

Leveraging LCFF for Equity and Coherence

The Case of San José Unified School District

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About the California Collaborative on District Reform

The California Collaborative on District Reform was formed in 2006 to join researchers, practitioners, policymakers, and funders in ongoing, evidence-based dialogue to improve instruction and student learning for all students in California's urban school systems.

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Introduction

In early 2019, California welcomed a new governor, superintendent of public instruction, legislators, and members of the state board of education to Sacramento. These leaders are shaping the direction of the state's K–12 education system, both in refining existing policies and developing new ones. One area of focus is school funding, including the signature school finance system of Governor Jerry Brown's administration, the Local Control Funding Formula (LCFF).

The state's transition to new leadership offers an ideal opportunity for members of the education community to consider how LCFF as implemented to date reflects the spirit of the law. Governor Brown's 2013–14 budget summary laid out several principles guiding LCFF, among them “a funding mechanism that is equitable, easy to understand, and focused on the needs of students,” providing local educators “maximum flexibility in allocating resources to meet local needs” and “holding schools accountable for academic and fiscal outcomes.”¹ Five years into a new model of resource allocation, does LCFF fulfill these ideals? Are there examples of effective implementation that can inform improvements statewide?

Some policy discussions about improving LCFF—including those on the campaign trail—have centered on increasing transparency requirements in districts' Local Control Accountability Plans (LCAPs) to advance understanding of how districts are achieving the goals in the policy. Transparency around resource allocation decisions might help community members ensure that school districts are doing right by the students in their care. Transparency can inform effective decision making to address persistent challenges. And comprehensive and easily understood descriptions of these decisions are critical for building a sense of accountability and trust with local communities.

Improving understanding is an important goal, especially as school budgets become increasingly constrained, but policy conversations sometimes do not answer the question “Transparency for what purpose?” Instead, they emphasize expanded reporting requirements as if it is the only way to achieve this goal. With new education leaders stepping into their roles, a more productive question to explore is how transparency can help to accomplish the goals laid out in LCFF. The purpose of transparency should be to foster other ideals we care about, such as equity, local control, and community engagement, rather than an end in and of itself.

One district that has worked hard to advance the ideals of LCFF is the San José Unified School District (SJUSD). Several years before LCFF, the district promoted locally responsive decision making, embraced strategic planning, and committed to serving all students equitably. In other words, SJUSD got a head start on LCFF and subsequently leveraged it as an opportunity for districtwide improvement. In doing so, the district sought to build understanding by engaging community members in informed dialogue rather than by overwhelming them with massive (and ultimately confusing) documentation. As our new leaders work to refine LCFF, it may be instructive to consider examples like SJUSD, where key priorities of LCFF—local control, strategic planning, and equity—are the guiding principles behind all the district’s actions.

SJUSD Leverages Its Strategic Plan to Promote the Ideals of LCFF

In SJUSD, a community-informed strategic plan drives every major decision that district leaders make. Through this approach, district leaders demonstrate their commitment to local control and alignment between district priorities and

resource allocation decisions. The district also fulfills the key purposes of transparency by advancing community understanding, enabling stakeholders to hold the district accountable, and building trust with the community.

A Community-Informed Strategic Plan Drives the Work of SJUSD

One aspect of local control promoted through LCFF is leveraging the expertise, resources, and perspectives of community members to inform and improve district decision making. The LCAP template as currently written encourages districts to list meeting dates, the attendees, and the topics discussed at these meetings.* But when districts simplify community outreach by including only these logistical details, they obscure the extent to which community stakeholders actually inform and influence district-level decision making—if at all.

SJUSD’s development of and faithfulness to a community-informed strategic plan is a prime example of local control moving beyond lists. In 2011, two years before the passage of LCFF, the district engaged in a massive community outreach campaign, spending nearly a year asking more than 3,500 people—including teachers, parents, community leaders, and local officials—for their input on what the district’s priorities should be.² Because of the district’s extensive engagement efforts—which it replicated when renewing the strategic plan in 2017—community members were deeply involved in deciding the strategic direction of the district. And district leaders take that direction seriously (for more information on the strategic plan, see the text box “What Is SJUSD’s Strategic Plan?”).

* The prompt districts respond to in the LCAP asks, “How, when, and with whom did the LEA consult as part of the planning process for this LCAP/Annual Review and Analysis?”





