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Pursuing Educational Equity at San Francisco Unified School District

On an afternoon in April 2004, Superintendent Arlene Ackerman hung up the phone with California Secretary of Education Richard Riordan feeling both excited and challenged. The state was considering mandating that school districts implement a weighted student formula (WSF) to allocate financial resources to individual schools, and move decision-making about those resources from central offices to schools. Knowing that Ackerman had implemented a system at San Francisco Unified School District (SFUSD) that accomplished both of those objectives, Riordan had asked her to brief his staff on what SFUSD had learned through three years of implementation.

Ackerman and her staff had already begun asking themselves the same questions. Was the WSF aligned with SFUSD's strategy to achieve educational equity? What capacity had the district developed, or did it still need to develop, to successfully shift to site-based decision making? How should SFUSD resolve the challenges and tensions that had emerged in the first three years of implementation? And perhaps most intriguing of all, could SFUSD connect the implementation of the WSF to improved student achievement data? Ackerman thought quietly for a few moments, and then walked out of her office to find key members of her team to tell them about Riordan's request.

Background and Context

Demographics, Finances, and Student Achievement

Founded in 1851 as the first public school district in California, San Francisco Unified School District (SFUSD) was the fifth largest in the state, serving 57,805 students in 116 schools with 3292 classroom teachers by SY03[1]. The diverse student body was 31% Chinese, 21% Latino, 15% African-American, 10% White, 7% Filipino, and 16% other non-white minorities. Thirty percent of total students were English language learners, and 56% were eligible for free or reduced price lunch. Special education (SPED) students represented 11% and gifted and talented students accounted for 12% of total students.

[1] SY denotes "school year". For example, SY03 indicates the school year spanning fall 2002 through spring 2003.

Stacey Childress and Robert Peterkin wrote this case. PELP cases are developed solely as the basis for class discussion. Cases are not intended to serve as endorsements, sources of primary data, or illustrations of effective or ineffective management.

In terms of teacher demographics, 55% were White, 14% Chinese, 10% Latino, 8% African-American, and 13% other non-white minorities. The United Educators of San Francisco (UESF) historically played a collaborative role with district management, but with the election of new leadership in June 2003, shifted to a stance that union leadership described as "cooperative rather than collaborative."

SFUSD's $660 million budget was independent from the city of San Francisco's budget. In California, districts operated under a state revenue limit, which attempted to equalize per student spending across districts. If funding through the local tax base went up, the state's contribution was reduced to offset the increase and preserve the limit. Local sources accounted for 93% of SFUSD's revenue limit funding. From 2001 – 2003, expenses increased 11%, while revenues grew only 4%. (**Exhibit 1** contains district financial information)

In aggregate, SFUSD students performed better in absolute terms than their counterparts in other urban districts in California on the California Standards Test, but African American and Latino students were overrepresented in the bottom two quartiles. Additionally, as in other urban districts in the U.S., the total number of students scoring in the bottom two quartiles in reading and math on the SAT-9, a national norm-referenced test, was considered too high by district stakeholders.[2] (**Exhibit 2** contains student achievement data)

Governance

A seven-member elected board of education was responsible for district-level governance. Members, called commissioners, were elected at-large to serve four-year terms, with no term limits. The board elected a chair from among themselves. A well-regarded middle school principal noted that the board was subject to the same "interest-based politics" as other elected bodies in San Francisco. Commissioners often saw themselves as representatives of specific community groups or special interests that had supported their candidacy, rather than as at–large members with a citywide perspective. One commissioner observed that some candidates for the board of education saw the body as a stepping-stone to the board of supervisors, San Francisco's powerful city council.

The board was responsible for establishing educational goals and standards, approving curriculum, and approving the overall budget and expenditures. They also approved all union contracts. The board appointed a superintendent of schools to manage the day-to-day administration of all district functions, including the hiring of all personnel. Between 2000 and 2004, the board shifted from nearly unanimous support for Ackerman's proposals, to a 4-3 split in favor of most resolutions proposed by the superintendent and district staff.

Each school had a locally elected school site council (SSC) that shared decision-making with the principal regarding the use of state and federal grants. Elections were held every two years. SSCs at the elementary school level included the principal and elected parents, teachers, and school staff. Middle and high school SSCs also included elected students. These groups ranged from 12 to 25 members, depending on the size of the school, and state law and district policy mandated their composition and responsibilities.[3] The engagement and capacity of SSCs varied across the district.

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[2] The California Standards Test measures student performance against CA content standards in language arts, mathematics, science, and history/social science. Until SY 02, SFUSD students in grades 2-11 took the SAT-9 in reading and math, a norm referenced exam. In SY 03, California replaced the SAT-9 with the CAT-6, a customized version of the SAT-9.

[3] For more information on composition and responsibilities of SFUSD School Site Councils, see "The SFUSD School Site Handbook", revised September 2002. http://portal.sfusd.edu/template/default.cfm?page=school_info.councils.resources

Superintendent Arlene Ackerman and "Excellence for All"

In summer 2000, the board of education appointed Dr. Arlene Ackerman superintendent of schools following a nation-wide search. With over 30 years of experience in public education as a teacher, principal and deputy superintendent in numerous districts, Ackerman had most recently been the superintendent of the public school system in Washington, D.C. A graduate of Harvard's doctoral program for urban superintendents, Ackerman quickly articulated five core beliefs intended to guide the work of all stakeholders on behalf of SFUSD students: 1) Children come first; 2) Parents are our partners; 3) Victory is in the classroom; 4) Leadership and accountability are the keys to our success; and 5) It takes the entire community to ensure the success of all students.

Ackerman immediately faced a volatile issue regarding a series of desegregation suits and countersuits that had begun in 1983 with *San Francisco NAACP v. SFUSD,* and continued in 1990 with *Ho v. SFUSD*. As a result, the district operated under a consent decree, managed by a federal judge, which required SFUSD to meet educational equity targets for all students in the district. In 1999, before Ackerman's arrival, a consent decree advisory committee issued a report highlighting severe deficiencies in the district's progress regarding these targets. After her arrival, Ackerman appointed four committees, including an educational equity committee, to explore the findings of the report and make recommendations. The committees included members from SFUSD central and school staff, parents, board members, community leaders, and union leadership.

