

Budgeting for Educational Equity



PODCAST SERIES
Episode 1

DEFINING AN APPROACH TO EQUITY



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Budgeting for Educational Equity is a podcast series that explores how education resources can be allocated to better meet the needs of all students. This brief was developed to provide opportunities for listeners to engage in tangible, practical application of the lessons derived from each episode. The brief can be used as a launching point for discussions about equity within communities and school district administrative offices. It can also be used to support existing ongoing work such as the Local Control Accountability Plan or district budget development. Episodes can be found on the [Budgeting for Educational Equity Podcast Series webpage](#).

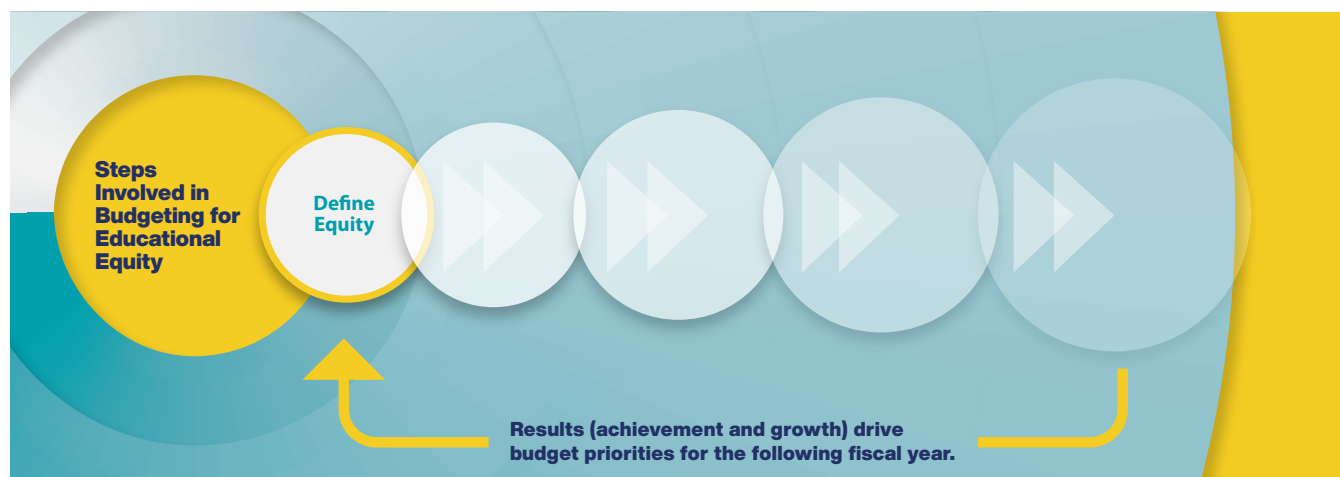
RESEARCH SUMMARY: RESOURCE EQUITY AND STUDENT ACHIEVEMENT

A key aspect of working toward resource equity in education involves ensuring that all school districts and schools receive sufficient funds to support the success of their students. Research has shown that school finance reforms based in sharp, immediate, and sustained increases in targeted spending in low-income school districts can cause gradual increases in student achievement in math and reading in the years that follow the initial investment.¹ Targeted increases in revenues in low-income school districts are key components of this type of reform that differentiate it from

others. Most research has found pronounced improvement in learning outcomes in low-income districts, as the effect of extra funds is higher in low-income areas than in their wealthier counterparts.² Moreover, increased fiscal investments in students have a long-term positive impact on the economic output of the municipalities in which they occur.³ Based on this evidence, it is clear that moving school fiscal systems toward equity is effective in increasing student achievement and has real economic value in the long term.

With this body of research in mind, WestEd staff set out to explore ways in which to apply principles of equity within the context of

FIGURE 1. BUDGETING FOR EDUCATIONAL EQUITY



K-12 education finance in California in our collaborative podcast series, *Budgeting for Educational Equity*. Through a series of discussions with experts, including state and local education leaders, school business officials, policy and finance experts, and education advocates, this podcast series explores how equity is operationalized and applied to meet the needs of school systems under myriad fiscal systems that govern education finance. In addition, we explore how to advance equity within the mechanisms that allocate funds to schools, including state-level systems such as the Local Control and Accountability Plan (LCAP) and the Local Control Funding Formula (LCFF); federal systems such as the Every Student Succeeds Act (ESSA) and the Individuals with Disabilities in Education Act (IDEA); and more recently, the American Rescue Plan (ARP).

