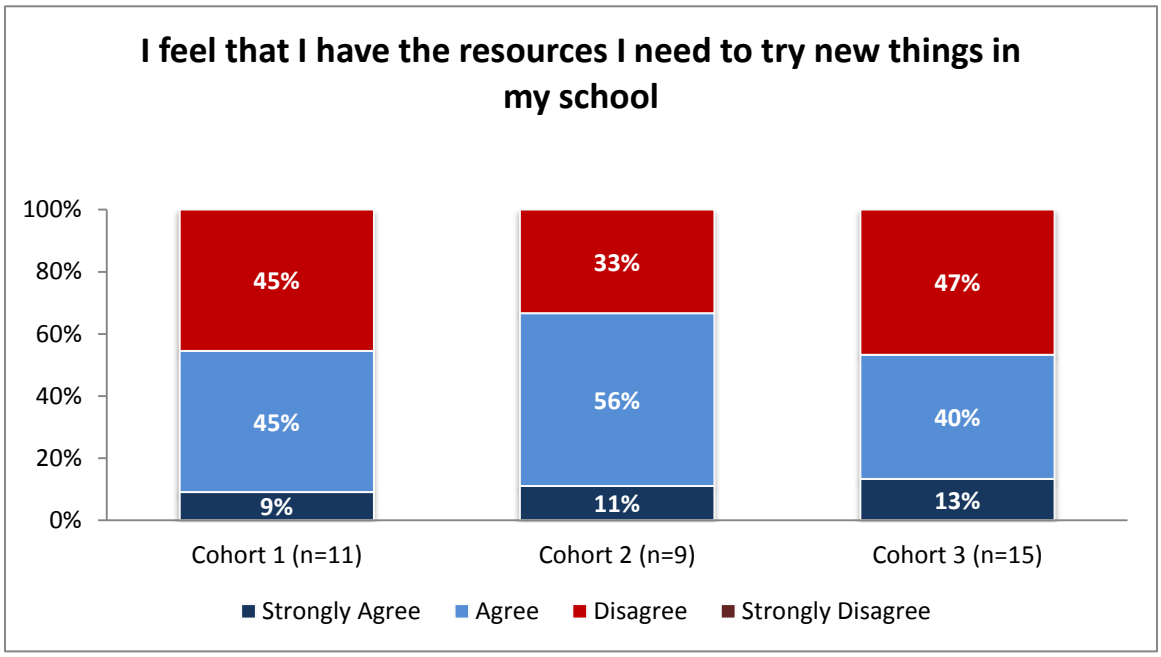


Innovation

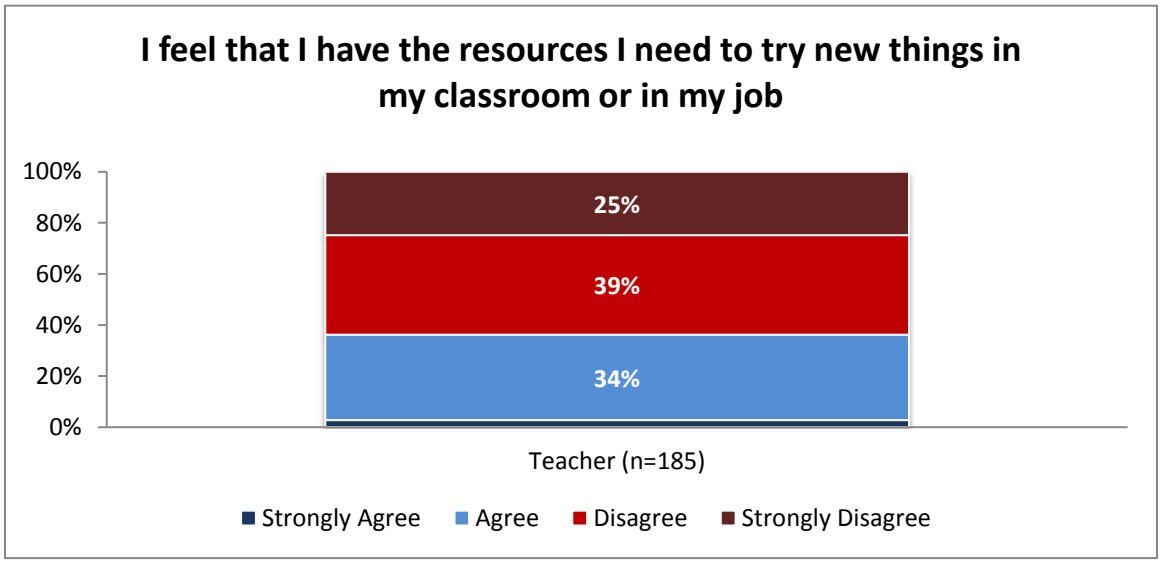
Resource Adequacy

Please indicate how much you agree or disagree with the following statement: I feel that I have the resources I need to try new things.

Principals (2011–12)



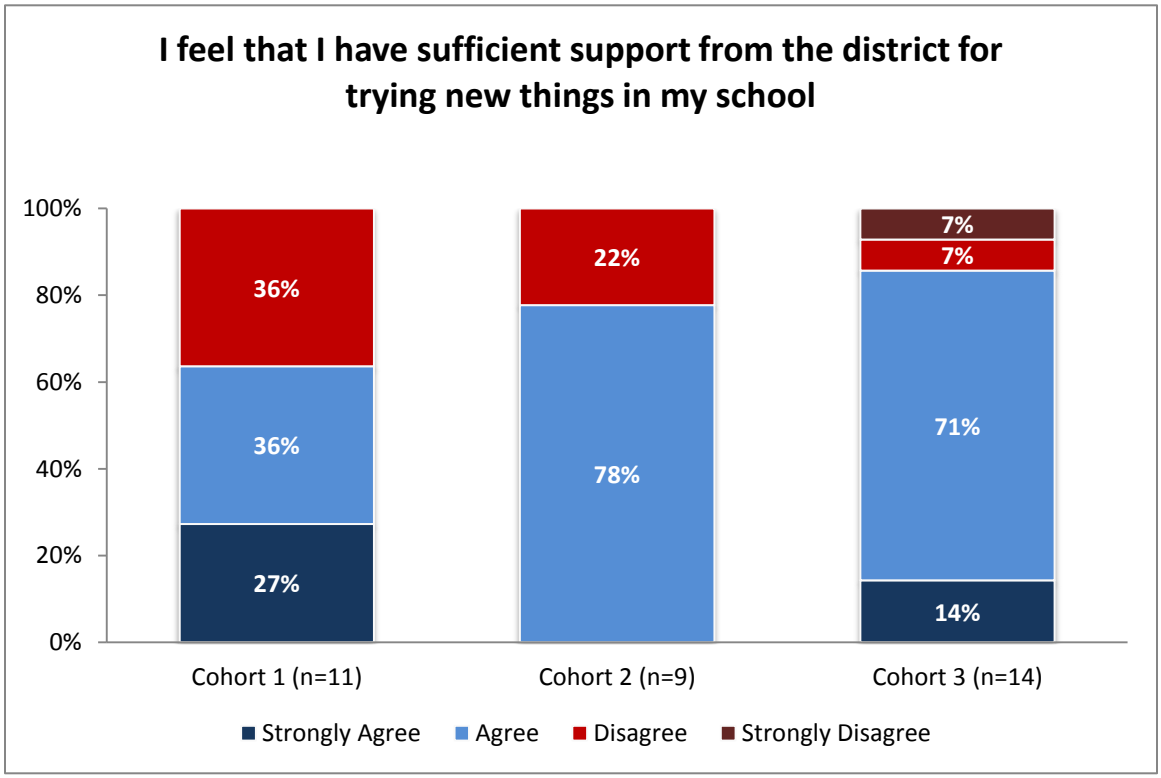
Teachers (2011–12)



District Support

Please indicate how much you agree or disagree with the following statement: I feel that I have sufficient support from the district for trying new things in my school.

Principals (2011-12)

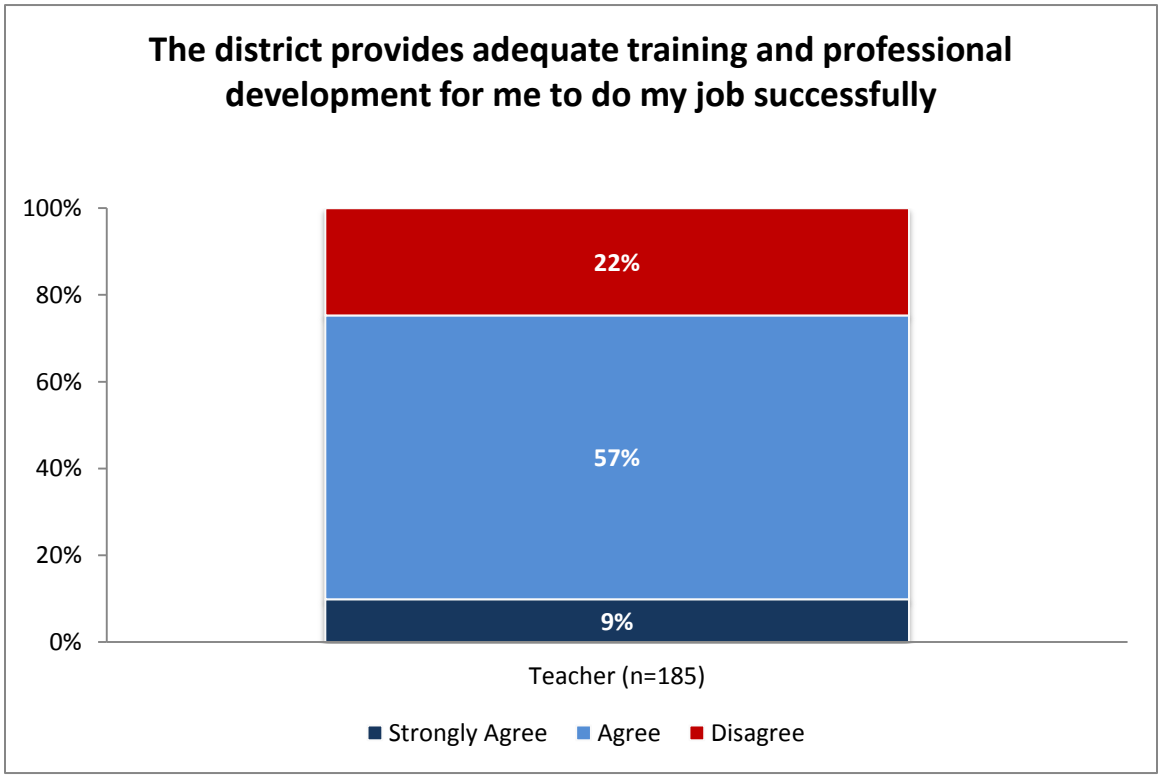


Professional Development

District Support

Please indicate how much you agree or disagree with the following statement: The district provides adequate training and professional development for me to do my job successfully.

