Building a Better Budget to Maximize Performance

Making Money Matter – More, Different, and Better

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Education and Money
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Which Game Have We Been Playing?

Two ways to look at budgeting

Looking for “Big Money”
- Something Nice, but Not Needed
- Exactly What You Need
- Yikes! Why Do We Have This?

Ask the Right Question
- Identify Priorities
- Align Funding to Needs
Performance Based Thinking

- The shifts to local control are a good time to revisit “why” and “how” we think about and manage resources
  - Fund that which contributes most to performance
- How do we currently factor in performance to our budgeting?
- What would it look like to plan for performance?
  - Procedures
  - Culture
  - Budget
Keys to Performance-Based Budgeting

- Data with analysis
- Persistence
- Understanding of planning and performance assumptions
  - Theory of action, logic model, etc.
Keys to Performance-Based Budgeting

- Criteria for evaluation
  - Starting with priorities and values
  - Expectations
  - Information to evaluate
- Stakeholder engagement
- Simplicity over complexity
How Far Have We Come? Operating Rooms in 1914 and Now
How Far Have We Come?
Classrooms in 1914 and Now
Making Meaning of Data

- Requires learning by the adults to make good decisions for students
- Adult Learning Theory (Malcom Knowles)
  - Self-Directed/Autonomous
  - Utilizes knowledge and life experiences
  - Goal-Oriented
  - Relevancy-Oriented
  - Highlights Practicality
  - Encourages Collaboration

*Adult learners make meaning through the story – what’s our data story?*
Outcomes and Impact

Outcome = Impact

OR

Outcome

Impact

Impact

Impact
Perspectives and Data

- Students
- Site Leaders
- School Board
- Parents
- Counselor
- Teachers
Making Data Meaningful

• Good data stories require understanding:
  • Context
  • Audience
  • Relevance
• Consider what’s driving data inquiry
  • Us or them?
Preparing Stakeholders

• WHO are our stakeholders?
• WHAT do they already know?
• WHY does this matter to them?
• WHEN do we share?
• HOW do we support authentic engagement?
## Mindsets

<table>
<thead>
<tr>
<th></th>
<th>Compliance Orientation</th>
<th>Performance Orientation</th>
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</thead>
<tbody>
<tr>
<td>Plan Responsibility</td>
<td>Lower level staff</td>
<td>Leadership function</td>
</tr>
<tr>
<td>Stakeholders</td>
<td>Invite and inform</td>
<td>Seek contributions</td>
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<tr>
<td>Budget</td>
<td>Submit a rollover budget</td>
<td>Align resources to goals with a long view</td>
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<tr>
<td>Time</td>
<td>Episodic, aligned to required deadlines</td>
<td>Ongoing, continuous improvement cycle</td>
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<tr>
<td>Measurement</td>
<td>Compliant plan, approved by required entity</td>
<td>Plan implemented with a positive impact on students</td>
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<tr>
<td>Data</td>
<td>NCLB disaggregation</td>
<td>Deep, locally meaningful analysis</td>
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<tr>
<td>Orientation</td>
<td>Extra work</td>
<td>Is the work</td>
</tr>
<tr>
<td></td>
<td>Focused on the parts</td>
<td>Focused on the whole</td>
</tr>
<tr>
<td>Equity</td>
<td>Equal funding</td>
<td>Equal outcomes</td>
</tr>
<tr>
<td>Communication</td>
<td>Focused on rules and regulations</td>
<td>Focused on building understanding and capacity</td>
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Aligning Resources is About

- Spending the right dollar, at the right time, on the right thing
- This requires:
  - Knowing what’s needed
  - Knowing what resources are required
  - Being ready to implement

*Performance and Learning versus Compliance and Completion*
Things to Remember

• Simple is best…and preparation is important
• Transparency is accessible information…avoid inundation
• “Why” matters…avoid assuming they must already know
• Start at the beginning…it’s usually in front of where you think you are
• Adults are working to make meaning…stories and analogies are helpful
Thank You!

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