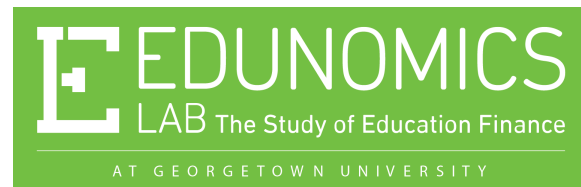# Financial Transparency Working Group:
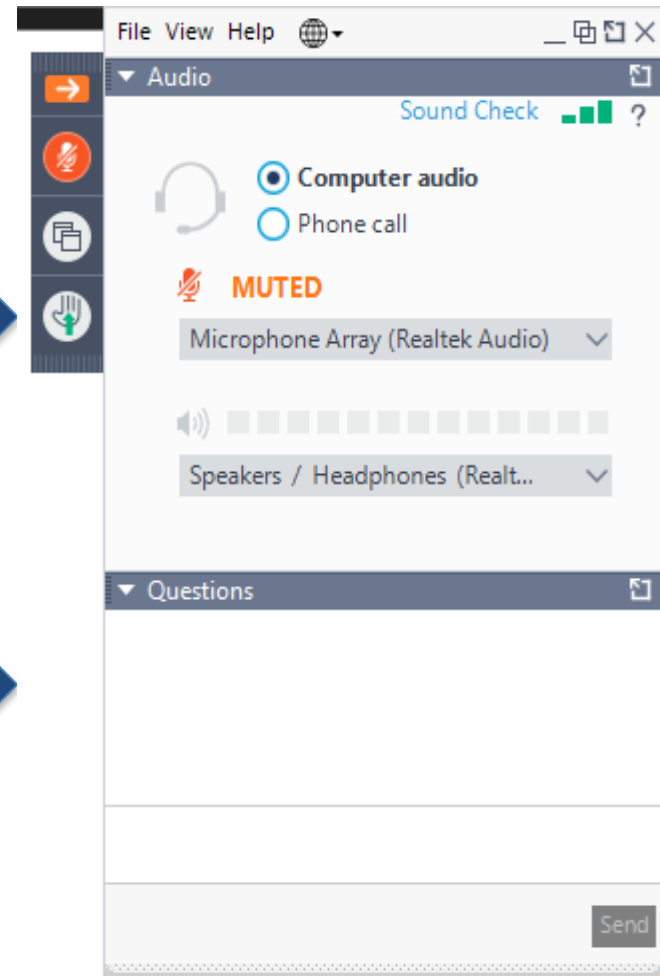# Working with LEAs on Developing Data Reports

June 20, 2017

Communicating During the Call

To request to be unmuted, please use the hand raise tool

Use the question box to ask questions or make a comment, and we will reply all so the group can see the question/comment & answer

Agenda

1. Financial Transparency in ESSA "state plans"
2. Working with LEAs: Case studies
   - MA
   - OH
3. Reflect on checklist: *Does your data display answer these questions?*
4. Next meeting: July 12th, 1-2pm EST

Financial Transparency in ESSA Plans

- T/F States are required to describe how to meet the financial transparency requirement in their state plans submitted to DoEd.

- T/F If a state does include its plan to meet financial transparency, the reviewers will a) approve or b) provide feedback on that plan.

    -- From recent meeting w/ Office of State Support & from DE letter, peer review is not expected to address non-required elements of plans

To date, some states have mentioned financial transparency in their plans: CT, D.C., DE, IL, LA, MA, ND, TN, VT, SD (10 out of 19 submitted plans)

So far, limited DoE feedback on financial transparency:

    DE: "did not discuss availability of and access to federal and local funding to identified schools"

Why involve LEAs in financial transparency?

1. LEAs are responsible for recording the data
   -- Might need training, capacity building

2. LEAs will get questions about the data once public
   – need understand the data
   -- need to be ready to explain (defend) spending patterns
   -- may want to rethink allocations in anticipation of transparency

3. If we want the data to be useful, need to understand how LEAs will use it

Massachusetts RADAR effort
Rob O'Donnell

# RADAR is a multi-year effort that will result in a series of planning and budgeting tools for use statewide.

Design and Build Reports

Launch Pilot

Expand Adoption

Continue Pilot

Statewide Adoption

Key Activities

2015-16	2016-17	2017-18	2018-2020
• Develop and build reports • Select districts for pilot cohort group	• Conduct pilot • Provide pilot districts with support for resource allocation • Continue building and improving reports	• Launch grant • Support implementation and gather feedback • Integrate lessons from cohort district pilot • Begin statewide expansion	• Expand adoption leading to improved resource decisions statewide

RESOURCE & DATA USE

The first year of the pilot has been oriented around 3 conferences.

