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Daniel Humphrey
Julia Koppich
Magaly Lavadenz
Julie Marsh
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Laura Stokes
Michelle Hall

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LCFFRC

Local Control Funding Formula Research Collaborative

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The Local Control Funding Formula Research Collaborative (LCFFRC)

Daniel Humphrey, *Independent Consultant*
Julia Koppich, *J. Koppich & Associates*
Magaly Lavadenz, *Loyola Marymount University*
Julie Marsh, *University of Southern California*
Jennifer O'Day, *American Institutes for Research*
David Plank, *Policy Analysis for California Education*
Laura Stokes, *Inverness Research*
Michelle Hall, *Chapman University*

With the assistance of:

Taylor Allbright, *University of Southern California*
Jarah Blum, *American Institutes for Research*
Tasmin Dhaliwal, *University of Southern California*
Laila Fahimuddin, *SRI Education*
Katherine Ramage, *Inverness Research*
Laura Tobben, *University of California, Berkeley*

In association with *Policy Analysis for California Education (PACE)*

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INTRODUCTION

California's Local Control Funding Formula (LCFF) was signed into law in 2013, and represents the most significant change in California education finance and governance in 40 years. It moves additional funds to districts with students in poverty, English language learners, and foster youth. The LCFF sends supplemental funds to districts based on unduplicated counts of these target student groups and concentration funds to districts with high proportions (over 55%) of these same students. In addition, the LCFF eliminates nearly all categorical funding and pushes decision-making about how best to allocate resources to the local level. The LCFF also requires districts to develop a Local Control and Accountability Plan (LCAP) with meaningful local community engagement of parents, community members, students, and educators.

The LCFF Research Collaborative has been following the implementation of LCFF since the first year of LCAP planning. In that time, we have seen broad support for the intent of the law, both in its emphasis on more equitable allocation of resources based on student need and in its incorporation of local control and flexibility to support more locally responsive and coherent approaches to improvement. However, we have also noted wide variation among districts in the extent and ways in which they have been able to manifest these intents at the local level. Often the attention of policy makers and the public is drawn to implementation shortcomings and instances in which either the intent or the specific provisions of the law are not being met. Certainly, it is important to address these shortcomings if implementation and the law itself are to be improved over time. Equally important, however, are cases in which the LCFF is operating as envisioned, for it is through such positive exemplars that others might learn and improve.

Thus, after studying LCFF implementation for 4 years, the LCFF Research Collaborative decided to identify and document the work of school districts whose implementation efforts in three specific areas are reputed to be noteworthy. We were interested in school districts that were particularly innovative in their attempts to:

1. Meaningfully engage stakeholders in their Local Control Accountability Plan (LCAP) development;
2. Advance the implementation of the California State Standards (CCSS); and
3. Take an innovative approach to resource allocation decision-making.

We chose these focal areas based on patterns documented in our earlier work. Most of the districts we had visited over the four years had made substantial good faith efforts to reach out broadly to parents and other stakeholders, but by fall 2016 many were making adjustments to try to deepen stakeholder engagement and communication. They were looking for better

solutions. Similarly, districts were evolving in their approach to resource allocation as they were learning to align budgets with state and local priorities rather than with categorical requirements. Approaches to the use of the supplemental and concentration funds in particular varied significantly, and some districts appeared to be devolving some of the authority for making these decisions to school sites rather than keeping them centralized in the district office. Finally, although implementation of the state's academic and performance standards for students is one of the eight state priorities for the LCAP, the districts we had studied varied considerably in the degree to which standards implementation and instructional improvement were integrated into their LCAP planning and budgeting. Finding examples where such integration was evident could be instructive for others.

Our purpose in conducting these three new case studies was thus to highlight interesting efforts to implement the above aspects of the LCFF so that all California school districts could learn from the efforts and experience of these three. To do so, we sought the advice of our advisory board and received several nominations of candidate districts for each of the three designated LCFF components. Following the nomination process, we conducted interviews with the district leaders and reviewed district documents for each of the nominated districts, and settled on the three focal case study sites. These were:

- Palmdale School District (PSD) as a system with innovative stakeholder engagement activities;
- Anaheim Union High School District (AUHSD) for its efforts to integrate standards implementation into the LCAP process; and
- San Mateo-Foster City School District (SMFCSD) for its approach to resource allocation decision-making.

Methods

Once the three districts were identified, teams of three to four researchers reviewed a variety of district-produced documents for their assigned districts, including the district's LCAP, its strategic plan, its budget, and its outcome data. Each research team then conducted a two- to three- day site visit to the district, interviewing district officials, principals, union representatives, school board members, and community members. Across the three districts, researchers conducted 55 interviews and focus groups. Each team systematically analyzed all interview notes, documents, and other data and produced an in-depth internal case study, focused on the particular topic for that district. This report contains brief summaries of the longer case studies.

Each of the three case study districts is working hard to implement the LCFF with fidelity to the intent of the law. Each district's implementation of the LCFF is driven by its local context, but their efforts are noteworthy and could be helpful to other districts across the state.

Palmdale School District (PSD) demonstrates that meaningful community engagement can be accomplished with a well thought-out strategy that includes dedicated district leaders, faculty, staff, students and community members. In the PSD case, the assistance of outside consultants helped train internal and external stakeholders and advance the district's engagement efforts.

Anaheim Union High School District has made standards implementation and instructional improvement the center of all of the district's work. An intensive stakeholder engagement effort appears to have resulted in a consistent understanding of the district's instructional vision by the variety of role types we interviewed.

San Mateo Foster City School District's implementation strategy for the LCFF allowed each of its schools to engage in resource allocation decision-making. By moving decision-making to the school level for two-thirds of its supplemental funds (with district oversight), the district managed to garner stakeholder buy-in to both school-level and district-level improvement strategies.

Although we set out to understand three separate topics—engagement, resource allocation, and CCSS—we ultimately found that all three districts shared a common approach that was intimately connected to their improvement efforts. As the following three case studies illustrate, each district made meaningful stakeholder engagement a key to their improvement strategies. Next, we present the three case studies.

ENGAGEMENT IN PALMDALE ELEMENTARY SCHOOL DISTRICT

District Demographics
- Preschool through Grade 8
- 26 schools—5 middle schools, 15 elementary schools, 6 other
- 22,000 students, of whom
    - 74% are Hispanic, 7% white, 1% Asian, 16% African-American, 2% Other
    - 23% are English Learners
    - 86% qualify for free- and reduced-price lunch
- 2000 employees
- 5-member school board

Palmdale Elementary School District (PSD) is the fourth largest elementary (K–8) school district in California and the largest in Los Angeles County. About 88 percent of its students are in unduplicated target groups and the district receives $40 million in supplemental and concentration funds.