The educational equity committee found that by 2000, the achievement gap between African-American and Latino students and their white and Chinese counterparts was widening. After controlling for student and school characteristics in 10 years of standardized test data, the committee discovered that African-American and Latino students as a group scored lower than other SFUSD ethnic groups, regardless of poverty or other factors. For African-American students, the achievement gap widened in the upper grades, indicating that these students did comparatively worse the longer they remained in school. In the early grades, non-poor African-American and Latino students scored higher than poor white and Chinese students in some years, but by seventh grade, poor and non-poor African-American and Latino students dropped below poor white and Chinese students. Many stakeholders connected these findings to the consent decree advisory committee's 1999 assertion that substantial numbers of SFUSD teachers and administrators had lower expectations for African-American and Latino students, and that some schools used a "dumbed-down" curriculum for these students. The committee put forth recommendations to address these findings, which were incorporated into a district-wide strategy for improvement.

Historically, district leadership had viewed the consent decree as a constraint, but Ackerman and her team decided to align their district-wide improvement strategy with the decree's requirements, and developed a five-year plan dubbed "Excellence for All". Over 3000 teachers, parents and other community members attended public input sessions and school meetings to discuss the plan, and 2500 people completed an open-ended form requesting feedback on the plan. The input was incorporated into the final version of "Excellence for All".

"Excellence for All" had three main elements: a focus on academic achievement for all students; the equitable allocation of district resources; and accountability for results. The academic achievement element included professional development for teachers and principals in instructional strategies and the use of data, a focus on literacy in all grades, and increased expectations for all learners. The plan included timetables for implementation of the various components. As one K-8 principal described, ""Excellence for All" is goal oriented. Kids enter the system at a variety of performance levels, but the plan's clear targets help us focus attention on underperforming students."

After obtaining unanimous board approval in April 2001, Ackerman submitted "Excellence for All" to the federal judge monitoring the consent decree. The judge approved the 231-page document as SFUSD's plan to meet the desegregation requirements of the consent decree, and implementation of "Excellence for All" became a legal requirement. (**Exhibit 3** includes "Excellence for All" goals.)

Executing a Strategy to Achieve Equity

In order to execute "Excellence for All", Ackerman and her team pursued a set of actions to meet the objectives of improving achievement for all students, allocating resources equitably, and instilling accountability for results. These actions included: giving parents a choice about where their children attended school; creating classrooms all over the city that represented the diversity of the entire student population and in which teachers had high expectations for all learners; and placing decisions about and accountability for instructional programs and the resources to support them in the hands of school communities.

Student Assignment and the Diversity Index

Historically, geographic boundaries around each of the city's schools dictated student assignment. In 2001, SFUSD data suggested middle class and affluent neighborhood schools had challenging curriculum programs, and that the number of seats available in these schools was greater than the number of children who lived in the surrounding neighborhoods. By contrast, schools in low-income neighborhoods had fewer seats available than students, dramatically lowered teacher expectations for African-American and Latino students, and a dearth of honors and advanced placement courses. "Excellence for All" committed the district to providing equitable access to schools with academically challenging programs, as well as improving the quality of deficient schools.

In order to meet the requirements of the consent decree, SFUSD could not use race as a factor in assigning students to schools. A local business leader framed the issue as "a broader question for the city. San Francisco's diversity is a great asset. But we're at a crucial time in defining what a truly great diverse American city can be, and how we educate our kids is an important component of that definition". In early 2001, Ackerman convened a task force comprised of representatives of various stakeholder groups in SFUSD and the city to develop a method to give parents choice and to balance the diversity of the city's schools. Over the course of several months, the task force created a new "educational placement" process. The process was implemented in SY02 to place kindergarteners in elementary schools, 6th graders in middle schools, and 9th graders in high schools.

The process allowed parents to rank up to five of the district's schools as assignment preferences for their children.[4] As mandated by state law, SFUSD posted on its website an annual school accountability report card (SARC) for every district school. SARCs included information about the academic program, student and teacher demographics, and test score data by grade for each school. Parents were encouraged to use SARCs to inform their preferences. Additionally, SFUSD ran an annual fair at which principals and their teams set up booths displaying the distinctive characteristics of their schools, and interacted with parents seeking information. Parental preference and student residency were then used as key factors in the assignment process. The task force also created a

[4] Lowell High School and School of the Arts were exempt from the assignment process. Students applied for admission to Lowell and acceptance was based on prior academic achievement, performance on standardized tests, and in some cases qualitative factors such as overcoming hardships. For admission to School of the Arts, students were required to audition for space in their specific area of interest.

diversity index for use in creating schools with balanced profiles. Based on research regarding social predictors of academic performance, the diversity index included six non-race factors to describe students: socioeconomic status, academic achievement status, mother's educational background, language proficiency status, home language, and academic performance rank of the sending school.

SFUSD partnered with WestEd, a nonprofit research and service agency, to develop a software program that used parental preference, student residency, and the diversity index to place students in schools. The system included a parameter that allowed siblings in the same grade range to be placed in the same school. The educational placement process was not without critics. Some parents in the Chinese community believed their children disproportionately experienced the negative effects of the new system by being forced to attend schools outside of their neighborhoods. Other detractors claimed that schools largely remained homogenous reflections of the surrounding neighborhoods, whether Chinese, Latino, or African-American. However, the system provided an element of choice to parents and achieved a more balanced diversity profile in many of the district's schools. In SY03, 63% of all students received their first choice, and 83% were placed in one of their preferred schools. (**Exhibit 4** provides more detail on the diversity index and assignment process).

Rethinking Resources

Historically, SFUSD schools received resources through a staffing ratios model. In this method, the central office allocated resources to schools in the form of teachers, counselors, librarians, and administrators based on the number of students enrolled at each site. Additionally, the schools received a small budget for supplies. As a result, the central office controlled the vast majority of spending at the school level. With the implementation of Excellence for All and the new educational placement system, Ackerman and her team re-evaluated the existing resource allocation model. Having been involved in the implementation of WSFs in two of her previous districts, Seattle and Washington, D.C., she decided to explore the method for SFUSD. Ackerman explained:

> As an educator, my first concern was to connect resource allocation to academic issues – resources should support increased student achievement. Next, we needed to address equity and transparency in the distribution of resources. Often, adults in high performing schools are more adept at navigating the system than adults in low performing schools. This can lead to resource disparities between schools. And finally, more money doesn't necessarily lead to higher achievement levels. We needed to introduce some accountability for producing results at all levels of the district. With a weighted student formula, the dollars follow the students and adults at the school level decide how to spend those dollars based on what's best for that particular group of kids. The central office provides data, supports schools, and monitors outcomes, so everyone is involved, and everyone is accountable.

Myong Leigh, chief of policy and planning, chaired a committee created to make recommendations to Ackerman for implementing a WSF. Committee members visited Seattle and Sacramento to learn from their WSF implementations. They also studied the District of Columbia's WSF -- Leigh had been on Ackerman's staff in D.C. and understood some of the advantages and challenges. These districts each varied in the mechanics of their WSF, but all gave schools the responsibility for managing their own budgets.

