



Strategic School Funding for Results (SSFR)

Perspectives of Central Office Staff, Principals, Teachers, and School Site Councils on Resource Allocation and *Budgeting for Student Achievement* Implementation in 2010–11

A report prepared for the Los Angeles Unified School District

March 2012

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Acknowledgments

We would like to acknowledge the Institute of Education Sciences, the William and Flora Hewlett Foundation, and the Ford Foundation for their generous support of this project in 2010–11. We would also like to acknowledge the full SSFR project team, our district partners, and the project advisors who make this work possible.

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About Strategic School Funding for Results (SSFR)

Purpose

During the 2009–10 school year, the 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**, 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 students being served.
- 2. SSFR links school autonomy to accountability** by offering schools discretion over how the dollars they receive are used and then holding schools accountable for the results (student outcomes). SSFR includes a site budgeting tool (the Planning, Budgeting and Allocation of Resources tool, or PBAR). The PBAR engages school decision makers in a series of activities, including a needs assessment, goal setting, and the specification of instructional strategies and resource allocation necessary to achieve the goals within 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 access by stakeholders 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 are the benefits of participation in the SSFR project?

Within the framework of the SSFR project, the AIR/PLP team provides the districts with data tools and analysis, technical assistance, coaching, and training to implement the funding strategies and evaluate their success. While there are common themes being promoted across the two participating districts, each has adopted its own focus and is adapting the SSFR components to fit its unique culture and context. Each of the participating districts has committed time on the part of its leadership and staff to participate effectively in this project and has acknowledged that the project represents a collaborative effort between the AIR/PLP and district leadership teams. The formative nature of the project allows 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 result of this work will provide a guide to other districts interested in implementing their own version of the SSFR model, and a series of reports describing the implementation of SSFR and the changes in patterns of resource allocation and student outcomes that coincided with the implementation of SSFR in the two districts.

How is SSFR being funded?

During the 2009–10 school year, the William and Flora Hewlett Foundation and 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 the SSFR work during 2010–11.

Report Highlights

As part of the evaluation of the Strategic School Funding for Results (SSFR) project (called Budgeting for Student Success, or BSA, in Los Angeles Unified School District), the American Institutes for Research (AIR) conducted surveys of principals, teachers, and members of School Site Councils (SSCs) to gather information on their attitudes and perspectives regarding key components of the BSA model. AIR also conducted interviews with central office staff and Pivot Learning Partners (PLP) staff involved in BSA implementation to gain insights into the successes and challenges they experienced in 2010–11.

Based on our surveys of principals, teachers, and SSCs, a substantial percentage of principals and teachers perceive resources to be inequitably distributed across schools. Our findings indicate that principals in BSA pilot schools may have been more aware of the inequities than principals in non-pilot schools. Across pilot and non-pilot schools, both principals and teachers reported understanding how resources were allocated to their schools.

The survey findings highlight several positives about BSA implementation. The vast majority of principals and teachers felt they had discretion over how school funds were spent and had the autonomy to meet the instructional needs of their students. Pilot principals reported greater autonomy over their school budget and instructional program than their non-pilot peers, and they reported that they have district support for developing their school budget.

With respect to transparency about budgeting and resource allocation, teachers and SSC members reported understanding how resources are allocated to schools and reported that they had an opportunity to provide input into developing school budgets.

Based on our interviews, there were several successes in implementation of the BSA initiative during 2010–11, including the following:

- an expansion in the number of pilot schools,
- an increase in flexibility at the school site over the use of categorical resources,
- an increase in budget transparency,
- progress towards changing the district’s planning and budgeting calendar, and
- providing initial planning and budget-related trainings to BSA pilot principals.

There were also several implementation challenges and lessons learned in 2010–11:

- Leadership and staffing are critical.
- It is imperative to have a clear message and consistent communication with the central office staff and outside the central office to principals, teachers, SSCs, and community stakeholders about the BSA reform to facilitate understanding and buy-in.
- Adequate support and training of both central office and school staff are needed to build capacity and buy-in for BSA implementation and ownership over the BSA approach.
- Well-developed tools are critical to facilitate budgeting and planning in the BSA model, and shifting from the old system to a new, pupil-based budget system is more complicated than district officials had anticipated.

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I. Introduction

This report summarizes the findings of surveys and interviews conducted in connection with the Strategic School Funding for Results (SSFR) project during the 2010–11 school year. In Los Angeles Unified School District (LAUSD), the SSFR project activities are referred to as Budgeting for Student Achievement (BSA).

LAUSD is the largest district in the state of California and the second largest in the nation, enrolling a diverse population of nearly 700,000 students in over 700 schools. Almost three-fourths of the students are of Hispanic origin, 11 percent are African-American, more than one-third (35 percent) are English learners, and more than two-thirds (68 percent) are eligible for free or reduced price lunch. In the fall of 2009, the LAUSD superintendent Ramon Cortines prioritized the development of a pupil-based funding system, directing that it be piloted in a volunteer group of 33 schools, with scale-up to follow within three years. Simply put, pupil-based funding is intended to allocate dollars equitably to schools, and provides school leaders with increased autonomy while holding them accountable for results.¹ LAUSD joined two other California districts (Twin Rivers Unified School District and Pasadena Unified School District²) that were similarly interested in implementing a pupil-based funding system, and partnered with the American Institutes for Research (AIR) and Pivot Learning Partners (PLP) to create the SSFR project.

The 2010–11 school year was the second year of the SSFR project, during which LAUSD was piloting BSA in 74 schools. LAUSD placed all new or redesigned schools created in LAUSD during 2009–10 and 2010–11 under the Public School Choice (PSC)³ program into the BSA pilot. Additional pilot schools opted into the pilot in the first year of BSA implementation (2009–10) based on principal interest.

To understand perceptions of the key SSFR components of resource equity, transparency, autonomy, innovation, and accountability in LAUSD, the AIR team developed surveys for key stakeholders—principals, teachers, and School Site Councils (SSCs).⁴ Additionally, the AIR team conducted interviews with key central office staff and PLP staff to understand the major successes, challenges, and lessons learned from 2010–11 implementation of BSA, and to outline the next steps as the district increases the number of pilot schools in 2011–12 and moves towards its stated goal of full-district implementation of BSA in 2012–13. Since PLP is charged with supporting district staff with SSFR implementation and is “on the ground” in the partner districts, AIR included key PLP staff in our formal interviews. This report describes the sample

¹ See “About Strategic School Funding for Results (SSFR)” presented at the front of this report for more information about the project.

² Upon the 2011 retirement of Edwin Diaz, the Pasadena Unified School District superintendent, SSFR was put on hold in the district.

³ More information on the Public School Choice (PSC) initiative in LAUSD is available at: <http://publicschoolchoice.lausd.net/>

⁴ The School Site Council (SSC) is a body of school staff and parents required by the California Department of Education to create the school improvement plan. It is also charged with approving the categorical budget. More information is available at: <http://pubs.cde.ca.gov/tcsii/ch9/sscldrshp.aspx>

selection criteria, outlines the survey and interview methods used, and summarizes key findings in LAUSD for the 2010–11 school year.

II. Methods and Data

A. Surveys

Principals, teachers, and SSC members were surveyed because they are the key stakeholder groups that BSA is targeted towards. Principals have school-level responsibility for planning, budgeting, resource allocation, and accountability. Although teachers do not have direct responsibility for their school budgeting processes, the associated site-level planning, budgeting, and resource allocation decisions have direct implications for their work. Thus, it is critical to capture their understanding of and perspectives on these issues. Finally, SSCs have a state and federally mandated responsibility for approving the principal’s proposed budget for categorical funding. They include school staff, parents, students (in high school only), and community members, so they allow us to get a sense of the perspectives of a wide array of stakeholders. However, since SSC members are elected, they do not represent a random sample of school staff, parents, students, or community members.

Principal and teacher surveys

In LAUSD, we capitalized on the district’s existing annual Staff Satisfaction Surveys of principals and teachers. We added five items to the principal survey and four items to the teacher survey to measure principal and teacher perspectives on key BSA components (equity, transparency, autonomy, innovation, and accountability) and to understand perceptions of related supports. This approach minimized respondent burden and increased our potential sample size to the entire district. However, we were limited by district protocol to constructing our items in a format consistent with the already existing four-point Likert scale format (Strongly Agree to Strongly Disagree) used on the LAUSD survey. In the table below, we have listed each of the items, along with an indication of which survey included the item and the SSFR concept the item represents.

Table 1. AIR Items Added to the Annual LAUSD Principal and Teacher Satisfaction Surveys

Survey item	BSA component	Principal survey	Teacher survey
I believe funds are equitably allocated to schools within our district.	Equity	x	x
I understand how resources (staff, funds, etc.) are allocated to my school.	Transparency	x	x
I have discretion over how the dollars in my school budget are spent	Autonomy	x	
I have sufficient autonomy to implement an instructional program that meets the needs of the students in my school.	Autonomy	x	
I have sufficient autonomy to implement an instructional program that meets the needs of the students in my classroom.	Autonomy		x
I feel that I receive adequate support from the central office to develop my school's budget.	Support	x	
Teachers have the opportunity to provide input into the school budget.	Transparency		x

The principal survey had an overall response rate of 62 percent (449 of 730). Item-level response rates varied across the five BSA-related items, but the respondents included 26 of the 74 BSA pilot principals (35%) and approximately 410 of the 656 non-pilot principals (63%). The teacher survey also had an overall response rate of 53 percent (15,575 of 29,221). On the four BSA-related items, respondents included approximately 1,400 teachers in pilot schools and approximately 13,500 teachers in non-pilot schools.