Stakeholder engagement is a centerpiece of PSD's overall approach to improving education and includes a history of involving a wide range of individuals in developing a strategic plan that is aligned with and supported by the district's LCAP. In fact, the district described its LCAP "as a companion document" to the strategic plan, "delineating the strategies and investments necessary to advance and realize this vision."

Palmdale PROMISE

In 2014, the second year of LCFF, the district hired a new superintendent, Raul Maldonado, who believed stakeholder engagement was critical to his ability to lead the district. When hired, he told the board, "Listen, if we are going to accomplish what we want, I need buy-in, not only from you but the community." With the support of the board, the district hired a consulting firm and organized a new strategic planning process involving a wide range of individuals and groups across the Palmdale region. The development process took about a year and resulted in what is now called the Palmdale PROMISE (Pursuing Remarkable Opportunities to Marshal Innovation, Inspiration, and Imagination for Success & Engagement).[1] At the center of the Palmdale Promise are five agreed upon values that emerged from the stakeholder engagement process:
1. High intellectual performance that prepares every student to graduate ready for college, career, and the global 21st century.
2. Equity for all students, schools, and communities as reflected in outcomes and opportunities.

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[1] http://www.palmdalesd.org/domain/40

3. Facilitating and supporting every student's achievement by building on their strengths, cultures, languages, and experiences to create new successes.
4. Multilingualism and multiculturalism as individual, community, national and global assets in the 21st century.
5. Integrity and community based on trust and common purposes that empower individuals and communities.

The plan goes on to outline a set of design principles intended to guide the district's work with schools, communities, and partner organizations—such as "transparent communication," "diversity," "focus on student success," and "out of the box learning experiences"—and five strategic goals:

1. Dramatically improve student engagement and achievement through access to powerful learning opportunities
2. Create and sustain globally-competitive learning environments of high intellectual performance across the curriculum and in all areas needed for 21st century success for students, including the opportunity for development of high levels of multilingual and STEAM competencies.
3. Provide strategic direction and support to district administrators, principals, teachers, and sites focused on improving the quality of classroom instruction and interaction in every classroom in every school.
4. Create and support safe, affirming, equitable, and enriched globally-competitive school environments for participatory, restorative, inclusive, and culturally and linguistically responsive learning and interaction for students.
5. Engage diverse families and communities in powerful learning and collaboration.

What distinguishes the PSD's improvement efforts from most other districts is how central meaningful stakeholder engagement was (and is) to its planning and implementation of the plan. Throughout our interactions with PSD administrators, board members, faculty, staff and external stakeholders, all respondents referenced the Palmdale Promise and how it was the center of all district activities. The Palmdale Promise was also strategically used to build community support and expand participation. As the superintendent explained,

> *…we have the Palmdale Promise pledge and you can see people sign [a commitment to help achieve "the promise"], and we talked about how we got there and [ask] are you willing to support it and help out. We took it to chamber lunches and we said, "This is our Palmdale Promise. Are you willing to support it?" And then we gave them a pen [to sign the pledge].*

Additionally, the Palmdale Promise served a symbolic role of building identity for the district and reinforcing the values and goals it represented. We observed the Promise and its logo on clothing, pins, and bags of School Board members, administrators, teachers, and students. We also observed Palmdale Promise posters, signs and stickers referencing the Palmdale Promise

on the walls of the central office, on bathroom soap dispensers, coffee pots, and in the central office parking lot.

In 2014, the development of the Palmdale Promise occurred simultaneously while the district was preparing its LCAP. In that year, and all subsequent years, the district has worked to build on its inclusive approach to engaging stakeholders to further develop the LCAP and align it to the Palmdale Promise. As noted, the district considers its LCAP "a companion document" to the strategic plan, "delineating the strategies and investments necessary to advance and realize this vision." To advance these goals, PSD's LCAP specifies investments in an extended school day, teacher professional development, new curriculum to support high needs students, instructional support staff, and special programs for EL and foster youth.

Meaningful Stakeholder Engagement in Palmdale

The PSD made a strong commitment to engage and educate teachers, administrators, students and the wider community to become active members of the LCAP planning and oversight process. These processes built on the work conducted to develop the Palmdale Promise. Three main approaches characterize these efforts. First, the district committed to broad and active engagement. They created a formal planning process with approximately 50 members that served as an LCAP advisory committee while also hosting ongoing community engagement trainings, meetings, and feedback sessions with internal and external stakeholders around the city in formal and informal settings. Second, PSD began to increase transparency around school and district activities, committing to and training school and district leaders on how to share positive and negative data, and to publicly acknowledge when they have no answers or have made mistakes. Third, PSD brought district subgroups together around a unity theory of action that all students will succeed together. We examine each of these approaches below.

Commitment to Building Broad and Active Community Engagement. The district's commitment to realizing meaningful engagement from a wide range of stakeholders was central to their overall improvement strategy, both in building the strategic plan and the LCAP. As the superintendent explained: "*I think we know that in order for people to have buy-in, they have to have voice so that's exactly what we did. We gave them a voice and they were able to give their opinion.*" The engagement process began by letting parents, students, and community members know that their voices would be as valuable as those of district and school staff. PSD included internal stakeholders, such as teachers and noncertified staff members, on the LCAP advisory committee alongside parents, students, and other community members.

The district paid particular attention to parent and community engagement. They hired parent liaisons at school sites who provided information and informal training to other parents so that they could become more informed actors in the school and district engagement efforts. The district also provided a two-day training for school board members and district officials on making schools more welcoming places for parents. As the superintendent reported:

One of the things we also understood that in order for our parents to be connected, they needed to be welcome at the schools. … through the LCAP process, we hired a parent liaison. That person is the connection between the school and the parents. It's a friendly person, it's a person that speaks both languages.

In our interviews, parents repeatedly noted that district leaders listened to and acted upon their suggestions. Citing the district's decision to add parent liaisons, a parent center and multicultural events, one parent explained, "we also asked for that. … our voice, our opinions, from the minority, has been heard." Similarly, another parent recounted, "our voice was heard, because we asked for us to be trained. That we felt that we needed to help our kids."