Nancy Waymack, who had played a key role with Ackerman and Leigh in implementing the WSF in D.C., later joined SFUSD's policy and planning division. She observed, "We started out looking at WSF as a resource allocation tool, but it quickly took on implications that were much more ambitious, including involving school communities more actively in the academic planning process." Leigh pointed out that previously "the school site academic plans had been seen primarily as compliance

documents required for receiving state and federal funds. By linking resource allocation decisions through the WSF to site level decision making about the academic plans, the district could transform these into living documents, created by school site councils using student data to make decisions about instructional programs and resources."

Along with Leigh and Waymack, the WSF committee involved over 40 people between 2000 and 2004, including teachers, parents, union leadership, principals, and central office staff. They met twice each week over four months beginning in late 2000 and weekly over another four months in the following year, to synthesize information about previous WSF implementations and design a system that fit SFUSD. The committee developed a set of weights for various student characteristics and developed recommendations about which resource decisions should remain at the central office and which should be moved to schools. (See **Exhibit 5** for allocation of decision rights)

In the spring of 2001, SFUSD launched a WSF pilot with 27 volunteer schools, and then incorporated lessons learned from that experiment into a revised mechanism. In spring 2002, with unanimous approval from the board of education, SFUSD rolled out the WSF as the primary resource allocation mechanism for all schools. During this process, schools linked their budgets to their academic plans for SY03. By SY04, the second full year of implementation, approximately 60% of the district's unrestricted general funds were allocated to schools through the WSF.

Implementing the Weighted Student Formula and Site-Based Budgeting

The new WSF system included a complex process to calculate school revenues, as well as a new academic planning process that required principals to work with their SSCs to link resources to specific elements of their academic plans. The state mandated that the SSCs be involved in shared decision-making, but only with respect to state and federal grant funds. Because of this significant shift in the responsibilities of school staff and SSCs, the central office created and delivered professional development to prepare them for their new duties.

Strengthening Capacity

SFUSD's department of research, planning, and evaluation developed and delivered training to strengthen the ability of SSCs, principals, and teachers to use data to develop academic plans that addressed the specific needs of their students. The training included analyzing current performance gaps at the school level; developing a plan that included specific actions to address the gaps and the alignment of resources with actions; implementing the plan throughout the school year; monitoring the implementation; and evaluating progress toward goals and student achievement at the end of each year. Principals and SSC members also received training from the central office on the WSF and on the budgeting process. Training for new and returning SSC members took place for half a day at the beginning of each school year, and again in January.

Five assistant superintendents for instructional support and operations (ISOs) supported the schools. Each ISO was accountable for a group of schools, and ensured that principals received training and technical assistance they needed to manage their SSC relationships and facilitate the academic planning and budgeting process. As one ISO pointed out, "The WSF brings new challenges to principals as instructional leaders. We need to figure out how to support them not only with training, but with systems." One middle school principal noted, "With the WSF and site-based budgeting, my role has changed dramatically, and the skills I need to manage my SSC and make

resource decisions are new for me. I'm excited, but also a bit overwhelmed. It's not clear which of my old duties I should let go of in order to make room for the new ones."

School Revenues: WSF and other allocation pools

The central office determined revenue levels by forecasting student enrollment for each school. The WSF allocation was based on these forecasts and had a number of components: a foundation amount for each school; a specific dollar amount for each enrolled student called the base funding factor; an additional dollar amount for students with specific characteristics; and a loss or gain limit. Additionally, schools received lump sum allocations for restricted and categorical funds.

Forecasting Enrollment Each January**,** using demographic and enrollment trend data, the central office developed a headcount projection for each school, which included specific counts for the types of students that were expected to enroll in the following academic year. The central office made adjustments in its forecasting procedures each year in order to increase the accuracy of projections. Ten days after the beginning of school, the actual enrollment at each school determined whether the revenue allocations would be adjusted. If the adjustment based on actual enrollment was less than $15,000 in either direction, no change to the budget was made.

Foundation Amount The foundation amount was designed to ensure that every school had the minimum funding necessary to pay the average salary and benefits of a principal and a clerk at the elementary, middle, or secondary school level. A school site could choose to spend more to upgrade the clerk position to a senior clerk or secretary with funds allocated through other parts of the weighted student formula.

Base Funding Factor The base funding factor specified a uniform dollar amount to be allocated to schools for every enrolled student. Base funding was premised on the notion that it cost a specific dollar amount to educate each child in the district before accounting for grade level, socioeconomic status, or special learning needs. In SY04, the base funding factor was $2518.78 per student.

Weights Additional amounts, determined by a multiplier to the base funding factor, were calculated to determine the total WSF for each student. Students in grades K-3 and 6-12, English language learners, students of low socio-economic status, and those requiring special education services qualified for additional weights. Students in the early grades were weighted due to state-mandated class size requirements. In the upper grades, the weights represented the increased cost of delivering instruction across a number of subject areas. For English language learners (ELL), the weights varied depending on proficiency and grade-level. The weights for special education (SPED) students varied based on the severity of the student's need and were intended to cover materials and professional development for teachers. Special education teachers were still funded and allocated to schools by the central office based on SPED enrollment. The weight for socio-economic status was intended to provide for the additional services required to educate children in poverty, and was determined by a student's eligibility for free or reduced price lunch. Table 1 below displays the WSF factors for SY04. (See **Exhibit 6** for WSF allocations for sample student profiles)

Table 1: SFUSD Weighted Student Formula Factors, SY04

Grade Level	Base Weight	ELL Long-Term Non-Redesignated	ELL Beginning/ Intermediate	ELL Advanced/ Transitional	Socio-Economic Status	SPED Resource Specialist	SPED Non-Severe	SPED Severe
K	1.3300	-	0.0794	0.0615	0.0900	0.0097	0.0179	0.0315
1-3	1.3300	-	0.0794	0.0615	0.0900	0.0097	0.0179	0.0315
4-5	1.0000	-	0.0794	0.0615	0.0900	0.0097	0.0179	0.0315
6-8	1.1402	0.0953	0.0953	0.0615	0.0900	0.0097	0.0189	0.0328
9-12	1.1900	0.0953	0.2104	0.0615	0.0900	0.0097	0.0189	0.0328

Loss/Gain Limit SFUSD established a loss limit of $25 per student and a gain limit of $300 per student so that no school was disproportionately affected by the WSF. If a school's total allocation in SY03 was decreased by more than $25 per student from SY02, the district made up the difference in the funding allocation. If the school's total allocation in SY03 was increased by more than $300 per student over the SY02 level, those funds were re-allocated to the pool available to other schools.