School Site Council survey

For the School Site Council (SSC) survey, AIR designed the survey⁵ and administered it to a stratified random sample of 40 LAUSD schools, designed to be representative of existing pilot and non-pilot schools across all three schooling levels (elementary, middle, high) in each of the eight LAUSD local districts.⁶ We worked in partnership with PLP's Manager of Stakeholder Engagement, who sent hard copies of the survey to all SSCs in the sample, along with instructions to administer the survey at a spring SSC meeting and an envelope to return the surveys to AIR.

⁵ See Appendix A for the SSC survey instrument.

⁶ There are eight local districts and three schooling levels, and we attempted to randomly select one pilot and one non-pilot school from each of these strata for a potential sample of 48 schools. However, one local district did not have any pilot schools, and several local districts did not have a pilot school at every schooling level, so our total sample was 40 schools.

Thirteen of the 40 schools participated in the SSC survey (33%), including a total of 93 individuals. Since the survey was self-administered at SSC meetings, the number of respondents varied across SSCs. Overall, the sample includes 12 respondents at two pilot schools, 43 respondents at five non-pilot schools, and 38 respondents from five schools with uncertain pilot school status. The low response rate and lack of participation at pilot schools must be considered when interpreting the SSC findings. Still, these findings provide insights into the parent and community understanding and perspectives about resource allocation in the district.

B. Interviews

The SSFR project team conducted interviews in the summer of 2011 with key central office staff and with PLP staff who were highly involved in BSA implementation. Four individual interviews were conducted in LAUSD. Interviews were approximately 60 minutes in length and followed a semi-structured interview protocol that asked participants to discuss the major successes, challenges, and lessons learned from BSA implementation in 2010–11, as well as to identify the critical next steps in 2011–12 for moving towards district-wide scale-up of BSA in 2012-13.⁷ It is important to note that the 2010–11 interviews did not include principals. Thus, reports of school-level successes and challenges are from the district perspective.

III. Findings

A. Surveys: Perceptions of Key BSA Components

The survey findings indicate a general perception of resource inequity across schools, particularly among pilot principals and teachers. Also, pilot principals and teachers reported lower levels of agreement about understanding how resources are allocated to schools. These findings perhaps illustrate the pilot respondents' engagement with BSA; as they participate in trainings and discussions about resource allocation and budget transparency, they may have acquired a heightened awareness about resource inequities in the district. Alternately, the pilot schools may have had different pre-BSA notions about resource equity than their counterparts in non-pilot schools.

Further, pilot principals reported greater agreement than their non-pilot peers that they have autonomy over their school budget and their instructional program, and that they have district support for developing their school budget. These findings provide promising interim evidence that BSA is “working” in the pilot schools.

However, pilot teachers reported lower levels of understanding of resource allocation and lower perceptions of opportunities to provide input into the school budget, suggesting a need to communicate more effectively about BSA to teachers and to involve them in the BSA reform.

⁷ See Appendix B for the central office interview protocol.

In addition, SSC members appeared satisfied with their understanding and their role, but their high levels of agreement on all items calls into question the extent to which they are actively engaged in the budgeting process at their schools.

Details of the survey findings are presented below, and supporting graphics are available in Appendix C.

Equity

One challenge in asking about resource “equity” is that the term is not the same as “equality,” and we cannot determine respondents’ interpretation of this term. For example, schools that receive School Improvement Grant (SIG) funds have more money, and Title I schools are supposed to receive funds on top of a comparable based of state and local resources.⁸ However, it is important to examine respondents’ perceptions of equity for BSA.

Fewer than half of principals and teachers felt that funds are allocated equitably to schools in LAUSD. Further, pilot respondents expressed less agreement than non-pilot respondents that funds are allocated to schools equitably (43% pilot principals, 54% non-pilot principals; 34% pilot teachers, 43% non-pilot teachers).

SSC respondents at pilot schools were more inclined to perceive resource allocation inequities than their non-pilot counterparts. While 71 percent of non-pilot respondents agreed that resources are allocated equitably across schools, 58 percent of SSC respondents in pilot schools expressed this view.

Transparency

Principal respondents generally agreed that they understood how resources were allocated to their schools. As with the equity item, it is notable that a lower percentage of pilot principals reported understanding resource allocation to their schools (85% pilot, 93% non-pilot).

As in the principal survey, teachers in pilot schools reported lower levels of understanding about resource allocation than their counterparts in non-pilot schools. A higher proportion of non-pilot teachers reported understanding how resources are allocated to their school (57% pilot, 70% non-pilot).

On the SSC survey, there was overwhelming agreement that respondents understood budget documents and resource allocation. All pilot respondents and 95 percent of non-pilot respondents reported, “I understand how resources are allocated to my school.” Also, 100 percent of pilot respondents and 89 percent of non-pilot respondents reported, “The budget documents I am provided for SSC review are easy to understand and interpret.”

However, it is important to note that interpretation of the SSC survey findings is limited by the low response rate and the fact that five schools were omitted from the analysis because they

⁸ For a more complete discussion of the comparability provisions of the Title I law, refer to our separate report, *A Case Study of Title I Comparability in Three California Districts*, which examines this issue in detail. The report is available from: www.schoolfundingforresults.org

were unsure whether they were a BSA pilot school. The survey included an item asking whether the school is a BSA pilot school, and respondents in five schools reported a mixture of yes, no, and I don't know to the BSA pilot question. Due to confidentiality concerns, we were not permitted by the district to include a school identifier on the surveys, so we could not verify their responses. In some cases, we used the majority response of respondents from a given SSC (known because surveys were returned in a single envelope from each school's SSC) to assign pilot/non-pilot status. And when the principal responded to the SSC survey, we used that response as the school's pilot status. However, neither of these approaches was possible in five schools given the mixture of responses to the pilot status question. This uncertainty about the basic question of whether or not a school is involved in the BSA pilot at 5 of the 13 participating schools speaks to the need for more and better communication about BSA. This is also discussed in the interview findings.

Autonomy

Principals generally reported having discretion over the dollars in their school budget and the autonomy to implement an instructional program that meets their students' needs, and the pilot principals reported greater agreement about having autonomy than the non-pilot principals. Over 90 percent of pilot principals reported having discretion over the dollars in their school budget, compared with 79 percent of non-pilot principals. And 96 percent of pilot principals reported having autonomy over their instructional program, compared with 79 percent of non-pilot principals.

On the teacher survey, over three fourths of teachers reported having autonomy to implement an instructional program that meets their students' needs (76% pilot, 79% non-pilot).

Support

Pilot principals expressed greater agreement than non-pilot principals that central office support for developing the school budget is adequate (89% pilot, 72% non-pilot). Teachers did not receive this item since they are not responsible for the school budget.

SSCs, however, do have formal responsibilities for approving the school's categorical programs budget. There were high levels of agreement across respondents that principals support and value the SSC. SSC respondents agreed that "the principal provides adequate support and information for the SSC to make budget recommendations" (100% pilot, 97% non-pilot). Respondents were also in unanimous agreement that "the principal values the SSC's recommendations" (100% pilot, 100% non-pilot).

However, the receipt of training about budgeting/resource allocation training varied substantially across pilot and non-pilot schools. Almost all (92%) SSC respondents in pilot schools reported receiving training about budgeting/resource allocation, compared with 60 percent of SSC respondents in non-pilot schools.

Opportunities to provide input

Although teachers do not have formal budget responsibilities, the survey sought to understand their opportunities to provide input in the budgeting process.

Teachers generally agreed that they have the opportunity to provide input into developing and spending the budget at their school. However, a lower proportion of pilot teachers agreed that teachers have the opportunity to provide input into the school budget (63% pilot, 71% non-pilot).

The SSC survey revealed that SSC respondents are satisfied with their influence and opportunities to provide input in the process. Respondents agreed that “the SSC has significant influence over how the dollars in the school budget, overall, are spent” (100% pilot, 93% non-pilot). Also, 92 percent of pilot and 91 percent of non-pilot respondents agreed that “parents and community members (besides SSC members) have adequate opportunity to provide input into developing and spending this school’s budget.”

Accountability

Only the SSC survey included items about accountability, but the results indicate that SSC respondents generally agreed that principals, teachers, and the SSC are held accountable for student success. All pilot respondents agreed that principals are held accountable for student success, 91 percent agreed that teachers are held accountable, and 82 percent agreed that SSCs are held accountable. The pattern was similar for non-pilot respondents; 89 percent of non-pilot respondents agreed that principals are held accountable for student success, 87 percent agreed that teachers are held accountable, and 70 percent agreed that SSCs are held accountable. SSC members are the least directly accountable for student outcomes, and SSC members reported themselves to be the least accountable.

B. Interviews: An Interim Self-Assessment of SSFR Implementation

In general, the findings from our central office and PLP interviews indicate that there were several major successes in 2010–11, but also major challenges that prevented implementation at the pace or scale LAUSD had hoped. One success was the growth of the pilot, a notable feat given that a group of 74 schools serving over 65,000 students is larger than many districts in the state and country. However, there is a long way to go to expand BSA district-wide, to over 700 schools and approximately 700,000 students.

