Strategic School Funding for Results (SSFR)

Laying the Foundation for Reform in Los Angeles Unified and Twin Rivers Unified

A presentation to the Association for Education Finance and Policy

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Matt Hill, Administrative Officer, Office of the Superintendent, LAUSD

Mahala Archer, Administrator, Special Projects, Office of the Superintendent, TRUSD

Jim Brown, Pivot Learning Partners, SSFR Co-Principal Investigator,

Steve Jubb, Pivot Learning Partners, SSFR Project Director

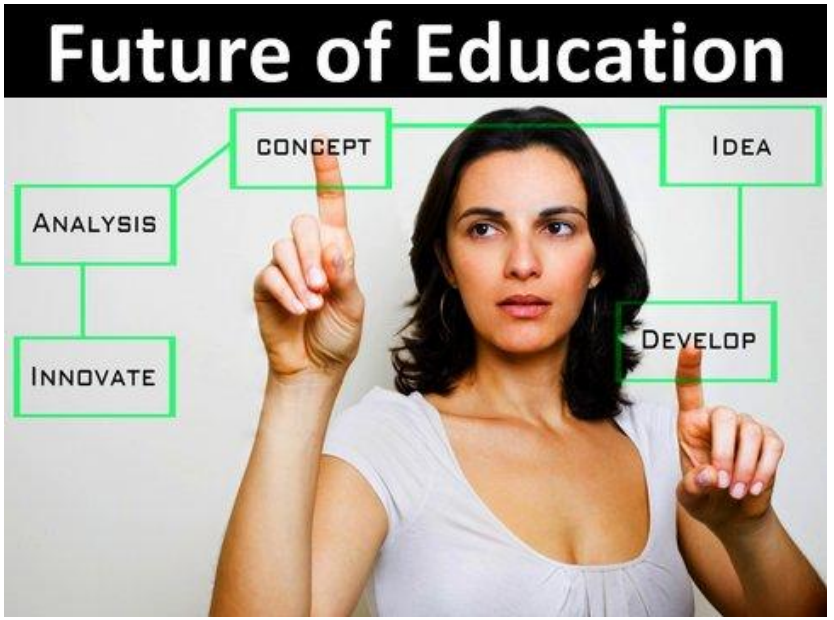
The context of education is changing — so how do we get …

From here

To there

Emerging areas of innovation in managing public school districts

1. Student base budgeting and need based funding models
2. Talent management, especially teachers
3. Performance management
4. Community partnerships and family engagement
5. Better data and information to drive decisions
6. School quality through choice & tiered intervention
7. “Blended learning” integrating online and real time approaches



Strategic School Funding for Results

Two Partners	Two Districts

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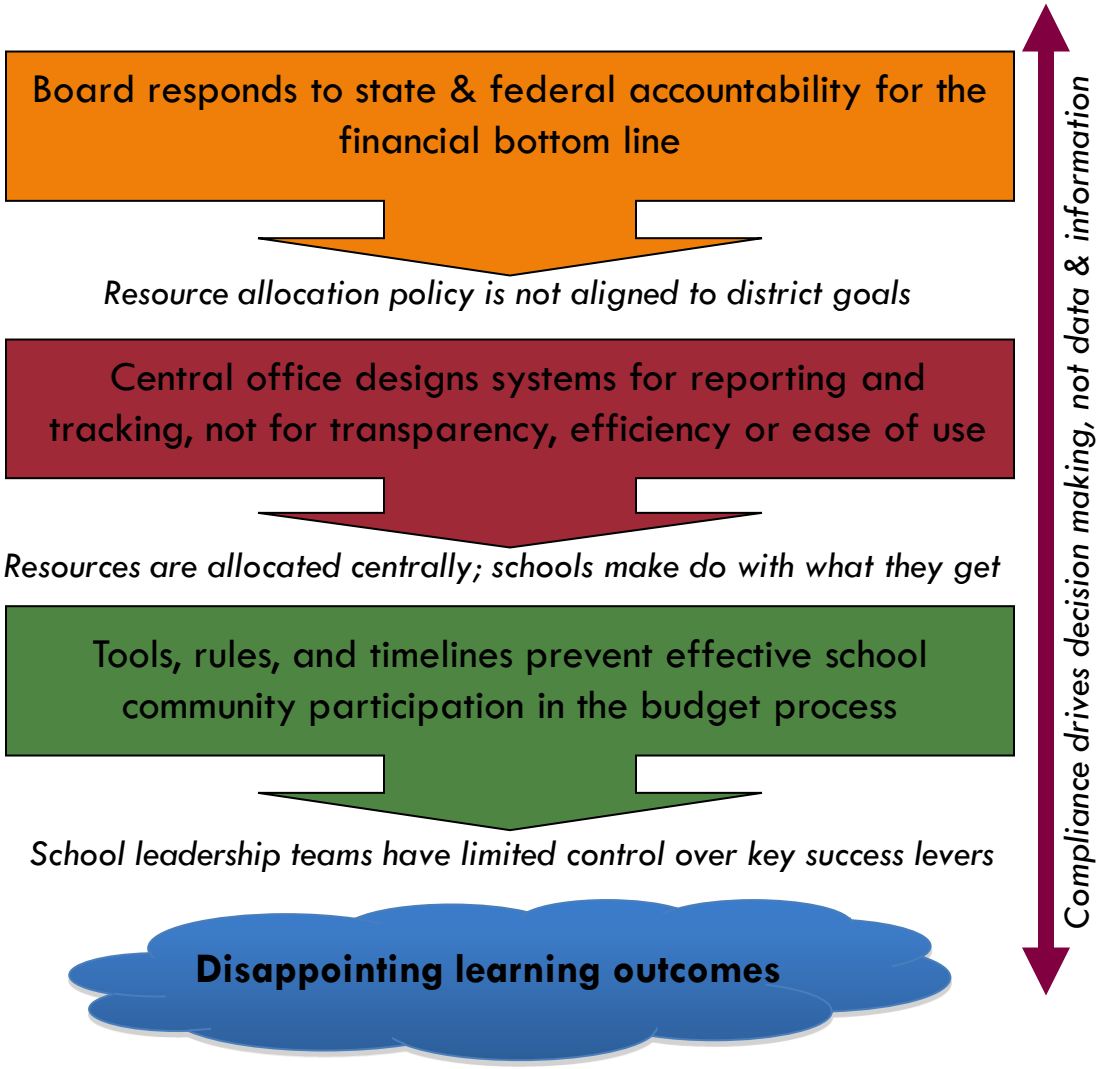
TwinRivers UNIFIED SCHOOL DISTRICT