Other Allocation Pools Additional dollar-denominated allocations to schools came from federal funds such as Title I[5], restricted funds from the state to carry out certain programs, and money allocated to SFUSD to meet the conditions of the consent decree to end desegregation. These allocations were added to a school's revenue number on top of the funding level determined by the weighted student formula. (See **Exhibit 7** for representative school revenue allocations for SY04)

STAR Schools program The STAR (Students and Teachers Achieving Results) program was developed to provide additional resources to underperforming schools, as defined by specific state or local criteria. Resources came in the form of a central allocation of additional school personnel, district support, and instructional resources, rather than dollar allocations to school budgets. In SY03, 43 sites were designated as STAR schools and received resources as part of the program.

School Expenses: The planning and budgeting process

In January of each year principals and their school site councils began developing academic plans and budgets for the next year using the central office revenue projections. As one SSC parent described, "Our academic plan used to be a laundry list of every program and activity we had ever done, including ones we probably wouldn't do again. There was something for everyone. With the WSF process, we had to develop a new discipline to prioritize and explain only those activities we would actually pursue, because we had to link funding to everything mentioned in the plan."

SSCs were encouraged to examine disaggregated student performance data provided by the central office to evaluate what was working from the previous year and to identify gaps that needed attention going forward[6]. The SSC then set the school's priorities for the coming year, in line with district-level priorities. Each priority had a narrow objective statement that set forth the guidelines against which performance would be evaluated. The SSC then worked collaboratively with the principal and faculty to select programs and activities to meet these objectives by addressing the needs of students. The central office provided guidance on research-based approaches for improving

[5] Title I is a federal program authorized under title I, part A, of the Elementary and Secondary Education Act of 1965 (as amended by the No Child Left Behind Act of 2001) targeted to underperforming students at high-poverty schools.

[6] Data included individual, group and school level data such as SAT-9 scores, state Academic Performance Index information, and standards-based assessments. Schools were encouraged to develop their own tools for tracking progress in the classroom.

student achievement. One elementary school principal observed, "We always had to interact with our staffs, our SSCs and the central office, but the WSF and academic planning process provide a focal point for those conversations that has been useful. Now we are focused on what our kids need and how to give it to them. The academic plan wasn't all that useful before, now it's a real guide for running the school, and it involves more people in the accountability for our results."

After developing the academic plan, the SSC and principal determined the staffing level necessary to implement the plan. Although the SSC did not have hiring authority (principals hired school staff, and the central office hired principals), they did influence the staffing level and mix through the budgeting process. After requirements for teacher/student ratios and other contractual obligations were met, principals and the SSCs had discretion about how many and what types of teachers were best for implementing the instructional program. Schools used average teacher salaries set by the central office to develop their salary and benefits budgets. Other non-personnel expenses were forecast based on historical costs of items such as materials and supplies using the districts buying power with approved vendors. (See **Exhibit 8** for school budgets)

Principals submitted their academic plans and budgets to their ISOs in early March. The ISO checked the plans for basic elements, and distributed them to a cross-functional central office review team. These teams included the ISO and staff members from human resources, the budget office, research, planning and evaluation, and the chief academic officer's staff. In late March and early April, principals met with these teams to discuss their plans and receive guidance on any changes required. Waymack remembered, "Principals were initially anxious about the academic plan review, but found it helpful. The conversations were about data and how their resources were aligned with their plans. The process also elevated the understanding and awareness of central office staff about what goes on in schools, particularly those not directly involved in teaching and learning."

Accountability System

Prior to rolling out the WSF, SFUSD implemented an accountability system designed to measure progress against the district's annual priorities (also called The Superintendent's Priorities). The primary objective of the system was to support data-driven decision making by principals and SSCs to improve teaching and learning throughout the district.

Data Collection and Analysis

The district's research, planning, and evaluation department maintained multiple measures of student achievement, including the SAT-9 and CAT-6, student GPAs, SABE and the Brigance Screen[7], and other proficiency tests in various subjects. They also tracked attendance, suspensions, expulsions, retentions, and dropouts. Data was disaggregated by demographic parameters such as gender, ethnicity, socio-economic and English-learner status. Along with longitudinal reports highlighting two- and three-year trends, the department tracked the academic progress of individual students for whom there were multiple years of data. The department analyzed student data by grade-level and by school, but not by classroom or teacher. Schools received annual data for the purposes of developing the academic plan each year, and could also request "data-on-demand" any time during the year in order to inform instructional decisions.

[7] SABE is a norm-referenced Spanish language achievement test, and the Brigance Screen is a criterion-referenced assessment instrument for Kindergarten and Grade 1 to assess student development in key areas identified as indictors for success.

Principal Evaluation System

A principal evaluation system was introduced in SY02. At the beginning of each school year, principals received their site's academic achievement targets and school leadership criteria. Among other things, the school leadership criteria included aligning resources with student learning needs in accordance with the WSF and ensuring a functioning SSC. Each principal was responsible for writing an individual management/leadership (M/L) plan to meet the academic targets and the priorities and activities in the school's academic plan.

Principals submitted these plans, which included requests for specific support necessary from central office departments to accomplish each element, to their ISO by mid-October of each school year. After discussing them with principals, ISOs responded to the M/L plans in writing by the first week of November. By the first week of December, each principal had a conference with their ISO to discuss ongoing progress. Between early January and the end of February the ISO conducted a mid-year evaluation based on the plan's school leadership components and provided feedback.

By April 1st, principals were required to provide a progress report on reaching the academic targets and meeting the leadership components. By mid-August the ISO conducted the final evaluation of each principal's performance on the student achievement targets and school leadership components, and met with the principal to discuss the final evaluation. At all evaluation points, student achievement and other school performance data was analyzed and discussed in the context of the school's academic plan and the principal's M/L plan. After two successive one-year contracts, principal contracts were renewable three years at a time. Principals who underperformed after receiving feedback through the principal evaluation process faced the possibility of non-renewal at the end of their contract periods.

One high school principal observed that the evaluation system seemed to be applied with varying quality across the district, both because of the differing abilities of individual principals to create management/leadership plans that were useful, and differences in the rigor applied to the evaluation by the ISOs. Even so, one board member lamented the fact that the community was largely unaware of the significant step SFUSD had taken with the principal evaluation system, and therefore didn't give district leadership the credit they deserved for instilling accountability.

Reflections: Stakeholder Perspectives on Implementation

Entering the academic planning and budgeting process for SY05, SFUSD had made a number of process improvements, student achievement was increasing overall, and the achievement gap had narrowed slightly. However, many stakeholders and district leaders articulated a number of challenges that remained.