Other major successes accomplished by the BSA initiative in 2010–11 included increasing flexibility over some categorical resources and increasing budget transparency for pilot schools. Minor successes that interviewees mentioned were progress towards changing the planning and budgeting calendar and providing budget-related trainings to principals, although they noted that these BSA components were still in progress in 2010–11.

The challenges that LAUSD faced in 2010–11 included issues related to leadership and staffing challenges, fiscal challenges, and communication challenges. The major lessons learned were that success of BSA requires the following elements:

- a high-level commitment to BSA implementation;
- a cross-functional team that is committed to BSA's success;
- a high-level staff member who has the authority to hold people accountable;
- providing a clear message and consistent communication within the central office and outside the central office to principals, teachers, SSCs, and community stakeholders;
- increasing and improving training and support; and
- fully functional tools.

Details about these interview findings are presented below.

Successes

All of the interviewees noted that calling out successes from 2010–11 was a challenge because the progress on BSA implementation was slow due to challenges that are elaborated on below. However, there were several notable successes in LAUSD in 2010–11, including the following:

- expanding the number of pilot schools from 33 schools serving over 20,000 students in 2009–10 to 74 schools serving over 65,000 students in 2010–11,
- increasing flexibility over categorical resources,
- increasing budget transparency, and
- making strides towards changing the planning and budgeting calendar and providing budget-related trainings to principals.

Increasing flexibility over some categorical resources was described as a “win” for principals.

One interviewee described additional resources being included in the per pupil rate and therefore in the dollars going to schools as a success, stating,

For example, we included additional funds around classified and certificated substitute accounts, targeted instructional improvement grants (TIIG), programs that had traditionally been allocating positions instead of allocating dollars to schools. So these changes led to additional resources in the rate going to schools.

Another interviewee noted that increasing flexibility was a success even if the total dollars in the school budget do not increase as a result of the shift to a per-pupil funding model (the ultimate BSA goal). The interviewee stated, “The principals have realized that. They recognize the additional flexibility in staffing and program, and they know that the economy will eventually improve.” Although the state and district budgets are currently shrinking, interviewees echoed the point that building in flexibility around the existing dollars was “a definite win for principals.”

In 2010–11, the district instituted a program review process to analyze resources and decide what resources to shift to schools. One interviewee lamented, “Unfortunately, it all ended up being cuts last year,” meaning that most of the programs they analyzed were eliminated due to budget reductions. Still, two interviewees identified the program review process as a success. As one explained,

There are multiple consent degrees, union agreements, state law, etcetera that dictate what schools have to do, like class size, what kind of plant manager, and how much of one you need to have at a campus. The challenge is that the schools comply with all of those constraints when developing their budgets. But BSA creates a venue where we can start having discussions. It's calling out these constraints and allows us to start having discussions with policymakers, especially if it's a district policy, to decide whether we need to have X or whether we can give schools flexibility around X.

Increasing budget transparency helped facilitate principal buy-in to BSA. Pilot principals discussed each other's budgets in meetings, and interviewees noted that this activity "opened the principals' eyes" to the fact that revenues do not cover expenditures at some schools, and that some schools are subsidizing others. One interviewee said,

This helped principals think about individual programs, and helped to make the case for per pupil funding... It started to show the monetary impact of policy decisions that don't have systematic resource allocations. For example, attendance: One school had 473 students absent on a given day, and that contributed to a \$600,000 deficit for that school. But they weren't feeling that at the school level, and the principals had no idea because the budget isn't transparent.

The interviewees pointed to the increased budget transparency in pilot principal meetings as a facilitator of principal buy-in that led to discussions about resource equity and accountability.

On minor success was that LAUSD worked to change the planning and budgeting calendar in 2010–11 to allow planning to be more meaningfully related to schools' goals and strategies. One respondent said,

We are separating planning from actual budgeting, trying to have scenario-based planning with an estimated budget rate with best/worst/likely scenario in the fall so they can start updating their plan and developing strategies... They can develop SMART goals and prioritize strategies based on analysis of school data, by the principal, with the SSC and other stakeholders. That allows them to develop these with stakeholders, and when they get their final rate, they just need to tweak.⁹

PLP worked with the district in 2010–11 to set their budget priorities in the fall and winter, soliciting stakeholder feedback from schools in the process. This will allow principals to start budgeting with a high and low scenario before they get their actual allocations for the coming year, instead of waiting for the actual allocations and then rushing to develop their budgets as they have traditionally. This is a major shift of the site planning and budget calendar, and it was in progress in 2010–11.

A second minor success is that pilot principals received initial information and training in 2010–11. PLP and the district introduced a pilot version of the Planning, Budgeting, and Allocation of Resources (PBAR) tool to BSA pilot principals, helping principals to start connecting their budget with their goals and strategies, and to consider the potential for a system that could ultimately connect with student outcomes. District and PLP interviewees commented on

⁹ SMART goals are "Specific, Measureable, Attainable, Realistic, and Timely."

how “eye-opening” this was for principals, and how these trainings helped to facilitate buy-in to the BSA reform.

However, interviewees also recognized the need for more training on site planning, budgeting, and resource allocation as BSA continues. As one said, “We provided initial trainings, but we heard that principals, SSCs, everyone needs more training, more specific training, and training for specific audiences.”

Challenges

Challenges are inherent in any change process, and LAUSD faced several in 2010–11, including leadership and staffing challenges, fiscal challenges, and communication challenges.

Departmental silos were mentioned as a barrier to BSA implementation in 2010–11, exacerbated by a lack of executive-level agreement about what needed to be done, by when, by who, and how. Without clarity about priorities around BSA, central office staff members “are paranoid about losing their jobs, don’t want to get into trouble, and don’t want to do anything that’s not in their job description.” As one interviewee noted,

We did not have a cross-functional team of budget, IT, and HR working on how to staff this. It was still primarily a budget initiative, and they had other things on their plate too. Even within the budget office, there were only a few people working on this. They were dealing with a multi-million dollar budget deficit, so I get why. But it [BSA] also wasn’t a key priority.

Interviewees agreed that BSA was not communicated clearly within the district office or to schools or the community in 2010–11. As one person said,

When you have such a complex initiative, you need to figure out what are the messages and what stakeholders should receive what message, and what processes you even need to get out a message.

None of this was achieved in 2010–11. Another person noted that the dynamic nature of the pilot made it hard to have a clear message, explaining,

For a major part of the year I felt that certain things had been stalled, and there was only so much I could explain to people. There was always something where I had to say, ‘We’re working on that,’ because I didn’t have an answer.

Further, the national economic crisis has had a direct impact on school district budgets, including \$400 million in cuts to LAUSD in 2010–11. Although the increased flexibility included in the Successes section facilitated buy-in among pilot principals, implementing a new budget system in a time of a fiscal crisis made it difficult to disassociate the reform from the crisis. As one person stated,

The budget had \$400 million of cuts in it, and now that’s associated with BSA because they occurred at the same time. Principals were saying, “I’m staying [in the current

system] because if I go to BSA, I'm going to lose money." That's not true, but some people got that perception.

Another interviewee said that the budget crisis and lack of central office buy-in were a related challenge, explaining, "Everyone was focused on balancing the budget, fairly, instead of changing the budget system in the middle of a budget crisis."

There is no expected reprieve from the fiscal crisis over the next few years, so deciding what to do about underfunded schools was also mentioned as a challenge. "It is easier to level up," one person said, "but that requires extra funds... [so] we'll have to figure out what to do." LAUSD was worried about declining state resources making SSFR implementation difficult. In ideal circumstances, the district would be able to hold all schools harmless and add funds and resources to the neediest schools, but LAUSD officials described that as an unlikely scenario.

Lessons learned

To facilitate a cultural shift and staff buy-in, executive-level commitment to implementation is critical. Although BSA was a board-adopted key reform strategy in 2010–11, it was one of many and did not receive consistent support for implementation from the executive level. One interviewee reflected,

There needs to be a clear and consistent message from the superintendent that this is a priority and it will happen... Now, we've clearly stated that, going forward, how we budget is per-pupil... We are trying to see how this switch will help allocate resources, and it is forcing equity conversations instead of conversations about, 'Can we do this?'

Another person remarked, "[Last year] there were lots of conversations about barriers but not conversations about how to get past the barriers."

Another shift was the explicit decision and timeline for going district-wide in 2013–14, which pushed staff to "get on board." As one person said, "The [new] superintendent's perspective is, 'We're going district-wide. We need to figure out how to get there.'"

Superintendent Cortinez got the ball rolling with BSA, but he retired in 2010–11, and John Deasy became the new LAUSD superintendent. The interviewees agreed that the leadership change allowed substantial structural reorganization and an increased emphasis on BSA that they felt was helpful to BSA implementation.

Success requires a superintendent who explicitly prioritizes and supports BSA, and a high-level staff member to oversee implementation. Interviewees also discussed the need both to have more people and the right people on board. As one interviewee explained,

Staffing decisions are critical. Everyone needs to be on the same page and you need to have buy-in, and you need a high-level individual that everyone is accountable to for implementation.

Others echoed the need for a high-level official (“someone in a leadership role,” “someone in the executive cabinet”) to have the BSA initiative “on someone’s radar continuously” and to have the authority to hold everyone accountable. One person said,

We strategically aligned the departments under BSA—budget, IT, data, federal and state programs—all under one person and now everyone is on the same team, and everyone is on board.

Interviewees pointed to examples in LAUSD of both hiring new staff and facilitating buy-in among existing staff at the central office in 2010–11, under the new superintendent.