An example of SJUSD’s commitment to the strategic plan and—by extension to its community—is the district’s vested interest in hiring and retaining great teachers. The 2012 strategic plan reflected a central priority of SJUSD stakeholders to “attract, recruit, support, and retain a highly effective and diverse workforce.”³ In turn, the district has come to see teachers as fundamental to everything the district does. Deputy Superintendent Stephen McMahon articulated this as the cornerstone of the district’s improvement: “If you really want to see transformative change, it’s going to be in the people you employ and the work that they do.” Reflecting this belief, the original 2012 strategic

plan promised that “SJUSD will design and implement a professional growth system for all employees to sustain and improve employee performance.”⁴ One year later, the board approved a robust, multifaceted teacher evaluation system that has received statewide attention for its embedded professional development opportunities and, if needed, peer review.

The district remains committed to the plan, even if it means saying no to new opportunities. For example, schools submit their proposed budgets to their district as part of the Single Plan for Student Achievement (SPSA) process. When

What Is SJUSD’s Strategic Plan?

SJUSD’s strategic plan is a set of goals and associated strategies deemed critical to meet the SJUSD mission: to eliminate the opportunity gap and provide every student with the finest 21st century education. District leaders collected input from the community through town halls, focus groups, and surveys and then translated the responses they got from their community into the five main priorities of the 2012 SJUSD strategic plan, which they called *OPPORTUNITY21*. SJUSD then engaged in a similar process for its 2017 strategic plan. They found overwhelming support for maintaining the same focal areas that community members had identified five years before but with some minor revisions to the benchmarks and indicators used to measure their progress. As the SJUSD website explains, “You’ll find these objectives familiar. That’s because we heard loud and clear from our community that we’re headed in the right direction.” The focal areas in the 2017–2020 strategic plan, which the district refers to as objectives, are:

- “ 1. A rigorous curriculum that inspires all students to discover their own greatness
2. An innovative workforce that knows the lessons we learn are just as important as the lessons we teach
3. A unified community that elevates opportunities for all
4. Enhanced resources that make the extraordinary ordinary
5. An efficient system that asks and answers the questions, ‘Why?’ and ‘What if?’”

These five statements help the district guide its work and set a vision for what the district ought to be. Each objective relates to a specific piece of the district’s work—academic outcomes, high-quality faculty and staff, engaged families and safe schools, efficient budgeting and use of classroom time, and meeting fundamental student needs and high expectations as outlined by the state, respectively. Each statement includes indicators of progress toward a particular objective. For example, in relation to academic outcomes (Objective 1), the strategic plan asserts, “All schools and student groups will score in the two highest performance levels on the California School Dashboard for English language arts, mathematics, English learner progress, graduation rate, and college and career readiness.” Related to the focus on teachers (Objective 2), the strategic plan says, “All roles will be filled on the first day of school.”

To learn more about the strategic plan, please visit <https://web.sjUSD.org/who-we-are/district-information/strategic-plan/132/>.

SJUSD principals submit their SPSAs to the central office for approval, they must link all items in their site budgets back to the strategic plan.⁵ According to former school board president Pam Foley, “If [something] doesn’t fall within the strategic plan, then we’re not likely to fund it. In other words, we’re not going to come up with a new program if it doesn’t move part of the strategic plan forward.” The district welcomes exciting or innovative ideas, but if school leaders cannot demonstrate a connection to the strategic plan, these ideas are denied.

In SJUSD, district staff consistently describe the plan as the place they turn to for all of their decisions. Director of Curriculum, Instruction, & English Learners Services, Deepa Mukherjee described it as “almost like a charter for us...like a road map for the way in which we go about achieving that closing of the opportunity gap and also brings into alignment the efforts at different aspects of the district.” Greg Dannis, SJUSD’s labor attorney agreed, explaining, “In San José, the strategic plan has become the North Star that guides all district activities.” The strategic plan is not just a document; it is the guiding force behind everything SJUSD does.

SJUSD Aligns Goals, Dollars, and Reporting

SJUSD has also leveraged LCFF to more effectively align its resource allocation practices with its priorities. The strategic plan was the first step in doing this; it gave the district a guidepost for how to operate as an organization and where to place their dollars. In the district’s very first LCAP in 2014–15, the executive summary called LCFF an opportunity, explaining that “rather than simply restoring what was cut [during the 2008 recession], strategic investments are being made in services to

students and in the district’s workforce to maximize the educational experiences for students, with each investment stemming directly from San José Unified’s 2012–2017 strategic plan.”⁶ But SJUSD wanted to meld their finance and strategic planning even more deeply.