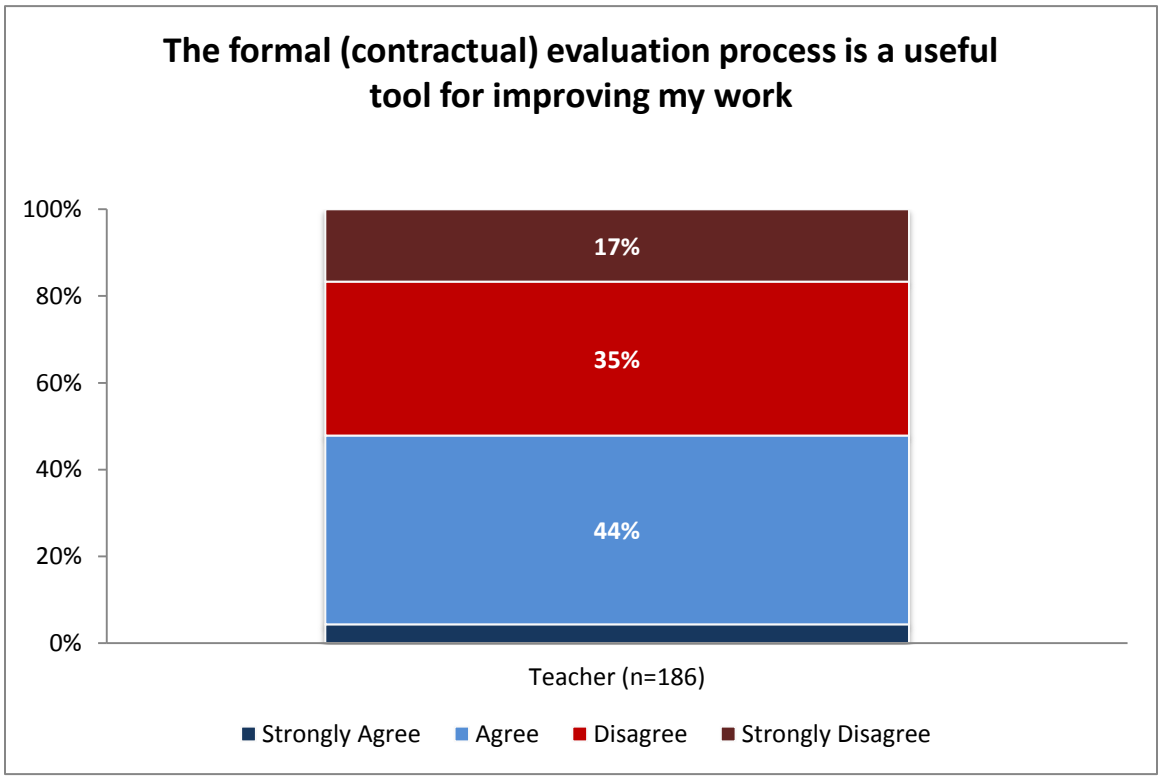
Teachers (2011–12)



Evaluation

Please indicate how much you agree or disagree with the following statement: The formal (contractual) evaluation process is a useful tool for improving my work.

Teachers (2011–12)

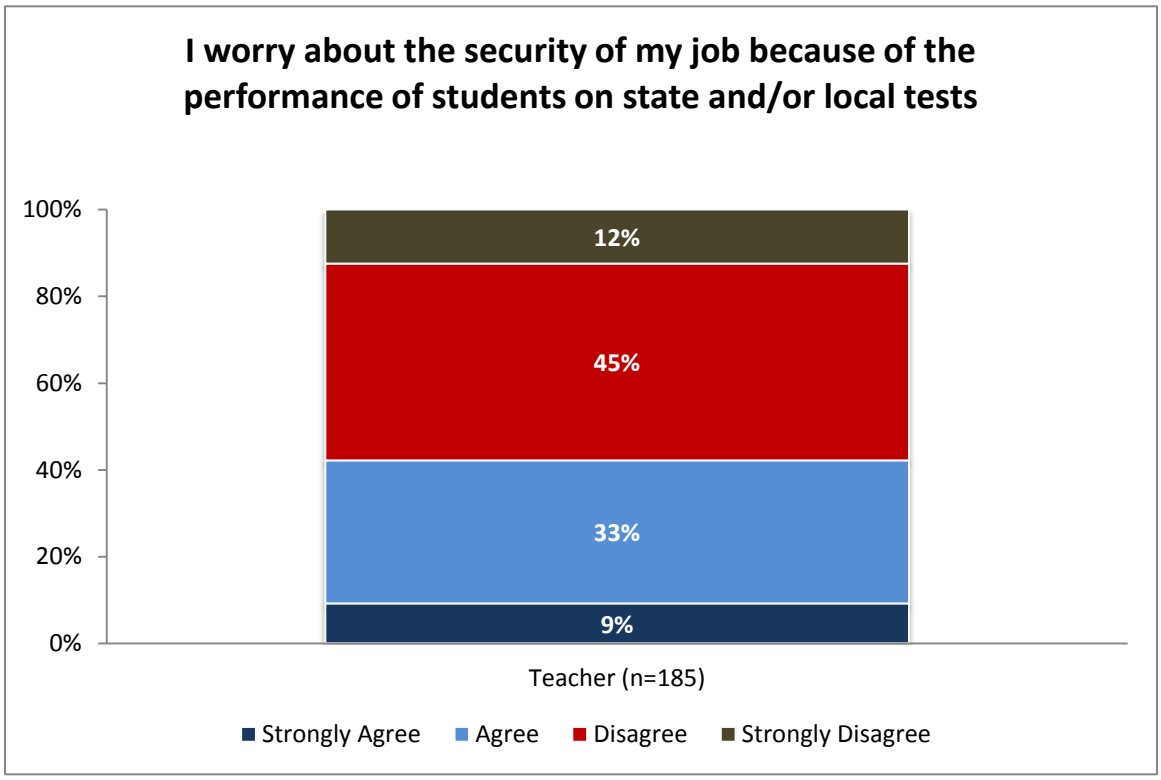


Job Satisfaction

Job Security

Please indicate how much you agree or disagree with the following statement: I worry about the security of my job because of the performance of students on state and/or local tests.

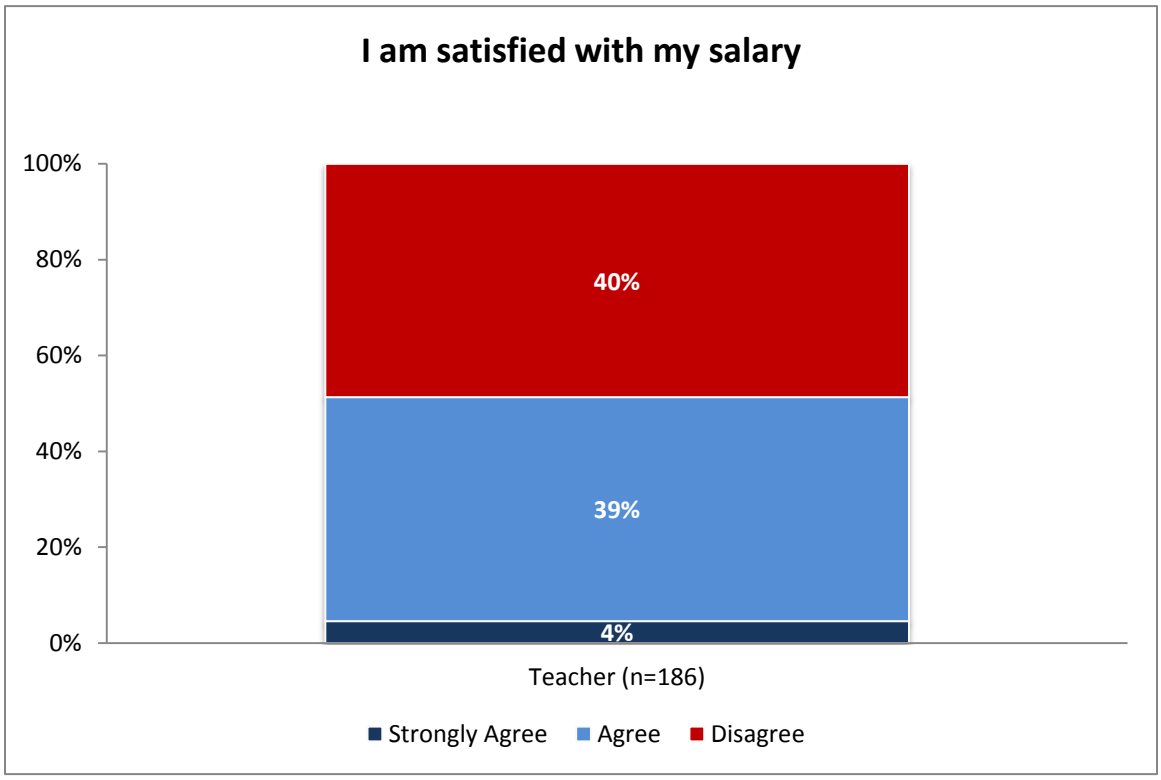
Teachers (2011–12)



Salary Satisfaction

Please indicate how much you agree or disagree with the following statement: I am satisfied with my salary.

Teachers (2011–12)



APPENDIX:
SURVEY INSTRUMENTS AND INTERVIEW PROTOCOLS

TRUSD SSFR Surveys 2010-11 & 2011-12

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Twin Rivers Unified School District

Principal Survey

Spring 2012

About the SSFR Principal Survey

Purpose of the study

The American Institutes for Research (AIR) is conducting a study of the Strategic School Funding for Results (SSFR) Initiative in two school districts: Los Angeles Unified School District and Twin Rivers Unified School District. This project is funded by the U.S. Department of Education Institute for Education Sciences.

Purpose of the survey

This annual survey will help us understand how school and district policies and your role and practices as an administrator change over time as this Initiative is rolled out, if at all.

Confidentiality

Your answers to the questions in this survey will be kept strictly confidential. Results from this survey will never be presented in a way that would permit any response to be associated with a specific school or individual. Only aggregate results- not individual responses- will be provided to Twin Rivers district staff. We will present findings such as, "62 percent of principal respondents reported having significant influence over spending their school's budget."

Benefits

Your participation gives you the opportunity to share information about your experiences with the SSFR Initiative as a school administrator. Confidential, aggregate feedback based on the results of this survey will be provided to district leaders. This will provide district leaders with information about principal experiences with this Initiative. The district's goal is to use this information to improve the SSFR Initiative.

Freedom to withdraw

Your participation in this survey is voluntary. You have the right to stop participating at any time without penalty. However, we encourage you to participate, as your input is critical to understanding how SSFR policies are affecting schools and SSCs.

Risks and discomforts

There are no foreseeable risks associated with participation other than the inadvertent release of the data. However, to minimize this risk, there will be no names included on surveys, and you are being asked to place your survey into an envelope with all other surveys to return directly to AIR so no one at Twin Rivers can see your responses when you turn it in. At AIR, surveys will be seen only by authorized project staff, entered into a secure database, and hard copies will be stored in a locked cabinet.

More information

If you have any questions or would like further information about this survey, please contact Lisa Cruz at 650-843-8272 or lcruz@air.org. For questions regarding your rights as a participant in this study, you may contact AIR's IRB chair at IRB@air.org or 1-800-634-0797.

If you decide to complete and return this survey, you are indicating that you understand and agree to the above.

Thank you for your participation!

Please answer each question below.