A single message, communicated consistently within and outside the district, is critical to the success of BSA. District officials recognized that many acronyms and terms were used to describe BSA and its component parts in 2010–11, and noted the confusion this created. One interviewee said,

Now, we are thinking about the main messages. We want schools to have control over 85 percent of their funding, with appropriate accountability and support. We are working on the exact words, but that’s what we’re trying to do. What happened last year is that we used BSA, SSFR, TRM, per pupil, and all of this other jargon... so there was mass confusion.

Two interviewees said it was important to explain “the why” of BSA. One stated, “We need to be clear and concrete because we believe this is better for children and better for schools, so we have to communicate that.” Another said,

We need to conduct a major communications campaign... We need to communicate about the big picture—what does this initiative mean for schools, for students? People need to understand what it is, and what it can do for students and schools.

One interviewee discussed the importance of communicating both internally, inside the central office, and externally, with schools and community members. The interviewee remarked that in addition to the need for external communication to principals, teachers, and others, “The (new) superintendent just created an internal communications team, which never existed before... BSA needs to be communicated more internally, with district staff.”

Fully functional tools are critical to BSA success, especially district-wide. One person noted that a lesson was learned when the pilot PBAR tool was shown to pilot principals in a training session; the tool had errors and was not working, causing frustration. The interviewee said, “We [the central office staff] might understand a beta [i.e., unfinished] version, but it was not ready to show to schools, and principals reacted negatively to seeing errors in it.”

In 2010–11, pilot schools were operating under a pilot version of a pupil-based budget system that was separate from the district’s budget system, and one interviewee discussed the challenges of trying to convert the current district budget system into a pupil-based system. This person explained,

Now, we are making decisions about the minimum level of technology needed to develop the budget in a per-pupil fashion, mapping between the old system and the new system, and identifying gaps that we need to address.

It is a challenge to create an entirely new budget system or to modify an existing system to serve different needs and goals, and LAUSD is in the process of deciding which direction to take with regard to tool development.

As more money goes to schools, principals and others will require training and support to build their capacity to handle the increased autonomy. While 2010–11 was focused on reviewing programs and figuring out how to push as many dollars as possible to the schools, the interviewees recognized that as more money goes to schools, principals and others will need training and support. One acknowledged, “We need a lot of training, and there are many stakeholders that need training—principals, fiscal specialists, SSCs. And they need lots of types of training—on the tools, budgets, soft skills.” This interviewee explained that trainings need to be interactive and tailored for different groups:

For example, a three hour slide deck on Title I do’s and don’ts probably isn’t going to work.... We’re doing this now, improving these trainings... Training modules will be approximately every month for multiple stakeholder groups. We will establish core training and tailor content by stakeholder group [e.g., principals, SSC]. For example, SSCs need to work on prioritizing goals, but don’t need to know how to input it into the tool, whereas principals do need to know the details of the tool.

Another person said,

I reviewed the current [pre-BSA] video for SSC training and it is very compliance oriented about filling out forms. I envision a training that is more about engaging stakeholders, but will also contain the information they need about filling out the forms.

PLP was working to develop improved trainings in 2010–11 to fill the needs identified above, balancing capacity-building for additional autonomy with the district’s need to ensure compliance. LAUSD secured an Americorps Volunteers in Service to America (VISTA) program grant for 2011–12 to enlist VISTA staff to help with training, and principals were given the opportunity to participate at a cost of \$950 for one VISTA staff member for one day/week for the entire school year. The exact role of the VISTAs was being fleshed out at the time of these interviews, but the idea was for them to help with training and increasing engagement between schools and the community.

Further, one interviewee questioned the role of the SSC in the new system, since the SSC has traditionally approved categorical program funds but now schools will have autonomy over more resources. The interviewee said, “The SSCs in the budget process only have decision-making power over categorical funds... I don’t know what role the SSC will play if the Single Site Plan gets used to decide on all the school funds.”¹⁰

¹⁰ The “Single Site Plan” is another name commonly used for the “Single Plan for Student Achievement” required of schools by the California State Department of Education.

Another person added, “We’re trying to get SSCs to reach out to stakeholders more effectively so they’re not just a symbolic representation on the school campus, but we also need to provide them training to do that.” The role of SSCs in the planning and budgeting process has important implications for the types of training and support that SSCs need as BSA moves forward.

Finally, one interviewee discussed the concept of “earned autonomy,” in which principals’ budgets will be frozen until they demonstrate certain competencies. This person stated, “We are working on the criteria, but you will have to earn budget flexibility.” This was seen as a bridge to district-wide BSA implementation, with a purposeful emphasis on both increasing autonomy and improving training.

IV. Summary

In this report, we have presented some of the attitudes and perspectives of school and central office staff regarding the BSA initiative in LAUSD. Based on our surveys of principals, teachers, and SSCs, there is the perception by a substantial percentage of principals and teachers that resources are inequitably distributed across schools. Our findings indicate that principals in BSA pilot schools may have been more aware of the inequities than principals in non-pilot schools. Across pilot and non-pilot schools, both principals and teachers reported understanding how resources were allocated to their schools.

Moreover, the survey findings highlight several positives about BSA implementation. The vast majority of principals and teachers felt they had discretion over how school funds were spent and had the autonomy to meet the instructional needs of their students. Pilot principals reported greater autonomy over their school budget and instructional program than their non-pilot peers, and they reported that they have district support for developing their school budget.

With respect to transparency about budgeting and resource allocation, teachers and SSCs reported understanding how resources are allocated to schools and that they had an opportunity to provide input into developing school budgets.

Based on our interviews, we report that there were several successes in implementation of the BSA initiative during 2010–11, including the following:

- an expansion in the number of pilot schools,
- an increase in flexibility at the school site over the use of categorical resources,
- an increase in budget transparency,
- progress towards changing the district’s planning and budgeting calendar, and
- providing initial planning and budget-related trainings to BSA pilot principals.

There were also several implementation challenges and lessons learned in 2010–11:

- Leadership and staffing are critical.

- It is imperative to have a clear message and consistent communication with the central office staff and outside the central office to principals, teachers, SSCs, and community stakeholders about the BSA reform to facilitate understanding and buy-in.
- Adequate support and training of both central office and school staff is needed to build capacity and buy-in for BSA implementation and ownership over the BSA approach.
- Well-developed tools are critical to facilitate budgeting and planning in the BSA model, and shifting from the old system to a new, pupil-based budget system is more complicated than district officials had anticipated.

LAUSD made progress in 2010–11 by pushing some categorical funds out to pilot schools and providing principals with increased budget transparency and initial trainings on the BSA model and PBAR tool. The district also worked to engage existing staff and new staff in the BSA reform, creating a cross-functional team with accountability to the superintendent’s office.

However, LAUSD faces several major challenges as it moves forward in 2011–12. First, and perhaps foremost, the fiscal crisis has hit LAUSD with massive revenue cuts and layoffs. While BSA is a reform that aims to ultimately become integrated into a district’s planning and budgeting systems, all reforms require start-up implementation effort that is on top of “business as usual.” If LAUSD decides to proceed with BSA, developing the tools to implement the model at scale is a large endeavor that requires the commitment and coordination of high-level budget and fiscal staff, and accountability to cabinet level officials. District commitment to implementing BSA is in question given its fiscal challenges and its other major concurrent initiatives, but it is clear that changing a district-wide budget system benefits from a single-minded focus at the executive level.

Appendix A. BSA SSC Survey

Los Angeles Unified School District School Site Council Survey

Spring 2011

1. Is this school a Budgeting for Student Achievement pilot school?

- Yes
- No
- I'm not sure

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
- 4-5
- 6
- 7-8
- 9-12

5. What is your role at this school?

- | | |
|--|--|
| <ul style="list-style-type: none"> <input type="checkbox"/> Principal <input type="checkbox"/> Teacher <input type="checkbox"/> Other school staff (Specify: _____) | <ul style="list-style-type: none"> <input type="checkbox"/> Parent <input type="checkbox"/> Student <input type="checkbox"/> Other (Specify: _____) |
|--|--|

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 dollars in the school budget, overall, are spent.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b. The SSC has significant influence over how categorical funds are spent.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c. Parents and community members (besides SSC members) have adequate opportunity to provide input into developing and spending this school's budget.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d. The principal provides adequate support and information for the SSC to make budget recommendations.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Strongly Disagree	Disagree	Agree	Strongly Agree
e. I believe funds are equitably allocated to schools within our district.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
f. I understand how resources (staff, funds, etc.) are allocated to my school.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
g. The budget documents I am provided for SSC review are easy to understand and interpret.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
h. Our principal is held accountable for student performance.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
i. Teachers in our school are held accountable for student performance.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
j. The SSC in our school is held accountable for student performance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
k. This school is welcoming to parents.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
l. The school communicates effectively with parents about the progress of their children.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
m. The school communicates effectively with parents about upcoming school events.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
n. The school communicates effectively with parents about school budgets and resources.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
o. The principal values the SSC's recommendations.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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

Thank you for your participation!