District leaders also made a point of going out into the community to meet with stakeholders in more informal settings. The superintendent hosts a breakfast at every school throughout the district each year with a goal of bringing in new parents who cannot attend other activities. The elected school board members, along with the superintendent, also attend school-level events, celebrations, and meetings, and meet with local business leaders to share information and ask for commitments to the Palmdale Promise. In doing so, PSD has been able to promote more direct engagement with new actors.

PSD also made student engagement a priority. Middle school student representatives sit on the school board as non-voting members as well as on the LCAP advisory committee. PSD also developed a student ambassador program in which students meet at school sites to discuss and make recommendations for systematic improvement to the schools. The ambassadors then share site-specific information and feedback with a districtwide, student Inter-Communication Council that gathers student "voice" and feedback, which is then shared with their student board and LCAP committee representatives. As the superintendent explained:

Early on also, through that process, because we discovered what we already had known forever, that kids have an opinion. …we would ask them and they would say, "We wanted friendly teachers. We want better food. We want afterschool athletics."

District officials and LCAP advisory board members reported that adding the students to the engagement process influenced the adults' perception and behavior around district planning with a stronger focus on student rather than adult interests. The importance of student voice was underscored by one of the teachers:

This girl stood up at a meeting and said, "'We need to have seven-period days. There's kids who are in special-ed, there's kids who are in ELD, who have nothing to look forward to at school.' Then this year we got seven periods, ... I think it really hit a nerve with other teachers, especially our union people who are on the negotiating team who were at the LCAP meetings, and then our district

administration who were on the negotiating team. They heard this from a kid. It was like, "This is what we need to be doing because there's kids who come to school and it's not fun because they're literally just in learning classes all day long. They don't have any ability to take a fun class."

While the concern over course access was voiced by parents and principals as well, the student representation on the school board keeps the district continuously focused on student-driven needs and priorities.

PSD also included internal stakeholders such as teachers and noncertified staff (not just union representatives) as a part of their strategic planning and LCAP engagement process. These stakeholders held seats on the LCAP advisory committee and provided their input alongside parents, students, and other advisory committee members. As a result, the internal stakeholders were not working in silos separate from the external stakeholders. As one teacher told us:

I think that participation makes everybody feel valued. I know I was sitting with parents and their voice was just as valuable as the Assistant Superintendent's voice. The student's voice was just as valuable as the teachers.

Importantly, to ensure that all of these stakeholders had the knowledge and skills to participate in a meaningful way in the planning and improvement process, PSD invested in capacity-building efforts, including trainings for district staff and community members on the LCAP process, how to examine data (see more below), and building awareness around issues of race and culture. As one consultant explained,

I think there's very much an openness to help educate everyone to get to the point at which they are able to ask the right tough questions about why their data are getting better or why not, and I think they really want to educate those people who are coming so they can be valuable partners. … It's amazing how much time and commitment they are willing to put in to do that

More specifically, trainers intentionally organized participants into heterogeneous groups to facilitate learning and conversation:

[We] intentionally set up in that room I believe eight to twelve, table groups. Every table group [had] representative, members, of all different levels of the community and the school and the district and we did things such as kind of like a round robin process like the six or eight different division districts, [an administrator who] oversees attendance and discipline, ELD - they all did like a mini presentation, so that they could go deeply to help learners learn exactly what they're doing as a district. "This year here's the data we have." They explain, "Here's what the data means," and then they offered opportunities from those people to ask questions so they could have the deeper understanding of

program services and understand how that data can be translated to make more personal meaning.

PSD worked with multiple external organizations and consultants who helped with this training and also created protocols and agendas, and helped facilitate meetings in ways that ensured all voices were heard. As one facilitator of the meetings described, "we always use the phrase, again 'Evidence speaks the truth.' Just because I have a thought, I have to back it up with something and I should get used to questioning the loud voice as a consensus process versus accepting the loud voice."

Transparency and Data Sharing. District leadership has traditionally had few incentives to go public with bad news. When outcome data show that some groups of students are not learning as much as others, superintendents, district officials, and principals often worry about their job security rather than problem solving with their communities. Inspired by the superintendent and their external consultants (at InnovateEd and UCLA), PSD took a different approach to transparency and sharing outcome data, and saw increased transparency as a vehicle for a united approach to improvement and building trust with stakeholders. As one teacher explained:

> *…everybody understands and feels comfortable that the district is being transparent. I know I've felt that way from the start. I don't ever feel like there's a hidden agenda or somebody has their own agenda.*

District officials and school administrators told us that it was not easy, but that they found value in being able to speak frankly about both positive and negative data, and discuss mistakes and needed changes. As a result, stakeholders reported that the district was unafraid to say, "*You know what, I'm not really sure*" and "*It's ok to make mistakes.*" As one district consultant explained: "*…they're not used to having, you know, a community engagement body asking those tough questions. Palmdale's willing to have their community ask the tough questions.*"

Training the district staff and the community on how to understand the data was a significant commitment of PSD. The training sessions focused on two overarching questions, *"**How do we make sure that our expenditures link to improved services and practices?**"* and "*How do we look at the evidence that helps us understand whether or not it's working?*" To answer these questions, the district used consulting service providers to train the district leadership and the broader stakeholder community to question data and to understand the "***type of evidence we have and [if] we need more to be able to validate whether it's [program or service] working***." By anchoring the conversation with data, the district leaders believe they are focusing engagement around the needs of students and not on the agendas of adults or the loudest voices. For example, an examination of data led stakeholders and district leaders to realize that outcomes were low for some of their African American students (who make up a minority of the district population). For example, data revealed African American students, particularly males, were disproportionately suspended. In response, the district worked with stakeholders

and consultants to focus on developing meaningful African American parent engagement and on developing and expanding programs directed at improving cultural relevancy.

By ensuring that district and school leaders respond to stakeholder requests, the district created "small wins" for stakeholders—quick, visible evidence that their input was being taken into consideration. Several central office leaders reported conscious efforts to identify actions that could be acted upon quickly to demonstrate "wins." For example, when students asked for more music programs and a student representative on the school board the district quickly purchased new instruments and new student board members were elected by their peers. They are elected through a process developed by the students who attend the ICC (Interschool Communication Council). Administrators viewed these acts as both "operational and symbolic" – giving the district "an effective boost in participation and a better quality of engagement" because stakeholders realized the district was willing to "put their money where their mouth is."

The LCAP director explained:

> The parents now feel like, "Our voice is heard. Now, if they ask us to come in and give them more input, I will go. Because, I know last year they asked me what do I need, and here it is in the school, and my kids are getting it," and so they feel more comfortable.

