



Community Engagement through Equitable Budgeting

October 25, 2024



TassantPartners

Tassant Partners is a small consulting practice. Together, we have over 25 years of public education experience.

- Julie was the Chief of Talent and Culture at DC Public Schools and Chief of Staff for three Chief Operating Officers, managing the district's school budget process and other team and process improvement efforts.
- Sara was DC Public School's Chief Business Officer, overseeing a \$1B budget. She designed and implemented processes to empower all 115 school principals to create their school's budget and make the most of resources.

Since leaving the district, we have partnered with districts and mission-driven nonprofits to improve their finance, human capital, operations, and other behind-the-scenes work that makes it possible to have enormous impact.

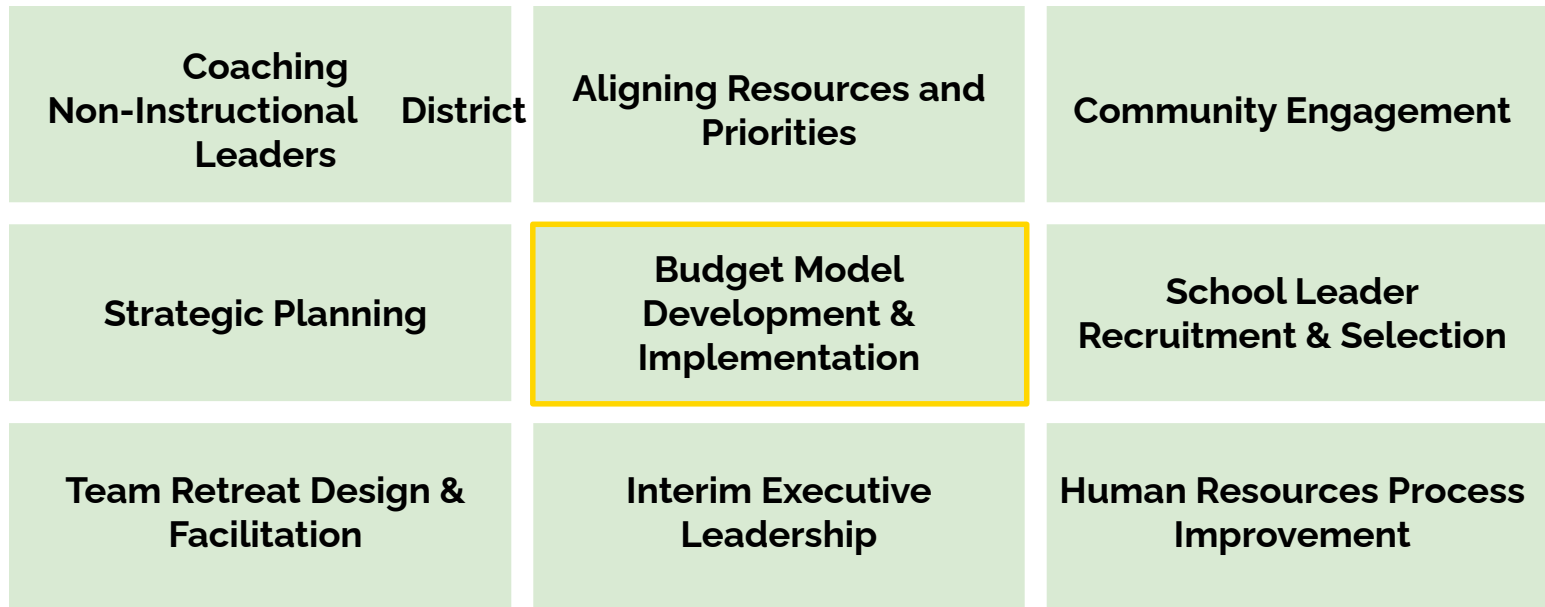


Julie Johnson



Sara Goldband

Our Work with School Districts



A G E N D A

Objective: Zoom out to the role of the Board and Community in designing a strong budget model.

- Background:
 - What is a school budget model?
 - Feeling the Heat: Budget Hold 'Em
- Developing and Using a Model
 - The Role of the Board in Model Development
 - Community Engagement to Drive Equity & Gain Buy in
- Q&A with Tassant Partners and Burlington School District
- Wrap up by 2:30 p.m. / 4:20 p.m.