Decision Rights An elementary school principal who had been with SFUSD for four years explained, "My first year in the district we had the staffing ratios model, so I didn't have to think much about how resources linked to my academic plan. Then I participated in the WSF pilot, which was a real eye-opener. I worked hard at building trust with my staff and the community, and helping them understand how the process worked. The first full year of WSF we had more money than ever before, so it was terrific to engage our community in decisions about how to spend it. In the second and third years, we experienced significant decreases in funding and had to make cuts, but at least the district wasn't doing the cuts. We were."

A middle school teacher on her school's SSC framed it differently: "SSCs are really a way to take the heat off the district and push it to the school people. One central office person said to us last year,

'This is really tough; I'm glad it's you making the cuts and not me.' That really sums up the problem. The SSCs get to decide, but decide what? Which colleagues to cut?"

A senior union leader observed, "We need clarity about the roles of the SSC and the central office. On many issues, the SSC can decide, but the central office can overrule the decision. It's not clear what SSCs are really responsible for and what is just window dressing."

Ackerman agreed that more work was needed. "It's a different kind of central office when schools are making the decisions. We have to move from a compliance and 'no' orientation, to a support and 'how can I help?' orientation. Most departments have changed, but we still have work to do. We are holding people at central accountable for old-style behavior, and calling it when we see it."

A senior teacher described a different situation: "Our building had a very teacher-centric culture; the faculty had much more power than the principal. It's been hard for our faculty to adjust to the idea of an elected SSC that includes parents and non-teaching staff, along with a few teachers and the principal, making important decisions about instructional issues."

Matthew Kelemen, special assistant to the superintendent, was responsible for supporting the SSCs. He acknowledged that difficult decisions could cause significant tensions at schools. District policy provided for a resolution process if school level parties were unable to reach consensus -- the chief academic officer, Elois Brooks, could convene a dispute resolution committee to make the decision. Kelemen noted, however, that quickly enforcing the formal district policy could have longer-term negative consequences for the academic planning and budgeting process. When site decision-makers faced difficulty, rather than abandoning the process and imposing a top-down decision, Kelemen and the appropriate ISO worked with them to reach agreement. As of spring 2004, schools had been able to reach decisions without intervention from the chief academic officer.

School Site Councils An elementary school principal who served on the WSF committee identified a viable, functioning, school site council as the key to making the WSF work as it was intended. A central office employee expressed concern about a complex system like the WSF being so reliant on the effectiveness of a complex structure like the SSC.

One parent noted that in schools with high numbers of "heavily weighted" kids, the parents of the students with the most resources "attached" to them seldom served on SSCs, adding that "principals need significant professional development on how to build and nurture an SSC, and how to build true participation and consensus among members."

A teachers' union leader expressed concern about faculty department chairs serving on school site councils, noting that in situations like this, "the formal decision makers are also taking on a role in a process that is supposed to increase democratic participation in decision making at schools." A middle school teacher observed that because of budget cuts, teachers in his building were running for SSC positions as a defensive move to protect their own programs. "The resource constraints sometimes pit people against people and program against program in our building. It's probably better overall that we make the decision at the school rather than having it come down from central, but nevertheless, it has caused real tension in our school."

A high school parent suggested that parents could be effective in resolving tensions between school employees, but thought "parents need serious training about how to bring up issues in SSC meetings that principals or teachers might disagree with. Many parents feel at a disadvantage because they aren't educators, so they'll defer to the principal or teachers even if they disagree with them." A teacher noted that detailed conversations of his SSC about instructional strategies to close the achievement gap were "a bit heady" for most parents, and wondered how feasible it was to expect them to fully understand issues that professional teachers spent their careers trying to master.

Another parent observed that it seemed wildly inefficient for each SSC to be dealing with similar issues in isolation, noting "we have over 100 groups in the district reinventing the wheel in a very tough budget environment. There must be common solutions that would work at many schools."

Average v. Actual Teacher Salaries Using average teacher salaries for budgeting had benefits and drawbacks. The WSF committee explained, "Using average costs eliminates incentives to hire less expensive, less experienced teachers by allowing schools to hire and retain veteran teachers without suffering a financial penalty. Using actual costs would create incentives for schools to hire inexperienced teachers and staff members. Principals and SSCs are responsible for hiring individuals based on the needs of students, not based on budgetary implications."[8]

Supporters of using actual salaries felt that low-performing schools suffered under the policy because they had a bulk of less expensive teachers. By using actual salaries for budgeting, these schools could allocate the reclaimed money to additional staff or materials. Waymack performed an analysis in March 2004 to better understand teacher experience and average salary by school site. The analysis revealed that average salaries in STAR K-8 and middle schools were actually $1000 to $1500 higher than those in non-STAR schools. However, the average salary in STAR elementary schools was $2200 less than in non-STAR elementary schools, and $4100 less in STAR high schools than in their non-STAR counterparts.

Waymack described the dilemma, "We know that some schools have higher proportions of less expensive teachers, but using actual instead of average salaries in these schools usually wouldn't free up enough money to pay for additional staff. The WSF highlights the problem of high concentrations of less experienced teachers in our low-performing schools. In the old staffing ratios model, the problem was the same but less transparent. The solution doesn't necessarily lie with changed WSF policies."

Resource Constraints As one principal recalled, "In the first year of WSF, there was more money to decide about. In the last two years, because of the state funding crisis, we've had less money to work with each year." Salaries and benefits represented approximately 97% of school level budgets, both before and after the implementation of the WSF. However with rising health care costs, benefits expenses increased from 16% to 22% of school spending from SY02 to SY04, without a requisite increase in revenue. Reductions were required in other areas to make up the difference. In some schools, SSCs "consolidated" teachers in order to stay within their budget targets. Consolidation meant reducing the school's headcount, and selecting which teacher(s) would be removed in light of the academic plan priorities and seniority as dictated by the collective bargaining agreement. For example, in planning for SY05, a middle school SSC faced with cutting one teaching position had a protracted debate about whether to consolidate a popular science teacher or a computer teacher. In the end, they agreed that because the computer teacher worked across multiple subject areas, the position was more critical to the academic plan, even though the science teacher was highly capable and well regarded by students, parents, and teachers. Consolidated teachers were available for assignment to other schools.

In a few under-enrolled schools, the foundation amount combined with a WSF allocation based on so few students was barely enough to run the school. The WSF committee was revisiting the policy of funding these small schools, but an option also existed to close schools that were unable to attract enough students through the educational placement system to be financially viable.