SSFR vision of the key elements

Innovation and Efficiency	• *Increase school autonomy linked to accountability* • *Increase incentives for teacher/principal performance* • *Ensure access to educational choices* • *Create a central office service culture*
Increased transparency	• *Simplify processes for allocating dollars to schools* • *Increase stakeholder participation in formula and budget development*
Improved Equity	• *Allocating dollars based on student needs* • *Facilitating equitable distribution of effective teachers and principals*

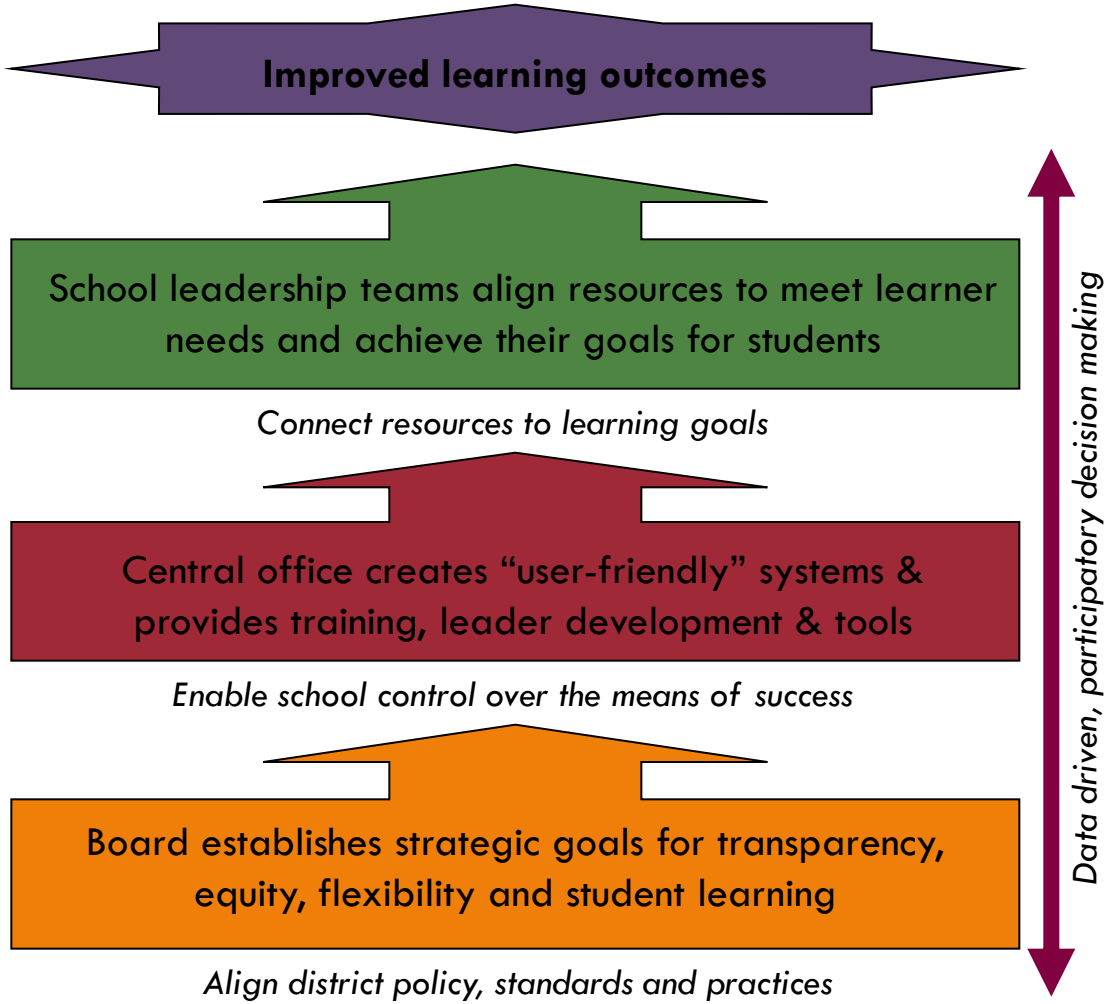
Centralized resource allocation constrains innovation, equity and accountability