What is a school budget model?

What is a (good) budget model?

A budget model is a method of distributing resources (teachers, staff, and other funds) to schools each year, making the most of the resources available to the District

A **good** model is:


- Reflective and supportive of a district's values/priorities
- Consistent and predictable
- Easy to understand
- Based on historical spending data
- Shifts decision making as close to students as possible
- **Aligned to student needs (more resources for students who need more support)**



Staffing Model

- Provide instructional and support staff positions (and the associated funding) based on the number of students enrolled
- Positions are allocated using different ratios for some student populations
- Budgets include average position costs that are the same for each school, regardless of the relative actual cost of staff at that school

| SCHOOL LEADERSHIP  | |
|---|---|
| School Principal | Every school receives a principal. |
| Assistant Principal | Schools receive 1 assistant principal for every 400 students. |

| K-5 GENERAL EDUCATION  | |
|---|---|
| Kindergarten-5th Grade Classroom Teacher | Allocation is based on the projected number of elementary classes. Each class receives 1 full-time teacher. |
| Kindergarten Instructional Aide | Each kindergarten class receives 1 full-time aide. |



Weighted Student Funding

| | | |
|-------------------------------------|----------------------------------|-------------|
| Base Weight: | \$6,606 for G4–6 | 1.0 |
| Foundation Amount: | \$265K for schools <260 students | |
| School-Level or Grade-Level: | K: \$5,615 | 0.85 |
| | G1–3: \$7,927 | 1.2 |
| | G7–8: \$7,267 | 1.1 |
| | G9–12: \$8,588 | 1.3 |
| Achievement–High: | \$661 | 0.1 |
| Achievement–Low: | Well below: \$661 | 0.26 |
| | Below: \$330 | 0.23 |
| Poverty: | | – |
| ELL: | 0–30 months: \$2,576 | 0.39 |
| | 30–60 months: \$1,652 | 0.25 |
| | 60+ months: \$859 | 0.13 |
| Special Education: | | |
| | Level 1: \$5,285 | 0.80 |
| | Level 2: \$8,588 | 1.30 |
| | Level 3: \$15,788 | 2.39 |
| | Level 4: \$26,886 | 4.07 |

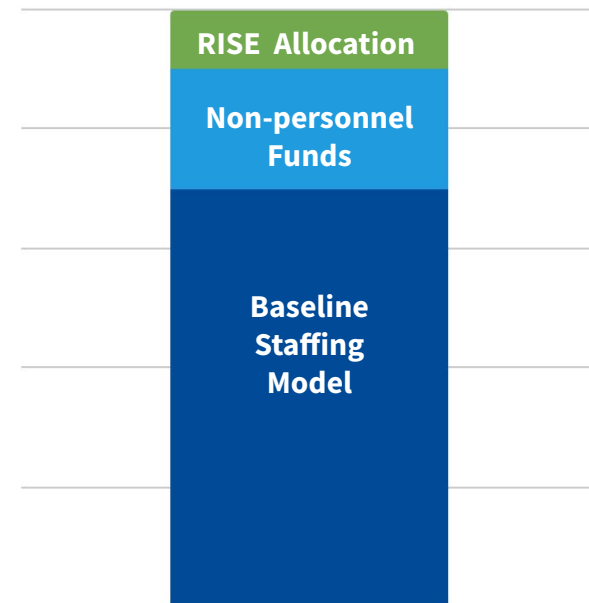
- Provides funding based on the number of students enrolled and those students' needs
- Additional funding is allocated for students with special needs
- Schools are able to use those dollars for staffing and materials to support students to best meet the needs of their students



BSD model: 3 components



- A **staffing model** provides each school with its core staffing, using staff:student ratios (e.g. 1 counselor staff for every 250 students)
- Non-personnel funds are allocated based on a **per-student** basis
- The RISE Allocation (Recognizing Injustice and Seeking Equity) provides additional funding using a **weighted student formula**, meaning more funds in schools with greater need
 - Principals have discretion in how best to serve their students using these funds
 - Intent and desired outcomes will be documented for future evaluation



Small districts: Is it worth it to have a model?