The responsiveness has also led to a more collaborative environment, which, according to stakeholder reports, has encouraged them to become more engaged at the district level. One parent reported:

> I really feel the changes to the LCAP structure with the new Palmdale Promise are doing that. Everything is really super clear. Any questions asked, they're answered. Parents are getting a lot more involved. I tell you, it totally changed my career desires. Because I felt like I could make an impact, not just in my own child's education, but in the community overall.

Respondents reported that building trust through district and school-level responsiveness to stakeholder input further deepens stakeholder interest in active participation.

Building Unity. A significant ingredient in PSD engagement success is the sense of unity among stakeholders. Building unity through shared experience and the celebration of cultures is part of the district strategic plan and is embedded in the actions the district takes to support engagement activities. Some of these celebrations include a Black History Performing Arts Showcase and other multi-cultural student performances at the Palmdale playhouse. As one school administrator explained,

> We do a lot of celebrating here in Palmdale School District so that every parent in every subgroup can feel valued. …The cultural relevancy practices that I feel are expected of

teachers is one, to build relations with children, build a rapport with parents, communicate with parents that don't look like you, and building those relationships, that's an expectation. That's an expectation through our Palmdale Promise, that's an expectation through the cultural relevancy training, it is to build those relationships because that's critical. The parent and the teacher must work together so that the child is successful.

Another way in which the district built unity was through the engagement of their African American Advisory Committee at the district level and an African American Parent Advisory Council (AAPAC) at the school site level. These groups were included in the same engagement process with an equal voice to the other advisory groups such as the DELAC and ELAC. This allowed the African American community to participate, contribute to and understand that the goal of the district was to address all student needs and that they were not limiting the input to LCFF-targeted groups.

Continuing Challenges. One challenge the district faces in coming years is sustaining the enthusiasm around these stakeholder engagement efforts. District leaders have spent a lot of time out in the community which required a significant investment of time. While the energy remained strong at the time of our visit, one must ask: can individuals maintain these efforts in the future, particularly when key leaders change positions within the central office and the newness and excitement of the Palmdale Promise and events fades? Many individuals interviewed felt confident they were up to the task and believed external partners played a significant role in sustaining the work. Referring to one such partner, a district leader said, "[she is] helping us not get tired and pooped out and stopping because we're all tired … but she keeps us going and energizes us." Leaders also recognize the need to continually train and build the capacity of district and school administrators to facilitate meetings and continue this work.

Summary

PSD demonstrates that meaningful community engagement is a resource-intensive, time-consuming effort that requires a well-thought out strategy. The case also indicates that with dedicated leaders, faculty, staff, students, and community members, a district can develop a meaningful engagement process. This was done with the assistance of outside consultants who trained all internal and external stakeholders. The district still faces funding challenges and gaps in student achievement, but its commitment to meaningful community engagement is at the heart of its improvement strategy.

COMMON CORE AND LCFF IMPLEMENTATION IN ANAHEIM UNION HIGH SCHOOL DISTRICT

District Demographics
- Secondary School District serving grades 7 through 12
- 17 schools—8 junior highs (7-8) 8 high schools, 1 7-12 school
    - 31,000 students
    - 66% students Hispanic, 11% white, 13% Asian, 3% African-American, 7% Other
    - 21% students English Learners
    - 71% students qualify for free- and reduced-price lunch
- 3,000 staff
- 5-member school board

Anaheim Union is a large Orange County high school district encompassing the cities of Anaheim, Buena Park, Cypress, La Palma and Stanton. The "unduplicated count" of low income, English learner, and/or foster youth in AUHSD is 73%. This figure represents a substantial demographic shift in the community and the district: as recently as 2004, low income students made up only 48% of the district's student population and were concentrated primarily on the east side of town. Since the recession, all schools serve significant numbers of poor students and students of color. District respondents noted that these changing demographics, especially when coupled with the introduction of the new standards, have placed considerable demands on teachers to adjust their practice to meet the needs of all students. Of particular concern were the large numbers of long-term English learners (LTEL 12%) and the 13% of AUHSD's students who are homeless.

AUHSD Approach to Common Core and LCFF Implementation

As is the case across California, LCFF and new state standards have not been the only major reform efforts confronting AUHSD staff. Changes in state assessment and accountability, in federal education programs, and in AUHSD's leadership have all been occurring simultaneously. What distinguishes AUHSD is that district staff interpret these changes as a convergence of mutually reinforcing policies and an opportunity for coherent programming, rather than a myriad of competing demands. This perspective may in part be the result of AUHSD's reform history. When California adopted the Common Core State Standards, AUHSD was already moving to integrate 21st Century learning strategies and goals (e.g. the 4 Cs[2]) and so saw the Common Core as enabling the shifts already underway. When the leader of this work became the superintendent 3 years ago, this direction increased in visibility and focus. In addition, the

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[2] The 4 Cs derive from the Partnership for 21st Century Learning (P21) and include Critical thinking and problem solving, Communication, Collaboration, and Creativity and innovation. As a result of conversations with the city's mayor, AUHSD has added Character, making it now 5Cs.

district has incorporated an inquiry approach to its work, linking data with planning and improvement efforts. This history aligns well with both the new standards and the LCFF.

Analysis of district documents and interviews with district and school leaders, parents, and community stakeholders revealed a consistent picture of the intersection of the standards and LCFF in this district: ***Improving core instruction in every classroom, aligned with the standards, lies at the heart of AUHSD's work and its approach to LCFF planning and budgeting.*** We found three interconnected strategic foci to support this instructional improvement: 1) Building the capacity for instructional change, both for the professionals in the district and organizationally for the system as a whole; 2) Garnering and aligning the financial resources needed to support these capacity-building and engagement efforts; and 3) Deeply engaging all stakeholders – students, teachers, administrators, parents and community members – in the planning process and educating them about the instructional vision, both to build constituency and support for the changes and to support broader democratic purposes.

First Best Instruction as the Goal. At the heart of AUHSD's approach to both standards implementation and LCAP planning is an emphasis on "First Best Instruction" (often referred to as FBI). FBI is at the core of the district's improvement efforts and central to the budgeting process that begins by identifying district needs and then determining how to fund activities to address those needs. The underlying assumption is that equity and success for all students depends first and foremost on ensuring that daily instruction in every classroom is of the highest quality possible and accessible to all students. FBI is "student-centered and inquiry-based"; it is intentionally designed to reflect the state standards, 21st Century skills, and preparation for democratic citizenship; and it incorporates a strong emphasis on language and literacy. A curriculum leader explained: "We believe if we focus on First Best Instruction, the scores will fall into place...Our LCAP reflects that and our LCFF spending reflects that. That's what we've been pushing with sites."