Conference 1 (Sept)	Oct - Jan	Conference 2 (Jan)	Feb - May	Conference 3 (May)
• Engage districts on strategic planning/ budgeting • Introduce RADAR tools and how to use • Collect district feedback on tools	• Begin using RADAR to analyze current resource allocation and identify opportunities for strengthening strategic plan	• Identify areas of investment, shifts and cuts in support of strategic plan • Begin developing key communication messages • Introduce new RADAR reports	• Continue developing multi-year resource plan	• Celebrate accomplishments • Share feedback on what worked well and how to improve • Begin planning for Year 2 and needed supports

Embed RADAR tools into existing teams and processes
Involving: Cabinet, principals, budgeting teams, planning teams, etc.

RESOURCE & DATA USE

As a result of divergent stakeholders needs, we began discussing the importance of aligning systems to your district plan.

Create Plan

Align Systems

Use of Time

People

Implement
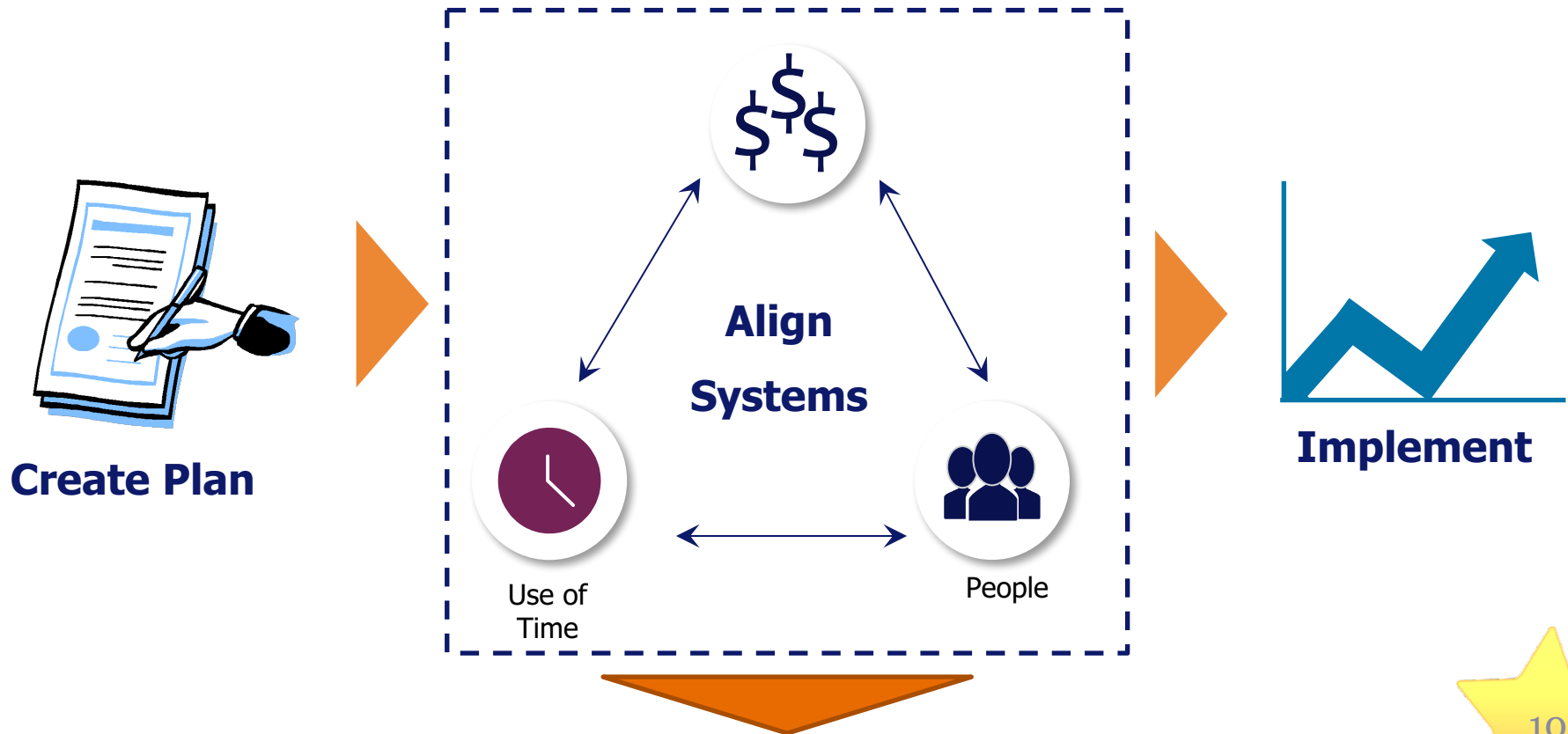
The use of people, money, and time in the district should support the district plan.

