

Smarter School \$ P E N D I N G

Free processes, tools, and resources that help districts be smarter with their budgets

School districts across the country are facing conflicting demands: improve student outcomes and make do with limited dollars. The fiscal realities are sobering, especially given the need to implement the new standards and tests, develop more accurate evaluation and feedback systems, and provide more relevant professional support, among other priorities.

Designed to help districts address these challenges, Smarter School Spending is a new way of aligning resources (people, time, and money) with instructional priorities for improving student achievement.



WHAT?

Smarter School Spending is a method that helps districts make smarter decisions about spending.

At its core, Smarter School Spending is an improved way for districts to make big decisions that affect student outcomes: What do you want to invest in to improve student success? How much will it cost? How will you pay for it?

To enable smart decisionmaking on these key questions, Smarter School Spending provides a series of free tools and resources, along with a practical, step-by-step process for implementing these changes.

The initial content on SmarterSchoolSpending.org was developed based on the work in four pilot districts and informed by many of the leading researchers in education finance. With generous support from the Bill & Melinda Gates Foundation, the resources are entirely free to use, and they will be supplemented as additional districts address these issues.

WHY?

Districts across the country are being asked to do more with less — Smarter School Spending was created to help districts make that possible.

Districts know firsthand that far too many students, particularly the country's neediest, fail to graduate, much less graduate with the skills to be college and career ready. On top of the pressing imperative to improve outcomes, most local governments face dismal economic prospects for the foreseeable future. Given these realities, school districts across the country are being asked to do more with less.

Smarter School Spending offers the encouragement that it can be done, early examples of district progress, and the expert support to get there.

HOW?

Smarter School Spending provides a comprehensive set of free processes, tools, and resources to support districts in making smarter decisions about spending.

Smarter School Spending offers practical advice for navigating the inevitable tradeoffs between programs that might be nice to have and programs that are proven to increase student success. For instance, one district was able to fund an \$8M personalized learning program through savings found from switching high schools from a block to a traditional schedule. Another district was able to fund additional supports for high-need students by reallocating personnel from general educational instructional assistants. What could your district fund through Smarter School Spending?

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WHAT'S INCLUDED? A comprehensive process and extensive set of practical resources

Smarter School Spending lays out a multistep process for districts to develop and implement a strategic finance plan over 9–18 months, on their own or with support from a technical assistance provider. Or instead of the full process, districts may choose to focus on a specific step and set of resources most relevant to them.

Each step provides districts with a variety of resources from meeting materials to analytic tools that will guide districts through each activity. Plus, the Smarter School Spending online library links to an even broader selection of resources developed by leaders in education finance. Below, you'll find a small selection of the resources for each step:



Meeting Materials

Template presentations for team meetings throughout the process. Includes agendas, **timelines, workplans, and discussion questions**



Guide

Instructional guides, introductory documents, and additional supports for each step of the process



Sample Content

Sample **reports, presentations, and findings** from the four pilot sites and from additional Smarter School Spending districts



Tools

Interactive **tools** to assist a district in developing a strategic finance plan, analyzing district finances, and segmenting stakeholders



Research

Articles, reports, issue briefs, books, and other **background information**

What can districts expect to achieve?

Districts that complete the full Smarter School Spending process will ...

- ✓ Identify two to three research-based **instructional priorities** for investment.
- ✓ Analyze three to seven **realignment opportunities** to identify areas of cost savings.
- ✓ Develop a multiyear **strategic finance plan** and annual **strategic budgets** that implement these priorities in a financially sustainable way.
- ✓ Engage and communicate with **key groups in the community and school system** early and often during the process to garner broad understanding and support for key decisions.
- ✓ Foster a **districtwide culture** that emphasizes the strategic use of resources.

A SUITE OF RESOURCES

At the core of Smarter School Spending is a set of tools and resources to support a district with the analytics and process management associated with each step of the process. Below is a representative list of the tools available.