The emphasis on language and literacy is particularly important given the large numbers of English learners. As one interviewee explained:

> *How do you intentionally embed the reading and the writing, speaking and listening? If you have ELs in your classroom, they should be speaking 30% of the time…You have got to have them using those skills all day long in every classroom.*

Within FBI, teachers are expected to appropriately differentiate instruction by applying the principles of Universal Design for Learning (UDL) and a deep knowledge of the needs and conditions of their students. Finally, FBI assessment is to be multi-faceted, including formative assessment practices, performance tasks, exhibitions and summative tests.

Significantly, every district respondent – from superintendent and central office staff to principals to union leadership – talked about the centrality of FBI to guide planning and improvement across all levels of the system. It is also featured prominently in the district's

LCAP. In the words of the chief business officer: *"**Most important is FBI and how do we get there.**"*

Building Professional Capacity to Support Instructional Improvement. To realize the district goals set by AUHSD, leaders emphasize the importance of building the capacity throughout the system. In fact, the AUHSD LCAP calls out on-going professional learning as essential for standards implementation. Three themes appear to guide this work: 1) movement from a deficits-based orientation to one that is strengths-based; 2) use of data and involvement of professionals in collective problem-solving (a reflective inquiry approach); and, 3) distribution of responsibilities for continuous improvement such that teachers lead professional development and administrators share responsibilities in leadership teams and leadership development activities.

To build the Cabinet's leadership capacity, all six members participated in executive coaching. This coaching facilitated the creation of the *Four Quadrants Tool* as a resource guide for leadership development throughout the entire district. The *Tool* consists of the following four components: 1) Leadership, 2) Systems, 3) First Best Instruction, and 4) Culture.

At the school site level, principals used the tool to guide their work with Site Leadership Teams (SLT), comprised of principals, coaches, teachers, parents, an LCFF-funded Multi-Tiered System of Support (MTSS) Coordinator, and, occasionally, students. The MTSS coordinators work with the SLTs to identify students' academic and non-academic needs and then to designate supports for students experiencing challenges. One high school principal observed that, *"**[The] MTSS coordinator is an example of the use of local data informing that process. For us, we've focused on two sub-groups - low SES and EL, especially regarding A-G completion and enrollment in 4-year colleges.**"* Based on these analyses the SLTs recommend the allocation of LCFF resources for programs or services to support specific student needs. Schools receive discretionary allocations from LCFF dollars and other sources and must align their school site plans with the goals and priorities enumerated in the district's LCAP.

For teachers, the district committed to on-going professional learning and supported that learning with investments in Curriculum Specialists and Lesson Design Coaches, professional learning communities, learning walks[3], and reflective writing journeys[4]. For targeted students, each site has a coordinator who is charged with using student data to identify their needs both academic and non-academic, and then garnering and managing support to address those needs.

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[3] *Reflective Learning Walks* involve non-evaluative classroom observations followed by conversations about teaching practice.
[4] *Writing Journeys* support language and literacy instruction across the curriculum and in all classrooms. The process engages both students and adults in demonstrating their knowledge, skills and cultural competencies through multiple means.

Meaningful Stakeholder Engagement in Anaheim UHSD

To advance the focus on instruction, the district committed to making parents and community stakeholders partners in the educational enterprise. Many of our respondents reported that the LCFF has provided the opportunity and impetus to marry democratic parental and community engagement with implementation of the standards and instructional improvement.
This engagement takes three forms discussed across multiple respondents and explicitly incorporated into the LCAP: Parent Leadership Academy and Parent Learning Walks, parent involvement in planning and district activities, and community engagement through the Anaheim Collaborative.

Parent Leadership Academy and Parent Learning Walks. The most direct connection between parent engagement and implementation of the state standards in AUHSD occurs through the Parent Leadership Academy (PLA)[5] and the associated Parent Learning Walks, both supported through LCFF funding and both intended to build parents' understanding of the standards and related instructional shifts. The PLA was initiated by the Family and Community Engagement Specialists (FACES), with support from California State University, Fullerton, to build parent understanding and involvement. All activities are conducted in the language of the parents (primarily Spanish).

> *"We saw we needed to build parent capacity. We got together to talk about what parents need to execute their role as partners in education and support for their students. We put together the first course – an 8-module informational course (PLA 1) that goes from explaining the US education system…to the nitty gritty of financial aid. PLA 2 talks more about growth mindset, the 4 Cs, and college and career readiness."* (FACES #1)

The PLA module on the Common Core standards also incorporates visits to classrooms that are similar to the teachers' reflective learning walks previously described:

> *"They learn the content and then see it live in the learning walks. 'Now it makes sense. Now I know why they're doing group math test.' Parents are learning what [the standards are] and why the state has gone in that direction. They learn it by seeing it and experiencing it."* (FACES #2)

> *"That's why learning walks are so powerful. We embed it in the module."* (FACES #3)

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[5] The Parent Leadership Academy (PLA) in Anaheim UHSD comprises of comprehensive and targeted parent education and leadership development intended to build capacity by fully integrating parents across a variety of district functions. In addition to traditional parent organizations, the PLA seeks to ensure equity in parental voice, decision-making and inclusion across key district initiatives such as those described in the case study.

"We don't go in to judge or criticize the teacher, just to look at how teachers are teaching and what students are learning. We debrief on that…They are teaching 21st Century skills…Then, when other parents hear something negative, you're able to answer questions because of the learning walks." (Parent)

All schools conduct parent learning walks 3-4 times per year. District leaders report that through these classroom visits and the PLA, parents have become "very knowledgeable." Indeed, parents now lead the learning walks, in a form of parent-to-parent education.

Parent involvement in planning and other district activities. Familiarity with the instructional shifts generates support and engagement that extends beyond the 600 parents who have been through the PLA. Parent leaders have become advocates for the standards and the instructional shifts with other parents, thus spreading support and alleviating concerns. Through this process, the district has helped to generate a cadre of informed community organizers and activists who are engaged in multiple ways with the district and with other parents, including through the LCAP planning process. Hundreds of parents now show up to LCAP planning meetings; they understand the data and are able to partner with each other and with district leaders and school personnel to set district priorities. Those priorities include support for teachers to teach, for improving teacher-student relationships in classrooms, and for students to learn the standards.