Yes it is!

- Transparency, consistency, and predictability over multiple years
- Clear method for allocating resources to schools vs. centralized services
- Clear method for explaining (+ values checking) how funds are distributed - even between 2-3 schools
- Community engagement



THE BOTTOM LINE

Nearly any budget model is better than no budget model to ensure resources are *distributed* and *reduced* clearly & equitably.



Feeling the Heat: Budget Hold Em



[https://bit.ly/
BudgetHoldEm](https://bit.ly/BudgetHoldEm)

The Objectives:

- Explore the types of difficult decisions needed to build a district budget
- Explore “return on investment” in the context of a District budget
- Keep the focus on the true bottom line – student outcomes

The Rules:

- One computer plays per group; you'll have to work together
- Join a group with leaders from other Districts
- 5m to play, then we'll discuss



Budget Hold 'Em Share out

- What trade-offs were hardest?
 - Were you successful? How?
 - What resonated with you?
-

Embarking on the Model Journey

Intro & Background



In spring 2020, Burlington School District (BSD) appointed its new Superintendent Tom Flanagan, and the BSD Board shared that increasing the transparency, clarity, and consistency of the district's budget was a top priority.

Superintendent Flanagan tasked BSD's Executive Director of Finance and Operations, Nathan Lavery, with developing a proposed budget model and annual process to equitably distributed resources to schools for the Cabinet, Superintendent, and Board to approve. Tassant Partners was contracted to support this work.

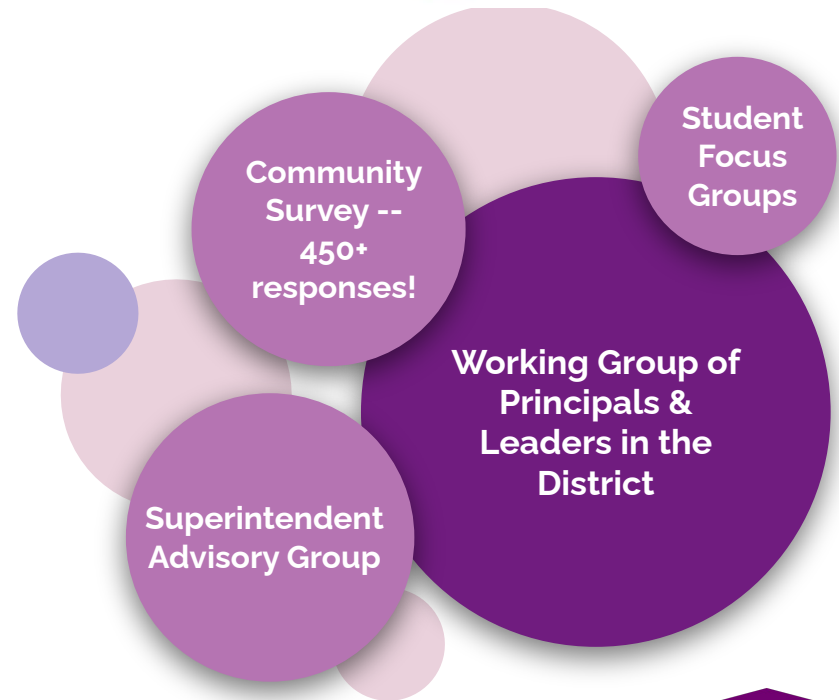


Creating the Model: Project Overview

Over ~9 months, BSD:

- **analyzed** historic spending and impact on outcomes on student subgroups
- **learned** from other districts around the country,
- **engaged** with over 500 stakeholders, and
- **collaborated** internally

to design a more transparent and needs-driven approach to school funding



The Role of the Board

The Board role evolves through Model development

Understand

Make sure you understand the financial landscape and needs of the district

Set Vision

Work with the Superintendent to outline a vision and priorities for the budget model

Support
Engagement

Stay engaged throughout model development process and give feedback

Tell the Story

Spread the word and help voters understand the model and its implications

Board Engagement



Full Board

- Identified need to improve budget model and development process
- Written monthly updates as part of the Superintendents' regular updates
- Presentation of final model before approval