**Appendix B. 2011 BSA Interview Protocol
for Central Office and PLP Staff**

**2011 BSA INTERVIEW PROTOCOL FOR
CENTRAL OFFICE AND PLP STAFF**

Goals

1. We know that the BSA reform is a board and cabinet priority in this district. What are the district's goals for BSA?
 - *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*

Progress/milestones

2. What progress has been made this year (2010-11) on goals related to funding allocation decisions? What key milestones have been reached?
 - *What influence has BSA had on flexibility of general funds? Categorical funds? What influence has BSA had on funding based on per-pupil allocations? Actual teacher salaries?*
3. What progress has been made this year (2010-11) on goals related to the planning and budgeting process? What key milestones have been reached?
 - *What influence has BSA 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?*
4. What progress has been made this year (2010-11) on other BSA goals? What key milestones have been reached?
 - *To what extent do you feel that schools' program plans are aligned with resource allocation?*

Capacity

1. 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?*
2. We know that you have invested a lot of time in SBSA. How much time would you estimate that you spend on a weekly basis on work related to BSA?
 - *About how many hours a week do you work total? About what proportion of your time do you spend on BSA?*

- *What do you spend most of your time on, related to BSA? (e.g., strategizing, meeting with principals, etc.)*
3. Who else would you say are key contributors to BSA implementation in the central office? In the schools?
 - *About how much time do they spend related to BSA?*
 - *Why are they key?*
 4. Do you feel that you have the capacity at the district level to successfully implement the BSA reforms?
 - *If no, what resources are needed?*

Professional development training and support

5. 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 (2010-11) 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?*
6. 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

7. What has the central office done this year (2010-11) with regard to communicating about BSA?
 - *What is the district's communication strategy about BSA reforms?*
 - *Who organizes and facilitates communication?*
 - *What types of communication methods do you use?*
 - *Who is the target audience for various types of communication?*
8. Do you feel that principals, teachers, school site council members, parents, and community members have a clear understanding of BSA?
 - *If no, 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

9. One of our goals on this project is to make district funding to schools a more transparent process. What progress has been made this year (2010-11) 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?*
10. Is the community 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 (e.g., teachers, other faculty, parents, students, other community members at large) 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 BSA

11. What are the biggest steps the district has taken this year (2010-11) to move BSA forward?
- *Probe for specific examples.*
 - *What have been major "wins"?*
 - *What are you most proud of about BSA this year?*
12. What have been the biggest challenges or barriers to BSA implementation this year (2010-11)?
- *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 BSA this year? What “keeps you up at night”?*
13. What do you see as critical next steps moving forward? What do you see as major challenges?
14. Do you feel there are any district- or state-level policies that create barriers to BSA implementation and achieving BSA goals?
- *If yes, which policies? What is the implication of these policies for BSA? 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?*
15. What are some major lessons learned this year (2010-11) that can help other districts who are considering implementing a reform like BSA?

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Figure 1. Equity – Principal Response

