Equitable Budgeting: 5 Steps to Promote Equity in Your District’s Funding Practices

By Nikkie Whaley, MPA, PHR
Equity has become central to any conversation about education and student outcomes due to an increased awareness that achievement disparities exist and a one-size-fits-all approach is not working. This is key to understanding educational equity, a concept that requires us to recognize opportunity gaps exist in every district and equal is not always equitable.

Our students come to us with a variety of characteristics, from various circumstances and with different experiences that all influence the way they and their families access our education system. Access, in this context, goes beyond physical buildings; it includes everything necessary for a student to fully participate in learning. Ensuring equitable access is the first step toward achieving equitable outcomes for every student.

What is the board’s role in all of this?

THE ROLE OF SCHOOL BOARD LEADERS IN EQUITY

In addition to setting the vision for the district, boards are responsible for providing the structure needed to pursue that vision. We do this primarily through policy, budget and administrator oversight, though community engagement and advocacy are also important aspects of the role. Realizing our students’ needs vary, how can we carry out our responsibilities in ways that promote equitable outcomes so every student reaches their potential?

One way is through our budget process. The default approach to district budgeting seems to be equality, wherein boards allocate the same resources to every student or every campus. However, equal is not always equitable. So, how do we begin to promote equity when it comes to resource allocation? The following steps will help boards look at budgets through an equity lens and guide them to the questions they can ask to assess their budgeting practices.

STEP 1: LOOK BEYOND THE DOLLARS

When looking at our budgets, we often focus on dollars. However, dollars only have value when we invest them in resources. The biggest investment and, therefore, our greatest resource is people.

In a recent presentation on budgeting for equity, Anabel Aportela, Ph.D., Director of Research for the Arizona School Boards Association, pointed out that, across the country, school districts spend approximately 60% of their budget on classroom teacher salaries and benefits, 20% on salaries and benefits for other staff, and 20% on everything else (supplies, materials, utilities, etc.). Her point was if you understand where staff are assigned and what they spend their time on, you will know where 80% of your budget was going.

How might this impact equitable funding? Let’s take a moment to consider a few scenarios.

School A has 100 sixth graders, with four full-time teachers assigned to them. School B has 75 sixth graders and three full-time teachers. On its face, it appears that, because the student-to-teacher ratio is the same at both schools, this is a fair allocation of resources. However, if we look deeper, we may come to a different conclusion. Let’s assume at School A, one in 25 students has special needs and is on an IEP or 504 plan, which requires more attention and effort from the teacher. If these students are
distributed among the four classrooms, each teacher will have some additional responsibilities to meet the required accommodation of their one special needs student. However, this is not expected to make a significant impact on the overall attention paid to the rest of the class.

School B, on the other hand, has an average of five special needs students in each class of 25 students. In School B, teachers express concern that they can’t complete lessons or check-in with every student because of the time required to ensure their students with plans are getting the support they need during class. Here we can begin to see while the student-to-teacher ratio is the same at each school, the students and teachers at School B appear to have a different experience than those at School A. Teachers are able to spend more time with each student at School A than those at School B. How might that potentially impact the experience of students at each of the schools, both students who have IEPs or 504s and those who don’t?

Continuing with this example, let’s look at the teachers themselves. In this example, all four of the teachers at School A have at least five years of teaching experience. The teachers at School B include one teacher with three years’ experience and two in their first year of teaching. So, is it reasonable to assume the teachers at School A may be more equipped to handle the challenges of managing a classroom and the added responsibilities of special education students than the teachers at School B? Despite each school having the same student-to-teacher ratio, how might the experience levels of teachers at each school impact the overall outcomes for the students?

What about the investment in teacher salaries and benefits in each of these scenarios? If we assume the more experienced teachers at School A are earning higher salaries, then the investment in human capital—teachers—is inequitable as well.

Dollars are primarily invested in people, which generate the resources of time and capital—teachers—is inequitable as well. Dollars are primarily invested in people, whose priorities and needs vary depending on their circumstances. Such is the case for students in our schools. To identify a school’s priorities, you must assess its needs. If the goal is for every student to succeed, we must begin to identify where our students are and what they need to get to the end goal. One way to do this is through data—specifically, disaggregated data.

Often data is presented in averages. For example, a district with multiple high schools may report their four-year graduation rate is 86%. This is on par with the national average and may not be cause for much concern at the board level. However, this is an example of aggregate data, information for all students that is shown together in a summary or average. Aggregated data is fine when tracking trends across large groups, but it can hide disparities.

Disaggregated data is data broken down by group or population. For example, if the above district disaggregated their graduation data by school and presented to the board the scores of their three high schools as 99%, 94% and 65% respectively, the board may have questions or concerns that were not raised when looking at the district average of 86%. Even the campus with a 94% graduation rate may have disparities that would be illuminated when the data is further disaggregated by race, special education, multilingual learners and other characteristics.