Culture of Accountability Acknowledging that the site-based budgeting movement had a mixed track record in public education, Ackerman described the kind of culture necessary at the

[8] Excerpted from WSF committee meeting handout dated December 12, 2002, internal SFUSD document.

central office and schools to make the WSF more than simply a decentralized budgeting mechanism. "Our version of the WSF doesn't simply give principals more autonomy. That's certainly an important element of it, but it's much more than that. The money is tied to a plan that is tied to goals that are measured by outcomes for which *everybody* is accountable, because *everybody* is involved: teachers, parents, principals, students, central office staff, and board members."

At the school level, moving to a shared accountability culture required new behaviors for principals, SSC members, and teachers. One principal described his SSC: "For years our SSC was largely perfunctory – I needed them to sign off on things, but they didn't make the calls, so they didn't feel responsible for my decisions. We're making progress, but it's difficult. " One district supporter observed, "My sense is that teachers remain resistant to the idea of being individually accountable for the performance of their students; until we figure out how to change this, I'm not sure we can ever fully build a culture of accountability. How can you hold the principal accountable for the results of a group of school staff who aren't accountable for their own piece of the problem?"

A middle school principal felt that while progress had been made in changing the old control and compliance culture at the central office, more work needed to be done in holding central staff accountable for supporting schools. "I wish there was more consistency across all the headquarters departments – some are much more responsive and supportive than others. I can always go to my ISO if I have a request that disappears into the system, or if I receive conflicting messages or competing demands from central folks, but I'd rather spend my time with my ISO on more productive conversations about teaching and learning."

Looking Forward

As Ackerman and her team considered the questions they needed to answer to brief Secretary Riordan's staff, they realized they had accomplished much and could add to the statewide conversation about a WSF and site-based budgeting. But they also realized they still had significant work ahead to build the organizational capacity required to execute at all levels in ways that would contribute to increased achievement for all SFUSD students. Ackerman knew one thing for certain: "The WSF isn't a silver bullet – the solution is much more complex than that."

Exhibit 1 SFUSD Financial Statements, SY01 – SY03

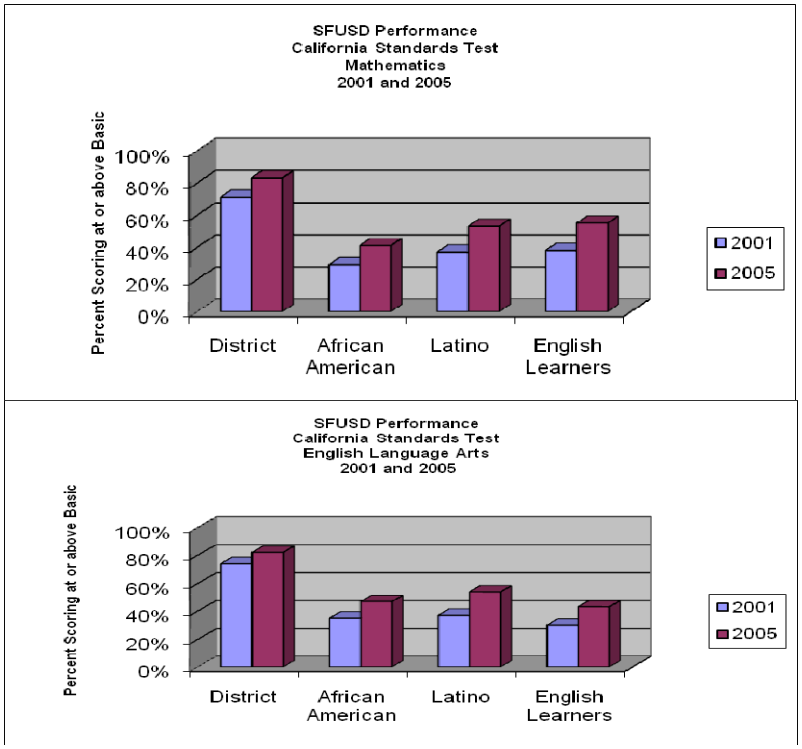
	SY 03	SY 02	SY 01
REVENUES			
Revenue Limit Sources (1)	276,754,268	276,410,133	261,350,108
Federal Sources	76,352,578	73,293,413	45,200,857
Other State Sources (categorical)	182,142,791	178,520,965	197,459,348
Other Local Sources (categorical)	83,606,036	89,934,369	88,609,431
Total Revenues	618,855,673	618,158,880	592,619,744
EXPENDITURES (2)			
Current			
Instruction	327,087,582	328,234,715	303,868,564
Instruction related activities:			
Supervision of instruction	35,831,336	33,080,004	30,624,346
Instructional library, media, technology	5,853,040	4,664,772	4,318,488
School site administration	38,500,312	34,738,432	32,159,662
Pupil Services:			
Transportation	19,531,111	19,148,102	17,726,663
Food services	17,410,306	18,071,309	16,729,805
Other	25,919,750	22,150,171	20,505,877
General Administration			
Data processing	8,152,244	4,795,947	4,439,925
All other G&A	57,523,882	52,297,465	48,415,219
Plant services	43,799,772	36,464,847	33,757,918
Facility acquisition and construction	34,419,948	19,241,307	26,674,763
Ancilliary services	1,950,728	16,841,880	15,591,641
Community services	14,164	37,768	34,964
Other (outgo)	35,245,061	22,182,869	27,982,010
Debt Service			
Principal	3,863,206	3,762,721	3,912,337
Interest and other	4,587,272	5,097,066	3,605,233
Total Expenditures	659,689,714	620,809,375	590,347,415
Deficiency of revenues over expenditures	(40,834,041)	(2,650,495)	2,272,329
OTHER FINANCING SOURCES (USES)			
Transfers in	27,886,693	16,805,060	9,451,062
Other sources	248,844	3,672,907	2,600,000
Transfers out	(26,652,585)	(16,805,060)	(14,345,453)
Other uses	--	(104,410)	--
NET FINANCING SOURCES (USES)	1,482,952	3,568,497	(2,294,391)
NET CHANGE IN FUND BALANCES	(39,351,089)	918,002	(22,062)
Fund Balance -- Beginning	87,457,745	86,607,925	93,392,844
Prior Period Adjustments	(689,958)	(68,182)	(840,803)
Equity Transfers	3,714,731	--	--
Fund Balance -- Ending	51,131,429	87,457,745	92,529,979

Source: SFUSD Annual Financial Reports (June 30, 2003, June 30, 2002, and June 30, 2001), and case writer analysis.

Notes: (1) The California Legislature sets revenue limits for each CA district in an effort to equalize funding per pupil across districts. If local property tax revenues rise within a district, the increase goes toward the district's revenue limit. The state's share is then reduced by the same amount. Local sources account for 93% of SFUSD's revenue limit total. Categorical aid is granted in addition to the revenue limit funds.

