

FEELING THE PINCH: NAVIGATING FINANCIAL PRESSURES IN PURSUIT OF EDUCATIONAL QUALITY AND EQUITY

THURSDAY, MARCH 28 AND FRIDAY, MARCH 29
ELK GROVE UNIFIED SCHOOL DISTRICT
ELK GROVE EDUCATION ASSOCIATION
9297 OFFICE PARK CIRCLE, SUITE 100
ELK GROVE, CA

MEETING AGENDA

DAY I: THURSDAY, MARCH 28

- 8:30 am **Breakfast.** Light breakfast will be available in the board room.
- 9:00 am **Convene Meeting.** Jennifer O'Day will convene the meeting with opening remarks, introductions, and an overview of the agenda. Superintendent Chris Hoffman will welcome the group to Elk Grove Unified School District (USD).

SESSION I

Understanding the Fiscal Pressures Facing School Districts

Despite a robust economy and increasing revenues for the state's K-12 education system, school districts are struggling to transform instruction while keeping up with growing obligations for pensions, employee benefits, and special education, often in the context of declining enrollment. Moreover, the political dynamics surrounding these issues create their own challenges for districts and their communities. This session will explore these issues at both the district and state levels.

- 9:20 am **A Case in Point.** The meeting will begin with the case of a specific California school district. In small groups, participants will explore the financial pressures that derive from historical decisions and current obligations that shape the district's options. Through this introductory exercise, participants will develop an understanding of the interrelated challenges a district might face and potential avenues for progress.
- 10:05 am **California Education's Fiscal Reality.** From the case of a single district, the session will move to a broader overview of the fiscal challenges in California education and the ways in which they impact local districts. Collaborative members Jason Willis and Arun Ramanathan will introduce topics related to the fiscal environment, district response, and

public discourse that will be explored in greater detail throughout the meeting. Questions and discussion will follow.

11:30 am **Break.**

SESSION II

Improving Quality and Efficiency in Two High Leverage Domains

11:45 am **Pursuing Cost Effectiveness in Special Education.** California's challenges to serve students with disabilities are both programmatic and fiscal. On the fiscal side, special education costs continue to grow, encroaching significantly on general fund dollars. Programmatically, the state is struggling with low performance for special education students, contributing to the high numbers of districts identified for differentiated support to address this problem. Leaders from San José USD and Sanger USD will share approaches that they have employed to improve the quality of their special education services and explore the implications of these approaches for reducing costs. Subsequent small group and full group discussion will discuss these strategies more deeply and consider potential policy implications.

12:30 pm **Lunch.**

1:10 pm **Pursuing Cost Effectiveness in Special Education (continued).**

2:10 pm **Ensuring Fair Employee Benefits While Controlling Costs.** Many districts wrestle with the challenge of providing appropriate benefits to current and former employees while remaining solvent. This session will highlight innovative approaches in Elk Grove and Garden Grove to address this challenge. Subsequent small group and full group discussion will further explore these strategies.

2:30 pm **Break.**

2:45 pm **Ensuring Fair Employee Benefits While Controlling Costs (continued).**

SESSION III

Exploring District Problems of Practice

3:45 pm **District Consultancies.** In their efforts to meet student needs while also managing resource constraints, districts face a wide array of challenges, the specific forms of which may vary according to their unique local contexts. Small groups will use the consultancy protocol employed in previous Collaborative meetings to address specific fiscal problems of practice posed by Collaborative district leaders.

4:30 pm **Report Out.** District presenters will report their main takeaways in the reconvened full group.

- 4:45 pm **Summary and Reflection on the Day's Discussion.**
- 5:00 pm **Adjourn for the Day.**
- 6:30 pm **Reception Followed by Dinner** at The Firehouse Restaurant.

DAY 2: FRIDAY, MARCH 29

- 8:30 am **Breakfast.** Light breakfast will be available in the board room.
- 9:00 am **Collaborative Updates.** We will begin the day with a brief update on current Collaborative projects in support of our members.

SESSION IV

Securing Adequate Revenues to Support K-12 Education

- 9:15 am **Pursuing Adequate Funding for K-12 Education.** The strategies discussed on Day 1 represent approaches through which districts can achieve greater quality and efficiency in the services they provide. However, education spending in California continues to lag behind other states and fall well short of the resources required to meet student needs. Conversation will turn to potential solutions for increasing funding levels by changing the ways in which the state and local communities generate revenue.

SESSION V

Changing the Narrative about Education Funding

The understandings and narratives about adequacy, efficiency, and equity in resource allocation often differ substantially among district administrators, community leaders, teacher unions, and legislators and other state policy actors. This session will explore the challenges of creating a sufficiently common understanding and narrative to guide collective problem solving, especially as fiscal constraints tighten.

- 10:15 am **Building Community Understanding and Collective Problem Solving.** As districts navigate their budgeting challenges, especially while also participating in labor negotiations and deepening community engagement in their LCAP development process, they often encounter a lack of shared understanding among their partners about opportunities and constraints shaping forward progress. A panel of grassroots community leaders will share their perspectives on how districts can engage with and increase understanding among community members about the context in which they operate and to collectively pursue solutions.
- 11:15 am **Break.**
- 11:30 am **Navigating Labor-Management Perspectives and Challenges.** Decisions made through the collective bargaining process directly impact district investments and obligations and therefore shape the opportunities and constraints districts face in pursuing their agendas for teaching and learning. Just as importantly, coverage of labor unrest is often the highest profile means of communicating a narrative about a district's financial picture and the ways in which districts and their partners address that picture. Participants will explore ways in which labor-management dynamics interact with strategies for improving programmatic and financial practices.

12:30 pm **Lunch.**

1:00 pm **Influencing State Policy Discourse.** Accounts from Collaborative members suggest that legislators may not fully understand the constraints within which districts operate. Indeed, the combination of increased revenues and implementation of LCFF may create the impression for some policymakers that districts have enough money, or that they need to more dramatically improve outcomes with the money they have before it would be prudent for the state to provide more. Participants will consider ways in which to build a shared understanding of the true financial picture in K-12 education and how policy changes might help position districts to succeed.

1:45 pm **Summary and Reflection on the Meeting.**

2:00 pm **Adjourn.**