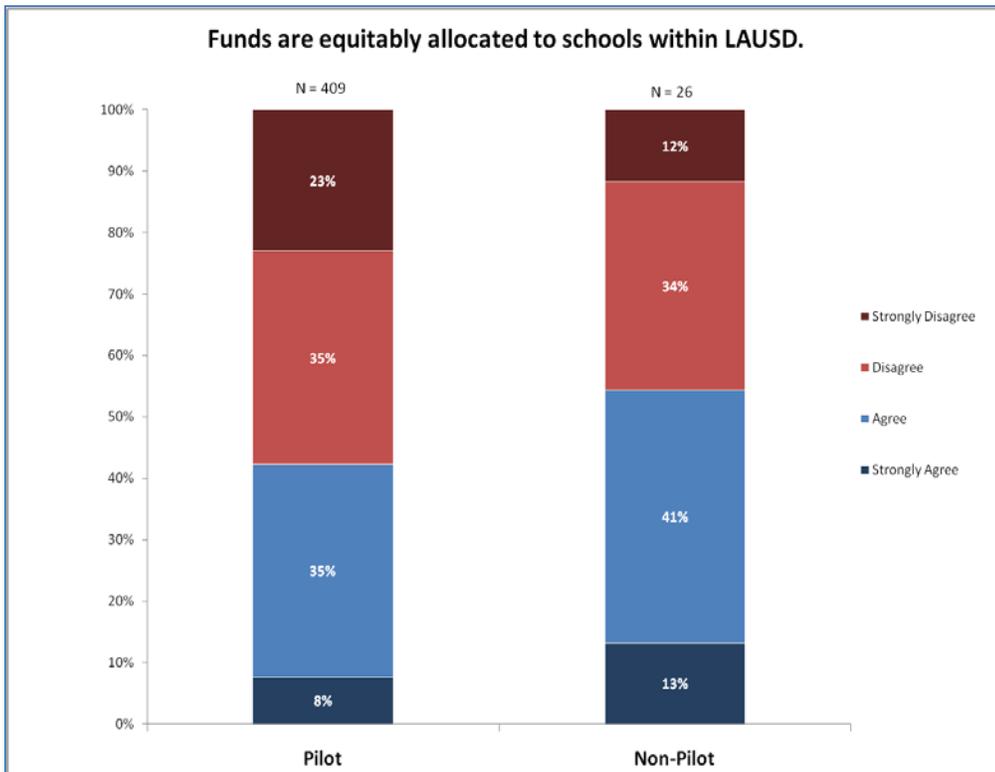


Figure 2. Equity – Teacher Response

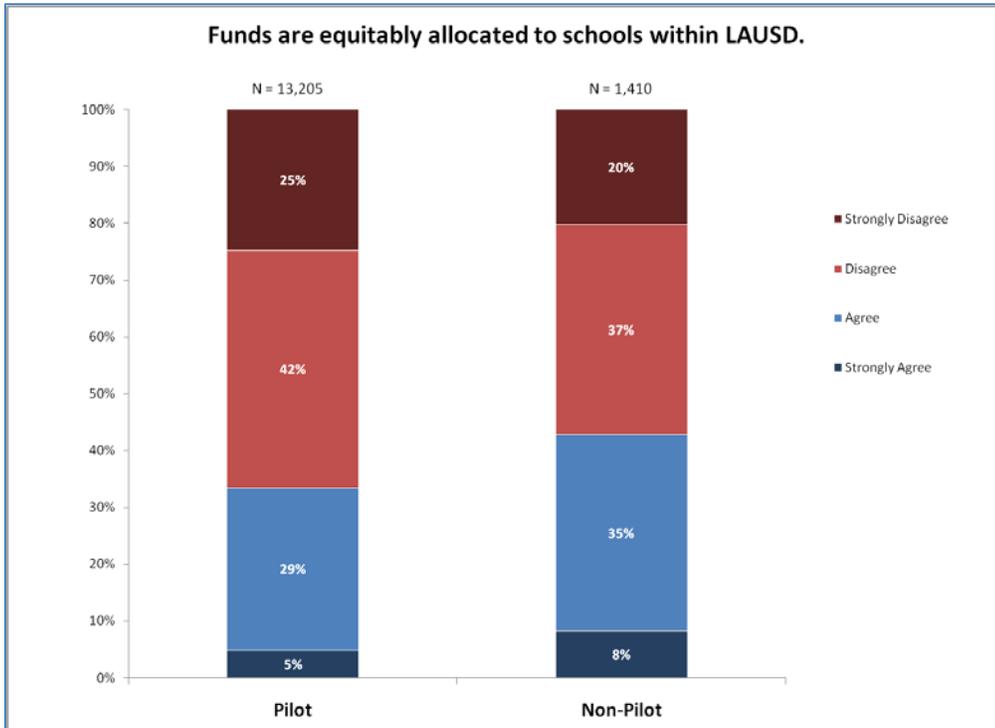


Figure 3. Equity – SSC Response

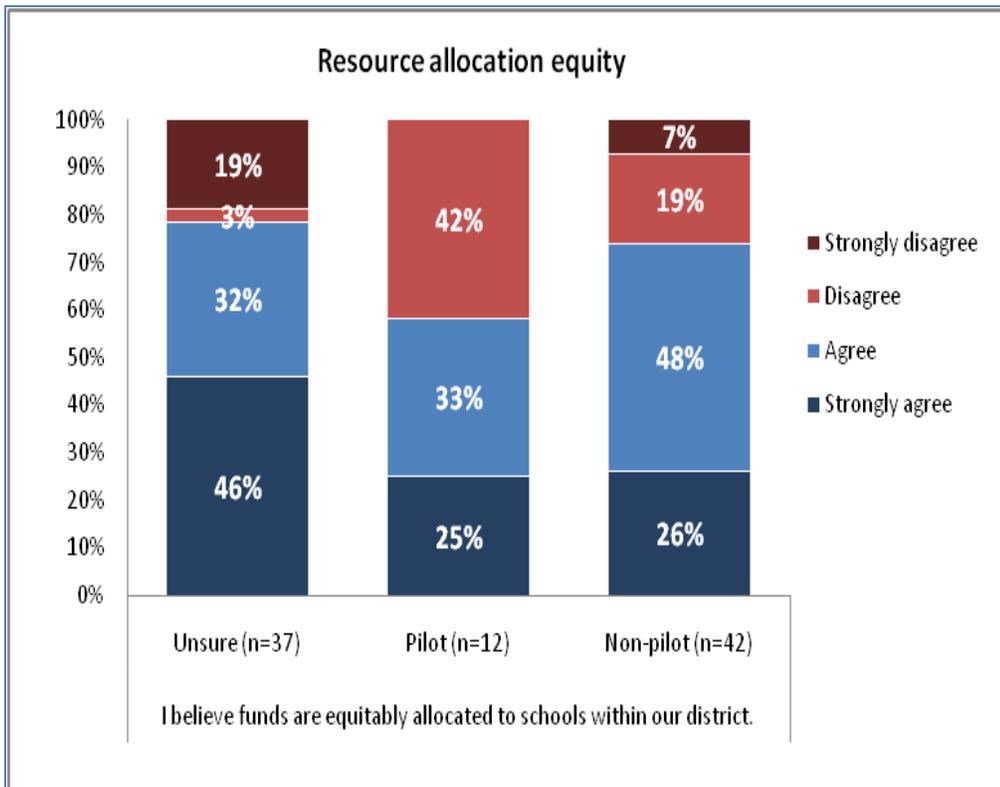


Figure 4. Transparency – Principal Response

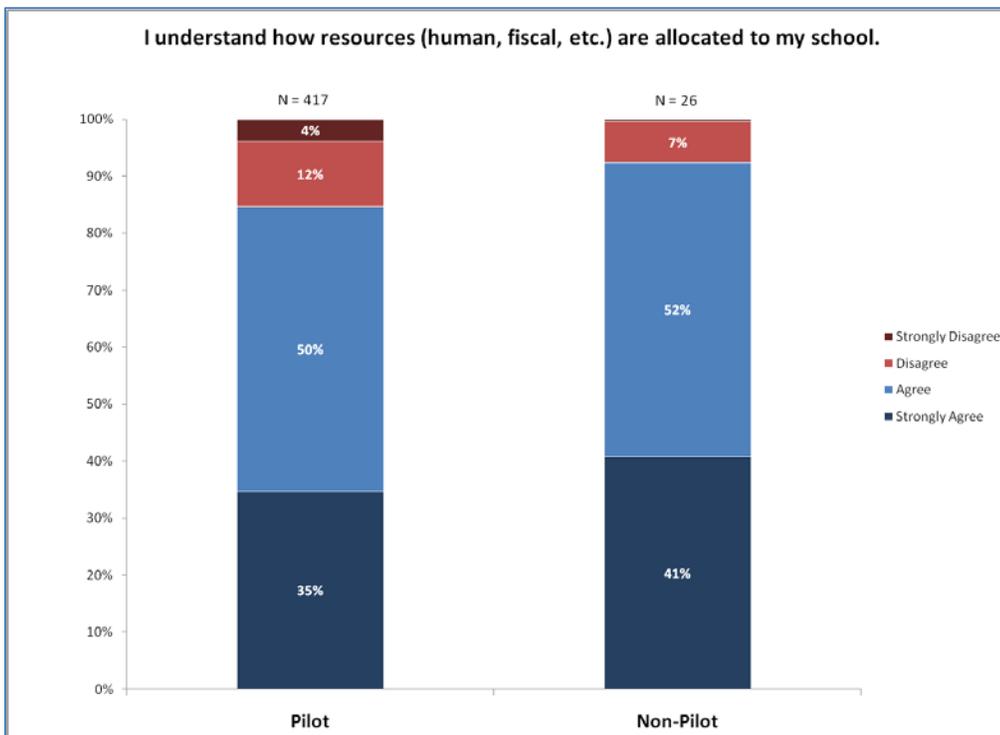


Figure 5. Transparency – Teacher Response

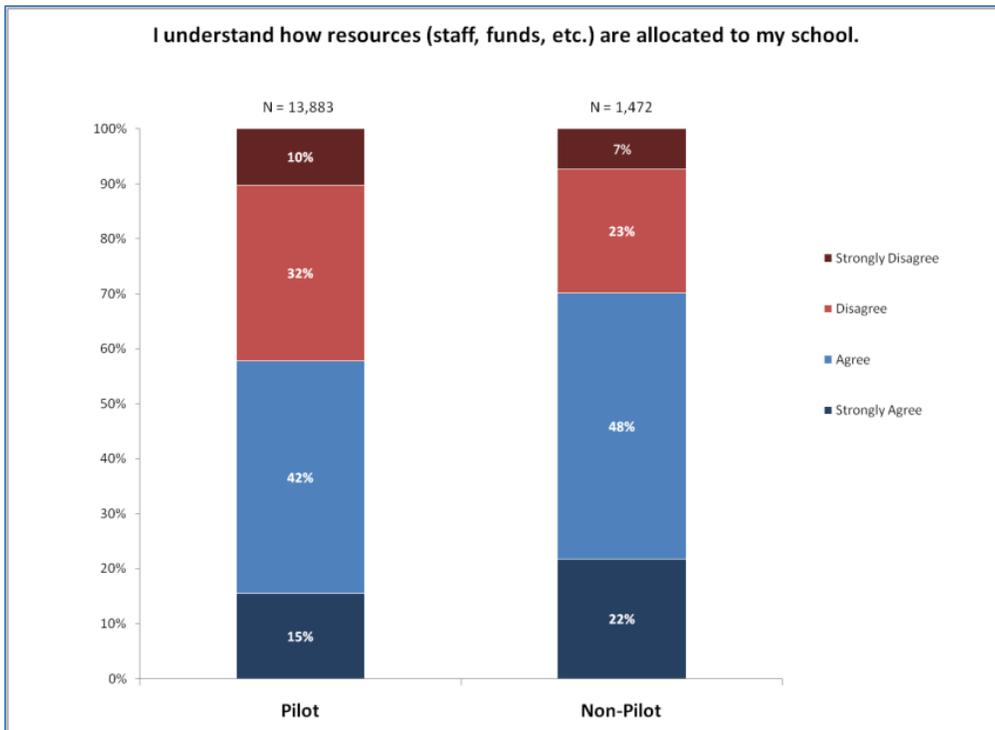


Figure 6. Transparency – SSC Response