1. **Which of the following describes your school's SSFR status?**

- ☐ Cohort 1 pilot
- ☐ Cohort 2 pilot
- ☐ Cohort 3 pilot
- ☐ I don't know

2. **What grades does this school serve?**

- ☐ Elementary
- ☐ K-8
- ☐ Junior high/middle school
- ☐ High school

3. **What is the percentage of students receiving free or reduced-price meals in your school?**

- ☐ Below 75%
- ☐ 75-90%
- ☐ Above 90%

4. **What is the percentage of English learners in your school?**

- ☐ Below 25%
- ☐ 25-40%
- ☐ Above 40%

5. **Prior to this school year, how many years did you serve as principal of <u>this or any other</u> school?**

- ☐ None
- ☐ 1-2 years
- ☐ 3-5 years
- ☐ 6-10 years
- ☐ 11 or more years

6. **Prior to this school year, how many years did you serve as principal of <u>this</u> school?**

- ☐ None
- ☐ 1-2 years
- ☐ 3-5 years
- ☐ 6-10 years
- ☐ 11 or more years

7. **How much control do you feel you have over the following areas in your school this year?**

	No control	**Minor control**	**Moderate control**	**A great deal of control**
a. Teacher roles/new staff	☐	☐	☐	☐
b. Types of support staff (learning coaches, paraprofessionals, vice principals, etc.)	☐	☐	☐	☐
c. Professional development	☐	☐	☐	☐
d. Teacher time use	☐	☐	☐	☐
e. Curriculum	☐	☐	☐	☐
f. Course offerings	☐	☐	☐	☐
g. Instructional materials	☐	☐	☐	☐
h. Instructional strategies or approaches	☐	☐	☐	☐
i. Parent involvement	☐	☐	☐	☐
j. Partnerships with external organizations	☐	☐	☐	☐
k. Student supports	☐	☐	☐	☐
l. Technology use	☐	☐	☐	☐
m. Data use	☐	☐	☐	☐
n. Student assessment	☐	☐	☐	☐
o. Extending the school day or year	☐	☐	☐	☐
p. Extracurricular or after-school programming	☐	☐	☐	☐

8. Please indicate how much you agree or disagree with the following statements.

	Strongly Disagree	Disagree	Agree	Strongly Agree
a. I understand how resources (staff, funds, etc.) are allocated to my school.	☐	☐	☐	☐
b. I have discretion over how *district dollars* are spent at my school.	☐	☐	☐	☐
c. I have discretion over how the dollars *in my school budget* are spent.	☐	☐	☐	☐
d. The district has a teacher placement process that assigns the most effective teachers to schools with the neediest students.	☐	☐	☐	☐
e. Schools that serve greater percentages of low-performing students in our district receive more resources.	☐	☐	☐	☐
f. Schools that serve greater percentages of low-income students in our district receive more resources.	☐	☐	☐	☐
g. I have sufficient autonomy to implement an instructional program that meets the needs of the students in my school.	☐	☐	☐	☐
h. I feel that I have sufficient support from the district for trying new things in my school.	☐	☐	☐	☐
i. I believe funds are equitably allocated to schools in our district.	☐	☐	☐	☐
j. I feel that I receive adequate support from the district to develop my school's budget.	☐	☐	☐	☐
k. I feel that I have the resources I need to try new things in my school.	☐	☐	☐	☐
l. Parents and community members (besides SSC members) have adequate opportunity to provide input into developing and spending this school's budget.	☐	☐	☐	☐
m. The school community's priorities are reflected in the school site plan.	☐	☐	☐	☐

9. **Please indicate how much you agree or disagree with the following statements.**

	Strongly Disagree	Disagree	Agree	Strongly Agree
a. I am held accountable for student performance.	☐	☐	☐	☐
b. Teachers in our school are held accountable for student performance.	☐	☐	☐	☐
c. The SSC in our school is held accountable for student performance.	☐	☐	☐	☐

10. Which of the following best describes the level of engagement between the SSC and administrators at this school? *(Please select one.)*

- ☐ Administrators make key school decisions and inform the SSC.
- ☐ Administrators consult with the SSC about key school decisions; administration makes the final decisions.
- ☐ Administrators and the SSC are involved in two-way communication about key school decisions; administration makes the final decisions.
- ☐ Administrators and the SSC are involved in two-way communication about key school decisions; administration and the SSC make final decisions together.

11. Please indicate how much you agree or disagree with the following statements about the Planning, Budgeting, and Resource Allocation (PBAR) tool.

	Strongly Disagree	Disagree	Agree	Strongly Agree
a. The PBAR is useful for developing comprehensive goals and strategies for my school.	☐	☐	☐	☐
b. The PBAR is useful for aligning my goals and strategies to my school budget.	☐	☐	☐	☐
c. The PBAR is useful for communicating with stakeholders at my school.	☐	☐	☐	☐

12. What is your definition of "equity" in terms of resource distribution among schools?

_____

_____

_____

_____

13. Please rank in order THE TOP THREE (1-3) by the actual influence you think each group or person has on decisions concerning the following activities. A rank of 1 means *most* influence over this activity.

a. Determining the content of in-service professional development for teachers of this school

— State department of education or other state-level bodies
— Local school board
— School district staff
— Principal
— Teachers
— Curriculum specialists
— School Site Council
— Parent association
— Teachers' union

b. Deciding how your school budget will be spent

— State department of education or other state-level bodies
— Local school board
— School district staff
— Principal
— Teachers
— Curriculum specialists
— School Site Council
— Parent association
— Teachers' union

c. Scheduling of instructional time at your school (i.e., length of the day, allocation of time among subjects or class periods, after school programming)

— State department of education or other state-level bodies
— Local school board
— School district staff
— Principal
— Teachers
— Curriculum specialists
— School Site Council
— Parent association
— Teachers' union

When you are finished, please insert this survey into the envelope addressed to AIR.

Thank you!

SSFR Principal Survey
2010-11

1. **Prior to this school year, how many years did you serve as the principal of <u>this or any other</u> school?**
   - ☐ None
   - ☐ 1-2 years
   - ☐ 3-5 years
   - ☐ 6-10 years
   - ☐ 11 or more years

2. **Prior to this school year, how many years did you serve as principal of <u>this school</u>?**
   - ☐ None
   - ☐ 1-2 years
   - ☐ 3-5 years
   - ☐ 6-10 years
   - ☐ 11 or more years

3. **Prior to this school year, how many years have you been a <u>principal or teacher</u> in this district?**
   - ☐ None
   - ☐ 1-2 years
   - ☐ 3-5 years
   - ☐ 6-10 years
   - ☐ 11 or more years

4. **Have you changed schools since last school year?**
   - ☐ Yes
   - ☐ No (**skip to 6**)

5. **If you have changed schools since last school year, which of the following reasons reflect your reasons for moving to this school?** (*<u>Check all that apply.</u>*)
   - ☐ Pay incentives
   - ☐ Personal reasons
   - ☐ I got assigned here. I did not choose to work at this school
   - ☐ Other. Please specify_____

6. **What grades does your school serve?**
   - Elementary
   - K-8
   - Junior High/Middle School
   - High school

7. **What is the percentage of students receiving free or reduced-price meals in your school?**
   - Below 75%
   - 75-90%
   - Above 90%

8. **What is the percentage of English learners in your school?**
   - Below 25%
   - 25-40%
   - Above 40%

9. **Which of the following are true about your school this year?** *(Check all that apply.)*
   - This school is a pilot school in the SSFR Initiative.
   - This school is a charter school.
   - Students are assigned to this school based on attendance area.
   - 10% or more of your students are transfers from outside of your official attendance area.
   - Your school or part of your school is a magnet or has a special theme.
   - Your school has academic entrance criteria for students.
   - Your school has other entrance requirements (eg- performing arts).
   - Your school has requirements or contracts for parent participation.
   - Students are required to maintain minimum performance standards (eg- behavior, academic, attendance) to remain at your school.

10. **How much support do you feel you receive from the district for trying new things in your school?**
    - A lot
    - Some
    - A little
    - None

11. **Have you tried anything new in your school this year in the following areas?** *(Check all that apply.)*
    - ☐ Teacher roles/new staff
    - ☐ Extending the school day or year
    - ☐ Teacher time use
    - ☐ Curriculum
    - ☐ Course offerings
    - ☐ Instructional materials
    - ☐ Instructional strategies or approaches
    - ☐ Parent involvement
    - ☐ Partnerships with external organizations
    - ☐ Student supports
    - ☐ Professional development
    - ☐ Data use
    - ☐ Student assessment
    - ☐ Technology use
    - ☐ Extracurricular or after-school programming

12. Please rank in order THE TOP THREE (1-3) by the actual influence you think each group or person has on decisions concerning the following activities. A rank of 1 means *most* influence over this activity.

a. Establishing curriculum at this school

— State department of education or other state-level bodies
— Local school board
— School district staff
— Principal
— Teachers
— Curriculum specialists
— School Site Council
— Parent association
— Teachers' union

b. Determining the content of in-service professional development programs for teachers of this school

— State department of education or other state-level bodies
— Local school board
— School district staff
— Principal
— Teachers
— Curriculum specialists
— School Site Council
— Parent association
— Teachers' union

c. Evaluating teachers of this school

— State department of education or other state-level bodies
— Local school board
— School district staff
— Principal
— Teachers
— Curriculum specialists
— School Site Council
— Parent association
— Teachers' union

d. Hiring new teachers at this school

— State department of education or other state-level bodies
— Local school board
— School district staff
— Principal
— Teachers
— Curriculum specialists
— School Site Council
— Parent association
— Teachers' union

e. Deciding how your school budget will be spent

— State department of education or other state-level bodies
— Local school board
— School district staff
— Principal
— Teachers
— Curriculum specialists
— School Site Council
— Parent association
— Teachers' union

f. Scheduling of instructional time at your school (i.e., length of the day or allocation of time among subjects or class periods)

— State department of education or other state-level bodies
— Local school board
— School district staff
— Principal
— Teachers
— Curriculum specialists
— School Site Council
— Parent association
— Teachers' union

13. To what extent do you feel *teachers* are held accountable for student success to the following groups?

	Not at all accountable	**Somewhat accountable**	**Very accountable**
To you, the principal	☐	☐	☐
To parents/guardians of students in your school	☐	☐	☐
To students	☐	☐	☐
To the general community	☐	☐	☐

14. What is your definition of "equity", in terms of resource distribution among schools?

_____

_____

_____

_____

15. To what extent do you agree with the following statements?

	Strongly disagree	Disagree	Agree	Strongly Agree
a. I feel that the evaluation of my performance is related to my students' achievement.	☐	☐	☐	☐
b. I understand how resources (staff, funds, etc.) are allocated to my school.	☐	☐	☐	☐
c. I have discretion over how *district dollars* are spent at my school.	☐	☐	☐	☐
d. I have discretion over how the dollars in *my school budget* are spent.	☐	☐	☐	☐
e. Principals are assigned equitably to schools in our district.	☐	☐	☐	☐
f. Teachers are assigned equitably to schools in our district.	☐	☐	☐	☐
g. Students are assigned equitably to schools in our district.	☐	☐	☐	☐
h. Other support staff (e.g., librarians, custodians) are assigned to schools in a way that best reflects student needs for these services.	☐	☐	☐	☐
i. The district has a teacher placement process that assigns the most effective teachers to schools with the neediest students.	☐	☐	☐	☐
j. Schools that serve greater percentages of low-income students in our district receive more resources than schools with lower percentages of these students.	☐	☐	☐	☐
k. Schools that serve greater percentages of low-performing students in our district receive more resources than schools with lower percentages of these students.	☐	☐	☐	☐
l. Schools that serve greater percentages of low-performing students in our district receive more resources than schools with lower percentages of these students.	☐	☐	☐	☐

m. I have sufficient autonomy to implement an instructional program that meets the needs of the students in my school.	☐	☐	☐	☐
n. I have sufficient autonomy to implement an *innovative* program in my school.	☐	☐	☐	☐
o. I believe funds are equitably allocated to schools within our district.	☐	☐	☐	☐
p. I feel that I receive adequate support from the central office to develop my school's budget.	☐	☐	☐	☐
q. I feel that I have the resources I need to try new things in my school.	☐	☐	☐	☐

