

# Do Now: A Tale of Two Dimensions



1. Work as a team to align your answer to the second pre-work question:
  - a. Choose two dimensions of resource equity for your district: one that is a current area of strength and one that is a current challenge. Compare and contrast these two dimensions through the following questions:
    - i. Do you think each dimension is differentiated with need or against need? (E.g., Do you think higher need students are getting more or less of the resource?) Why do you think this is the case?
    - ii. What would need to happen or change for your district to improve equity across these dimensions?
    - iii. How can increased transparency support changes in these dimensions? How can increased transparency inhibit changes?
2. Write down your district's response on chart paper.



# District Strategic Planning and Resource Allocation Community of Practice: Financial Transparency Team Session 3

9/18/2017



**State Support Network**

Partnering for School Improvement

## Pre-work Share-out

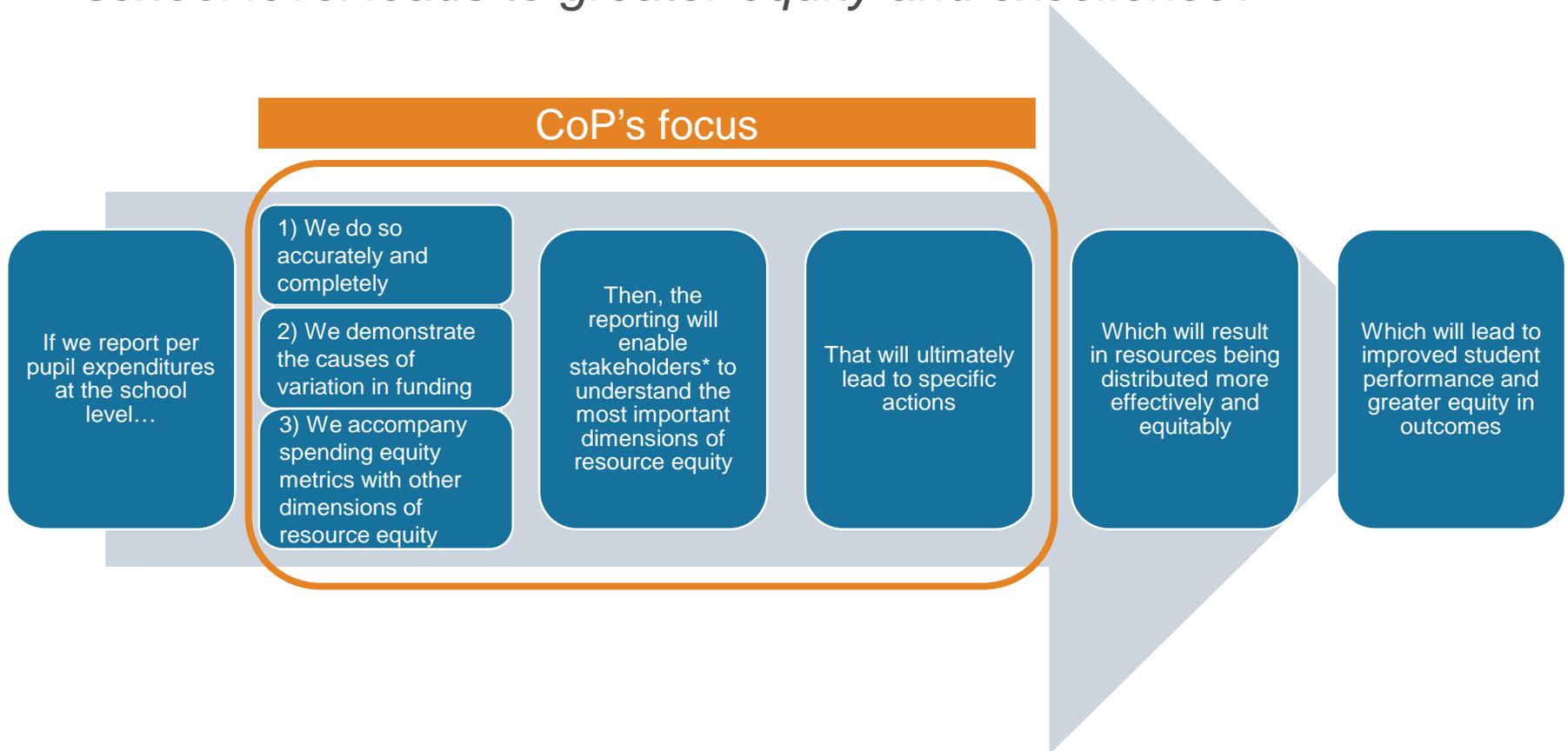
Review the next steps you shared coming out of the July 14th session.