By allocating resources to schools centrally districts have systematically disempowered school leadership and parents, and undermined local accountability for learning outcomes.



SSFR helps districts create conditions for equity, innovation and accountability

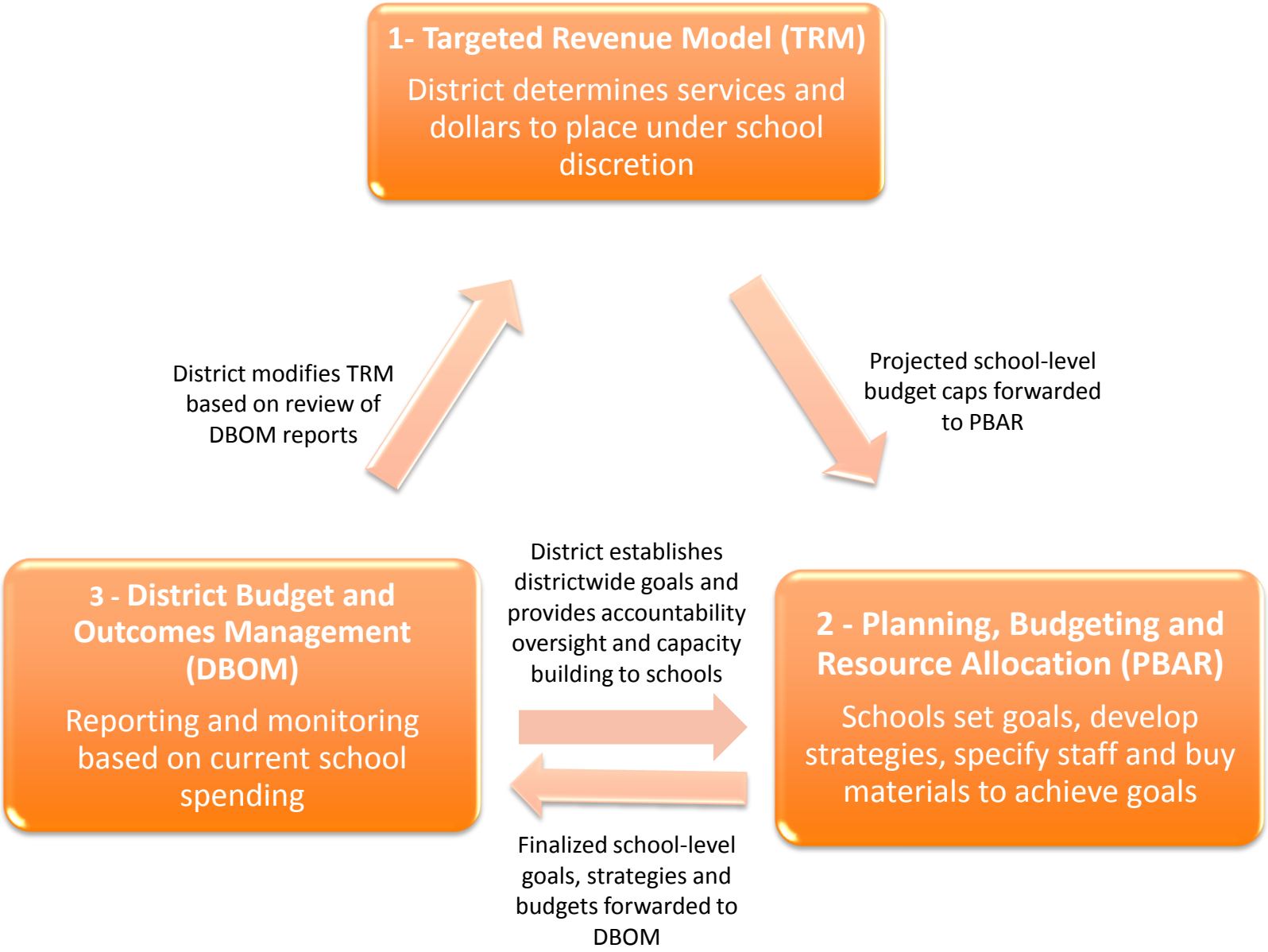
Student-based budgeting systems allocate resources and decision rights to schools and support them to make tailored, data-driven spending decisions as a key lever for improving student outcomes.