Community Engagement through the Anaheim Collaborative. In addition to the engagement with parents, AUHSD has partnered with local higher education institutions (Fullerton and Cypress Colleges, CSU-Fullerton, UC-Irvine) and the City of Anaheim to develop the Anaheim Union Educational Pledge. The focus of this pledge is support for college, career, and life readiness and success. Members note a wide range of activities toward their goal. These include academic counseling and mentoring before and after high school graduation and matriculation in post-secondary education. There are also various joint activities with the district (STEM and NGSS support, professional development on integrating technology into instruction, Gear-Up, and the A-G summit with principals).

Continuing Challenges. Building professional capacities across a variety of stakeholders in the district is central to supporting the instructional change, but as the Superintendent states, creating conditions for classroom level learning requires *"having the systems in place to identify where there are gaps in the system, and the monitoring has to take place at the site and there has to be ownership. That's part of the cultural shift."* The shifts in both culture and practice take time and also have ongoing challenges. One of these mentioned by several respondents has been the resistance of some educators to the kinds of changes in practice necessitated by the combination of the demographic shifts in the district and the demands of the new standards. Some mentioned in particular the challenge of moving instruction in mathematics, an identified area of need for the district. Others mentioned the need to go much deeper in addressing the needs of particular underserved groups in the classroom. And, as is the case with most California school districts, AUHSD faces financial challenges associated

with the slowing of LCFF funding at same time that obligations (e.g. STRS and PERS, step and column) are increasing.

Summary

AUHSD is a case where standards implementation and instructional improvement are front and center in all aspects of the district's work. Based on our interviews, we found consistent understanding of the district's instructional vision among all respondents. Key to the improvement effort was the district's effort to involve all stakeholders in the changes that the new standards mean for instructional practice.

RESOURCE ALLOCATION IN SAN MATEO-FOSTER CITY SCHOOL DISTRICT

> ### *District Demographics*
> - Preschool through Grade 8
> - 20 schools—3 middle schools, 14 elementary schools and 2 K-8 schools
>   - 12,500 students
>   - 34% students Hispanic, 26% white, 25% Asian, 1% African-American, 14% All Others
>   - 26% students English Learners (69% have Spanish as home language)
>   - 30% students qualify for free- and reduced-price lunch
> - 642 certificated staff, 48 administrators, 515 classified staff
> - 5-member school board

Background

The San Mateo-Foster City School District (SMFCSD), the largest school district in San Mateo County, is located on the expanding edge of Silicon Valley. The district's geography encompasses two distinct cities. San Mateo, a culturally and economically diverse community, became an incorporated city more than 120 years ago. Foster City, a planned development dating from the 1960s, is home to largely middle and upper middle class families. The district's fiscal circumstances vary annually. In some years, SMFCSD qualifies as a Basic Aid District; in some years it does not. SMFCSD was a Basic Aid district in 2016-17.

SMFCSD's strategic plan serves as the district's touchstone. Developed in 2013 with the help of Pivot Learning Partners, the strategic plan is structured around three goals: 1) academic achievement, described as, "measurable progress in mastering grade level Common Core standards," 2) 21st century skills, including collaboration, communication, creativity, and critical thinking, and, 3) citizenship and character education. The plan's overarching goal is to ensure all SMFCSD students "develop career and life skills."

At the same time as SMFCSD began to implement the fourth year of the Local Control Funding Formula (LCFF), the district faced two significant fiscal issues that impacted its budget. First, voters narrowly rejected the district's renewal of a parcel tax measure in March 2017. Defeated by barely a percentage point, the tax was to be a nine-year extension of the parcel tax SMFCSD voters passed in 2010. Revenue from the parcel tax generated $7 million annually to the district's general fund. That money had been used to support basic instruction in reading and math as well as libraries, music, and art. Second, the recent state-mandated increases in STRS/PERS retirement contributions will add an extra $2 million each year to the district's operating costs. SMFCSD estimates that the loss of the parcel tax revenue and the increases to STRS/PERS rates, will necessitate budget reductions of $9 million over the next two years.

Additionally, at the time of this research, the district and its teachers' union, the San Mateo Elementary Teachers Association (SMETA), were engaged in protracted contract negotiations

with teacher salaries being the primary sticking point. The district and union declared impasse in September 2017 and were able to reach agreement on November 30, 2017. The agreement, which will be in place through June 2019, provided teachers with a 5% salary increase retroactive to July 1, 2016 and another 3% increase retroactive to July 1, 2017, plus additional fiscal incentives.

SMFCSD as A Case Study Site

SMFCSD was nominated to be a case study site largely because of its approach to resource allocation with the district central office and schools sharing decisions about how to distribute funds. As a result of previous LCFFRC research, we were particularly interested in the extent to which schools had authority to make resource allocation decisions. While conducting the research, we recognized the central role school-based stakeholder engagement plays in determining how dollars are distributed in SMFCSD. (For more information on site selection, data collection, and data analysis, see Methodology Appendix.)

SMFCSD's Two-Pronged Approach to Resource Allocation

SMFCSD created a two-pronged resource allocation strategy that aims to balance school priorities and needs with district-set priorities. In explaining this fiscal balancing act, one high-level district administrator noted, "Schools should not be islands. It's good to foster innovation but a base program is necessary so all schools [can] meet the needs of all students."

In the 2016-17 school year, the district allocated approximately $4 million of its $6 million supplemental fund dollars (SMFCSD received no concentration funds) to schools to support school-determined priorities. The district retained the remainder of the supplemental funds (approximately $2 million) for district-wide programs and investments. Importantly, the district distributed supplemental funds to the schools based on locally-developed assessments of need and plans to address those needs.

How supplemental dollars available to schools were deployed, and indeed, how fiscal priorities for schools generally were set, was determined through a process that relied heavily on school-based stakeholder engagement. The district established a common engagement process that each school used and trained principals in its application. The process resulted in schools establishing their own resource priorities.

The district charged principals with explaining the LCAP development process, sharing district- and school-level data, and using a set of guiding questions with stakeholder groups. In general, stakeholder groups were asked to reflect on and propose strategies to address the question: "What would help all SMFCSD students reach our identified needs and goals?" Beginning in January, each principal held multiple meetings with each stakeholder group, including all school staff, the PTA, and the school site council.

As one principal told us:

> In the engagement meetings, we share data on the school and then use a set of guiding questions. We ask what is working, what is not working, what needs to be tweaked, and what other issues are important. From these discussions, we identify our needs and generate a list of ideas.