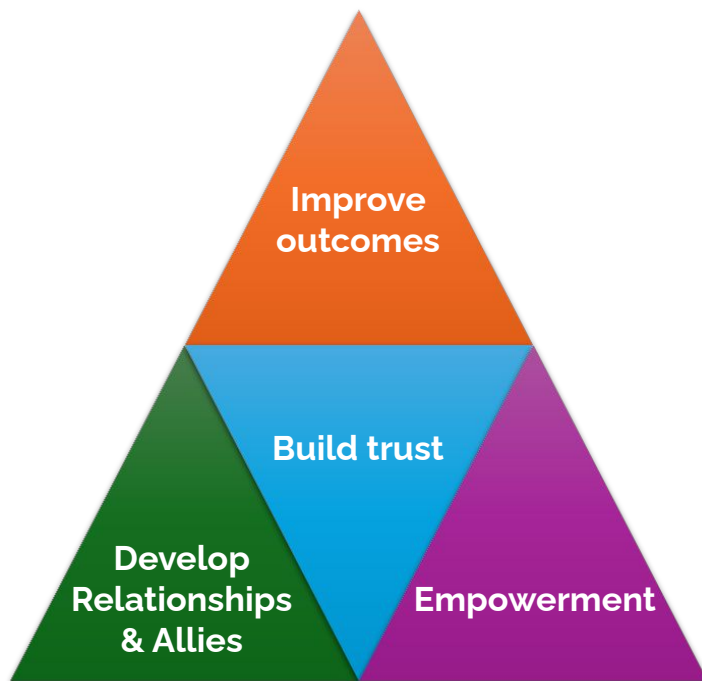
Finance Committee (includes Chair)

- More detailed overview of the info shared in written update
- Feedback sessions and other more informal conversations



Community Engagement to Increase Equity & Gain Buy In

Why engage your community?



Identify ways to hear from your community at-large and small groups over time:

- Historically marginalized groups
- Subject matter experts
- Students
- Families



Community Surveys



Model Development Survey:

- Past engagement and understanding of existing budget process
- Desires for future budget process
- 450+ responses to a community survey open to all **students, families and staff**

Annual Budget Survey

- Focused on individual school recommendations
- Collects information about how principals should spend equity-focused portion of school budget



What did they say?

72% of all survey respondents and 79% of staff strongly agreed or agreed that **resources should be allocated in a way that supports the students who need them most** - even if it means reducing the resources at their school(s).



Advisory and Focus Groups



Student Focus Groups

- Understand student perspective on the goals of the budget design
- Hear from students what is working well and what they'd like to change
- Frame for students that the goal is to increase equitable resource distribution

Cabinet and Teacher Advisory Groups

- Inform the group on the work done so far including high level community survey results
- Understand teachers' and district leaders' perspectives on the goals of the budget design
- Develop informed allies for equitable resource distribution



Annual Engagement

| | District | Schools |
|----------|---|---|
| October | Budget Kick Off <ul style="list-style-type: none"> Town Hall Superintendent Advisory Groups Web form launches | <ul style="list-style-type: none"> Budget update in newsletters School Advisory Groups (SAG) form |
| November | Schools Receive Budget Guidance <ul style="list-style-type: none"> Web form available for input | <ul style="list-style-type: none"> SAGs convene - visioning, intro to budgets |
| December | Schools Finalize Budget Submission <ul style="list-style-type: none"> Superintendent & Cabinet review | <ul style="list-style-type: none"> SAGs continue to meet, weigh tradeoffs |
| January | Board Approves Budget <ul style="list-style-type: none"> Board meeting to approve budget | <ul style="list-style-type: none"> Principals submit proposals |

Town Meeting to approve district funding level in March.



**Q&A with BSD's Nathan Lavery, Executive
Director of Finance and Operations
and Tassant Partners**

To: Julie@TasantPartners.com

Subject: 1 Minute Memo

Email one of the following:

1. What's 1 thing you learned today?
2. What's 1 question you still have?

We will respond to your email with:

- Community Survey template
- BSD annual budget development calendar

1-Minute Memo