SSFR provides essential supports for implementation and scalability

Key Areas of Support	Purposes
1. **SSFR suite of SAAS tools** built using user-centered design	1. Make the switch to a per pupil system more manageable
2. **Inside/outside project management** support team	2. Increase project management support during implementation
3. **A service blueprint** for redesign of central office budget systems	3. Re-focus central office departments on supporting schools
4. **Site-level training and stakeholder engagement** in planning & budgeting	4. Create a more efficient and effective system of school
5. **Knowledge management systems** for equity, efficiency and effectiveness	5. Increase the impact and quality of investment & allocation decisions
6. **Research & evaluation** to support policy change	6. Opportunity to change policy at the state and local levels
7. **Expanded dissemination** of activities and findings	7. Influence state policies

SSFR tools will help make the change



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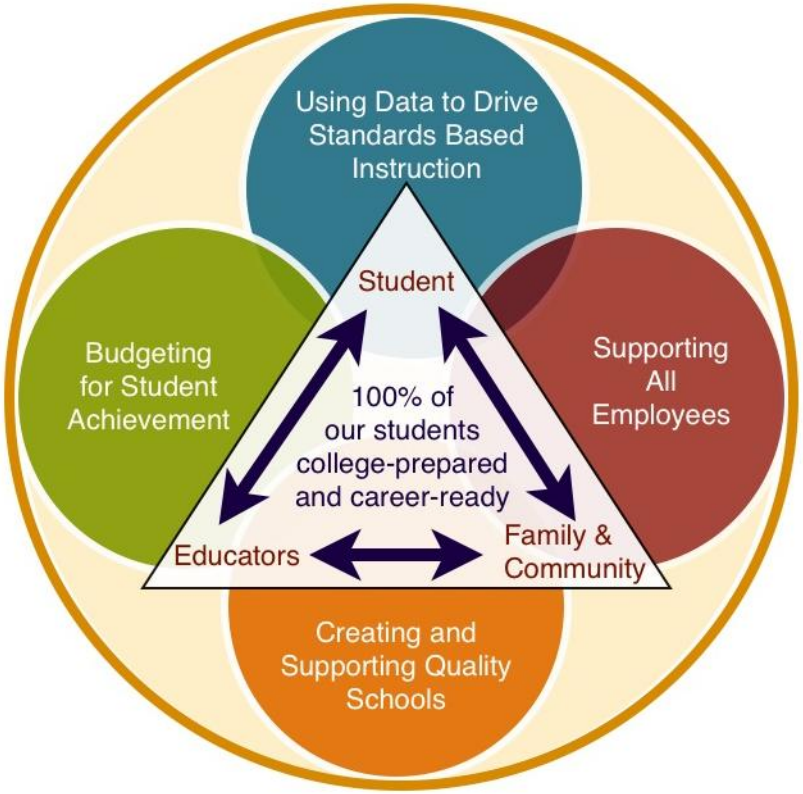
Strategies

Budgeting for Student Achievement is one of four core initiatives to drive change

We will make the District budget more transparent, align resources for greater impact and equity, and give schools the ability to target resources to meet their school specific needs, bringing funding and decision-making closer to schools and classrooms.



Use data to drive standards – based, effective instruction for all students, coupled with support and intervention, when students need extra assistance or accelerated learning.

We will analyze multiple data points to differentiate the service and support we deliver to schools. In addition, we will capture and share best practices across all of our schools regardless of school models.

We are accountable for our students' success. We will use data to personalize the supports that all of our employees need to be efficient and successful, from professional development and training, to creating measurable performance goals.

Early findings in Los Angeles:

School leaders seek control over means to success

Interviews showed that school leaders…

- Feel they need greater control over their budgets
- Believe that the schools and students would benefit from greater control
- Worry about their capacity to manage their budgets
- Do not feel that they are supported by the central office
- Vary in their understanding of the current budgeting system and/or the benefits of transparency

LAUSD's four main drivers of change

- Need-based, per pupil resource allocation → Transforms incentives
- Expanded flexibility for greater accountability → Transforms accountability
- Talent & performance management systems → Transforms the human capital system
- Accurate, timely, relevant, accessible data & information → Transforms decision-making at all levels

Work-streams and Projects for 2010-11

Transparency	•Designing Tools *to support transparency and strategic budgeting at school sites.*
Flexibility	•Program and Policy Reviews *to identify resources and flexibilities for schools.*
Accountability & Support	•Capacity Building *for principals, school site councils, and the central and local district offices.*
Equity	•Budgeting for Student Achievement Pilot Analysis *to address and identify issues of scalability and equity.*