1. Since the last meeting, what two things have you have been working on and thinking about (w/in district, w/ stakeholders, w/ state) with regards to financial transparency?
2. What's one question you want to ask the group today?

5 minutes per district

# Financial Transparency Logic Model

*What is the theory that greater transparency in funding at the school level leads to greater equity and excellence?*



\*Parents, community members, teachers, principals, district staff, others?

# CoP Objectives

## 1. Methodology:

- Explore how current financial reporting structures and practices prevent fully accurate per pupil reporting at school level
- Identify “imperatives” to communicate to state level methodology developers

## 2. Reporting Strategy:

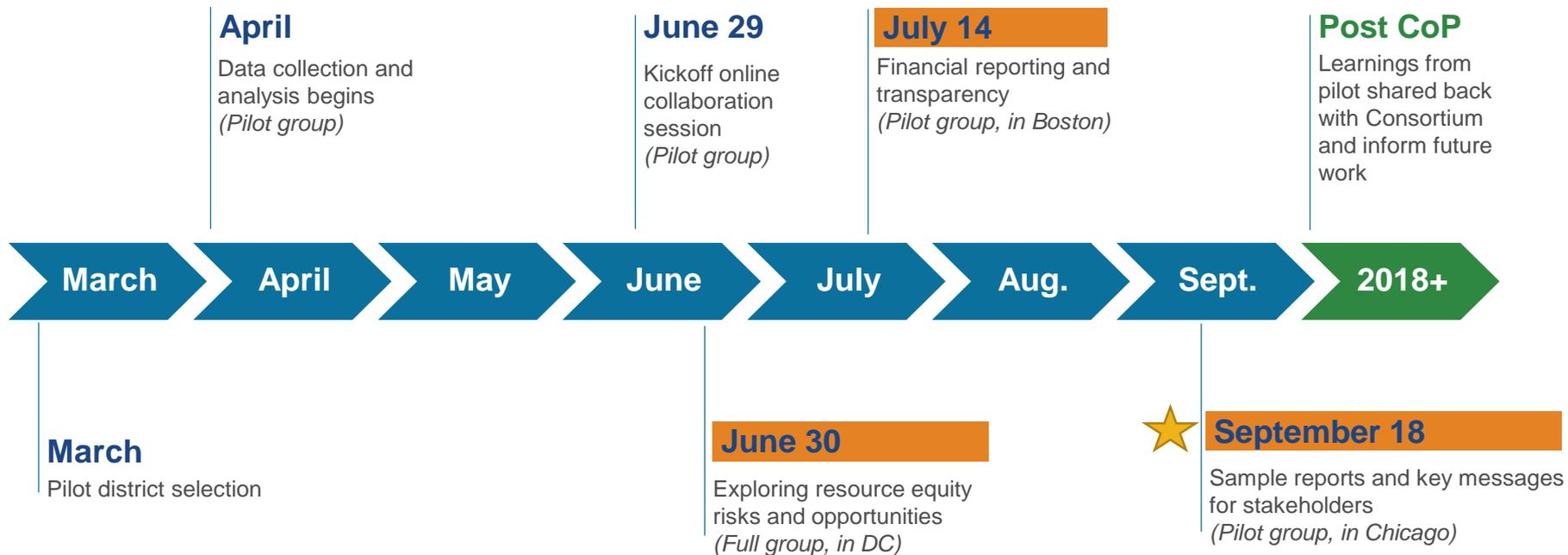
- Understand the primary drivers and causes of variation in per pupil spending
- Identify supporting school level data needed to responsibly interpret and explain spending variation

## 3. Engagement:

- Define key messages to facilitate discussions of resource equity, focusing on priority policy options and approaches

# Timeline for Activities

This session is the last of three key conversations in the District Strategic Planning and Resource Allocation Community of Practice (CoP).