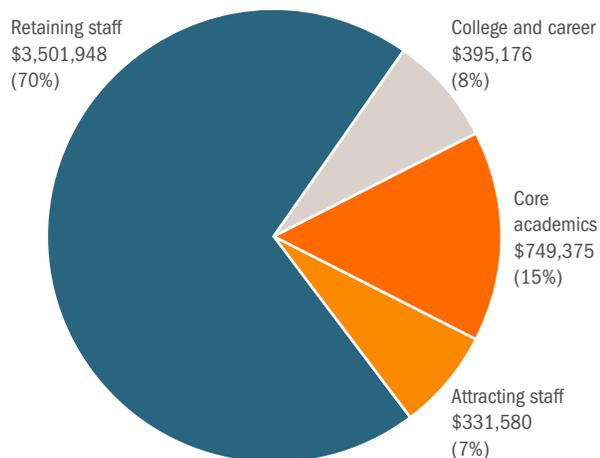
As SJUSD set out to revise its strategic plan in 2017, central office leaders used the renewal to make their LCAP and strategic plan one and the same. The first strategic plan, *OPPORTUNITY21*, served as the foundation for the district’s initial LCAPs, but they were two different documents and processes. Rather than helping SJUSD become a more coherent and aligned school district, the separation was requiring staff to spend more time replicating the same information. When the district set out to renew the strategic plan in 2017, they put an end to their duplication efforts. Now, when someone downloads the SJUSD LCAP, they are also downloading the strategic plan and vice versa. The entire document opens with the five guiding statements of the strategic plan (which the district calls its objectives), followed by the state’s LCAP template organized by the same five statements. Through its updated strategic plan, SJUSD facilitated coherence in its approach over time by emphasizing a commitment to the objectives that had guided its work for the previous five years.

Another example of alignment is a parcel tax passed in 2016. In the newly combined strategic plan and LCAP, the district describes Measure Y as providing funding for three core components of the strategic plan, including “attracting and retaining high-performing teachers and educational staff.”⁷ In a description of how the district allocates the money, a pie chart shows that 70% supports “Retaining staff,” 7% goes to “Attracting staff,” 15% to “Core academics,” and 8% to “College



and career.” Each one of these is a goal explicitly defined in the strategic plan, and Measure Y serves as a straightforward example of SJUSD committing dollars to those goals (see Figure 1).