Key accomplishments in LAUSD

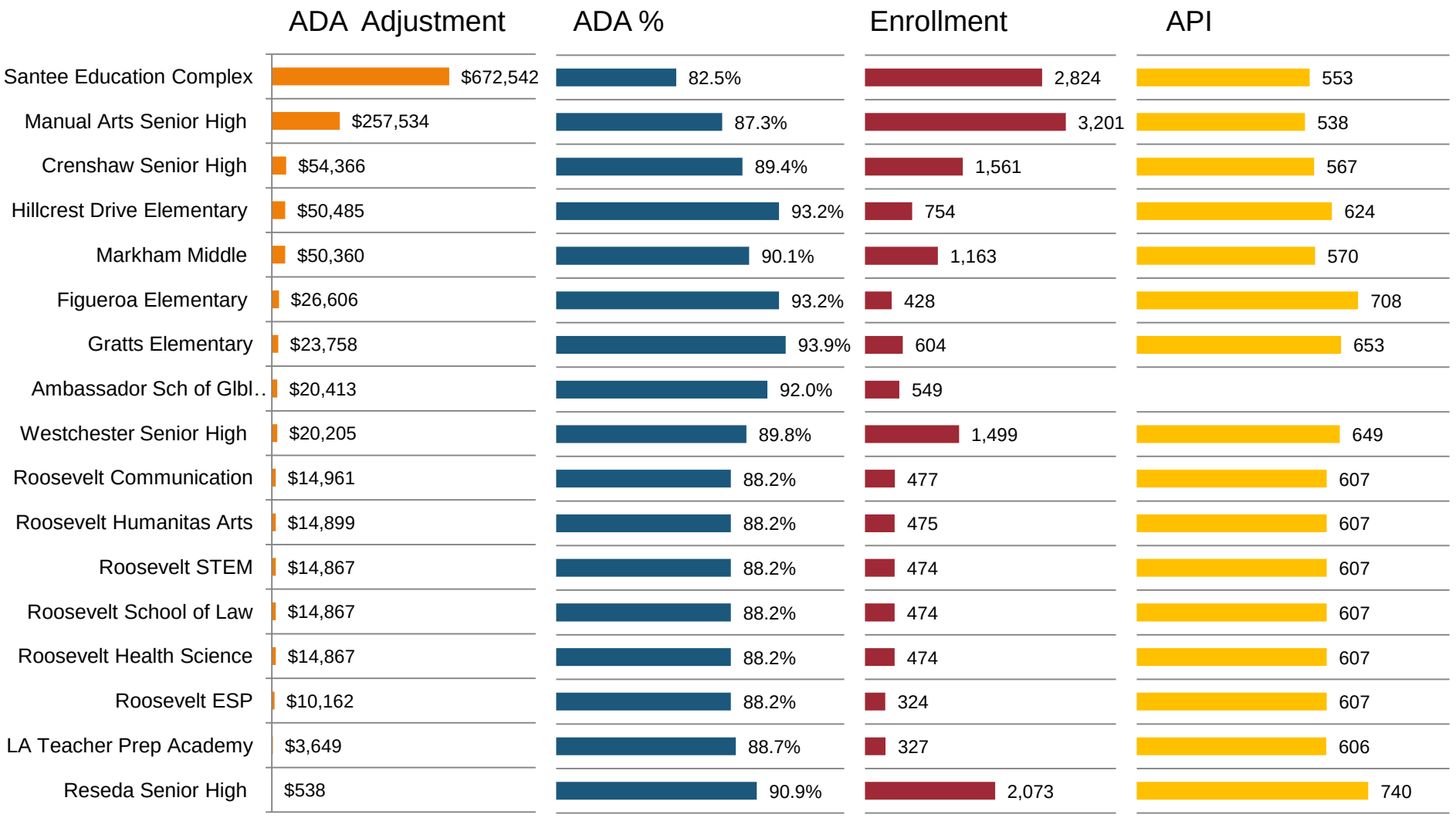
- We have 73 schools participating in this model serving 65,154 students
- An average of 72% of revenues were allocated to school sites

Pilot case study: adjustments in school budgets creates inequity & inefficiency

- In the 2010-11 budget development cycle, Budget Services made several types of adjustments to Budgeting for Student Achievement school site budgets.

- These adjustments are:
  - **Average Daily Attendance** – adjusted school site revenue up or down to reflect the average district attendance rate.
  - **Salary Adjustment** – adjusted school site revenue to match the district average salary by position.
  - **Other Adjustment** – adjusted school site revenue up or down to match the expenditures identified in a norm-based budget for the site.

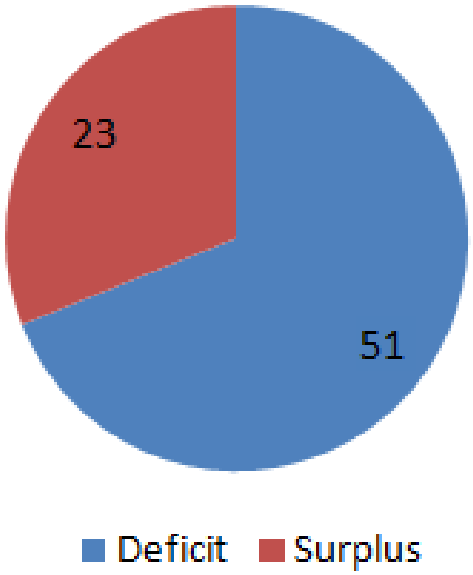
Case study: 17 schools received adjustments because of ADA