RESOURCE & DATA USE

We are publishing some RADAR reports this June with more to follow later in the summer.

Benchmarking
(Publish online in June)

- Home page
- Change over 5 years
- State context
- Per-pupil expenditure
- Staffing per 100 students
- SPED enrollment
- SPED staffing

Special education
(Summer 2017, security portal)

- Home page
- SPED enrollment/placement
- SPED staffing
- District profile – 5 years
- Students identified for or moving off services, by grade
- Five year trajectories for students by placement
- SPED classes and staff deployment

Staff deployment
(Summer/Fall 2017, security portal)

- Home page
- Class size by grade and subject area (district and school)
- 9th and 11th grade course-taking by MCAS performance level and sub-group
- Advanced courses - participation by sub-group

RESOURCE & DATA USE

Ohio
Jim Comeaux

Classroom Spending Data
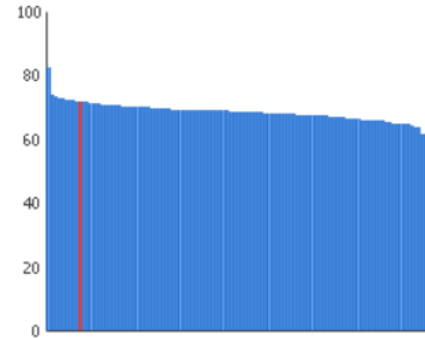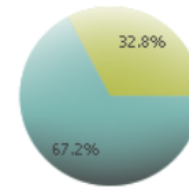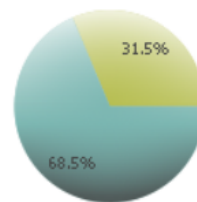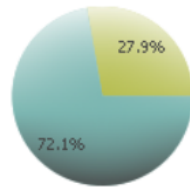
Spending Per Pupil

○ Classroom Spending   ◉ Spending per Pupil   ○ Source of Funds

	District	State
Operating Spending per Pupil ⓘ	$9,013	$8,840
Classroom Instruction	*$6,502*	*$5,942*
Non-Classroom Spending	*$2,510*	*$2,898*
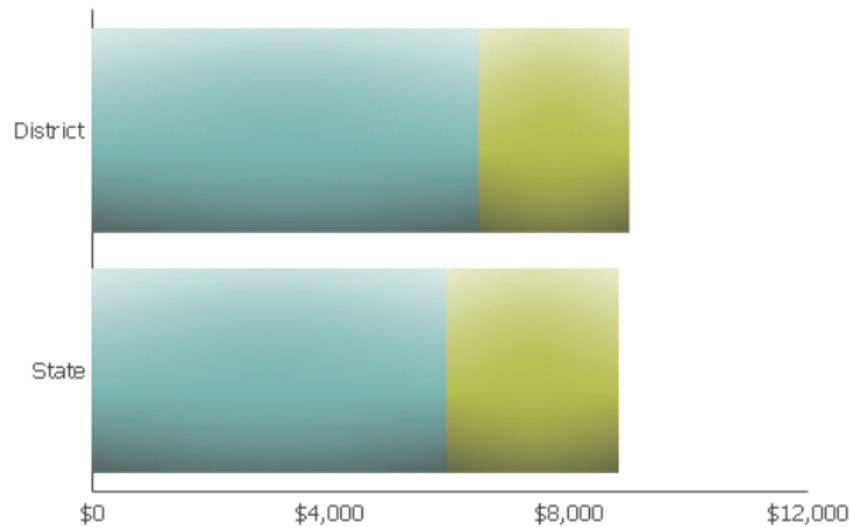
✖ Perrysburg Exempted Village IS NOT among the 20% of public districts with the lowest operating expenditures per pupil