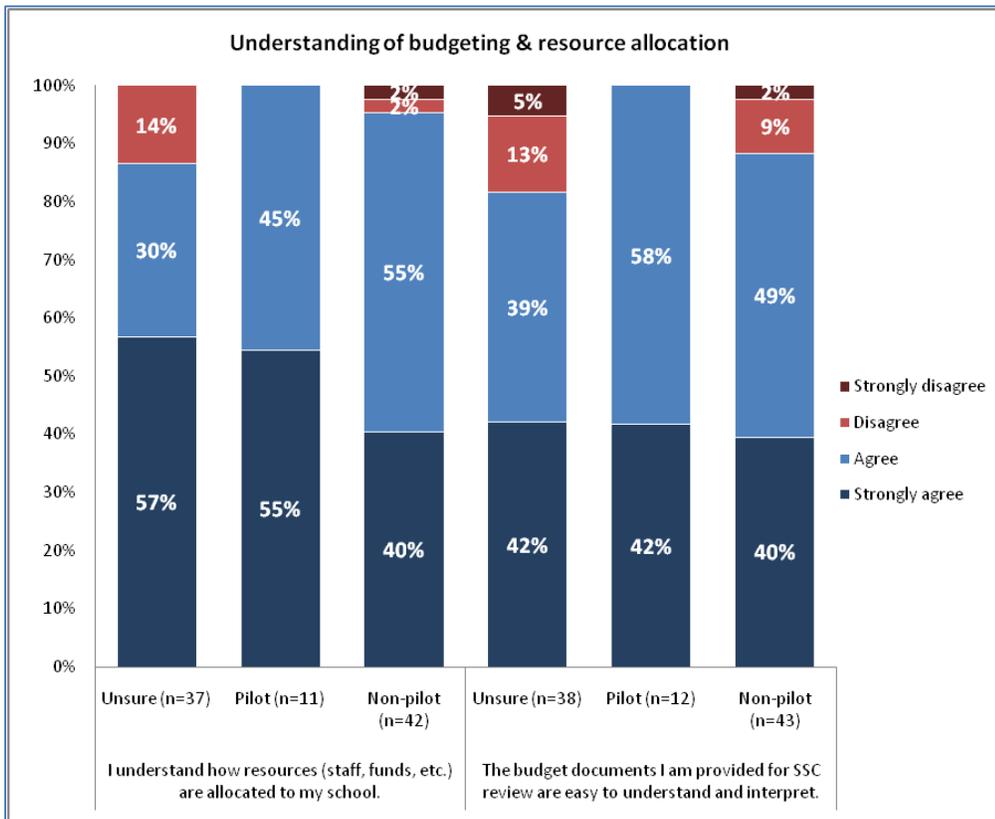


Figure 7. Autonomy – Principal Response

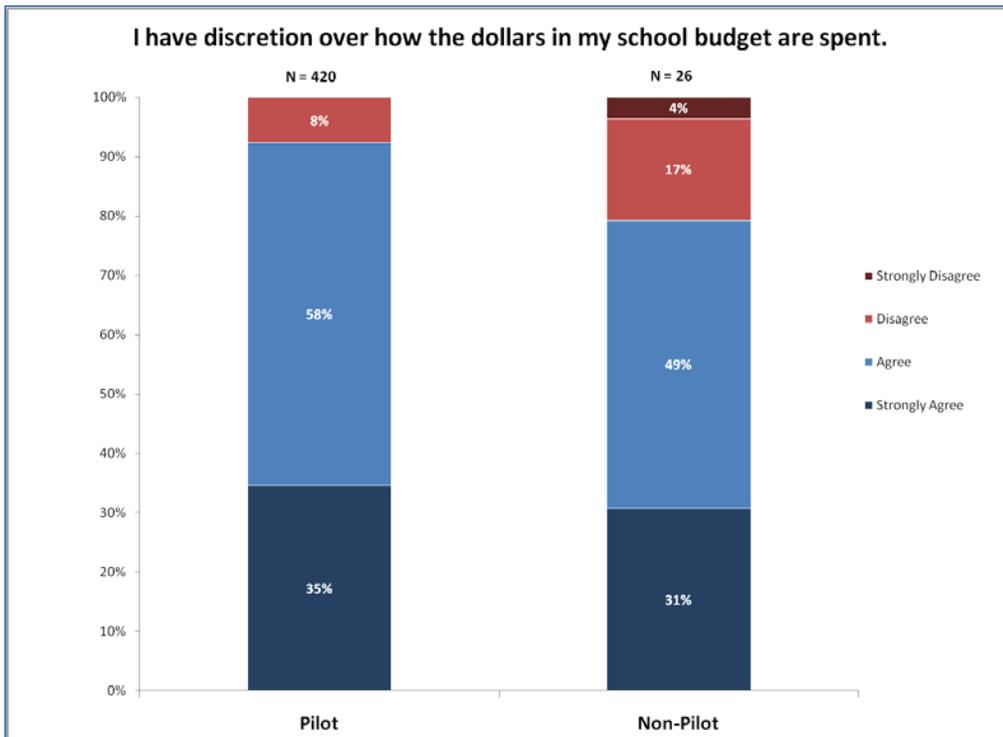


Figure 8. Autonomy – Principal Response

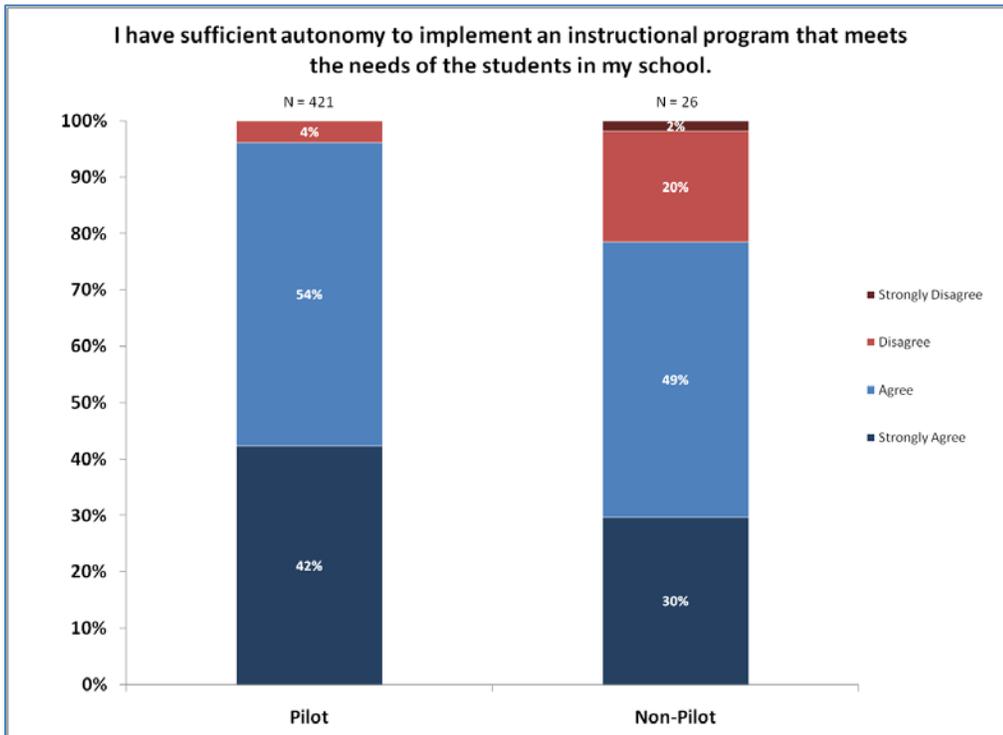


Figure 9. Autonomy – Teacher Response

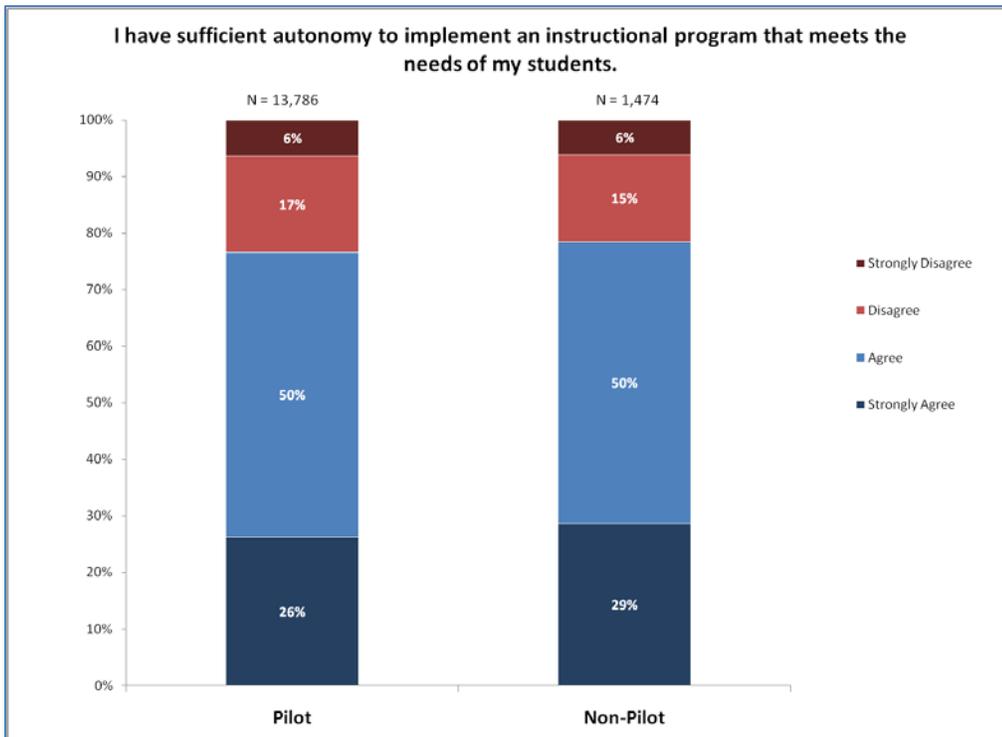


Figure 10. Support – Principal Response

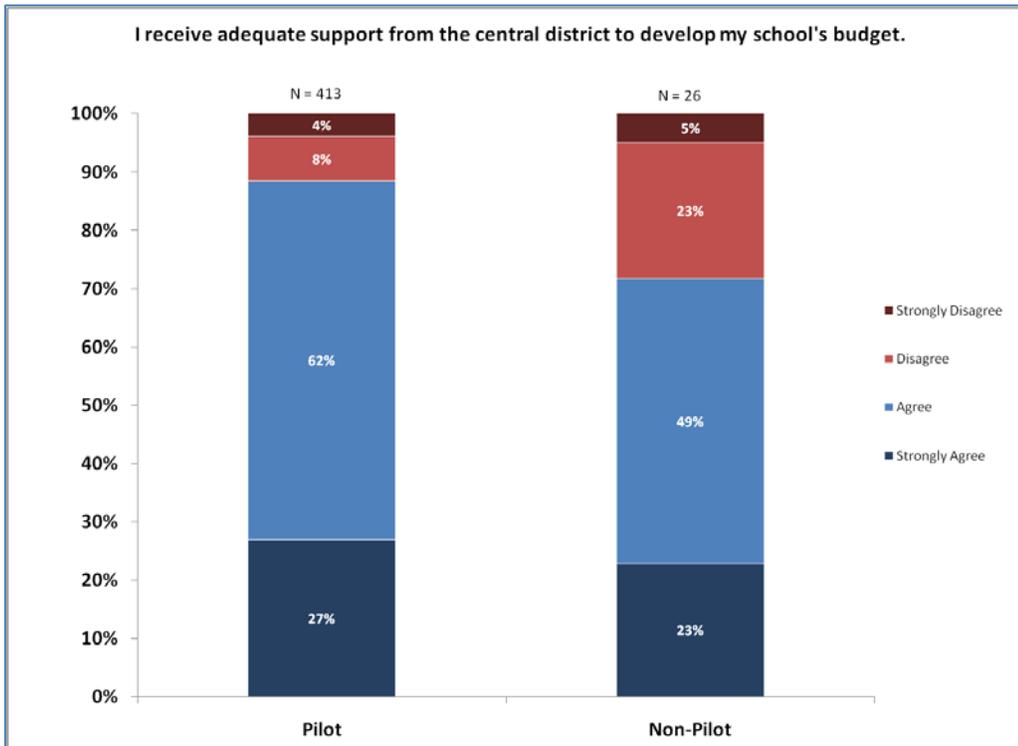


Figure 11. Support – SSC Response