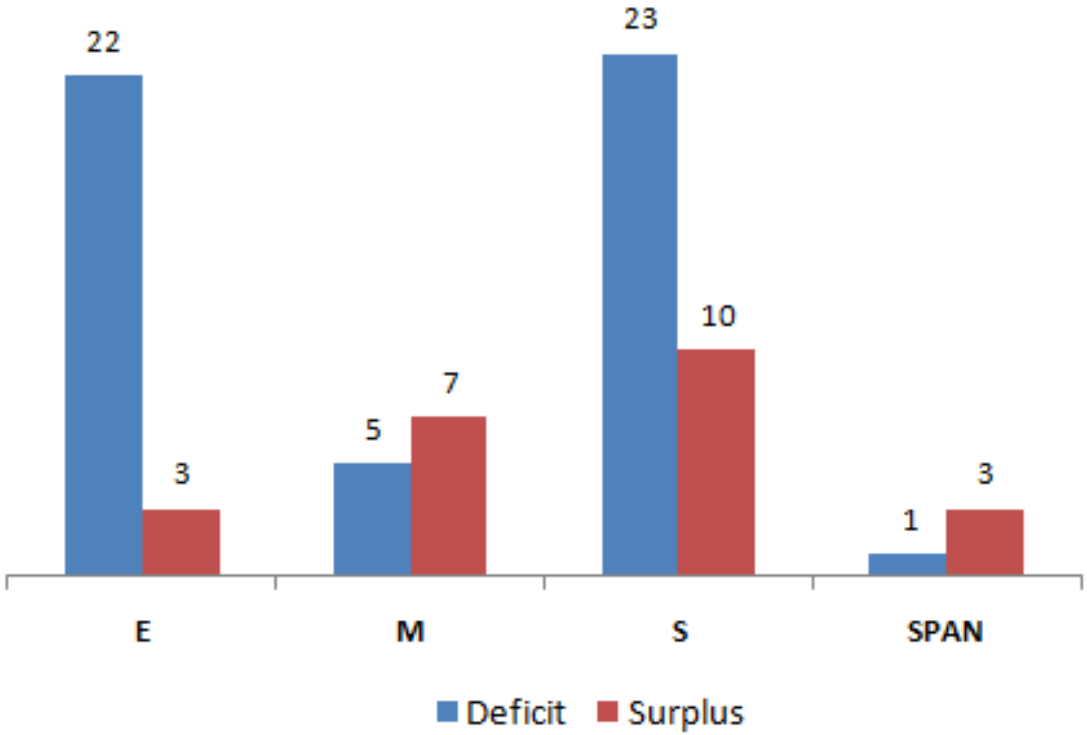


19 of 74 pilots received salary adjustments; 11 of the adjustments exceeded $65,000

School Name	Max Salary Adj	Total Enrollment	API 2010	Salary Adj Per Pupil
FRANKLIN SH	$ 255,636	2,236	658	$ 114
VERDUGO HILLS SH	$ 159,192	1,911	712	$ 83
RESEDA SH	$ 135,218	2,073	740	$ 65
CARVER MS	$ 98,064	1,636	561	$ 60
HAMILTON SH-COMPLEX	$ 93,530	2,943	710	$ 32
ROOSEVELT COMMUNITCATION	$ 72,282	477	607	$ 152
ROOSEVELT HEALTH SCIENCE	$ 72,282	474	607	$ 152
ROOSEVELT HUMANITAS ARTS	$ 72,282	475	607	$ 152
ROOSEVELT SCHOOL OF LAW	$ 72,282	474	607	$ 152
ROOSEVELT STEM	$ 72,282	474	607	$ 152
UNIVERSITY SH	$ 67,648	2,096	678	$ 32
GRATTS EL	$ 63,021	604	653	$ 104
ROOSEVELT ESP	$ 51,630	324	607	$ 159
WRIGHT MS	$ 42,780	928	755	$ 46
KENTWOOD EL	$ 23,595	322	870	$ 73
COWAN EL	$ 22,872	404	837	$ 57
AMBASSADOR SCH-GLBL LDRSHP	$ 22,760	549		$ 41
WESTCHESTER SH	$ 15,930	1,499	649	$ 11
HILLCREST DR EL	$ 9,649	754	624	$ 13

70% of the pilot schools had a deficit; 45% were high schools, 43% elementary schools.