✔ Perrysburg Exempted Village IS among the 20% of public districts with the highest academic performance index scores.
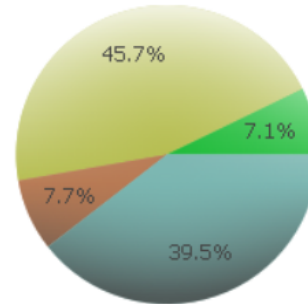
Ohio | **Department of Education**

Source of Funds

○ Classroom Spending   ○ Spending per Pupil   ⦿ Source of Funds

Source of Funds	District		State Total	
Local	$33,927,125	63.6%	$8,697,598,445	39.5%
State	$14,349,995	26.9%	$10,072,007,846	45.7%
Federal	$1,286,678	2.4%	$1,699,267,399	7.7%
Other ⓘ	$3,784,175	7.1%	$1,562,415,185	7.1%
Total	$53,347,975	100.0%	$22,031,288,875	100.0%

District

State

26.9%   2.4%   7.1%   63.6%

45.7%   7.1%   7.7%   39.5%
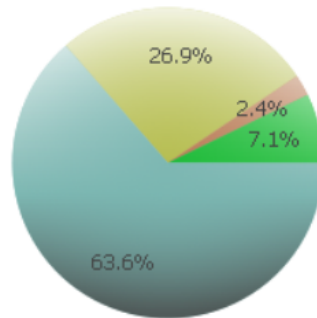
■ Local   ■ State   ■ Federal   ■ Other Non-Tax