	Step	Resource	Description
Plan and Prepare	1 Organize Process	Capacity Assessment and Resources	Assessment of where the district may need additional capacity in order to successfully take on this process and resources for how to fill the gaps
		Readiness Assessment	Assessment tool for foundations or technical assistance providers to use in determining whether a district is a good candidate to take on the Smarter School Spending efforts
		Process Organization & Workplanning	Guide for project manager to use in setting up the leadership teams, timeline, and workplans for the strategic finance process
		Project Management Tracker	Interactive tracker for project managers to use as they go through activities in each step of the process
	2 Assess Landscape	Smarter School Spending Introduction	Meeting materials to introduce the process, team structure, objectives and timelines to the district leadership team
		Vision Worksheet	Worksheet to facilitate agreement around a district vision
		Budget Projection Tool	Tool to project estimated district revenues and expenditures
3 Start Engaging Stakeholders	Communications Toolkit	Set of resources for district communications teams to utilize throughout the strategic planning process. Plus sample PowerPoints, letters and other outreach tools.	
Set Instructional Priorities	4 Develop Priorities	Resource Packet: Instructional Priorities	Set of resources with research and recommendations on potential strategic investment opportunities
		Instructional Priorities Planner	Worksheet to ensure detailed explanation of the detailing the elements of and workplan for each instructional priority
	5 Estimate Costs of Priorities	Cost Projection Tool	Template to project costs for district priorities; includes sample cost analyses for select priorities
		Resource Packet: Implementing Priorities	Set of resources on the components of and implementation supports for common district instructional priorities

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Pay for Priorities	6	Identify Top Savings Options	<p>Cost Savings Hypotheses</p> <p>List of potential areas and ways a district could explore to identify cost savings</p> <p>Cost Savings Prioritization Tool</p> <p>Analytical tool to assess the potential for each cost savings opportunity in the specific district's context. Allows for estimation of the size for the cost savings, and assesses applicability given district's environment.</p> <p>District Spending Benchmarks</p> <p>Resource from the Council of the Great City Schools that provides spending benchmarks across categories of district resource allocation</p>		
		7	Analyze Top Savings Options	<p>Exploration Process & Tools</p> <p>For each cost savings option, a process and set of resources to support a district in exploring and sizing that opportunity</p> <p>Time Analysis</p> <p>Tool to investigate use of SPED instructor time in order to identify potential time efficiency improvements and other opportunities</p> <p>Staffing Analysis</p> <p>Set of tools that examine staff responsibilities and workload</p> <p>Professional Development Survey</p> <p>Sample survey questions and associated graphs to assess teachers' feelings on the value and use of different PD offerings</p>	
			8	Balance Budget Tradeoffs	<p>Balancing Tradeoffs Tool</p> <p>Tool to weigh tradeoffs between the district's instructional priorities, budget environment, and cost saving opportunities</p>
	9			Adopt Strategic Finance Plan	<p>Strategic Finance Plan Template</p> <p>Template for writing a district strategic finance plan</p>
	10			Adopt Annual Budget	<p>Strategic Budget Template</p> <p>Template for creating a strategic budget that incorporates the principles of a strategic finance planning process</p> <p>Communications Toolkit</p> <p>Set of resources for district communications teams to utilize throughout the strategic planning process. Plus sample PowerPoints, letters and other outreach tools.</p>
		11	Build Internal Capacity	<p>Resource Packet: Capacity Building</p> <p>Set of resources to build capacity for ongoing strategic finance work in the district (includes RFPs, job descriptions, and training materials)</p> <p>Training of Budget Decisionmakers</p> <p>Materials used to train district leaders in executing strategic finance and resource tradeoff work for school budgets</p>	
	12		Plan for Continuous Improvement	<p>Program Effectiveness Analysis & ROI</p> <p>Template for assessing the academic return on investment for district programs and investment areas</p>	
Implement Plan					
Ensure Sustainability					