Lessons Learned

- Need to start with transparency in order to have equity conversations
- Need to invest heavily in budget process redesign and technology upgrades
- Actively involve all stakeholders

TwinRivers
UNIFIED SCHOOL DISTRICT

New district, new systems, better results

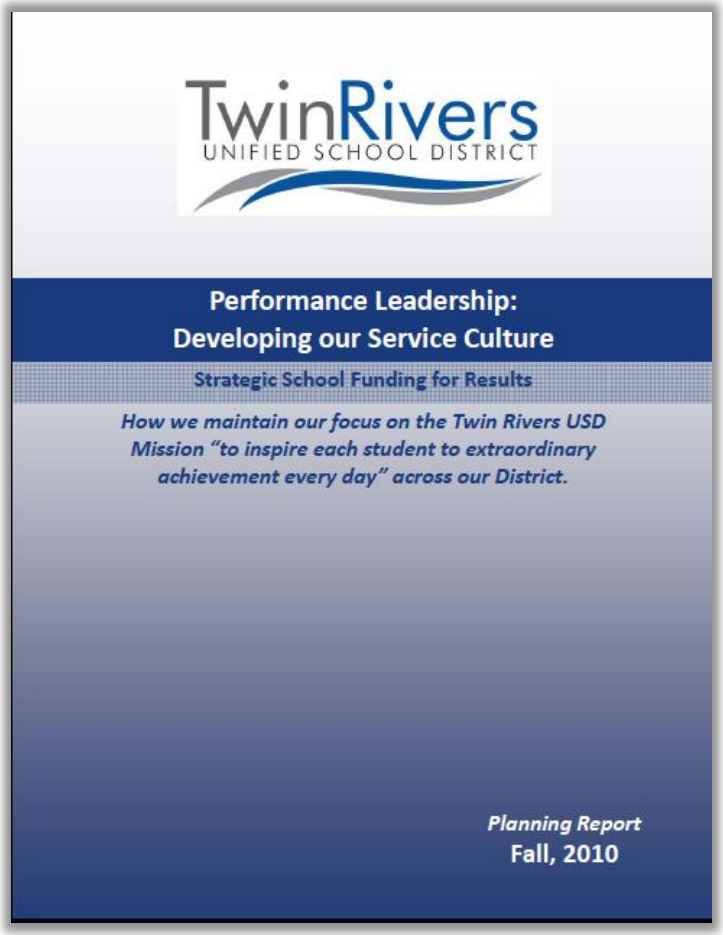
- Newly unified school district
- Urban area of Sacramento, 22000 students, 100% Title I schools, 20+ Languages
- An opportunity to start the new, progressive systems with the guidance of AIR/PLP

Better systems to support better schools

- Per-pupil funding and a needs-based formula
- Training for leadership teams
  - decision-making, program evaluation, and resource management
- Engaging stakeholders in planning & budgeting
- Increase transparency around resource allocation

Align a culture of effectiveness and improvement to enhance learning

- Focus on quality services to schools
- Set performance standards & measure impact
- Link evaluation to performance for everyone:
  - teachers, principals, certificated and classified staff & leadership
- Maximize dollars to schools



Making changes at a time of reduced funding is difficult

Accomplishments

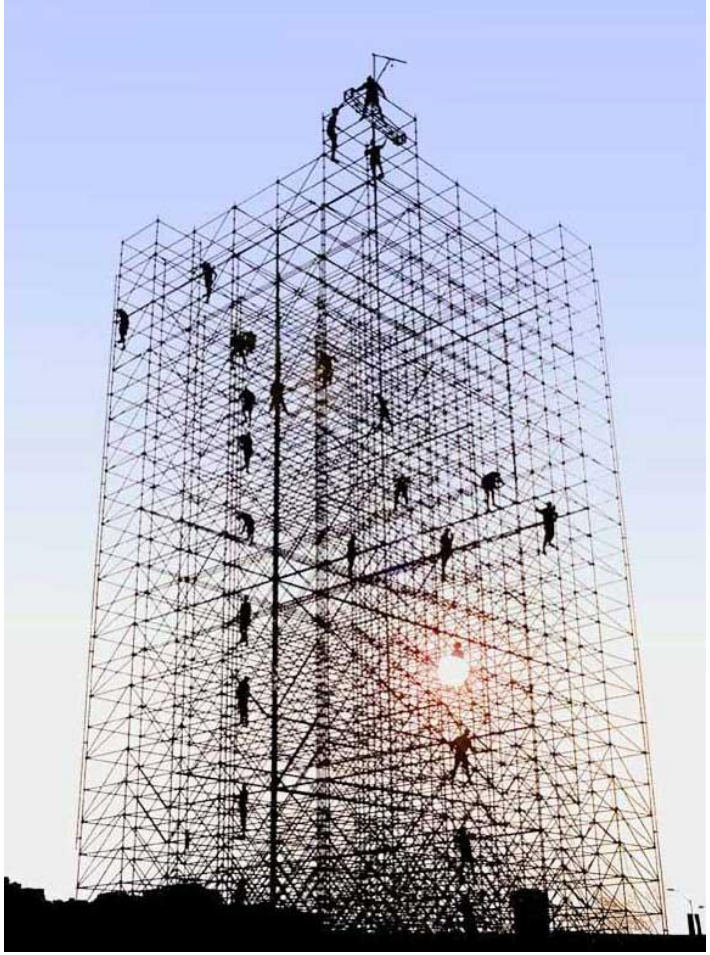
- Principal, teacher, and community involvement at the pilot sites.
- Commitment of the Superintendent to focus district decisions through the lens of SSFR