Ohio | Department of Education

Spending vs. Performance: Similar Districts

This measure answers the question – what is the relationship of average spending per student to performance, and how does that compare to similar districts and schools?
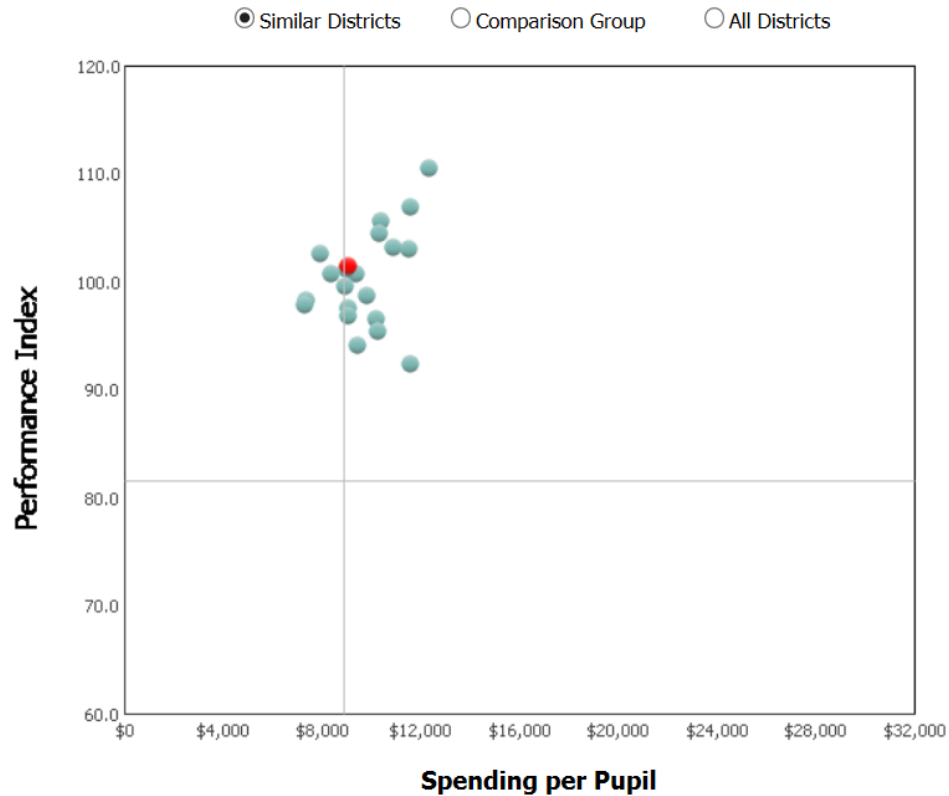
The quadrant lines on this graph represent the statewide average performance index score and the statewide average spending per pupil.
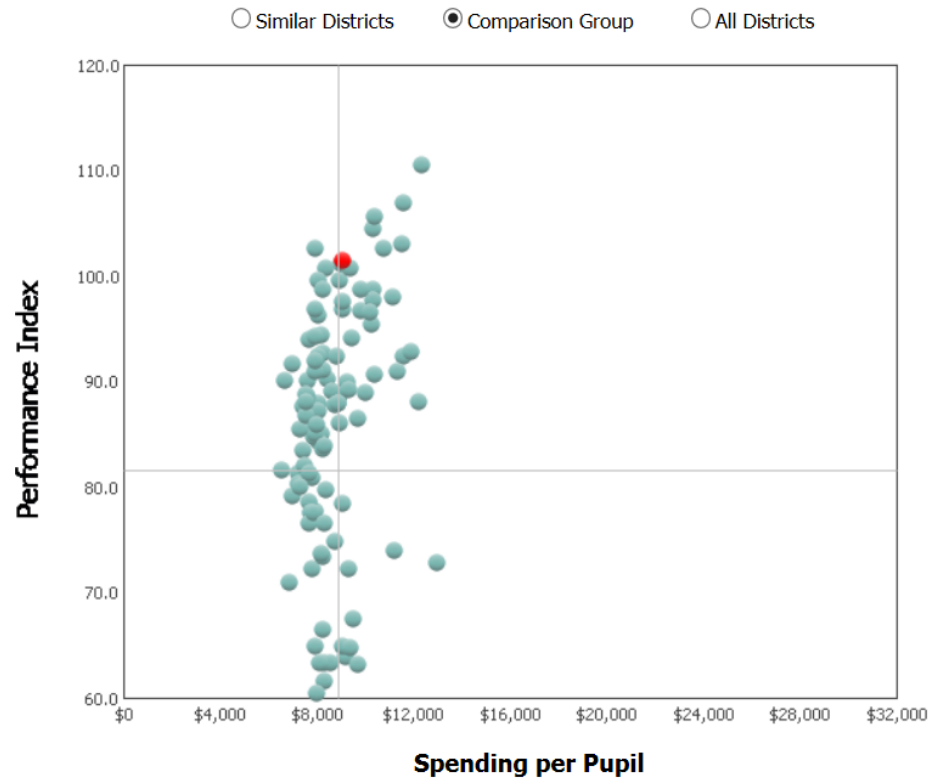
Spending vs. Performance: Comparison Group

This measure answers the question – what is the relationship of average spending per student to performance, and how does that compare to similar districts and schools?

○ Similar Districts   ● Comparison Group   ○ All Districts

The quadrant lines on this graph represent the statewide average performance index score and the statewide average spending per pupil.