(2) In SY01, expenditures were categorized differently in SFUSD annual report than subsequent years. Except for Facility acquisition and construction, Debt service, and Transfers, all costs are estimated across line items by using the same percent to total allocation of these costs from SY02.

Exhibit 2 Students scoring at or above basic on the California Standards Test, SY01 – SY05



	California Standards Test (CST) Change in Percent of Students at or above Basic, STAR Schools							
Grade Level	2001 to 2005 CST Language Arts (A)				2002 to 2005 CST Mathematics (A, B)			
	District	AA	L	ELL	District	AA	L	ELL
2	8%	7%	**17%**	**10%**	13%	**20%**	**17%**	**17%**
3	5%	**7%**	**14%**	**6%**	14%	**17%**	**27%**	**25%**
4	9%	**12%**	**19%**	**18%**	15%	**19%**	**23%**	**23%**
5	9%	**21%**	**17%**	**14%**	11%	6%	**17%**	**23%**
6	10%	9%	**14%**	5%	6%	0%	4%	5%
7	14%	**21%**	**19%**	**16%**	10%	4%	9%	**12%**
8	12%	9%	**15%**	**18%**				
9	-1%	**15%**	**19%**	**15%**				
10	1%	**3%**	**16%**	**8%**				
11	7%	5%	**20%**	**17%**				

Note: (A) Bold figures indicate higher growth than the district aggregate. (B) Math CST was first administered in 2002. Math exams become subject-specific beginning in 8th grade

Source: SFUSD Internal Documents and California Department of Education

Exhibit 3 Excerpted Goals from "Excellence for All" Five-year plan

OVERVIEW OF EDUCATIONAL EQUITY GOALS

1. Increase the academic achievement of students of all races and ethnicities, and of English Language Learner and non-English Language Learner status, District-wide and for each school, and narrow the existing academic achievement gap between students of different races, ethnicities, and English Language Learner status, with this goal to be realized through the establishment of specific growth targets for improved academic achievement at each school, as measured by standardized tests and performance assessments.

2. Increase the enrollment and success of students of all races and ethnicities, and of English Language Learner and non-English Language Learner status, in honors courses, District-wide and for each school, at the middle and high school levels.

3. Increase the number and percentage of students of all races and ethnicities, and of English Language Learner and non-English Language Learner status, taking and completing Advanced Placement (AP) courses, District-wide and at each high school.

4. Increase the number and percentage of students of all races and ethnicities, and of English Language Learner and non-English Language Learner status, taking and earning a 3 or better on AP exams, District-wide and at each high school.

5. Decrease the overrepresentation of students from specific racial/ethnic groups and English Language Learner status in special education programs to the extent practicable by eliminating inappropriate referrals to and placements in such programs, District-wide and at each school.

6. Increase the exit rates for students of all races and ethnicities, and of English Language Learner and non-English Language Learner status, from special education programs, District-wide and at each school.

7. Increase the attendance rates for students of all races and ethnicities, and English Language Learner and non-English Language Learner status, District-wide and at each school, so that the attendance rate for students of each race, ethnicity, and English Language Learner status at every school is at least 98 percent.

8. Decrease the suspension rates for non-expulsionable offenses for students of all races and ethnicities, and of English Language Learner and non-English Language Learner status, District-wide and for each school.

9. Enhance early childhood education so that all children entering kindergarten in SFUSD, regardless of race or ethnicity or of English Language Learner or non-English Language Learner status, will possess the tools and skills necessary to be successful in school.

10. Increase the number and percentage of qualified, diverse teachers, Districtwide and at each school, particularly at targeted schools. Targeted schools are those with a high number or percentage of low-performing students. A qualified, diverse teacher is defined as one who is credentialed and has:

    - classroom experience (3-5 years);
    - content-area expertise;
    - pedagogical expertise; and
    - cultural competencies.

Exhibit 4 Diversity Index and Educational Placement process

Six Diversity Index Factors used to create a student's profile: (answers to these questions are gathered from information provided on the application form and from test score data supplied by the California Department of Education).

- **Socioeconomic Status:** Does the student and/or the student's family participate in any of the following programs: free/reduced lunch, CalWORKS, and/or public housing?
- **Academic Achievement Status:** Incoming Kindergarteners: Did the Student attend preschool? Students entering grades 1-12: Did the student score above or below the thirtieth (30th) percentile on the most recent standardized test of record`?
- **Mother's Educational Background:** Did the student's mother graduate from high school?
- **Language Status:** Is the student fully proficient in English?
- **Home Language:** Is English the student's home language? This is determined by the answers to the language survey questions on the application form.
- **Academic Performance Rank of Sending School:** Is the Academic Performance Index ranking of the student's current school 4 or above? The California Department of Education ranks every public school in California by academic performance, and assigns each school an Academic Performance Index (API). Note: this factor is excluded for Kindergarteners.

How the Diversity Index Works

1. After placement of younger siblings and students with program needs, the index looks at all grades/programs where there are more requests than seats available and counts how many seats are available.

2. The index averages the "profiles" of all the pre-assigned students to create a "base profile" for the program/grade.

3. The index divides the students who have requested the program into two groups: students who live in the schools' attendance area and students who live outside the schools' attendance area.

4. The index selects students living in the attendance area and assigns the student whose profile is the most different from the base profile in the grade/program.

5. The base profile is recalculated, to include the profile of the student just assigned.

6. The index recalculates how many seats remain for assignment, and the process is repeated until students from the attendance area no longer contribute diversity to the base profile or no more seats remain for additional placements.

7. When students from the attendance area no longer contributed to the diversity of the base profile, all students who requested the grade/program are considered for assignment.

8. The index recalculates the base profile by including the profile of the last student assigned and assigns a student whose profile is the most different from the base profile.