Another principal lauded the openness of the school-based engagement/priority setting process: "[The process is] transparent. Everyone has a say, so [everyone] feels invested in the decisions. [Our engagement approach] focuses the conversation."

Stakeholders were encouraged to share aspirational and practical strategies (e.g., "Students who struggle in math need differentiated instruction"), rather than specific investments (e.g., "More Chromebooks"). After suggestions were collected from school-based stakeholders, each principal identified themes for school resource priorities that emerged from engagement activities. One school whose principal we interviewed, for example, was concerned about lack of supports for students in the middle—those who were not failing and not really succeeding—and decided a key priority was to initiate an Advancement Via Individual Determination (AVID) program. Other schools identified increased social and emotional support for their students as a priority and sought to increase the number of school counselors.

Principals we interviewed agreed that the school-based stakeholder engagement and resource allocation processes have advanced buy-in from teachers and staff regarding investments, aligned state, district, and school goals, and led to more support for targeted student groups. The district leadership's commitment to meaningful school-level engagement was strong and was based on a belief in the value of the process. The district viewed the school-based engagement process around resource priorities as paying dividends. Noted one high-level district leader, "Schools with the strongest engagement have the strongest instruction…"

Once school budget priorities were identified, each principal met with district leadership to discuss the school's funding needs. Participants at this meeting reviewed a number of factors: the efficacy of the school's previous year's expenditures based on current outcome data, student demographics, stakeholder input, the school's identified priorities, alignment of the school's "ask" with district and state priorities, special school characteristics (i.e., small schools have fewer students but there are similar costs for additional staff), and the amount of supplemental funding the district had available. These factors became part of the mix to determine the level of resources each school will need and receive. In other words, schools were not pre-assigned dollar amounts to use for the coming year. Instead, through dialogue between the principal and district leadership, the level of funding is based on the percentage and number of unduplicated students with a focus on students who are English Learners and Socioeconomically disadvantaged. The substance of this school-district agreement became the basis for the school's Single Plan for Student Achievement (SPSA).

Principals we interviewed told us that the district consistently found a way to fund schools' needs. SMFCSD's approach to resource allocation—focused stakeholder engagement at the school level to set targeted funding priorities followed by conversations with district officials—resulted in a more thoughtful approach and more considered decision making. As one principal remarked, "We've moved from, 'Here's your money' to 'What do your students need?'"

The district reserved some of its supplemental and base funds for district-wide priorities, programs, and services designed to benefit all students, regardless of their school assignment. The district used a similar process as the schools used to determine what these investments should be. Stakeholder groups, including the District PTA, the District Advisory Committee, the District English Learner Advisory Committee, and the Board of Trustees, participated in an engagement process to set priorities. In addition, the superintendent held community coffee chats. District leadership provided detailed data on a variety of student outcomes broken out by student subgroups and then met with stakeholder groups. Using guiding questions to direct the conversation, the leadership identified common concerns and investments to address those concerns. In 2016-17, the district prioritized improving early literacy through Reading Intervention teachers and Reading Recovery and other supports, increasing math achievement, and reducing the number of long-term English learners. To address these issues, SMFCSD added reading teachers at all elementary schools, provided a second math course for middle school students struggling in math and invested in teacher professional development. The largest investment was the addition of a second counselor at all middle schools and two additional district elementary school counselors to address students' social and emotional needs.

Issues and Challenges

SMFCSD's dual approach to determining how to allocate its resources neatly combines schools' felt need for having a substantial say in the programs, supports, and services that will meet their students' needs with the district's desire to ensure that all students have access to foundational programs designed to address district-wide issues. As one principal said, "The district strikes the right balance between district-wide and school-based decision-making." That balance notwithstanding, SMFCSD continues to face a number of challenges.

Fiscal uncertainty remains a worry for this district, as it does for many districts in California. After failure of the parcel tax renewal, and in an effort to address what became a substantial budget deficit, the district lowered its reserve from 10% to 6% for 2017-18. It then made various other budget reductions totaling $4 million for 2017-18. The district is now in the process of identifying an additional $9 million in reductions over the next two years.

Fiscal uncertainty also added to the district's challenge of ensuring equity of opportunity for all of it students. SMFCSD is a district trying to juggle, as a high-level official described them, "have" and "have not" schools. The district approaches equity in the words of one district official, as "greater resources to those with greater economic needs." Some schools in

wealthier sectors of the district have the advantage of parent groups able to raise significant funds to hire additional staff and install programs not otherwise funded by the district. Other schools do not have this advantage. Recognizing the disparities, some "have" schools have raised funds for the "have nots."

In 2015-16, SMFCSD had a significant carryover of funds largely due to the difficulty of finding and hiring qualified staff and substitute teachers, as well as late hires and the overestimation of the costs of textbooks and professional development. For 2016-17, even more dollars are likely to be left unspent given the continuing challenges of attracting qualified staff to the district.

The district's innovative approach to resource allocation grounded in school-based stakeholder engagement remains a work in progress. Successfully implementing the work at the school level has been somewhat uneven as it is largely dependent on the capacity of the principal to lead the engagement process, secure meaningful feedback, and implement the actions and services identified. While district leaders have been working to guarantee that all principals fully engage stakeholders, they readily admit that there still is work to do.

Finally, the district's overall performance as portrayed by the new California School Dashboard is relatively strong (with green ratings for suspension rates, English language arts achievement, and math achievement). However, the progress of English learners is poor (orange rating). The district acknowledged this problem and has made investments in teacher training and a Coordinator of Support for English Learners. One principal praised the emphasis on English Learners: "LCFF shines a light on ELs [and] causes us to focus on figuring out their needs and try to serve them. [Before LCFF] we didn't have a way to put money toward their needs. We do now." Nevertheless, work in this area, too, remains, made all the more challenging by the district's strained financial circumstances.

Summary

SMFCSD's approach to resource allocation, balancing local school site decision making with district guidance and centralized support for all schools while focusing heavily on site-based engagement, can inform the larger conversation about LCFF implementation. The district's system has enhanced buy-in for school-determined programs and support priorities and has resulted in school budgets and plans tailored to schools' needs. SMFCSD is a case study that illustrates how meaningful engagement can advance improvement efforts.

CONCLUSION

When the research team originally conceived of this study, we sought to investigate three key aspects of LCFF implementation—stakeholder engagement, Common Core implementation, and resource allocation as it relates to the LCFF—and highlight interesting and promising approaches. What we found was that each district's improvement efforts were closely related to its efforts to achieve meaningful stakeholder engagement.