2011-12 Survey for TRUSD Teachers

Question	Sub Question	Potential Responses
Please indicate the type of site you work at. If you work at more than one site, please select your primary site.		9-12 grade site (also includes 6-12 and 7-12 sites)
		Middle grades site (3-6, 5-8, 6-8, 7-8)
		Preschool through 2, 4 or 5 site
		Preschool through 6 site
		Preschool through 8 site
		Preschool -K site
		Dependent charter site
		An adult education site
		Not at a school site
		Not sure how to answer this question
		Other
		Comment
Please select your school site from the list of 9-12 sites below:		Foothill High School
		Grant Union High School
		Highlands High School
		Rio Linda High School
		Keema
		Pacific High School
		Vista Nueva
		Miles P Richmond
		Other
		Comment
Please select your school site from the list of middle grade sites below:		Harmon Johnson
		Foothill Ranch Middle School
		Rio Linda Preparatory Academy
		Rio Tierra Junior High
		Norwood Junior High
		Martin Luther King Jr. Technology Academy
		NOVA Opportunity School
		Other
		Comment

Please select your school site from the list of preschool through 2/4/5 sites below:		Noralto
		Woodridge
		Strauch
		Regency Park
		Dry Creek
		Other
		Comment
Please select your school site from the list of preschool through 6th grade sites below:		Allison
		Babcock
		Castori
		Del Paso Heights
		Fairbanks
		Foothill Oaks
		Frontier
		Garden Valley
		Hagginwood
		Hillsdale
		Madison
		Northwood
		Sierra View
		Westside
		Woodlake
		Other
		Comment
Please select your school site from the list of preschool through 8th grade sites below:		F C Joyce
		Kohler
		Oakdale
		Orchard
		Pioneer
		Ridgepoint
		Village
		Other
		Comment
Please select your school site from the list of preschool/kinder sites below:		Morey Ave
		Vineland
		Other
		Comment

Please select your school site from the list of dependent charter sites below:		Creative Connections preschool-5 site
		Creative Connections 6-12 site
		Eastside Campus of WPCS
		Frontier Campus of WPCS
		Westside Campus of WPCS
		Smythe Academy preschool-6 site
		Smythe Academy 7-8 site
		Other
		Comment
How would you classify your position at this school during this school year? (Although more than one category may apply, please choose the one that best fits your current employment situation.)		Regular full-time or part-time teacher
		Itinerant teacher (I teach at more than one school)
		Long-term or short term teaching substitute
		Regular full-time or part time classified employee
		Itinerant classified employee (I work at more than one site)
		Long-term or Short-term classified substitute
		Instructional Paraeducator
		Leadership position - administrator, manager, or supervisor
		Other support role at a site (nurse, counselor, RSP, speech therapist)
		Other
		Comment

Do you hold any of the following positions? (Mark all that apply.)		Academic Coach
		BTSA mentor
		Lead teacher/department chair
		School site council member
		Another leadership position.
		Teacher in charge/Assistant to the principal
		None of these
		Other
		Comment
Do you feel like you have influence over the following areas in your classroom/site this year?	Use of time	No influence
		Minor influence
		Moderate influence
		A great deal of influence
	Curriculum	No influence
		Minor influence
		Moderate influence
		A great deal of influence
	Instructional materials, strategies or approaches	No influence
		Minor influence
		Moderate influence
		A great deal of influence
	Parent involvement	No influence
		Minor influence
		Moderate influence
		A great deal of influence
	Partnerships with outside organizations	No influence
		Minor influence
		Moderate influence
		A great deal of influence
	Student supports	No influence
		Minor influence
		Moderate influence
		A great deal of influence
	Use of data	No influence
		Minor influence
		Moderate influence
		A great deal of influence
	Student assessment	No influence
		Minor influence

		Moderate influence
		A great deal of influence
	Use of technology	No influence
		Minor influence
		Moderate influence
		A great deal of influence
	Types of support staff (learning ocaches, paraprofessionals, vice principals, etc.)	No influence
		Minor influence
		Moderate influence
		A great deal of influence
		Comment
Prior to this school year, how many years have you worked in any position in this district (including precursor districts)?		None
		1-2 years
		3-5 years
		6-10 years
		11 or more years
		Other
		Comment
Prior to this school year, how many years have you been employed at this or any other school, department, or district?		None
		1-2 years
		3-5 years
		6-10 years
		11 or more years
		Other
		Comment
If you have changed schools or departments since last school year, which of the following reasons reflect your reasons for moving to this school? (Please check all that apply.)		Did not change schools
		Pay incentives
		Personal reasons
		I got assigned here. I did not choose to work at this school or department
		Other
		Comment

Determining the content of in-service professional development for teachers	State department of education or other state-level bodies	#1 Influencer for this activity
		#2 Influencer for this activity
		#3 Influencer for this activity
		Not in the top 3 for influencing this activity
	Local school board	#1 Influencer for this activity
		#2 Influencer for this activity
		#3 Influencer for this activity
		Not in the top 3 for influencing this activity
	School district staff	#1 Influencer for this activity
		#2 Influencer for this activity
		#3 Influencer for this activity
		Not in the top 3 for influencing this activity
	Principal	#1 Influencer for this activity
		#2 Influencer for this activity
		#3 Influencer for this activity
		Not in the top 3 for influencing this activity
	Teachers	#1 Influencer for this activity
		#2 Influencer for this activity
		#3 Influencer for this activity
		Not in the top 3 for influencing this activity
	Curriculum specialists	#1 Influencer for this activity
		#2 Influencer for this activity
		#3 Influencer for this activity

		Not in the top 3 for influencing this activity
	School Site Council	#1 Influencer for this activity
		#2 Influencer for this activity
		#3 Influencer for this activity
		Not in the top 3 for influencing this activity
	Parent association	#1 Influencer for this activity
		#2 Influencer for this activity
		#3 Influencer for this activity
		Not in the top 3 for influencing this activity
	Teachers' union	#1 Influencer for this activity
		#2 Influencer for this activity
		#3 Influencer for this activity
		Not in the top 3 for influencing this activity
		Comment

Deciding how school budgets will be spent	State department of education or other state-level bodies	#1 influencer over this activity
		#2 influencer over this activity
		#3 influencer over this activity
		Not in the top 3 for influencing this activity
	Local school board	#1 influencer over this activity
		#2 influencer over this activity
		#3 influencer over this activity
		Not in the top 3 for influencing this activity
	School district staff	#1 influencer over this activity
		#2 influencer over this activity
		#3 influencer over this activity
		Not in the top 3 for influencing this activity
	Principal	#1 influencer over this activity
		#2 influencer over this activity
		#3 influencer over this activity
		Not in the top 3 for influencing this activity
	Teachers	#1 influencer over this activity
		#2 influencer over this activity
		#3 influencer over this activity
		Not in the top 3 for influencing this activity
	Curriculum specialists	#1 influencer over this activity
		#2 influencer over this activity
		#3 influencer over this activity
		Not in the top 3 for influencing this activity

	School Site Council	#1 influencer over this activity
		#2 influencer over this activity
		#3 influencer over this activity
		Not in the top 3 for influencing this activity
	Parent association	#1 influencer over this activity
		#2 influencer over this activity
		#3 influencer over this activity
		Not in the top 3 for influencing this activity
	Teachers' union	#1 influencer over this activity
		#2 influencer over this activity
		#3 influencer over this activity
		Not in the top 3 for influencing this activity

Scheduling of instructional time at schools (i.e., length of the day, after school programming, or allocation of time among subjects or class periods)	State department of education or other state-level bodies	#1 influencer over this activity
		#2 influencer over this activity
		#3 influencer over this activity
		Not in the top 3 for influencing this activity
	Local school board	#1 influencer over this activity
		#2 influencer over this activity
		#3 influencer over this activity
		Not in the top 3 for influencing this activity
	School district staff	#1 influencer over this activity
		#2 influencer over this activity
		#3 influencer over this activity
		Not in the top 3 for influencing this activity
	Principal	#1 influencer over this activity
		#2 influencer over this activity
		#3 influencer over this activity
		Not in the top 3 for influencing this activity
	Teachers	#1 influencer over this activity
		#2 influencer over this activity
		#3 influencer over this activity
		Not in the top 3 for influencing this activity
	Curriculum specialists	#1 influencer over this activity
		#2 influencer over this activity
		#3 influencer over this activity
		Not in the top 3 for influencing this activity

	School Site Council	#1 influencer over this activity
		#2 influencer over this activity
		#3 influencer over this activity
		Not in the top 3 for influencing this activity
	Parent association	#1 influencer over this activity
		#2 influencer over this activity
		#3 influencer over this activity
		Not in the top 3 for influencing this activity
	Teachers' union	#1 influencer over this activity
		#2 influencer over this activity
		#3 influencer over this activity
		Not in the top 3 for influencing this activity

To what extent do you feel teachers are held accountable for student success to the following groups?	To the principal	Not at all accountable
		Somewhat accountable
		Very accountable
	To parents/guardians of students in your school	Not at all accountable
		Somewhat accountable
		Very accountable
	To students	Not at all accountable
		Somewhat accountable
		Very accountable
	To the general community	Not at all accountable
		Somewhat accountable
		Very accountable
	To the district	Not at all accountable
		Somewhat accountable
		Very accountable
	To your school's school site council	Not at all accountable
		Somewhat accountable
		Very accountable
		Comment
To what extent do you feel principals are held accountable for student success to the following groups?	To the district	Not at all accountable
		Somewhat accountable
		Very accountable
	To parents/guardians of students in your school	Not at all accountable
		Somewhat accountable
		Very accountable
	To teachers in your school	Not at all accountable
		Somewhat accountable
		Very accountable
	To the general community	Not at all accountable
		Somewhat accountable
		Very accountable
	To your school's school site council	Not at all accountable
		Somewhat accountable
		Very accountable