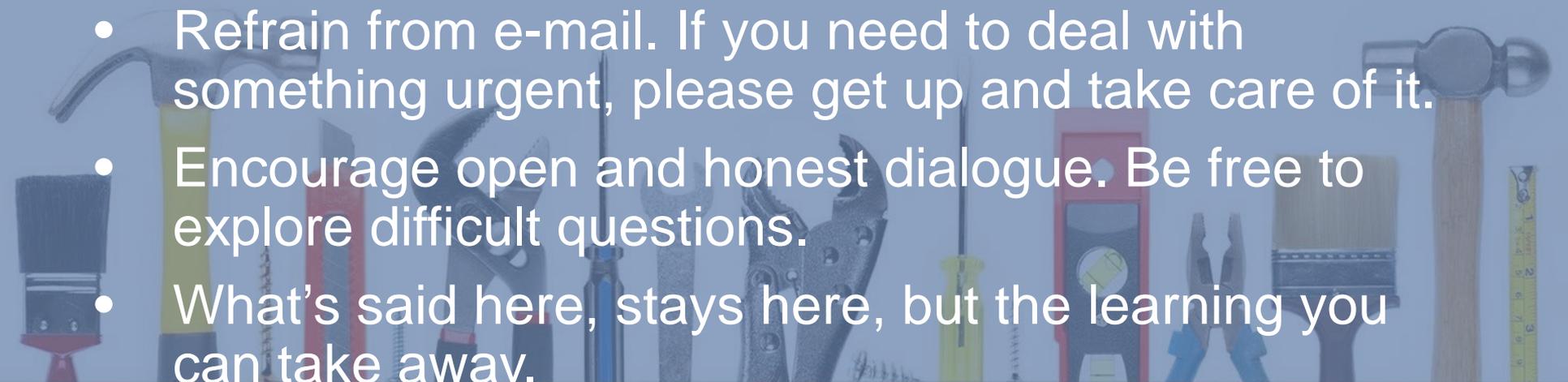


# Goals for Today's Session

We will continue to explore how to use financial transparency as a means to improve resource equity by...

1. Collaborating with one another on key messages for our local stakeholders and the state
2. Digging into your dimensions of resource equity data to:
  - a. Inform your equity strategy and how you report school level expenditures
  - b. Begin to think about how to educate stakeholders on the “full equity picture” and your district’s equity goals
3. Determining concrete actions for how this group can best impact our districts and students and influence the nationwide conversation about resource equity
4. Having fun

# Expectations for In-Person CoP Participation

- Be present.
  - Turn your ringers off.
  - Refrain from e-mail. If you need to deal with something urgent, please get up and take care of it.
  - Encourage open and honest dialogue. Be free to explore difficult questions.
  - What's said here, stays here, but the learning you can take away.
  - Place name cards up to join the conversation.
- 

# Today's Agenda

Time	Topic
9:30 – 10:20	Welcome, opening, and district share-outs
10:20 – 11:10	Dimensions of resource equity
11:10 – 11:20	Break
11:20 – 12:40	Resource equity: Reporting data and templates
12:40 – 1:10	Lunch and networking
1:10 – 2:25	Action planning and next steps (working time)
2:25 – 2:55	Discussion: Sharing and continuing this work
2:55 – 3:00	Closing and feedback forms

# Recap on the Do Now

Choose two dimensions of resource equity for your district: one that is a current area of strength and one that is a current challenge.