In the early years of LCFF implementation, most districts we examined took seriously the law's requirement to engage stakeholders in the LCAP development.[6] However, most were ill-equipped to realize the kind of engagement the LCFF envisions. In general, most districts were not natural organizers and found that getting everyone involved in making hard and complicated priority setting and resource allocation decisions was beyond their capacity and expertise. More recently, districts we examined appear to be learning from their experience and experimenting with new approaches to meaningful engagement.[7] The three cases we presented in this report illustrate how central engagement strategies can be to overall district improvement efforts.

As the LCFF was formulated and rolled out, it was not always clear what was meant by meaningful engagement. For the Governor, engagement was part of his commitment to subsidiarity, in other words, moving decisions to the lowest level of government. For some policy makers, engagement served an accountability function by making districts regularly report on their programs to stakeholders. For others, engagement was simply a way to get parents more involved in their children's education.

Our three case study districts embraced the engagement requirement. They viewed engagement as central to their overall improvement strategy rather than separate from it. Meaningful engagement for these districts served as a mechanism to refine, modify, and advance their improvement strategy, to promote understanding and establish common goals, and to give all stakeholders a real stake in the success of the district and its schools and classrooms. It is too early to tell if the districts' commitment to meaningful engagement will pay dividends for students, but these districts have demonstrated how carefully thought out, comprehensive engagement strategies can enhance general district improvement strategies. If these districts are any indication, meaningful stakeholder engagement seems to serve as a crucial linchpin to implementation of the LCFF.

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[6] http://www.edpolicyinca.org/sites/default/files/toward-a-grand-vision-early-implementation-of-lcff.pdf
[7] http://www.edpolicyinca.org/sites/default/files/LCFFRC_04_2017.pdf

APPENDIX – METHODOLOGY

After studying LCFF implementation for four years, the LCFF Research Collaborative decided to identify and document the work of school districts whose implementation efforts in three specific areas are reputed to be noteworthy. We were interested in school districts that were particularly innovative in their attempts to:

1. meaningfully engage stakeholders in their Local Control Accountability Plan (LCAP) development;
2. advance the implementation of the California State Standards (CCSS).
3. take an innovative approach to resource allocation; and

Our purpose in conducting three new case studies was to highlight interesting efforts to implement the above aspects of the LCFF so that all California school districts could learn from these districts' efforts and experience. To identify potential sites, we used a version of snowball sampling. We asked our advisory board members for recommendations and received several nominations of candidate districts for each of the three designated LCFF components. Some members of the advisory board also reached out to other colleagues for recommendations. We recorded all recommendations and then narrowed our list to sites that were nominated by more than one source and rank-ordered them. Following the nomination process, we conducted brief interviews with district leaders from each nominated site, reviewed district documents, and, based on our review, settled on the three focal case study sites. In all three cases, we were able to secure the participation of the most highly recommended districts. These were:

- Palmdale School District (PSD) as a system with innovative stakeholder engagement activities,
- San Mateo-Foster City School District (SMFCSD) for its approach to resource allocation decision-making, and
- Anaheim Union High School District (AUHSD) for its efforts to integrate standards implementation into the LCAP process.

Data Collection and Analysis

Once the three districts were identified, teams of three to four researchers reviewed a variety of district-produced documents for their assigned districts, including the district's LCAP, its strategic plan, its budget, and its outcome data. Each research team then conducted a two- to three-day site visit to the district, interviewing district officials, principals, union representatives, school board members, community members, and other site-specific representatives. Across the three districts, researchers conducted 49 interviews and focus groups with 95 individuals. See Table 1 for a breakdown of interviews conducted in each

district. Each team systematically analyzed all interview notes, documents, and other data and produced an in-depth internal case study, focused on the particular topic for that district.

Table 1: Interviewees by District

Interviewees	San Mateo-Foster City Elementary School District	Palmdale Elementary School District	Anaheim Union High School District
Superintendent	1	1	1
Central Office Staff	4	6	8**
Board Members	1	2*	1
Parents		2*	
Advisory Board Members (DELAC, DAC, LCAP Advisory, AAPAC, etc.)	3	1	14***
Principals	4	4*	5*
Parent Liaisons		1	9*
Teacher Union Representatives	1	1	1
Teachers/TOSAs		3*	4*
Curriculum Specialists			8*
Classified Union Representatives	1	2*	
Community-based partners			4*
Outside Consultants		2	
Total Interviewees	**15**	**25**	**55**
Total Interviews	**15**	**17**	**14**

*Denotes focus group
**Three interviews were conducted with pairs of district officials.
***Included 5 PTA members and 9 DELAC representatives

This report contains brief summaries of the longer case studies describing each district. The senior members of the research committee reviewed the case studies and derived overarching themes and findings to create the frame for the current report.

Research Questions

Below are the research questions that guided our inquiry at each of the selected sites.

Palmdale School District: Stakeholder Engagement
1. What is the extent of meaningful community engagement in the LCAP development process?
2. Are there exemplary practices that advance meaningful community engagement?
3. What roles are specific groups, such as school boards, teacher unions, and community-based organizations, playing in LCAP development?
4. To what extent are districts producing coherent and strategic improvement plans in their LCAPs?

Anaheim Union High School District: Common Core Implementation
1. How is implementation of the state standards in AUHSD integrated into LCFF implementation and how do stakeholders perceive the relationship between standards, LCAP goals, planned activities, and data use?
2. In what ways are LCAP community engagement activities in the district engaging/educating parents and community members about standards implementation for all students (and particularly for LCFF targeted students)?
3. How is the district allocating funds in their LCAP to support standards implementation?

San Mateo-Foster City School District: Resource Allocation
1. How are decisions about resource allocation made at the local level?
2. To what extent are schools receiving additional resources and what authority do they have to make decisions about how these dollars are spent?
3. How are new resource allocation decisions impacting district and school level programs, policies, and operations?
4. Are appropriate resources reaching the target student groups?

About

The Local Control Funding Formula Research Collaborative (LCFFRC) brings together a diverse set of policy experts who, since 2014, have been documenting implementation of the Local Control Funding Formula (LCFF), California's pathbreaking finance and governance system. Operating under the auspices of Policy Analysis for California Education (PACE), principal LCFFRC researchers are Julia Koppich (J. Koppich & Associates), Daniel Humphrey (Independent Consultant), Julie Marsh (University of Southern California), Jennifer O'Day (American Institutes of Research), Magaly Lavadenz (Loyal Marymount), and Laura Stokes (Inverness Research).

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