Before a school system can make progress toward equity, however, practitioners within the school system must define what equity means within their context. This is the first step

in a method called *Budgeting For Educational Equity*, as shown in Figure 1. Future podcast episodes will explore the steps that occur after a school district defines equity.

Using this first step as a foundation, this podcast series will discuss the necessary components required for education agencies to engage in the fiscal planning process with an explicit focus on advancing toward equity. The podcast series and the accompanying briefs will also provide tangible tools to help listeners and readers engage in equity-focused fiscal planning.

WHAT THE EXPERTS HAVE TO SAY

A major early theme that has begun to emerge throughout our conversations with experts during this podcast series is how they define equity and how their definitions of equity connect to their philosophies of change. Accordingly, we begin this brief by laying the foundation for developing a clear definition of equity. Below, we provide a series of definitions of equity from some of the

podcast guests followed by reflection prompts for practitioners to engage with as they work toward their own definition of equity.

Defining an Approach to Equity

A broad definition for equity that is often used in school finance employs the concept of vertical equity, which specifies that differently situated children should be treated differently such that every child can have equal opportunity for access to a quality public education regardless of location, income status, or identity. In practice, vertical equity means giving local education agencies support based on both their total students as well as their unique demographic and socioeconomic makeups. For example, students who are English learners may require supplemental resources to support their educational experience, including teachers with certifications and training who require higher salaries, or access to software and materials that are meant specifically for dual-language learning. For reasons such as these, achieving vertical equity

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may result in some students receiving more resources than others.⁴ Overall, while each of our guests has their own understanding and application of equity within their context, vertical equity offers a strong, research-based reference point to use as a basic definition.

Podcast Guests: Defining Approaches to Equity

To further develop our thinking about equity, during each episode, we asked our guests to speak to their own understanding of how to apply equity and experience with doing so. The following are some excerpts of what they said.

Dr. Chris Edley, former Dean of UC Berkeley School of Law, and Maria

Echaveste, Policy and Program Development Director, UC Berkeley School of Law: *“Equity refers to subgroup disparities in both outcomes, on the one hand, and opportunities or inputs on the other. It’s a question of measuring the right things, looking at the subgroup differences, and asking the question of what’s driving those differences, and how can we do better? It simply requires identifying the disparities that we believe are unacceptable and deciding that something must be done.”*

Adela Jones, Superintendent, Sanger Unified School District: *“First: knowing that more was needed for that population, and second, thinking beyond what they need in*

the classroom: the people, the time, and the money. And how we allocate them to our students efficiently, knowing that the students with the greatest need require the greatest amount of resources.”

Mike Kirst, Professor of Education, Stanford University: *“Opportunity to learn’ equity is what happens in the classroom – in other words, the curriculum that is actually implemented versus the alleged curriculum.”*

With these examples from our podcast guests of how to apply equity from both researcher and practitioner perspectives, it is possible to begin forming your own practical approach to achieving equity and how it applies within the context of your fiscal system.

ESTABLISHING AND APPLYING EQUITY

1 | In the pursuit of equity, there is an undeniable link between how the budgeting process is carried out and how resources will reach those students who need them most. With this in mind, and using the definitions of equity provided above, reflect on your own experiences as a practitioner and establish an approach for advancing toward equity within the context of your school or district:



2 | With your draft definition of equity in place, take time to engage with staff and discuss your definition. After receiving feedback, draft a revised definition of equity:

3 | Finally, use this definition to begin to identify (a) areas within your own school or district fiscal structure that are progressing toward equity and (b) areas where there is opportunity for growth in creating a more equitable fiscal system:

Equipped with a sound definition of equity as well as some preliminary ideas for progress, we move to our next episode, in which we will discuss how to use data to help identify precise goals and levers of change within fiscal systems.

1 Lafortune, J., Rothstein, J., & Whitmore Schanzenbach, D. (2016). *School finance reform and the distribution of student achievement*. (NBER Working Paper No. 22011).

2 Carlson, D., & Lavertu, S. (2018). School improvement grants in Ohio: Effects on student achievement and school administration. *Educational Evaluation and Policy Analysis*, 40(3).

3 Levin, H., & Belfield, C. R. (2009). *Some economic consequences of improving mathematics performance*. SRI International

4 Berne, R., & Stiefel, L. (1984). *The measurement of equity in school finance: Conceptual, methodological, and empirical dimensions*. Johns Hopkins University Press.