Figure 1. SJUSD’s Allocation of Measure Y Parcel Tax Funds



Source: San José Unified School District, 2018, p. 12

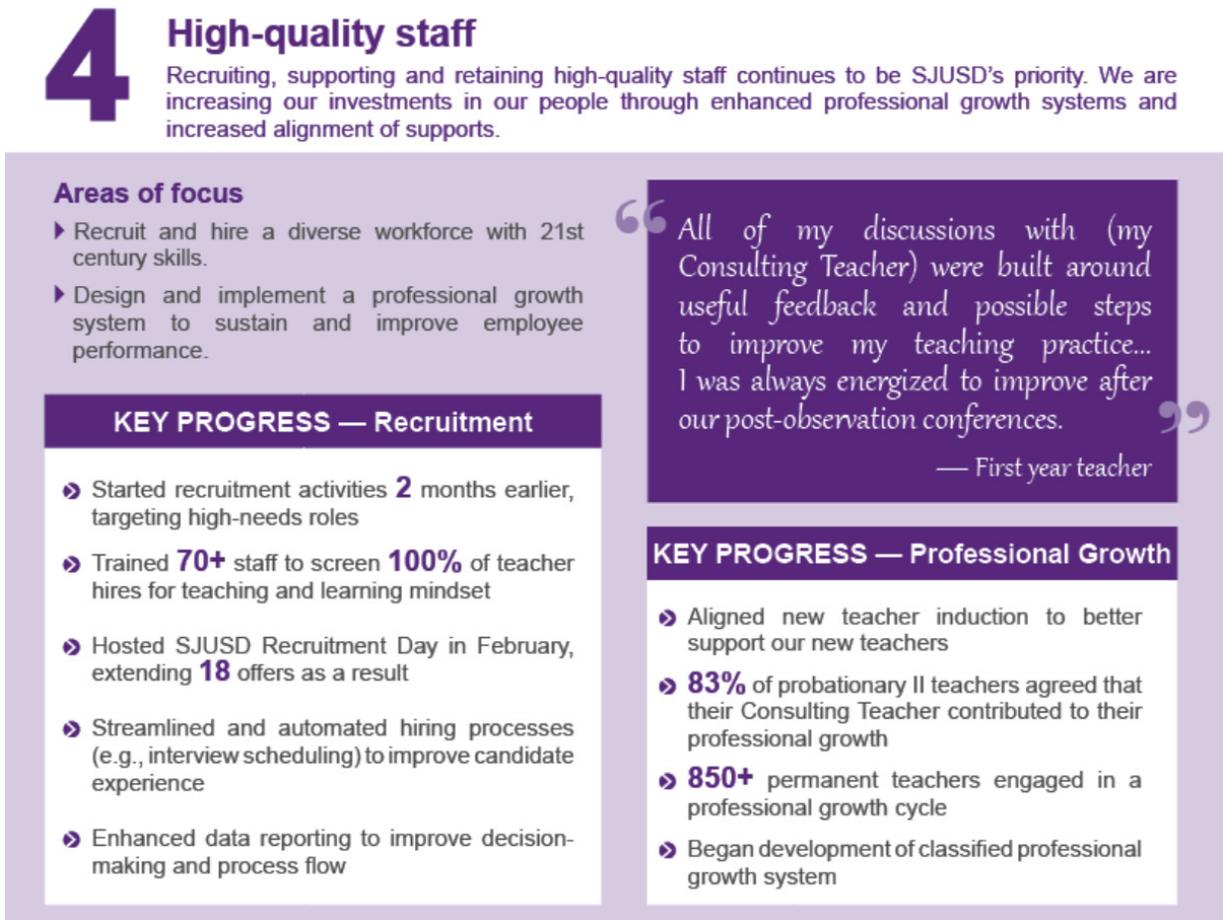
By tying together community input, district plans, and resource allocation, SJUSD’s commitment to its strategic plan plays an important symbolic role. The decision to make the strategic plan and LCAP the same makes a statement that strategic planning and budgeting should not be isolated activities. Often, district budget and academic offices operate independently of one another; the budget office makes decisions about funds (generally based on categorical requirements), and the district figures out ways to make their goals fit into the budget constraints. LCFF helped many districts across the state bridge this divide,⁸ but in SJUSD, the unification of the two documents underscores a message of alignment and coherence that is at the core of its approach and is consistent with what LCFF set out to promote.

SJUSD Builds Community Understanding

The strategic plan has also helped district leaders articulate to external stakeholders the ways district dollars connect to actions and the district’s progress on meeting their goals. In the strategic plan, community members can see the principles and values that guide the district’s work, and they can follow the district’s progress in board meetings, printed materials, and other communications efforts. One strategy employed to make these connections during implementation of *OPPORTUNITY21* was the publishing of annual reports that described progress toward each of the objectives laid out in the strategic plan. One of these reports, from 2015–16, described improvements in the hiring process. The community had identified recruiting, supporting, and retaining high-quality staff as a district priority. In the annual report, the district shared evidence of progress toward this objective. For example, it reported that recruitment activities had begun two months earlier than in previous years, targeting high-need roles, and that all new hires were screened using San José’s growth mindset protocol (see Figure 2).

At the same time, the district uses the strategic plan to provide their community with context about some of its most important financial decisions. For example, the opening section of the now combined strategic plan and LCAP contains a description of the increased financial burden on California school districts to contribute to retirement funds for their teachers. The document states, “These retirement systems are a true benefit to public school employees. However, [...] LCFF does not provide enough funding to cover the continually increasing contributions school districts must make to PERS [the Public Employees Retirement System] and

Figure 2. SJUSD Annual Report on Objective 2 (Formerly Objective 4), 2015–16



Source: San José Unified School District, 2015, p. 5

STRS [the State Teachers Retirement System]. Expenses must be reduced in other areas to afford these new, mandated payments.”⁹ Following this language is a chart that tracks the pension obligations over time and demonstrates how these contributions continue to increase. Contextual information like this helps inform the SJUSD community of the very real constraints that influence district decisions.

District leaders believe that the strategic plan and other communications empower community members to hold SJUSD accountable for student

outcomes. These efforts may also facilitate greater transparency and trust. If parents and others see actions in classrooms and schools that are out of alignment with the strategic plan, they can cite the plan as evidence that the district’s priorities are not being reflected. If the district has explained in their most important document why pension obligations have outpaced increases in revenue, then parents walk away with a clearer picture of the SJUSD budget. One district leader explained that it is important to keep decisions public and accessible because “it holds us accountable to whether we’re actually producing any student change.”