Compare and contrast these two dimensions through the following questions:

- i. Do you think each dimension is differentiated with need or against need? Why do you think this is the case?
- ii. What would need to happen or change for your district to improve equity across these dimensions?
- iii. How can increased transparency support changes in these dimensions? How can increased transparency inhibit changes?

# Financial Transparency Logic Model

Our logic model is grounded in three core ideas:

1. Performance must be the basis for any changes we pursue.
2. Financial transparency is a means to an end, not an end.
3. Changing spending level is a means to an end, not an end.



\*Parents, community members, teachers, principals, district staff, others?

# Table Exercise

1. Look at the first set of slides in front of you that show \$pp vs. spend-based need index. What do you see?
2. Now, look at the second set of slides in front of you that show \$pp vs. performance. What do you see?

The **spend-based need index** is derived from the proportion of students with additional needs at each school, weighted by the cost required to serve them.

# Dimensions of Resource Equity (Draft)



# Money Isn't Everything?!

There are many factors that influence the quality of education, and the distribution of key educational resources won't show up in spending per pupil.

		How do these schools compare to the district median?					
		High \$pp Schools			Low \$pp Schools		
		A	B	C	X	Y	Z
% students proficient		Below	Below	Below	Above	Above	Above
Dimension	Metric						
Access to Effective Teaching	% highly effective teachers	Below	Below	Similar	Similar	Above	Above
	% novice teachers	Similar	Above	Above	Similar	Below	Below
Rigor	% secondary students enrolled in at least one AP course	Similar	Below	Below	Above	Above	Similar
	# of AP courses offered	Below	Below	Similar	Similar	Above	Above
Instructional Time	Length of school day (hrs)	Similar	Similar	Similar	Similar	Similar	Similar
School Leadership	# of principals in last three years	Above	Similar	Above	Below	Similar	Below
Concentration of Need	% poverty	Similar	Above	Above	Below	Below	Similar
	% Black or Latino students	Above	Above	Similar	Below	Similar	Below

# Performance, Student Need, and Dimensions

How are *our* dimensions related to performance and need?

Key: + = Positive Correlation - = Negative Correlation Grey = No Correlation NA = No data		Correlation with: Spend-Based Need Index				Correlation with: % Students Proficient			
		A	B	C	D	A	B	C	D
Dimension	Metric								
Funding	Dollars per pupil	+	+	+	+	-	-	-	-
Access to Effective Teaching	% highly effective teachers	Grey	Grey	Grey	Grey	Grey	Grey	Grey	Grey
	% novice teachers	Grey	Grey	Grey	Grey	Grey	-	Grey	-
Rigor	% of secondary students enrolled in at least one AP	-	-	NA	+	+	Grey	NA	-
	# of AP courses offered	-	Grey	-	Grey	+	Grey	+	Grey
Instructional Time	Length of school day	Grey	Grey	NA	Grey	Grey	Grey	NA	Grey
School Leadership	Principal Years of Experience	Grey	Grey	Grey	Grey	Grey	Grey	Grey	Grey
Concentration of Need	% poverty	+	+	+	+	-	-	-	-
	% Black or Latino	+	+	+	+	-	-	-	-
Social & Emotional Supports	% of students that feel safe	Grey	NA	-	-	Grey	NA	+	+

# Performance, Student Need, and Dimensions

How are *our* dimensions related to performance and need?