To what extent do you feel the classified staff at a school are held accountable for student success to the following groups?	To the district	Not at all accountable
		Somewhat accountable
		Very accountable
	To parents/guardians of students in your school	Not at all accountable
		Somewhat accountable
		Very accountable
	To teachers in your school	Not at all accountable
		Somewhat accountable
		Very accountable
	To the general community	Not at all accountable
		Somewhat accountable
		Very accountable
	To your school's school site council	Not at all accountable
		Somewhat accountable
		Very accountable
	To the principal	Not at all accountable
		Somewhat accountable
		Very accountable
To what extent do you feel the support staff at a school (nurses, counselors, RSP) are held accountable for student success to the following groups?	To the principal	Not at all accountable
		Somewhat accountable
		Very accountable
	To the district	Not at all accountable
		Somewhat accountable
		Very accountable
	To parents/guardians at your school	Not at all accountable
		Somewhat accountable
		Very accountable
	To the general community	Not at all accountable
		Somewhat accountable
		Very accountable
	To your school's school site council	Not at all accountable
		Somewhat accountable
		Very accountable
		Comment
To what extent do you agree with the following statements?	I believe funds are equitably allocated to schools within our district.	Strongly disagree
		Disagree
		Agree
		Strongly Agree
	Schools that serve greater percentages of low-income students in our district receive more resources than schools	Strongly disagree
		Disagree
		Agree
		Strongly Agree

	with lower percentages of these students.	
	Schools that serve greater percentages of English learners in our district receive more resources than schools with lower percentages of these students.	Strongly disagree
		Disagree
		Agree
		Strongly Agree
	I feel that I have the resources I need to try new things in my classroom or in my job.	Strongly disagree
		Disagree
		Agree
		Strongly Agree
	Teachers have sufficient autonomy to implement an instructional program that meets the needs of my students.	Strongly disagree
		Disagree
		Agree
		Strongly Agree
	I understand my school's goals and strategies	Strongly disagree
		Disagree
		Agree
		Strongly Agree
	I understand how my school decides on budget priorities	Strongly disagree
		Disagree
		Agree
		Strongly Agree
	School budget decisions are aligned with our school's goals and strategies	Strongly disagree
		Disagree
		Agree
		Strongly Agree
		Comment

To what extent do you agree with the following statements? (continued)	Teachers and staff have the opportunity to provide input into developing and spending the budget at schools	Strongly disagree
		Disagree
		Agree
		Strongly Agree
	I understand how resources (staff, funds, etc.) are allocated to schools.	Strongly disagree
		Disagree
		Agree
		Strongly Agree
	School administration's behavior towards the staff is supportive and encouraging.	Strongly disagree
		Disagree
		Agree
		Strongly Agree
	I am satisfied with my salary.	Strongly disagree
		Disagree
		Agree
		Strongly Agree
	Necessary materials such as textbooks, supplies, and copy machines are available as needed by the staff.	Strongly disagree
		Disagree
		Agree
		Strongly Agree
	I worry about the security of my job because of the performance of students on state and/or local tests.	Strongly disagree
		Disagree
		Agree
		Strongly Agree
	Communications about district strategies for improving student achievement are clear.	Strongly disagree
		Disagree
		Agree
		Strongly Agree
	I understand the financial condition of the district.	Strongly disagree
		Disagree
		Agree
		Strongly Agree
	The Twin Rivers Unified School District is headed in the right direction	Strongly disagree
		Disagree
		Agree
		Strongly Agree

To what extent do you agree with the following statements? (continued)	I am proud to tell people that I work for Twin Rivers USD	Strongly disagree
		Disagree
		Agree
		Strongly Agree
	I feel respected for the work I do at this school or site.	Strongly disagree
		Disagree
		Agree
		Strongly Agree
	The district provides adequate training and professional development for me to do my job successfully	Strongly disagree
		Disagree
		Agree
		Strongly Agree
	The formal (contractual) evaluation process is a useful tool for improving my work.	Strongly disagree
		Disagree
		Agree
		Strongly Agree
	This school or site is a supportive and inviting place for staff to work.	Strongly disagree
		Disagree
		Agree
		Strongly Agree
	Schools' goals for student achievement are clear and well defined	Strongly disagree
		Disagree
		Agree
		Strongly Agree
	The site administrators deal with student conflicts in a fair manner	Strongly disagree
		Disagree
		Agree
		Strongly Agree
	The site administrators make student academic achievement their top priority.	Strongly disagree
		Disagree
		Agree
		Strongly Agree
	The site administrators make sure that teachers and staff have the necessary training and resources to do my job	Strongly disagree
		Disagree
		Agree
		Strongly Agree
	Faculty and staff work in teams regularly to pursue school goals.	Strongly disagree
		Disagree
		Agree
		Strongly Agree

To what extent do you agree with the following statements? (continued)	My collaboration with colleagues has had a powerful impact on my growth as an employee/teacher	Strongly disagree
		Disagree
		Agree
		Strongly Agree
	Teachers at schools collaborate regularly with colleagues to plan instruction and review assessment	Strongly disagree
		Disagree
		Agree
		Strongly Agree
	Teachers and staff at schools feel a responsibility to improve the school.	Strongly disagree
		Disagree
		Agree
		Strongly Agree
As an employee, these factors motivate/would motivate me to go above and beyond to support and educate our students:		Supervisor or other administrator acknowledge my efforts
		My colleagues support each other and create a sense of "family"
		Parents, students, or community members express their support
		I see the difference I make in young people's lives
		Financial compensation for extra duties
		Other
		Comment

On a scale of 1 to 5, please rate the importance of each of the following characteristics in a new superintendent for our district (1 indicates less important, 5 indicates very important)	Committed to building positive relationships	Least Important
		Most Important
	Believes in the use of instructional and administrative technology	Least Important
		Most Important
	Has experience with an ethnically and culturally diverse community	Least Important
		Most Important
	Able to work with legislators	Least Important
		Most Important
	Earned Ed.D. or Ph.D. degree	Least Important
		Most Important
	Inspires trust	Least Important
		Most Important
	Effective speaking, listening and writing skills	Least Important
		Most Important
	Is visible in the community	Least Important
		Most Important
	Willing to listen to input, but can make a tough or unpopular decision when	Least Important

	necessary	
		Most Important
	Ability to work cooperatively with the Board of Education	Least Important
		Most Important
		Comment

Additional qualities-On a scale of 1 to 5, please rate the importance of each of the following characteristics in a new superintendent for our district (1 indicates less important, 5 indicates very important)	Ability to build consensus and commitment among individuals and groups	Least Important
		Most Important
	Solicits and values input from stakeholders as to effectiveness of processes and programs	Least Important
		Most Important
	Values parent input and participation	Least Important
		Most Important
	Promotes constructive relationships with employee representative groups/unions	Least Important
		Most Important
	Committed to providing regular communication to employees, parents and the community	Least Important
		Most Important
	Committed to a "student first" philosophy in all decisions	Least Important
		Most Important
	Committed to the planning, implementation, and assessment of relevant professional development for all staff members	Least Important
		Most Important
	Prior experience as a classroom teacher	Least Important
		Most Important

	Prior experience as a superintendent	Least Important
		Most Important
	Ability to nurture and maintain a positive relationship between the business community and the school district	Least Important
		Most Important
		Comment
Additional qualities-On a scale of 1 to 5, please rate the importance of each of the following characteristics in a new superintendent for our district (1 indicates less important, 5 indicates very important)	Involved and connected in external professional/networking organizations	Least Important
		Most Important
	Knowledge of emerging research and best practices in the area of curriculum/instructional design and practice	Least Important
		Most Important
	Knowledge of current education policy issues	Least Important
		Most Important
	Committed to meeting the individual needs of all students	Least Important
		Most Important
	Is committed to sound fiscal management that addresses both the short- and long-term educational missions, goals and objectives	Least Important
		Most Important
	Knowledgeable about finance, budgeting and allocation of resources	Least Important
		Most Important
		Comment

2010-11 Survey for TRUSD Teachers

Note: The following items were added to an existing TRUSD teacher survey.

SSFR items to add to
Twin Rivers Teacher Survey
Spring 2010

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1. **How would you classify your position at this school during this school year?**
   - ☐ Regular full-time teacher
   - ☐ Regular part-time teacher
   - ☐ Itinerant teacher (I teach at more than one school)
   - ☐ Long-term substitute
   - ☐ Short-term substitute
   - ☐ Student teacher
   - ☐ Teacher aide

2. **Do you hold any of the following positions? (Mark all that apply.)**
   - ☐ Academic coach
   - ☐ BTSA mentor
   - ☐ Lead teacher/department chair
   - ☐ School site council member
   - ☐ Another leadership position. Explain _____

3. **Prior to this school year, how many years have you been a teacher at <u>this or any other</u> school?**
   - ☐ None
   - ☐ 1-2 years
   - ☐ 3-5 years
   - ☐ 6-10 years
   - ☐ 11 or more years

4. **Prior to this school year, how many years have you been a teacher at <u>this school</u>?**
   - ☐ None
   - ☐ 1-2 years
   - ☐ 3-5 years
   - ☐ 6-10 years
   - ☐ 11 or more years

5. **Prior to this school year, how many years have you worked in any position in <u>this district</u>?**
   - ☐ None
   - ☐ 1-2 years
   - ☐ 3-5 years
   - ☐ 6-10 years
   - ☐ 11 or more years

6. **If you have changed schools since last school year, which of the following reasons reflect your reasons for moving to this school? (Please mark all that apply.)**
   - ☐ Did not change schools
   - ☐ Pay incentives
   - ☐ Personal reasons
   - ☐ I got assigned here. I did not choose to work at this school.
   - ☐ Other. Please specify_____

7. **How much actual control do you have in <u>your classroom</u> at this school over the following areas?**

	No control	Minor control	Moderate control	A great deal of control
a. Selecting textbooks and other instructional materials	☐	☐	☐	☐
b. Selecting content, topics, and skills to be taught	☐	☐	☐	☐
c. Selecting teaching techniques	☐	☐	☐	☐
d. Evaluating and grading students	☐	☐	☐	☐
e. Disciplining students	☐	☐	☐	☐

8. ***Please rank in order THE TOP THREE (1-3)* groups below by the influence you think each group or person has on decisions concerning the following activities. A rank of 1 means *most* influence over this activity.**

For each activity, please rank only the top 3 groups, and leave the others blank.

a. Establishing curriculum at this school

— State department of education or other state-level bodies
— Local school board
— School district staff
— Principal
— Teachers
— Curriculum specialists
— School Site Council
— Parent association
— Teachers' union

b. Determining the content of in-service professional development programs for teachers of this school

— State department of education or other state-level bodies
— Local school board
— School district staff
— Principal
— Teachers
— Curriculum specialists
— School Site Council
— Parent association
— Teachers' union

c. Evaluating teachers of this school

— State department of education or other state-level bodies
— Local school board
— School district staff
— Principal
— Teachers
— Curriculum specialists
— School Site Council
— Parent association
— Teachers' union

d. Hiring new teachers at this school

- — State department of education or other state-level bodies
- — Local school board
- — School district staff
- — Principal
- — Teachers
- — Curriculum specialists
- — School Site Council
- — Parent association
- — Teachers' union

e. Deciding how your school budget will be spent

- — State department of education or other state-level bodies
- — Local school board
- — School district staff
- — Principal
- — Teachers
- — Curriculum specialists
- — School Site Council
- — Parent association
- — Teachers' union

f. Scheduling of instructional time at your school (i.e., length of the day or allocation of time among subjects or class periods)

- — State department of education or other state-level bodies
- — Local school board
- — School district staff
- — Principal
- — Teachers
- — Curriculum specialists
- — School Site Council
- — Parent association
- — Teachers' union

9. **To what extent do you feel *teachers* are held accountable for student success to the following groups?**

	Not at all accountable	Somewhat accountable	Very accountable
To the principal	☐	☐	☐
To parents/guardians of students in your school	☐	☐	☐
To students	☐	☐	☐
To the general community	☐	☐	☐

10. To what extent do you feel *the principal* of your school is accountable for student success to the following groups?