Disaggregated data is essential in equity work. So, too, is the approach that boards, superintendents and school leaders take in using it. Data should be used as a flashlight to guide improvement, not a hammer to punish. Creating a culture where data is not used to shame or blame, but to illuminate opportunities for improvement and spotlight things that are working, helps districts ensure no student falls through the cracks. It is a healthy and vital step toward identifying who is in need and in what areas.

**STEP 2: IDENTIFY YOUR NEEDS**

Anyone who has successfully managed their own finances knows strategic decisions are required to ensure priorities are met. Shelter and food, for example, tend to come before travel and fashion. So, when allocating your personal resources, you prioritize rent and groceries over exotic trips or designer shoes. However, people’s priorities and needs vary depending on their circumstances. Such is the case for students in our schools. To identify a school’s priorities, you must assess its needs. If the goal is for every student to succeed, we must begin to identify where our students are and what they need to get to the end goal. One way to do this is through data—specifically, disaggregated data.

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**STEP 3: INCLUDE STAKEHOLDER VOICE**

Several years ago, ASBA convened a diverse group of adults and youth to provide feedback and insight on our action-focused equity tool, “Leading for Equity: A Practical Framework for Boards.” During the conversation, one youth said something so simple, yet so profound: “Nothing about us without us.” Essentially, she said, adults make decisions for kids all day: what they will learn, how they will behave, what will be celebrated, who will be recognized. While she said most adults felt they were making those decisions with the best interest of students in mind, she said they rarely stopped to ask if the students if that was what they needed or wanted. She’s right. Even with the best intentions, public schools rarely intentionally include the voices of stakeholders who will be directly affected by their actions.

Quantitative data alone—data that provides us with numbers and percentages—is not enough. To get a full picture, we need to add qualitative data to the mix to provide context as to what is influencing the numbers and what the people those numbers represent are experiencing. What are teachers, students and families saying they need? Is what we are offering them working in their opinion? As leaders, we need to engage our stakeholders intentionally and systematically so we may incorporate their voices into our decision making. This includes decisions on how we distribute resources.

Larry Ferlazzo, an award-winning teacher and education advocate, summarizes this concept well: “A school striving for family involvement often leads with its mouth—identifying projects, needs and goals, then telling parents how they will behave, what will be celebrated and systemically so we may incorporate their voices into our decision making. This includes decisions on how we distribute resources.

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STEP 4: ALIGN YOUR RESOURCES WITH YOUR PRIORITIES

Whether you are a state at the top or the bottom of the education spending curve, how you allocate your resources reflects your priorities. Your budget—or resource allocation—in theory, should align with your district’s strategic plan or stated goals and values. Remembering our budgets are spent primarily on people, look beyond materials to the allocation of staff and their time. If, for example, your district publicly touts its commitment to the arts, but you don’t fund music and arts programs—or you reduce class time or staff in those areas in favor of math intervention, sports or some other area—your stated priorities and your resources allocation will appear out of alignment. If you’re out of alignment, how likely are you to meet your goals?

We’ve all heard the saying, “Put your money where your mouth is.” That is particularly relevant when it comes to equity. Trust is an import part of building equity and aligning your words with actions—such as resource allocation—is a way to demonstrate your commitment. Hopefully, if you followed steps one to three described here, you have a better idea of what your resources are and where they are needed. This step calls you to fund those needs appropriately.

STEP 5: MEASURE IMPACT

A few years back, I took up running. After the first couple of weeks, I started having pain in my legs, so an avid runner friend suggested I get better shoes. Always up for buying shoes, I took her advice and purchased some quality running shoes. That worked at first. I was excited to try out my new shoes and running did feel better, but eventually the leg pain would come back. I stopped running.

Months later, I met up with my friend and she asked how the running was going. I sheepishly admitted I gave it up. She asked more questions and discovered I wasn’t stretching before and after running and I wasn’t drinking enough water. She suggested I give running another try, but with stretching and more water. It worked! Running—or, more accurately, slow jogging—without pain was possible; I just needed to invest my resources in the right place. Had I not met up with my friend and assessed my situation with her, she might have assumed I was off to the races when in fact I was couch surfing. Or, I may have continued spending money on fancy running shoes thinking it would work eventually. Neither outcome would have gotten me closer to my goal. The moral of the story is monitor and correct.

As leaders, we must ensure our efforts yield results. We cannot keep blindly investing resources without checking to see if that investment is improving outcomes for our students—not some, but all. If you aren’t getting the desired results, go back through the steps here and regroup. Identify where adjustments can be made and pivot. Equity is a journey, not a destination, so we always need to make sure we survey the terrain and adjust course as needed.