Key: + = Positive Correlation - = Negative Correlation Grey = No Correlation NA = No data		Correlation with: Spend-Based Need Index				Correlation with: % Students Proficient			
		Mont.	Wake	Belle.	Beav.	Mont.	Wake	Belle.	Beav.
Dimension	Metric								
Funding	Dollars per pupil	+	+	+	+	-	-	-	-
Access to Effective Teaching	% highly effective teachers	Grey	Grey	Grey	Grey	Grey	Grey	Grey	Grey
	% novice teachers	Grey	Grey	Grey	Grey	Grey	-	Grey	-
Rigor	% of secondary students enrolled in at least one AP	-	-	NA	+	+	Grey	NA	-
	# of AP courses offered	-	Grey	-	Grey	+	Grey	+	Grey
Instructional Time	Length of school day	Grey	Grey	NA	Grey	Grey	Grey	NA	Grey
School Leadership	Principal Years of Experience	Grey	Grey	Grey	Grey	Grey	Grey	Grey	Grey
Concentration of Need	% poverty	+	+	+	+	-	-	-	-
	% Black or Latino	+	+	+	+	-	-	-	-
Social & Emotional Supports	% of students that feel safe	Grey	NA	-	-	Grey	NA	+	+

## Deep Dive: Explore your Data and Discussion

- Explore your individual district data on the dimensions of resource equity.
- At your tables, discuss:
  1. To what extent are resources differentiated with or against need? How is this similar or different to what you expected in the pre-work?
  2. What challenges or opportunities does this data raise as you think about resource equity across your district?

## Actions and Next Steps

What next steps can you take in the areas below to:

1. Improve resource equity in your district, either through the SY1819 budget development process or outside of this process; or
2. Get ready for creating public reports that meet the ESSA requirements?

Area	Next Step
Perform further analysis or gather additional information	
Inform superintendent (or others on leadership team)	
Engage state	
Take specific internal district actions	

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# Key Questions Raised from ESSA's Financial Transparency Requirement

ESSA's fiscal transparency requirement raises both technical and strategic questions



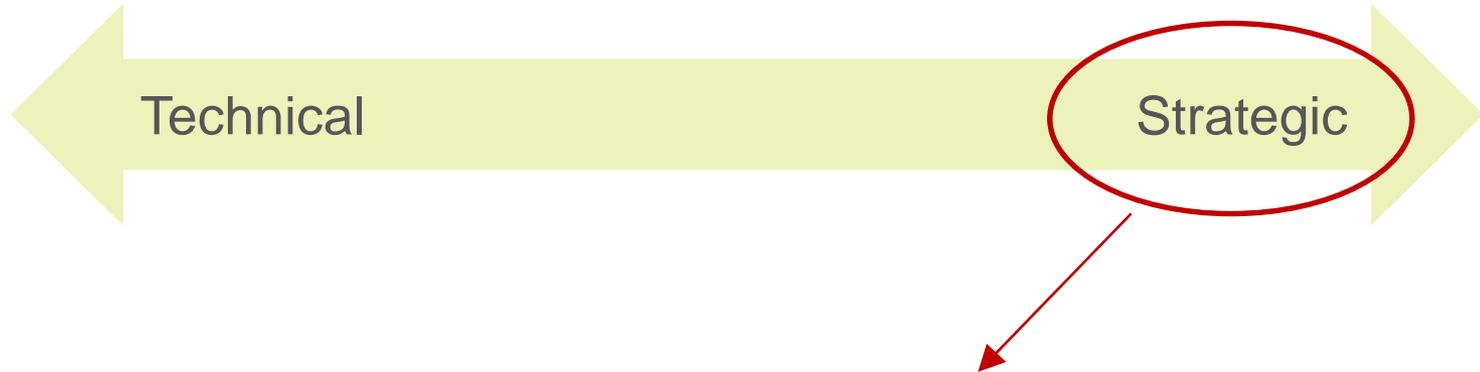
## More Technical Questions:

- What funds/expenditures should I exclude from my dollar per pupil calculation?
- How should I treat spending at schools that is reported on central budgets?

## More Strategic Questions:

- What drives funding variation across schools in my district?
- Are schools using their resources effectively?

# Key Questions Raised from ESSA's Financial Transparency Requirement



## Our focus for today:

1. What is my school's spending level and why is it the same/different from other schools?
2. Are my school's resources invested in drivers of performance?

# Case Study: Colorado State Reporting System

- In teams, review the financial transparency reporting for two Denver schools (**handout**).
- For discussion: How well do these reports help you answer our two key questions?
  1. What is my school's spending level and why is it the same/different from other schools?
  2. Are my school's resources invested in drivers of performance?