	Not at all accountable	Somewhat accountable	Very accountable
The district	☐	☐	☐
To parents/guardians of students in your school	☐	☐	☐
To teachers in your school	☐	☐	☐
To the general community	☐	☐	☐
To your school's school site council	☐	☐	☐

11. To what extent do you agree with the following statements?

	Strongly disagree	Disagree	Agree	Strongly Agree
a. I believe funds are equitably allocated to schools within our district.	☐	☐	☐	☐
b. Principals are assigned equitably to schools in our district.	☐	☐	☐	☐
c. Teachers are assigned equitably to schools in our district.	☐	☐	☐	☐
d. Students are assigned equitably to schools in our district.	☐	☐	☐	☐
e. Other support staff (e.g., librarians, custodians) are assigned to schools in a way that best reflects student needs for these services.	☐	☐	☐	☐
f. Schools that serve greater percentages of low-income students in our district receive more resources than schools with lower percentages of these students.	☐	☐	☐	☐
g. Schools that serve greater percentages of low-performing students in our district receive more resources than schools with lower percentages of these students.	☐	☐	☐	☐
h. Schools that serve greater percentages of English learners in our district receive more resources than schools with lower percentages of these students.	☐	☐	☐	☐
i. I feel that I have the resources I need to try new things in my classroom.	☐	☐	☐	☐
j. I have sufficient autonomy to implement an instructional program that meets the needs of my students.	☐	☐	☐	☐
k. Teachers have the opportunity to provide input into developing and spending the budget at this school.	☐	☐	☐	☐

	Strongly disagree	Disagree	Agree	Strongly Agree
l. I understand how resources (staff, funds, etc.) are allocated to my school.	☐	☐	☐	☐
m. The school administration's behavior toward the staff is supportive and encouraging.	☐	☐	☐	☐
n. I am satisfied with my teaching salary.	☐	☐	☐	☐
o. Necessary materials such as textbooks, supplies, and copy machines are available as needed by the staff.	☐	☐	☐	☐
p. I worry about the security of my job because of the performance of my students on state and/or local tests.	☐	☐	☐	☐

12. Have you tried anything new in your classroom this year in the following areas? *(Check all that apply.)*

- ☐ Use of time
- ☐ Curriculum
- ☐ Instructional materials
- ☐ Instructional strategies or approaches
- ☐ Parent involvement
- ☐ Partnerships with external organizations
- ☐ Student supports
- ☐ Use of data
- ☐ Student assessment
- ☐ Use of technology

Twin Rivers Unified School District

School Site Council Survey

Spring 2012

About the SSFR School Site Council Survey

Purpose of the study

The American Institutes for Research (AIR) is conducting a study of the Strategic School Funding for Results (SSFR) Initiative in two school districts: Los Angeles Unified School District and Twin Rivers Unified School District. This project is funded by the U.S. Department of Education Institute for Education Sciences.

Purpose of the survey

This annual survey will help us understand how school and district policies and your role and practices as a School Site Council member change over time as this Initiative is rolled out, if at all.

Confidentiality

Your answers to the questions in this survey will be kept strictly confidential. Results from this survey will never be presented in a way that would permit any response to be associated with a specific school or individual. Only aggregate results- not individual responses- will be provided to Twin Rivers district staff. We will present findings such as, "62 percent of SSC respondents reported having significant influence over spending their school's budget."

Benefits

Your participation gives you the opportunity to share information about your experiences with the SSFR Initiative on the School Site Council. Confidential, aggregate feedback based on the results of this survey will be provided to district leaders. This will provide district leaders with information about SSC experiences with this Initiative. The district's goal is to use this information to improve the SSFR Initiative.

Freedom to withdraw

Your participation in this survey is voluntary. You have the right to stop participating at any time without penalty. However, we encourage you to participate, as your input is critical to understanding how SSFR policies are affecting schools and SSCs.

Risks and discomforts

There are no foreseeable risks associated with participation other than the inadvertent release of the data. However, to minimize this risk, there will be no names included on surveys, and you are being asked to place your survey into an envelope with all other surveys to return directly to AIR so no one at Twin Rivers can see your responses when you turn it in. At AIR, surveys will be seen only by authorized project staff, entered into a secure database, and hard copies will be stored in a locked cabinet.

More information

If you have any questions or would like further information about this survey, please contact Lisa Cruz at 650-843-8272 or lcruz@air.org. For questions regarding your rights as a participant in this study, you may contact AIR's IRB chair at IRB@air.org or 1-800-634-0797.

If you decide to complete and return this survey, you are indicating that you understand and agree to the above.

Thank you for your participation!

Please answer each question below.

1. **Which of the following describes your school's SSFR status?**

- ☐ Cohort 1 pilot
- ☐ Cohort 2 pilot
- ☐ Cohort 3 pilot
- ☐ I don't know

2. **What grades does this school serve?** *(Please circle all that apply.)*

K 1 2 3 4
5 6 7 8 9
10 11 12

3. **What is your role at this school?** *(Please select one.)*

- ☐ Principal
- ☐ Teacher
- ☐ Other school staff (*Specify:*

  _____*)*
- ☐ Parent
- ☐ Student
- ☐ Other (*Specify:*

  _____*)*

4. Please indicate how much you agree or disagree with the following statements.

	Strongly Disagree	Disagree	Agree	Strongly Agree
a. The SSC has significant influence over how the dollars in *this school's budget* are spent.	☐	☐	☐	☐
b. Parents and community members (besides SSC members) have adequate opportunity to provide input into developing and spending this school's budget.	☐	☐	☐	☐
c. I believe funds are equitably allocated to schools within our district.	☐	☐	☐	☐
d. The budget documents I am provided for SSC review are easy to understand and interpret.	☐	☐	☐	☐
e. The principal provides adequate support and information for the SSC to make budget recommendations.	☐	☐	☐	☐
f. I understand how resources (staff, funds, etc.) are allocated to my school.	☐	☐	☐	☐
g. The school community's priorities are reflected in the school site plan.	☐	☐	☐	☐
h. Our principal is held accountable for student performance.	☐	☐	☐	☐
i. Teachers in our school are held accountable for student performance.	☐	☐	☐	☐
j. The SSC in our school is held accountable for student performance.	☐	☐	☐	☐
k. The principal values the SSC's recommendations.	☐	☐	☐	☐

5. Which of the following best describes the level of engagement between the SSC and administrators at this school? *(Please select one.)*

☐ Administrators make key school decisions and inform the SSC.

☐ Administrators consult with the SSC about key school decisions; administration makes the final decisions.

☐ Administrators and the SSC are involved in two-way communication about key school decisions; administration makes the final decisions.

☐ Administrators and the SSC are involved in two-way communication about key school decisions; administration and the SSC make final decisions together.

6. Please indicate how much you agree or disagree with the following statements.

	Strongly Disagree	Disagree	Agree	Strongly Agree
a. This school is welcoming to parents.	☐	☐	☐	☐
b. This school communicates effectively with parents about the progress of their children.	☐	☐	☐	☐
c. This school communicates effectively with parents about upcoming school events.	☐	☐	☐	☐
d. This school communicates effectively with parents about school budgets and resources.	☐	☐	☐	☐

When you are finished, please insert this survey into the envelope addressed to AIR.

Thank you!

Twin Rivers Unified School District

School Site Council Survey

Spring 2010

About the SSFR School Site Council Survey

Purpose of the study

The American Institutes for Research (AIR) is conducting a study of the Strategic School Funding for Results (SSFR) Initiative in two school districts: LAUSD and Twin Rivers USD. This project is funded by the U.S. Department of Education, Institute for Education Sciences, and by the Hewlett Foundation.

Purpose of the survey

This survey will help us understand how school and district policies and your role and practices as a School Site Council member change over time as this Initiative is rolled out, if at all.

Confidentiality

Your answers to the questions in this survey will be kept strictly confidential. Results from this survey will never be presented in a way that would permit any response to be associated with a specific school or individual. AIR staff will have access to individual data, but we will not know who each respondent is. Only aggregate results- not individual responses- will be provided to Twin Rivers district staff. For example, we will tell Twin Rivers how many pilot school SSC members agree with a certain statement compared to how many of those at non-pilot schools.

Benefits

Your participation gives you the opportunity to share information about your experiences with the SSFR Initiative on the School Site Council. Confidential, aggregate feedback based on the results of this survey will be provided to district leaders. This will provide district leaders with accurate and complete information about SSC experiences with this Initiative. The district's goal is to use this information to improve the SSFR Initiative.

Freedom to withdraw

Your participation in this survey is voluntary. You have the right to stop participating at any time without penalty. However, we encourage you to participate, as your input is critical to understanding how SSFR policies are affecting schools and SSCs.

Risks and discomforts

There are no foreseeable risks associated with participation other than the inadvertent release of the data. However, to minimize this risk, there will be no names included on surveys, and you are being asked to place your survey into an envelope with all other surveys to return directly to AIR so no one at Twin Rivers can see your responses when you turn it in. At AIR, surveys will be seen only by authorized project staff and then stored in a locked cabinet.

More information

If you have any questions or would like further information about this survey, please contact Karen Manship at 650-843-8198 or kmanship@air.org. For questions regarding your rights as a participant in this study, you may contact AIR's IRB chair at IRB@air.org or 1-800-634-0797.

If you decide to complete and return this survey, you are indicating that you understand and agree to the above.

Thank you for your participation!

Please answer each question below.

1. **Is your school an SSFR pilot school?**

☐ Yes ☐ No

2. **Is your school a charter school?**

☐ Yes ☐ No

3. **Is your school an alternative school?**

☐ Yes ☐ No

4. **What grades does this school serve?** *(Please select all that apply.)*

☐ K-3 ☐ 7-8

☐ 4-5 ☐ 9-12

☐ 6

5. **What is your role at this school?**

☐ Principal ☐ Student

☐ Teacher ☐ Other (*Specify:*

☐ Other school staff (*Specify:* _____*)*

_____*)*

☐ Parent

6. Please indicate how much you agree or disagree with the following statements.

	Strongly Disagree	Disagree	Agree	Strongly Agree
a. The SSC has significant influence over how *district dollars* are spent at this school.	☐	☐	☐	☐
b. The SSC has significant influence over how the dollars in *this school's budget* are spent.	☐	☐	☐	☐
c. The SSC has significant influence over how *categorical funds* are spent.	☐	☐	☐	☐
d. Parents and community members (besides SSC members) have adequate opportunity to provide input into developing and spending this school's budget.	☐	☐	☐	☐
e. I believe funds are equitably allocated to schools within our district.	☐	☐	☐	☐
f. The budget documents I am provided for SSC review are easy to understand and interpret.	☐	☐	☐	☐
g. The principal provides adequate support and information for the SSC to make budget recommendations.	☐	☐	☐	☐
h. I understand how resources (staff, funds, etc.) are allocated to my school.	☐	☐	☐	☐
i. Our principal is held accountable for student performance.	☐	☐	☐	☐
	Strongly Disagree	**Disagree**	**Agree**	**Strongly Agree**
j. Teachers in our school are held accountable for student performance.	☐	☐	☐	☐
k. The SSC in our school is held accountable for student performance	☐	☐	☐	☐
l. This school is welcoming to parents.	☐	☐	☐	☐
m. This school communicates effectively with parents about the progress of their children.	☐	☐	☐	☐
n. This school communicates effectively with parents about upcoming school events.	☐	☐	☐	☐
o. This school communicates effectively with parents about school budgets and resources.	☐	☐	☐	☐
p. The principal values the SSC's recommendations.	☐	☐	☐	☐

7. Have you received any training about budgeting/resource allocation?

☐ Yes ☐ No

a. *If yes,* **To what extent do you agree with this statement?:**

The training I received was sufficient to help the SSC allocate funds at this school.