SJUSD Leverages LCFF to Pursue Its Commitment to Equity

San Jose’s student population is diverse but distinctly separated: traditionally underserved students are concentrated in certain neighborhoods and schools (on the north side of the city) and more advantaged students, in others (on the south side). Schools serving predominantly low-income and English learner (EL) students in the district tend to have significantly more challenges and lower student performance. SJUSD has a long-standing public commitment to addressing these disparities, most notably articulated in the school’s 2010 adoption of an equity policy explicitly focused on vulnerable student populations. The policy states:

“The Board further recognizes that such inequities lead to educational, social, and career outcomes that do not accurately reflect the abilities, experiences, and contributions of students, employees, parents, and community partners.... The Board is therefore committed to ensuring that equity and inclusion are essential principles of our school system and are integrated into all policies, programs, operations, and practices.”¹⁰

LCFF provided an opportunity and a push for SJUSD to translate its equity principles into action. The opportunity was the provision of additional dollars through the supplemental grant based on the district’s numbers of low-income, EL, and foster youth. Consistent with its emphasis on the importance of adequate staff, SJUSD decided to use its supplemental funds to allocate 20% more staffing to schools with the highest concentrations of the targeted student populations. There are several advantages to this approach.

As described earlier, SJUSD’s philosophy is that teachers are the district’s most valuable resource. Superintendent Nancy Albarrán stated, “We believe that having the right people is going to drastically change outcomes for students.... We are trying to change inequities through the people that we have.” Developing and retaining high-quality teachers was a central component of the strategic plan prior to LCFF. SJUSD is thus not bringing in a new program or an initiative that is disjointed from the work already under way. Instead, it has invested in a strategy that is consistent with the strategic plan and a long-standing commitment to equity. This coherence contributes to the broader community’s ability to understand what is happening in the district.

A Note About Our Sources

This brief is part of an ongoing series from the California Collaborative on District Reform exploring key issues of LCFF implementation. It draws primarily on a series of interviews and meeting observations conducted with SJUSD district leaders in spring 2017 for the report *From Combat to Collaboration: The Labor-Management Partnership in San José Unified School District*. Although the focus of that report was on the relationship between SJUSD and the San José Teachers Association, data collected for that project highlighted the central role that the strategic plan plays in the district’s work, the fundamental commitment to equity in the district, and the ways in which resource allocation decisions reflect these priorities. Subsequent interviews in 2018 with Superintendent Nancy Albarrán and Deputy Superintendent Stephen McMahon, public presentations by district leaders, and a review of district documents have also informed the development of this brief.

Second, because the law *requires* that the funds be used to serve targeted students, the district was able to avoid any pushback from more advantaged communities that were not receiving additional staff. Deputy Superintendent McMahon explained, “It’s hard to convince taxpayers to have unequal distribution of your resources. The LCFF helped us do that.... It’s decreased controversy in the district.... It’s nice to be able to justify your actions by the law and best practices throughout the state.” LCFF helped the district do what it believed would help its students—give more of its most valuable resource to students who need it—an action that it may not have been able to do without LCFF.

Third, the provision of additional staff to identified schools facilitates transparency and accountability because community members can see exactly how the supplemental dollars are being spent and to what effect. Indeed, according to Deputy Superintendent McMahon, the district’s message to parent and community groups is that principals should be able to answer two questions: “Who are the school’s supplemental staff, and what do they do?”† To this end, a recent report by EdTrust–West describes one SJUSD site (Lincoln High School) that was able use the extra funds to hire seven more teachers and two more assistant principals than a similar but more affluent site in another part of the district. Lincoln now offers more supports to their students, such as an Advanced Placement course designed to support ELs and a project-based learning program. It has also experienced early signs of success, such as fewer course failures

† Each SJUSD site that receives supplemental funds reports how they are used in their SPSA. More information on SJUSD’s SPSA process can be found here: <https://web.sjUSD.org/our-schools/schools/hammer-montessori-at-galarza/192/?/schools/elementary-schools/hammer-montessori-at-galarza/192/>.

and an increase in students’ sense of connection to school—changes that school leaders attribute in part to additional, supplemental staff.¹¹

There is one potential caveat to this approach, however. Because the LCAP template fields focus on expenditures, they tend to emphasize *quantity* rather than *quality* of resources and supports. Allocating additional teachers to high-need schools helps the district build capacity and provide more supports for students who struggle the most. However, merely adding positions does not necessarily ensure that the students in these schools have equitable access to high-quality teachers.