9. This process continues until there are no more seats available.

Source: Internal SFUSD document

Exhibit 5 Allocation of budget decision rights

Site Budget Responsibility	Central Office Budget Responsibility
General education teachers	Itinerant staff
Paraprofessionals	Boiler plant engineers salary and overtime
Librarians	Transportation
Counselors	Business services (Accounting, Purchasing)
Building administration – Leadership	Human resources
Building administration – Office Support	Legal services
Parent Liaisons	Athletic coaches
Noontime supervisors (elementary)	Food and nutrition services
Elementary advisors	Telecommunications / telephones
Substitutes – staff development absences	Substitutes – non-staff dev. absences
Extra-duty pay for student activities	Professional development*
ELL school-based teachers and paraprofessionals	Special education school-based teachers and paraprofessionals (except 1-on-1);Special education related service providers
School supplies	Furniture (Purchase, Repair and Maintenance)*
Library books	Equipment (Purchase, Repair and Maintenance)*
Instructional materials and technology utilized by Special Ed, ELL teachers (excluding assistive technology)	Utilities
Extended learning opportunities (after-school and Saturday school programs)	Assistive technology for Special Education
Optional test preparation or other assessment-related activities	Maintenance and grounds-keeping staff and supplies*
Custodial supplies	District-wide assessment
Replacement texts	Custodial staff salaries and overtime*
	Basic texts (new adoptions)
	Language interpreters and translations*
	Capital Outlay – parts and materials*
	Information technology and hardware*
	Security personnel
	STAR schools staff (except Parent Liaisons)

Source: Internal SFUSD document

*These items are provided centrally but sites may supplement these through their WSF funds.

Exhibit 6 Sample WSF allocations by student type, using SY04 WSF guidelines

Base Funding factor	**$2518.78**

Example A: Second grader, free lunch, beginner English language learner

Second grade weight	1.33
ELL beginning weight	.0794
Socio-economic status weight	.090
Total weight factor =	1.4994 **x** $2518.78 = **$ 3776.99 – Total WSF allocation**

Example B: Fifth grader, designated as non-severe special education

Fifth grade weight	1.00
SPED non-severe weight	.0179
Total weight factor =	1.0179 **x** $2518.78 = **$ 2563.87 – Total WSF allocation**

Example C: Seventh grader, long-term English language learner, reduced price lunch

Seventh grade weight	1.1402
ELL long-term weight	.0953
Socio-economic status weight	.090
Total weight factor =	1.3255 **x** $2518.78 = **$ 3338.64 – Total WSF allocation**

Example D: Eleventh grader, no weights

Eleventh grade weight	1.190
Total weight factor =	1.190 **x** $2518.78 = **$ 2997.35 – Total WSF allocation**

Source: Case writer analysis using SFUSD weights from page 8

Exhibit 7 SFUSD Sample School Revenue Allocations, SY05

SCHOOL YEAR 2004-2005
HORACE MANN MIDDLE SCHOOL

	SBCP	SI	SCE	LEP	Title I TAS	Title I SWP	Consent Decree	WSF	WSF SPED	GRAND TOTAL
Salary Total	0		0	0	0	92,674	244,928	1,657,572	0	1,995,174
Benefits Total	0	0	0	0	0	31,976	84,544	560,459		676,979
Extended Service Total	14,367	0	0	0	0	0	6,809	0	0	21,176
Non-Personnel Total	42,282	0	0	0	0	17,038		24,197	3,724	87,241
Proposed Budget Total	56,649	0	0	0	0	141,688	336,281	2,242,228	3,724	2,780,570
Amount Allocated	56,649	0	0	0	0	141,688	336,281	2,242,228	3,724	2,780,570

SCHOOL YEAR 2004-2005
CESAR CHAVEZ ELEMENTARY

	SBCP	SI	SCE	LEP	Title I TAS	Title I SWP	Consent Decree	WSF	WSF SPED	GRAND TOTAL
Salary Total	40,002		0	0	0	61,369	95,026	1,005,887	0	1,202,284
Benefits Total	14,428	0	0	0	0	21,652	33,704	341,220		411,004
Extended Service Total	0	0	0	0	0	0	5,613	4,771	0	10,384
Non-Personnel Total	17,476	0	0	0	0	7,169	23,113	26,370	2,340	76,468
Proposed Budget Total	71,907	0	0	0	0	90,190	157,455	1,378,248	2,340	1,700,140
Amount Allocated	71,907	0	0	0	0	90,190	157,455	1,378,248	2,340	1,700,140

LEGEND: Categorical funds

SBCP – School Based Coordinated Programs (state); **SI** – School Improvement (state); **SCE** – State Compensatory Education;

LEP – Limited English Proficiency (state); **TAS** – Targeted Assistance School (Federal Title I);

SWP – School Wide Program (Federal Title I); **Consent Decree** – court-ordered desegregation funds (state)

Source: SFUSD internal documents

Exhibit 8 SFUSD Sample School Site Budgets, SY05

618 HORACE MANN MIDDLE SCHOOL	2004-05 Budget					Summary Report
Total Allocation 2,780,570	Count	FTE	Salaries	Benefits	Non Personnel	Extended Hours
1101 Classroom Teacher	30	28.8	1,559,894	534,787		
1102 Substitute Teachers Salary	0					4,771
1102 Substitute Teachers Salary4310 Instructional Materials	1				3,724	1,870
1105 Certificated Extended Hourly	0					4,939
1201 Librarians Salaries	1		0	0		
1202 Counselor	2	1.5	81,245	27,854		
1202 Head Counselor	1	1	67,297	21,679		
1301 Assistant Principal Middle Sch	1	1	79,785	24,642		
1301 Principal Middle School	1	1	96,238	28,912		
2101 Instructional Aides Salaries	3	.75	22,859	8,245		
2402 Senior Clerk Typist	3	2	87,856	30,860		
4310 Instructional Materials and Supplies	6				49,038	
4313 Supplies	3				5,197	
5622 Rental/Lease of Equipment	1				18,000	
5803 Consultants	1				2,000	
5811 Field Trips	1				2,000	
5890 Other Services	2				4,282	
5912 Postage	1				3,000	
Totals	58	36.05	1,995,173	676,978	87,241	21,176
Percent of Allocation			72.30%	24.53%	3.16%	0.77%

603 CESAR CHAVEZ ELEMENTARY	2004-05 Budget					Summary Report
Total Allocation 1,700,140	Count	FTE	Salaries	Benefits	Non Personnel	Extended Hours
	0	2.25	0	0		
1101 Classroom Teacher	17	17	920,771	315,673		
1102 Substitute Teachers Salary	0					7,577
1105 Certificated Extended Hourly	0					2,806
1301 Principal Elementary	1	1	89,105	27,390		
2101 Instructional Aides Salaries	7	4.375	133,341	48,094		
2402 Secretary II	1	1	50,174	16,726		
2901 Community Relations Specialist	1	.25	8,893	3,120		
4211 Library Books	1				2,500	
4313 Supplies	1				29,968	
5642 Repair & Maintenance Equipment	1				2,000	
5803 Consultants	4				40,000	
5811 Field Trips	1				2,000	
Totals	35	25.87	1,202,284	411,004	76,468	10,383
Percent of Allocation			71.15%	24.32%	4.53%	.61%
						3/18/2004

Source: SFUSD Internal documents