## Website:

<https://coloradok12financialtransparency.com/#/compare/expenditure?orgIds=33952,34531>

## Schools to compare (Denver):

Asbury Elementary  
Gilpin Montessori Elementary

# Sample Reporting Templates

Our reporting templates are structured across three panels.

## Panel 1

- School Performance and Need

## Panel 2

- Financial Resources and Drivers of Funding

## Panel 3

- Non-Financial Dimensions of Resource Equity

# Assessing Sample Templates

In teams, we will assess sample templates using several guiding principles:

*Primary Objective*

- ← Inspires actions that impact resource equity

*Other Considerations*

- Accuracy of information
- Completeness of information
- Simplicity to understand (from audience perspective)
- Simplicity to execute (from district/compiler perspective)

Anything else?

# Deep Dive: Explore your Data and Discussion

- Explore your individual district reporting template.
- Reflect on and capture answers to the following questions:
  1. How does this make you want to structure your public reports? Why? For example, what criteria are you using to decide what your public reports should look like?
  2. What questions and concerns does this start to raise about communication and messaging?

## Actions and Next Steps

What next steps can you take in the areas below to:

1. Improve resource equity in your district, either through the SY1819 budget development process or outside of this process; or
2. Get ready for creating public reports that meet the ESSA requirements?

Area	Next Step
Perform further analysis or gather additional information	
Inform superintendent (or others on leadership team)	
Engage state	
Take specific internal district actions	

# Lunch Exit Ticket

As a district, decide how you want to spend the work block after lunch.

1. Do you want to stay together or split up?
2. What do you want each person to focus on?
3. Write your name on a post-it (one name per post-it) and place it on the chart paper to indicate how you'd like to use the time.

## Options

### **1. Focus on my district and understanding my data:**

- a. Develop a strong understanding of the key takeaways coming out of your July 14th analysis, CMSS tool, and sample reports. Plan how to continue to work with your data after this session.

### **2. Collaborate on key components for school level reports:**

- a. Begin to define key information you would like to see in school level reports – for use directly by your district and/or to advise the state on how to approach this. Plan next steps for how to complete this work after the session.

### **3. Collaborate on how to best engage with my state:**

- a. Create an initial plan for what you want to communicate with your state and plan how (who, when) to make that happen.

# Lunch and Networking

Return by 1:10 PM

Sit with 1-2 people you have not yet talked with and consider:

1. What would your five-year-old self tell people when they asked, “What do you want to be when you grow up?”
2. How did you find your way into your current role?
3. If you could wave a magic wand, what’s one change you would make to how you resource your schools? Why?



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# Action Planning and Next Steps (Working Time)

As a district, decide how you want to spend the next hour.

1. Do you want to stay together or split up?
2. What do you want each person to focus on?
3. Write your name on a post-it (one name per post-it) and place it on the chart paper to indicate how you'd like to use the time.

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# Sharing Learnings and Continuing this Work

[5 min] Reflect independently on the questions below

[25 min] Discussion

Based on what has been most helpful to you in this Community of Practice (CoP), how would you want to...

1. Share our work nationally
  - a. Write two key takeaways for what **state leaders** or **Superintendents** should know or do
  
2. Advance the work of this group
  - a. Propose two ideas for further **individual technical assistance** or **content to collaborate on**

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# Three Next Steps after Sept 18th

By **Renée Sullivan** on Today, September 15 - 12:23pm

Thank you for joining us in Chicago! At the close of this CoP, please take the time to:

**1. Complete today's feedback form (one per person) by tomorrow Spet 19th.**

Survey link: <https://www.surveymonkey.com/r/7TNMG53> 

**2. Stay connected!** Continue the conversations you started today online through the CoP site.

**3. Complete the State Support Network feedback form.** Look for an email from us by Sept. 28th that will ask each of you for your input for the State Support Network on participation in this CoP overall.