SJUSD attended to the quality issue through hiring, professional development, and evaluation systems to ensure quality throughout its teaching ranks to meet the needs of all students. For example, SJUSD’s teacher evaluation system includes multiple opportunities for observations, coaching, and, if needed, a review process conducted by a board of peers and administrators. In its most recent LCAP, the district reports that “100% of 2017–18 teacher and principal evaluations were aligned to the new evaluation system.”¹² LCAP also reports that the district “screened 100% of teachers hired for [growth] mindset and used a new student teacher program as a pipeline for talent.”¹³ Although these processes are new and constantly being refined, they demonstrate SJUSD’s commitment to providing structures to ensure that all students have access to quality instructors. That is, SJUSD was able to do both—they used their LCAP money to increase the number of teachers in the district, but because of their strategic plan, it was not at the expense of quality.





Lessons From SJUSD

As California school districts continue to articulate their goals, report on their progress, and demonstrate fiscal responsibility in their LCAPs, they are simultaneously trying to figure out how best to engage community members in both informing and understanding the district's approach. Meanwhile, policymakers, confronted with requests for greater transparency from advocates and constituents, typically respond with calls for more and more documentation. The limitations of such documentation, however, have themselves been well documented.¹⁴

SJUSD has pursued a different pathway toward transparency and improvement, and its story suggests some lessons that the state and other districts might consider in their efforts to refine LCFF to fulfill its original goals.

The first lesson learned from the SJUSD experience is that districts should choose to share information primarily to facilitate understanding, enable accountability, and build trust and not merely comply with external requirements. In SJUSD, efforts to engage the community come through plain language in a strategic plan, explicit connections between the strategic plan and LCAP, and consistent messaging to community members that connects their priorities to the actions the district takes and the outcomes it monitors. The information that community members receive is easily understandable; is consistent across content, messengers, and time; and demonstrates the connections between community input, the actions the district is taking, and the outcomes that students and educators desire.

Another lesson from San Jose is that strategic coherence can foster both improvement and transparency. When the values and vision of a district are consistent across different avenues of communication, staff can reduce the amount of work they put into any single documentation or reporting effort. SJUSD is saving time now that they can update LCAP and examine their progress in meeting the goals of the strategic plan as part of the same process. Districts have many responsibilities to students and their families. When reporting requirements become empty exercises in compliance, the time leaders spend on that work detracts from time they can spend on serving students. Moreover, looking for ways to build through-lines in district planning and reporting processes can help districts achieve greater consistency while also connecting dots for members of the broader district community. Instead of treating the LCAP as an additional (and burdensome) task for district leaders, SJUSD decided to use it to advance a strategic plan that had been under way since 2012. In doing so, they added photos, figures, and easily accessible language to help readers understand the district's approach in the way that vast pages of tables could not accomplish alone. Their LCAP supports other efforts toward communication and transparency without distracting from the district's central messages.

Finally, the San José example suggests the importance of striking an appropriate balance between the demand for better student outcomes—especially for the most vulnerable youth—and exercising patience with the processes of system and adult learning that come with new reforms. SJUSD seemingly has the right pieces in place but still has improvements to make. Like many

districts, student outcomes are not yet where leaders want them to be, increased financial burdens make planning for the future difficult, and increasing housing costs pose significant challenges to attracting and retaining good teachers. Long-term, sustainable change is hard, and frequently altering course can make sustained progress over time nearly impossible. At the same time, educators, families, and policymakers must remain diligent in the expectation that all students, especially underserved students, receive the supports they need to succeed.

Conclusion

As new leadership in the state evaluates how LCFF can be improved, SJUSD helps us remember the bigger picture: What did LCFF seek to achieve, and what can we do to help achieve these goals?

SJUSD is a district with a clear vision for supporting student success—one that is consistent with principles that LCFF sought to establish across the state. This is not to say that SJUSD is the only school district that has such coherence. On the contrary, research suggests that other districts in California have similarly high levels of coherence. But unlike SJUSD, implementing LCFF has actually undermined some districts' ability to demonstrate coherence.¹⁵ Instead, SJUSD serves as a noteworthy example because LCFF allowed SJUSD to leverage the work it was already doing to advance the goals of the state *rather than* upending what was already under way in an effort to be in compliance. The district did this by focusing on the central ideals of LCFF—local control, strategic planning, and equity. If changes to the letter of the law are on the horizon, SJUSD reminds us to not lose sight of the spirit of the law.





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