☐ Strongly agree ☐ Agree ☐ Disagree ☐ Strongly disagree

When you are finished, please insert this survey face down into the envelope addressed to AIR.

Thank you!

SSFR Interview Protocols

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2013 SSFR district interview protocol for TRUSD central office staff regarding change in SSFR status

1. [If applicable]: What has your role been in the SSFR reform process, if any?
2. Do you feel that you have a clear understanding of SSFR?
3. What aspects of SSFR seemed to be working well in the district? Please share any evidence or perceptions you may have to support your statements.
4. What did you see as the benefits to continuing SSFR?
5. What aspects of SSFR did not seem to be working well in the district? Please share any evidence or perceptions you may have to support your statements.
6. What did you see as the challenges or reasons not to continue SSFR?
    a. PROMPTS
        i. *In what ways was SSFR improving equity or not improving equity?*
        ii. *To what extent was resource allocation more transparent because of SSFR?*
            1. *If it was, please cite examples of how resource allocation became more transparent.*
            2. *If it was not, please explain why you believe a more transparent resource allocation process was not achieved.*
        iii. *In what ways did SSFR provide autonomy at the school site?*
        iv. *How were schools being held accountable for results fiscal and student performance results?*
        v. *Do you feel the schools received thorough reviews of the content of their academic plans derived from the SSFR budgeting process? If so, how were these reviews done?*
        vi. *Did you detect changes in innovation at the school or district level because of SSFR? Is so, can you give me some examples?*

vii. *To what extent did school leaders have or not have sufficient capacity or time to make resource allocation decisions? Please cite some examples if possible.***
viii. *In what ways were SSC members involved or not involved in site-level decisions on programs, services, and/or resource allocation?***
ix. *Did it seem like SSFR was taking up too much time of central office or site-level leaders? What aspects of SSFR required most additional time?*
x. *Did SSFR reveal any specific benefits to improving instructional or resource allocation decisions?*

7. What were the biggest challenges or barriers to implementation of SSFR in the district?
8. What changes could have been made to permit continuation of the SSFR project?
9. To what extent did the current national or California fiscal crisis play a role in the decision to suspend work on SSFR?
    a. *If it did play a role, please explain how the current national or California fiscal crisis influenced the decision to suspend work on SSFR.*
10. What changes do you anticipate in the processes by which resource allocation decisions will be made at the central office?
    a. Will Twin Rivers be moving toward a more centralized approach to allocating school resources?
    b. Will Twin Rivers stop using the TRM in allocating revenues to school sites?
        i. What specific aspects of the TRM did you like/not like?
        ii. What aspects of the TRM would you have changed and how?
11. What changes do you anticipate in the process by which resource allocation decisions will be made at the school sites?
    a. What do you anticipate will be the impact of suspending work by school leaders on the PBAR tool?
        i. What specific aspects of PBAR did you like/not like?
        ii. What aspects of the PBAR would you have changed and how?
    b. What control will school leaders have, if any, over staffing decisions at the school site? How will this be different from control that they had under SSFR?
12. Is there anything else you would like to add that we haven't already covered?

**These questions were asked in the interviews with central office staff in the spring of 2012. If time constraints do not allow asking all questions please skip these questions.

2012 SSFR-BSA interview protocol for principals (both districts)

* = High priority question

Background

1. * How long have you been a principal at this school? In this district?

2. In what year did your school first become part of the SSFR reform?

Goals

3. * What do you think are the goals for SSFR? [Ask this first and then probe as needed]
    - ** What do you see as the primary goals for the way various general or categorical sources of revenues are distributed among schools?[Probe, if necessary:]*
        - *Flexibility/autonomy of general funds, categorical funds; per-pupil funding, need-based funding; actual teacher salaries*
        - *Transparency, innovation*
    - ** What do you see as primary goals for the site level planning and budgeting processes that have been implemented as part of SSFR?*
        - *Budget timeline; goals-based budgeting; alignment between program plans, budgets, and resource allocation*
        - *The extent to which schools face the real costs of inputs (e.g., through the use of actual teacher salaries as part of the budgeting process)*
        - *Transparency, innovation, staff and community engagement*

4. [If applicable]: In what ways, if any, have these goals changed since the SSFR reform began?

Progress/milestones

5. What progress has been made this year (2011-12) on goals related to the distribution of revenues among schools?
    - *What influence has SSFR had on flexibility of general funds? Categorical funds? Equity with which general or categorical funds are distributed to schools?*
    - *What influence has SSFR had on funding based on per-pupil allocations? Actual teacher salaries?*

6. * What progress has been made this year (2011-12) on goals related to the site level planning and budgeting process?
    - **What influence has SSFR had on the budget timeline? On goals-based budgeting? On schools facing the true costs of staff or other inputs (e.g., by costing out teachers based on actual vs. average salaries)?*
    - **What, if anything, does/will the new planning and budgeting process allow principals to do that they would not have been able to do otherwise?*

7. What progress has been made this year (2011-12) on other SSFR goals?

8. To what extent do you feel that your school's program plans or goals are aligned with resource allocation?
    - *How does SSFR help you align your program plans, goals, and allocation of resources?*
    - *Would you prefer to see them more aligned?*
    - *What would it take to get to greater alignment?*

9. What do you know about the processes and procedures by which revenues were allocated to your school?
    - *Were these procedures appropriate/fair/equitable?*
    - If applicable - *What would make this tool more useful?*
    - If applicable - *What is left to be done to implement this process for distributing revenues to schools more fully or effectively?*

10. For TRUSD: What progress have you made this year in using the PBAR (Planning, Budgeting, and Allocation of Resources) tool?
    - *What would make this tool more useful?*
    - *What do you see is left to be done to implement PBAR more fully or effectively?*

For LAUSD: What progress have you made this year in using the site based budgeting tool?
    - *What would make this tool more useful?*
    - *What do you see is left to be done to implement the site budgeting tool more fully or effectively?*

11. * Has the implementation of SSFR enabled you to introduce any new or innovative programs or strategies at your school this year or in any past year?
    - *If yes – what have you done, and how were you able to do it?*
    - *If no – why not?*

Capacity and Training/Support

12. *How would you describe the role of the district central office in supporting the alignment of your school's program plan with resource allocation decisions?
    - *What has the central office done this year (2011-12) to provide professional development training to you or your school around program planning, budgeting, and/or resource allocation?*
        - *What types of activities have occurred? How many times/how often?*
        - *Who attends?*
        - *How would you rate the quality and usefulness of these trainings? Why?*
        - *What other trainings would you like to see offered?*

13. Do you feel that central office staff have adequate preparation and the technical capacity to help you successfully implement the SSFR reforms in your school?
    - *If yes, what evidence do you have of this?*
    - *If no, what kinds of capacity building activities do you think are needed?*

14. *Do you feel that you and the other administrators at your school have adequate preparation and the technical capacity to make effective decisions about program planning, budgeting, and resource allocation?
    - **If yes, what evidence do you have of this?*
    - **If no, what kinds of capacity building activities do you think are needed?*

15. What other resources or supports do you have for program planning, budgeting, and resource allocation—besides from the central office?
    - *What resources or supports do you need? Are there any plans to provide these?*

16. *Do you feel that teachers and school site council members have adequate preparation and the technical capacity to make effective decisions about program planning, budgeting, and resource allocation?
    - **If yes, what evidence do you have of this?*
    - **If no, what kinds of capacity building activities do you think are needed?*

17. What other resources or supports do teachers and school site councils (SSC) have for program planning, budgeting, and resource allocation—besides from the central office?

- *What resources or supports do you think they need? Are there any plans to provide these?*

18. *We know that you have invested a lot of time in SSFR. What proportion of your work time would you estimate that you spend on a weekly basis on work related to SSFR?

- **What do you spend most of your time on, related to SSFR? (e.g., strategizing, meeting with teachers, etc.)*
- **What activities are you no longer doing because of the time required for carrying out the SSFR related activities? Did these foregone activities get delegated to other staff?*
- **What other staff are helping you with your SSFR related duties and about how much of their time is required to carry these duties out?*

<u>Communication</u>

19. What communication have you received from the central office this year (2011-12) with regard to SSFR?
    - *Was that communication adequate and helpful?*

20. Do you feel that central office staff [in TRUSD say "network executives and other budget staff" and in LAUSD say "fiscal coordinators and staff who help with academic planning"] have a clear understanding of SSFR?
    - *<u>If no,</u> what do they know? What don't they know?*
    - *What perceptions or misperceptions do they have?*
    - *What do you wish they knew?*

21. *Do you feel that you have a clear understanding of SSFR? Why or why not?

22. *Do you feel that teachers, school site council members, parents, and community members have a clear understanding of SSFR?
    - *<u>If no,</u> what do they know? What don't they know?*
    - *What perceptions or misperceptions do they have?*
    - *What do you wish they knew?*

Transparency and involvement

23. In what ways, if any, do you feel that the way revenues are distributed to your school is a transparent process?
    - *How does this level of transparency compare to the process prior to SSFR?*
    - *What is the most transparent? What is the least transparent?*

24. * In what ways are members of your school community involved in the budgeting and program planning process at your school? How would you describe their role and involvement?
    - ** What members of the school community (e.g., teachers, other faculty, parents, students, other community members at large) are involved in budgeting, program planning, and budgeting at your school?*
    - **What have you done to involve the community in the program planning and budgeting process at your school?*
    - **What value do you feel is added (or could be added) with the community's involvement in this process?*
    - **What limitations, if any, do you see in involving the community in these decisions?*
    - **Are there any plans in place to increase community involvement in this process?*

General reflection on SSFR

25. What are the biggest steps the district has taken this year (2011-12) to move SSFR forward?
    - *Probe for specific examples.*
    - *What have been major "wins"?*

26. What are the biggest steps you have taken this year (2011-12) to move SSFR forward?
    - *Probe for specific examples.*
    - *What have been major "wins"?*
    - *What are you most proud of about SSFR this year?*

27. *What do you feel are the biggest challenges or barriers to successful SSFR implementation?

    - Probe on: *funding and resource allocation; planning and budgeting process; professional development; communication; transparency; community involvement*

28. What most concerns or disappoints you about SSFR?

29. *What kinds of accountability mechanisms, if any, have been implemented in conjunction with SSFR?

    - If applicable - *What kinds of mechanisms were put in place and were they not implemented?*

30. How do you balance compliance and flexibility when you make budgeting and planning decisions with SSFR?

31. What do you see as critical next steps moving forward?

32. *Do you feel there are any district- or state-level policies that create barriers to SSFR implementation and achieving SSFR goals?
    - *<u>*If yes</u>, which policies? What is the implication of these policies for SSFR? What would you like to see changed about this policy?*
        - *State categorical program restrictions*
        - *State and/or federal accountability policies*
        - *Small school, comprehensive schools*
        - *Open enrollment*
        - *Curriculum and/or standards policies*
        - *District hiring, placement, tenure policies; union collective bargaining agreements*
        - *Other?*
    - **Have you been able to find ways of surmounting any of these barriers?*

33. * What are some major lessons you have learned this year (2011-12) that can help other principals who are considering implementing a reform like SSFR?