Challenges

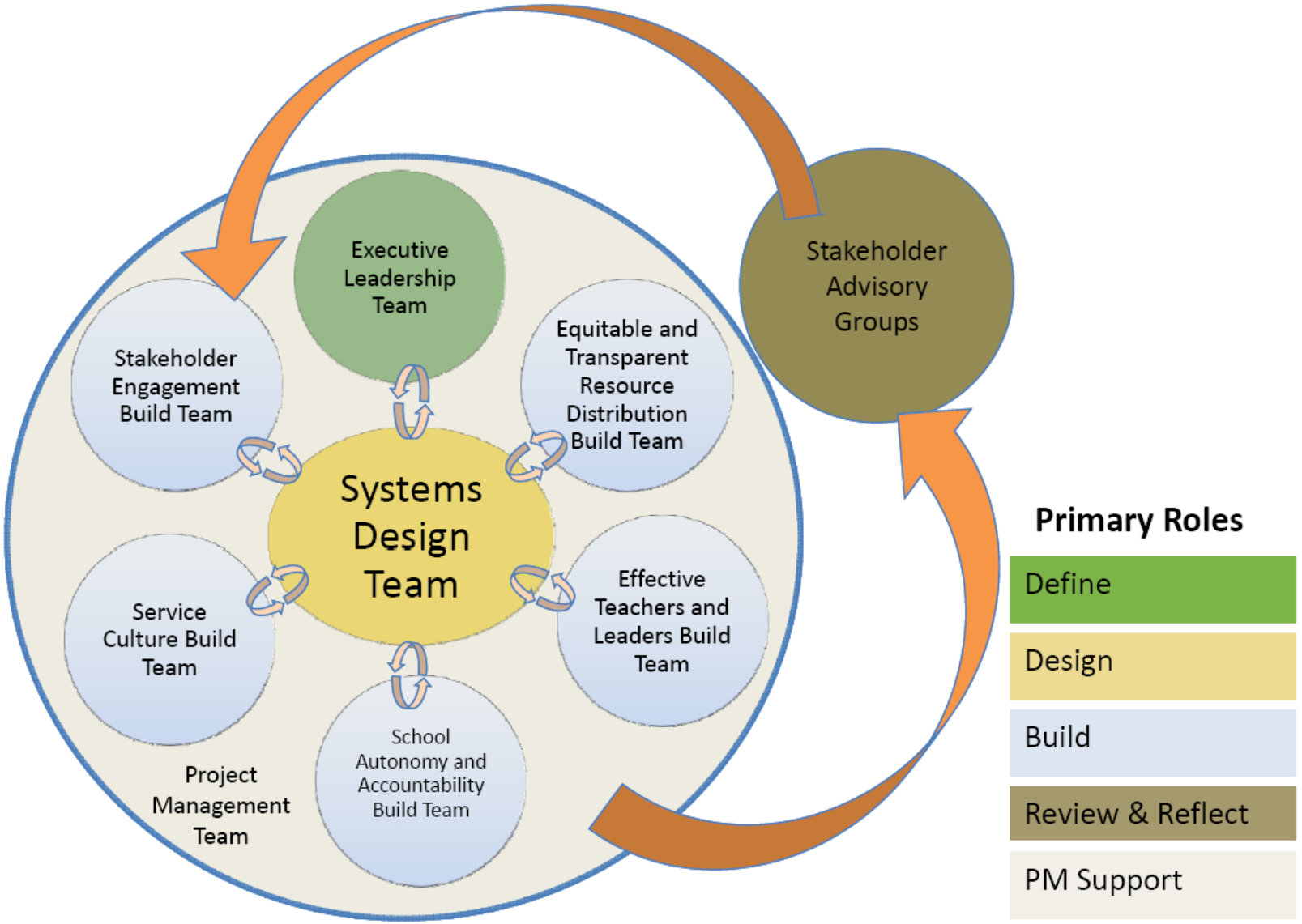
- Uneven ownership of the reform
- Resistance from central office to experiment with new processes
- Transparency is very threatening

Ambitious changes require planning and project management

- Commitment of project sponsor
- Project management support
- Cultivate demand for change
- Collaboration between stakeholders
- Strong leadership is the antidote to the “rope a dope”



TRUSD Project Infrastructure



Lessons learned about change management

- It's really true: where there is conflict there is opportunity
- Patience and persistence
- Stakeholder engagement strategies that leverage the "sweat spot"*

*The shared interests that motivate people to work hard and collaborate.

Thank You!

http://www.schoolfundingforresults.org/index.php

Email addresses:

- Matt Hill – matt.hill@lausd.net
- Mahala Archer – Mahala.Archer@twinriversusd.org
- Jim Brown – trailrunner26@verizon.net
- Steve Jubb – sjubb@pivotlearningpartners.org

QUESTIONS?