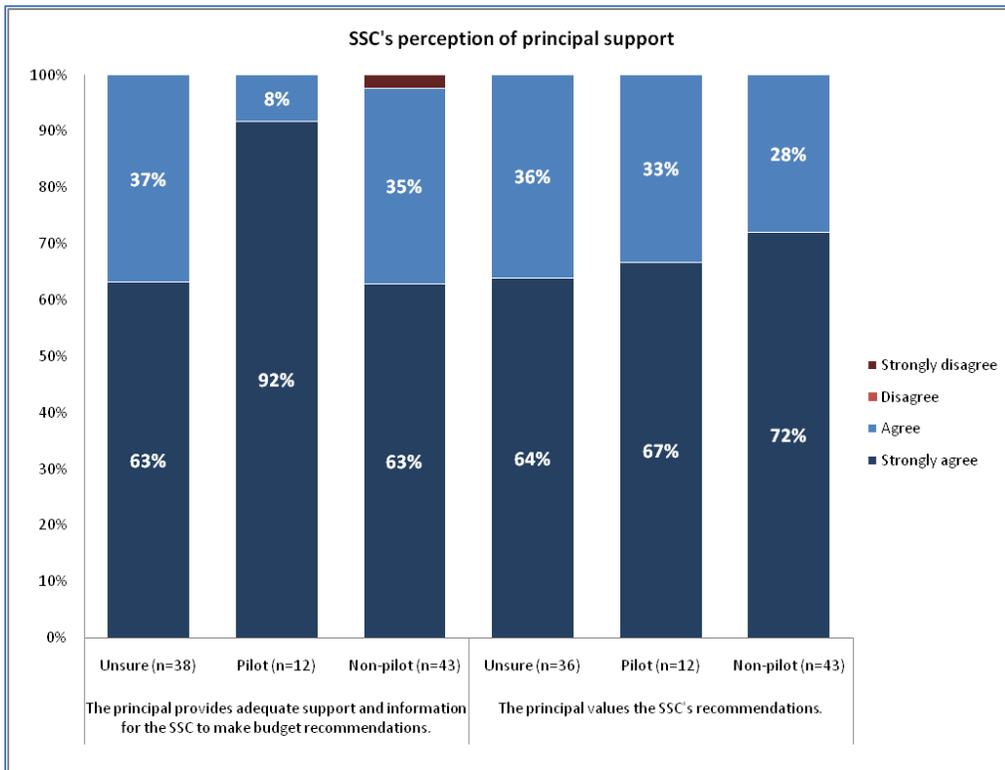


Figure 12. Opportunities to Provide Input – Teacher Response

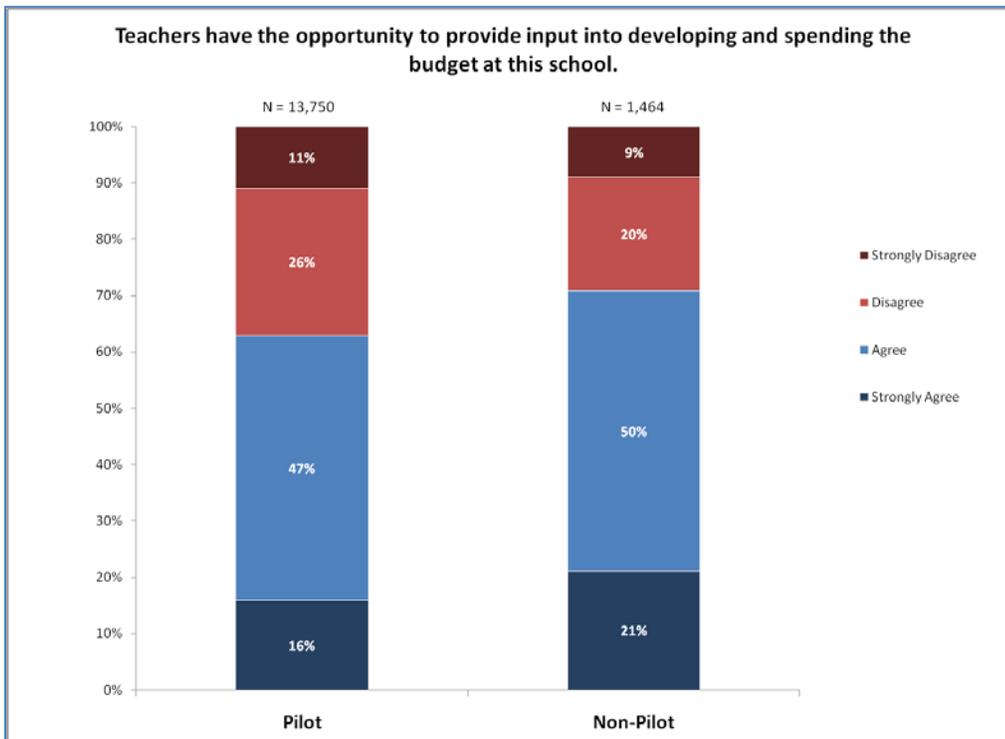


Figure 13. Opportunities to Provide Input – SSC Response

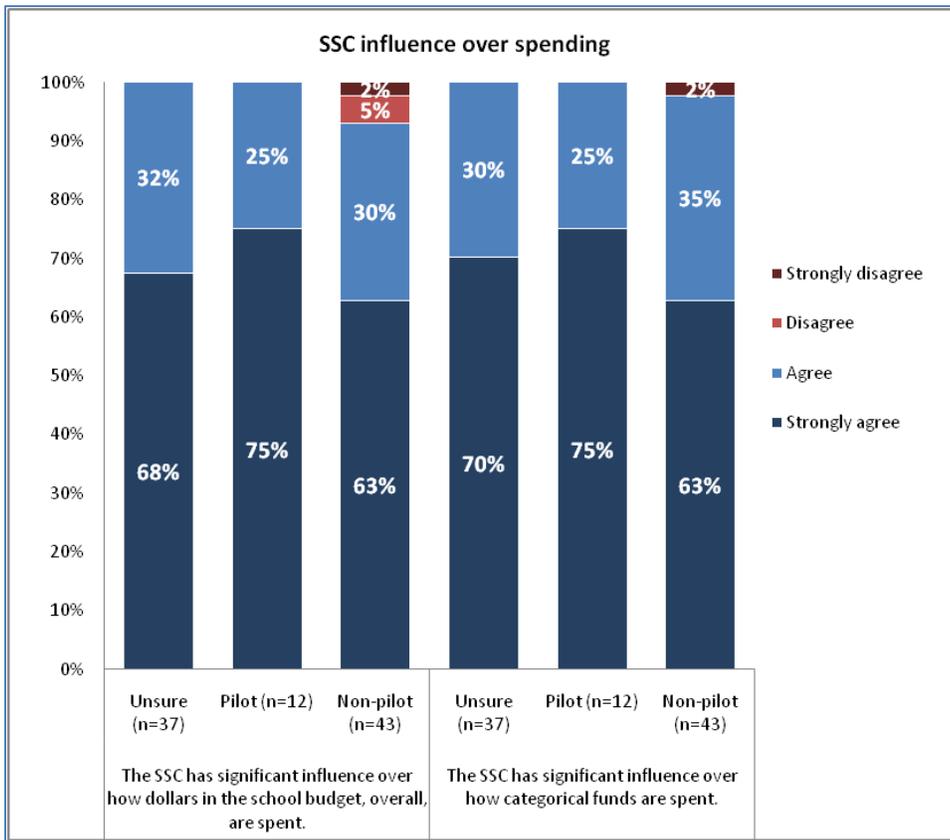


Figure 14. Opportunities to Provide Input – SSC Response

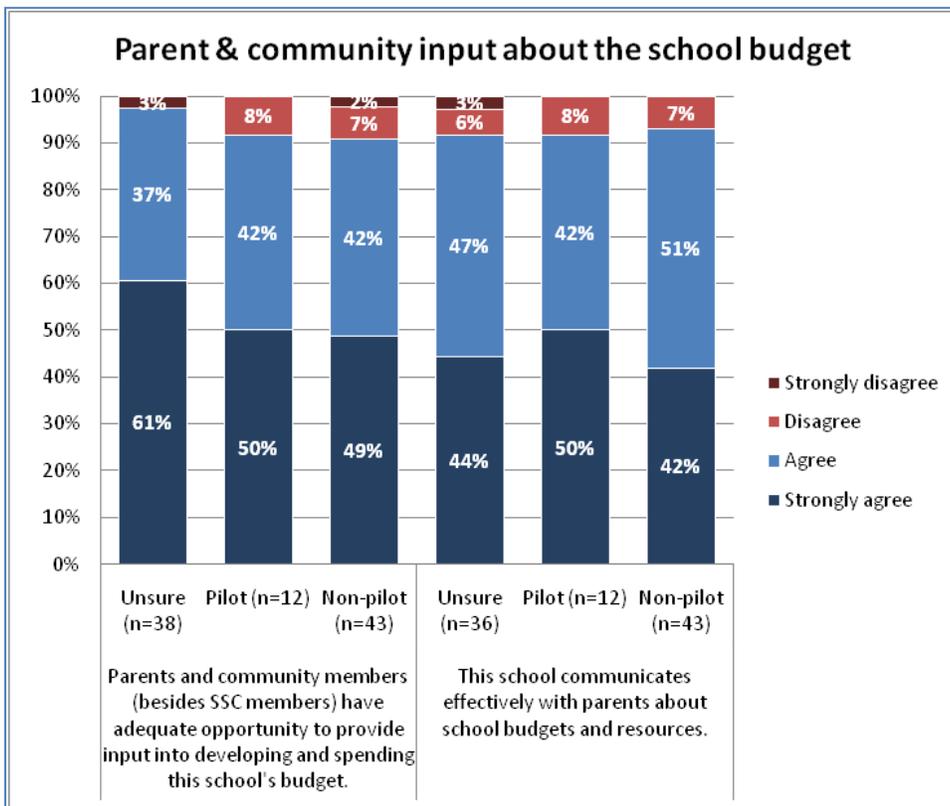


Figure 15. Accountability – SSC Response