2012 SSFR district interview protocol (TRUSD)

Goals

2. [If applicable]: What has your role been in the SSFR reform process?

3. What are the district's goals for SSFR?
    - *What do you see as the primary goals for funding allocation decisions?*
        - *Probe, if necessary:*
        - *Flexibility/autonomy of general funds, categorical funds; per-pupil funding, need-based funding; actual teacher salaries*
        - *Transparency, innovation*
    - *What do you see as primary goals for the planning and budgeting process?*
        - *Budget timeline; goals-based budgeting; alignment between program plans, budgets, and resource allocation*
        - *Transparency, innovation, staff and community engagement*

4. To what extent have these goals changed since the SSFR reform began?

Progress/milestones

5. What progress has been made this year (2011-12) on goals related to funding allocation decisions? What key milestones have been reached?
    - *What influence has SSFR had on flexibility of general funds? Categorical funds?*
    - *What influence has SSFR had on funding based on per-pupil allocations? Actual teacher salaries?*

6. To what extent are funding allocation decisions different this year as compared to last year?
    - *To what would you attribute those changes or lack of changes?*

7. What progress has been made this year (2011-12) on goals related to the planning and budgeting process? What key milestones have been reached?
    - *What influence has SSFR had on the budget timeline? Goals-based budgeting?*
    - *What, if anything, does/will the new planning and budgeting process allow principals to do that they would not have been able to do otherwise?*

8. To what extent has the planning and budgeting process changed since last year?
    - *To what would you attribute those changes or lack of changes?*

9. For TRUSD:

8A: What progress has been made this year in using the TRM (Targeted Revenue Model) and PBAR (Planning, Budgeting, and Allocation of Resources) tools?

8B: What do you see is left to be done to implement these tools fully or more effectively in the district?

For LAUSD:

8A: What approaches has the district used this past year to distribute revenues or resources to schools? Have student needs been directly addressed in this approach? What do you envision are the next steps in implementing a revenue distribution tool in the district?

8B: How would you describe the site based budgeting tool used in the district during 2011-12 in preparation for 2013? What do you envision are the next steps in implementing a new site based budgeting tool?

10. What progress has been made this year (2011-12) on other SSFR goals? What key milestones have been reached?
    - *To what extent do you feel that schools' program plans are aligned with resource allocation?*

Capacity

11. Do you feel that central office staff have adequate preparation and the technical capacity to successfully implement the SSFR reforms?
    - *If yes, what evidence do you have of this?*
    - *If no, what kinds of capacity building activities do you think are important?*

12. Do you feel that principals, teachers, and school site council members have adequate preparation and the technical capacity to make effective decisions about program planning, budgeting, and resource allocation?
    - *If yes, what evidence do you have of this?*
    - *If no, what kinds of capacity building activities do you think are important?*

13. We know that you have invested a lot of time in SSFR. How much time would you estimate that you spend on a weekly basis on work related to SSFR?

- *About how many hours a week do you work total? About what proportion of your time do you spend on SSFR?*
- *What do you spend most of your time on, related to SSFR? (e.g., strategizing, meeting with principals, etc.)*

14. Who else would you say are key contributors to SSFR implementation in the central office? In the schools?
    - *About how much time do they spend related to SSFR?*
    - *Why are they key?*

Professional development training and support

15. How would you describe the role of the district central office in supporting the alignment of schools' program plan with resource allocation decisions?
    - *What has the central office done this year (2011-12) to provide PD training to school sites around program planning, budgeting, and/or resource allocation?*
        - *Who organizes and facilitates PD training activities?*
        - *What types of activities have occurred? How many times/how often?*
        - *Who attends? How many people attend?*
        - *What feedback – if any – have you received from staff members who have attended these PD trainings?*

16. What other resources or supports do principals, school site councils (SSC), and teachers have for program planning, budgeting, and resource allocation—besides from the central office?
    - *What resources or supports do you think they need? Are there any plans to provide these?*

Communication

17. What has the central office done this year (2011-12) with regard to communicating about SSFR?
    - *What is the district's communication strategy about SSFR reforms?*
    - *Who organizes and facilitates communication?*

- *What types of communication methods do you use?*
- *Who is the target audience for various types of communication?*

18. Do you feel that central office staff have a clear understanding of SSFR?
- *<u>If no,</u> what do they know? What don't they know?*
- *What perceptions or misperceptions do they have?*
- *What do you wish they knew?*

19. Do you feel that principals, teachers, school site council members, parents, and community members have a clear understanding of SSFR?
- *<u>If no,</u> what do they know? What don't they know?*
- *What perceptions or misperceptions do they have?*
- *What do you wish they knew?*

<u>Transparency and involvement</u>

20. One of the goals of SSFR is to make district funding to schools a more transparent process. What progress has been made this year (2011-12) in terms of transparency?
    - *To what degree do you believe your current process is transparent to:*
        - *Board members? Principals? Teachers or other school faculty? Parents? Community members?*
    - *What has been done to increase transparency?*
    - *What remains to be done to increase transparency?*
    - *What successes or failures have you encountered in attempting to increase transparency?*

21. Is the school community (teachers, other faculty, parents, students, other community members) involved in the budgeting and program planning process at the school level? How would you describe their role and involvement?
    - *What members of the school community are involved in budgeting, program planning, and budgeting at the school site?*
    - *What steps has the district taken to involve the community in the program planning and budgeting process at the school level?*
    - *What value do you feel is added (or could be added) with the community's involvement in this process?*
    - *What limitations, if any, do you see in involving the community in these decisions?*
    - *Are there any plans in place to increase community involvement in this process?*

General reflection on SSFR

22. To what extent is there an accountability mechanism in place for implementing SSFR?

- *What kinds of mechanisms may have been put in place? If applicable - Why were they not implemented?*

23. Do you feel that SSFR has created more of a culture of innovation and efficiency in the way resources are being allocated in the district or in the schools?
    - *If so, what changes have you observed that provide evidence of innovation or improved efficiency?*
    - *If not, why do you think this is so?*

24. What are the biggest steps the district has taken this year (2011-12) to move SSFR forward?

    - *Probe for specific examples.*
    - *What have been major "wins"?*
    - *What are you most proud of about SSFR this year?*

25. What have been the biggest challenges or barriers to SSFR implementation this year (2011-12)?

    - Probe on: *funding and resource allocation; planning and budgeting process; professional development; communication; transparency; community involvement*
    - *How were these addressed?*
    - *Were there any issues you faced that you hadn't predicted?*
        - *If yes, how did you address this?*
    - *Were there any major mistakes that were made?*
        - *If yes, how did you address this? What might you do to avoid a similar mistake in the future, or to prevent it if you could go back?*
    - *What most concerns or disappoints you about SSFR this year? What "keeps you up at night"?*

26. What do you see as critical next steps moving forward? What do you see as major challenges?

27. Do you feel there are any district- or state-level policies that create barriers to SSFR implementation and achieving SSFR goals?
    - *<u>If yes</u>, which policies? What is the implication of these policies for SSFR? What would you like to see changed about this policy? Do you have any strategies for changing the policy?*
        - *State categorical program restrictions*
        - *State and/or federal accountability policies*
        - *Small school, comprehensive schools*
        - *Open enrollment*
        - *Curriculum and/or standards policies*
        - *District hiring, placement, tenure policies; union collective bargaining agreements*
        - *Other?*

28. What are some major lessons learned this year (2011-12) that can help other districts who are considering implementing a reform like SSFR?

29. Is there anything else you would like to add that we haven't already covered?

2010 SSFR-BSA district interview (both districts)

1. Can you tell me a bit about your background and your current role in the district?

2. What services does your department provide to schools? Which of these services are schools required to use and which are optional?

3. How much budgetary discretion do schools in your district have? That is, what proportion of the total school budget do principals have discretion over? Has this changed over time?

4. How do you feel about the current balance between district and school control? Would you like to see the district or schools have more control over school-level expenditures?

5. To what degree do you believe your current process of allocating resources to schools is transparent to board members? To principals? To teachers and other school faculty? To parents?

6. Are there any guiding district-wide strategies for funding allocations?

Probe, if necessary:

- To what extent are funds distributed based on student need?
- When was the need-based funding formula implemented?
- What has been the influence of this policy? Positives, negatives, challenges?
    - What has been the influence on each of the following: professional development, staffing, instruction, technology, student support, student achievement

7. Do you feel that funds are distributed equitably to schools in your district? Why or why not? Has this changed over time?

8. Is the community involved in the budgeting and program planning process at the school level? How would you describe their role and involvement?

Probe, if necessary:

- What steps has the district taken to ensure the community's involvement in the budgeting process at the school level?
    - Who in the community is involved?

- What value do you feel is added (or could be added) with the community's involvement in the processes of budget allocation and/or program planning?
    - What are the major concerns or needs they have raised?

9. Can you explain how schools develop their site-based academic plans? How would you describe the district's involvement in this process?

Probes:

- Does your central office plan and organize technical assistance and/or professional development activities for this process?
- How does the district ensure that the site-based plans are aligned with the overall academic plan for the district?

10. To what extent do you feel that schools' academic plans and resource allocation are aligned? How would you describe the role of the district central office in supporting the alignment of the academic plan and resource allocation?

11. Are you or is anyone in the central office currently actively engaged in providing professional development to school sites around budgeting?

Specifically, are there any supports or guidance available to SSFR (pilot) schools?

12. To what extent are principals encouraged or expected to share budget information with their staff?

13. Do you feel that teachers, principals, and school site council members have adequate preparation and the technical capacity to make effective decisions about budgeting/resource allocation? If not, what kinds of capacity building activities do you envision as being important?

14. Does the district currently have any policies in place to encourage effective teachers to teach at higher-needs schools? If so, how are these policies structured? Have they been effective, in your opinion at getting teachers to teach in high needs schools? Do you think they have been effective in raising student achievement? Why or why not?

15. Who make hiring and firing decisions about staff at schools in your district? How much input do principals have? How much input do teachers have? Has this changed in the past year?

    - How did this policy come about?
    - Do you think this policy allocate teachers equitably across schools? Does this policy allocate principals equitably across schools? Why or why not?

16. Are school principals held accountable for student learning in your district? How is this reflected in your interactions with school principals? What does it mean for school principals to be held accountable for student learning?

17. Are teachers held accountable for student learning in your district? What does it mean for teachers to be held accountable for student learning?

18. Can you think of any notable innovations in instruction, organization, or policy at the schools in your district (that you believe will raise student achievement)?

    - What enabled these innovations? (listen for school leadership, SSFR, etc.)

19. What is the district's strategy for communicating the SSFR reform to schools? Has this strategy been effective? What challenges are you facing?

20. Are there any other related initiatives in the district right now?
    - Can you tell me a little bit about them?

21. Are there factors that support the reform?
22. Are there any challenges that you have seen or foresee in school-level implementation of the reform? What is your strategy for dealing with these challenges?
    - Probes:
        - State categorical funds
        - District's hiring policies
        - District's collective bargaining agreements
        - Student assignment policies
        - State and/or federal accountability policies
        - Curriculum and standards policies
23. Are there any funding challenges you are facing right now in the district?

- To what extent do you think these will influence the reform?

24. What do you see as the intended goals for the current budgeting/planning process in your district? Have those goals been achieved?

25. What changes are planned to the district budgeting process?

26. Do you have any other comments about the SSFR initiative?