Ohio | **Department of Education**
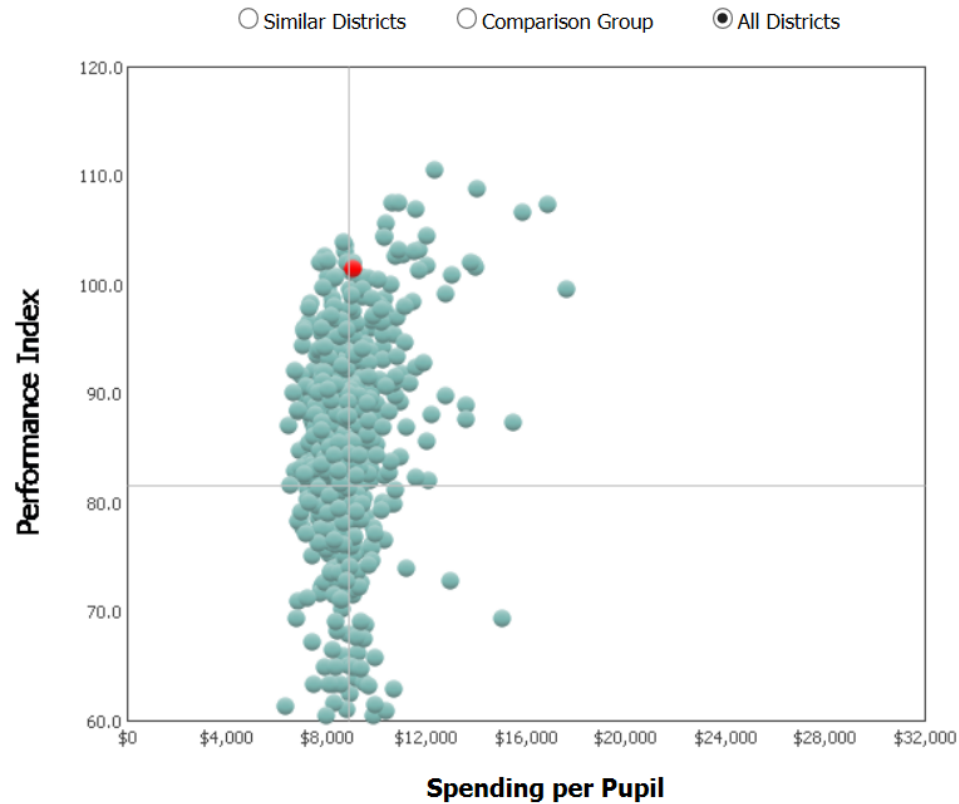
Spending vs. Performance: All Districts

This measure answers the question – what is the relationship of average spending per student to performance, and how does that compare to similar districts and schools?

The quadrant lines on this graph represent the statewide average performance index score and the statewide average spending per pupil.

Ways to Involve LEAs in Financial Transparency Work

- Communicate with LEAs
  - Communicate directly
  - Partner with existing affiliations, groups, conferences
- Create a working group of LEAs
  - Pilot collection of data
  - Examine data reports together
  - Seek input on public-facing reporting
  - Collectively develop metrics toward a common goal
- Disseminate early data analyses to LEAs
- Offer training
- Others?

Do your visualizations answer these questions?

Question	
1. How much does my school spend per pupil?	
2. Is that more or less than other schools in my district?	
3. Is that more or less than other schools with similar student demographics?	
4. Is that more or less than other schools within the state?	
5. Does my district divvy up funds equitably?	
6. What is driving spending differences across schools?	
7. What funds/expenditures (if any) were excluded from calculation?	
8. How does my school's spending on services compare to that of other schools? (Are we able to get similar services for less, more?)	
9. How does my schools' costs for different inputs compare to those of others?	
10. Is there a school (or schools) that I can learn from? Specifically, is there one that has a similar level of funds (and similar demographics) but that is able to achieve much higher outcomes for their students?	
11. Compared to peers, how well is my school able to leverage funds to achieve outcomes for students?	

Do your visualizations answer these questions?

Question	
1. How much does my school spend per pupil?	
2. Is that more or less than other schools in my district?	
3. Is that more or less than other schools with similar student demographics?	
4. Is that more or less than other schools within the state?	
5. Does my district divvy up funds equitably?	
6. What is driving spending differences across schools?	
7. What funds/expenditures (if any) were excluded from calculation?	
8. How does my school's spending on services compare to that of other schools? (Are we able to get similar services for less, more?)	
9. How does my schools' costs for different inputs compare to those of others?	
10. Is there a school (or schools) that I can learn from? Specifically, is there one that has a similar level of funds (and similar demographics) but that is able to achieve much higher outcomes for their students?	
11. Compared to peers, how well is my school able to leverage funds to achieve outcomes for students?	

Any feedback on this list?

E

One-on-One's with Edunomics Lab

If your state or district is interested in a TA call, please indicate in chat box or email Katie to set up a time (katie.hagan@georgetown.edu).

Don't have time for a call? Send us your feedback, questions, and topic requests via email!

Next meeting: July 12, 2017, 1-2pm EST