



Building a Better Budget to Maximize Performance

Making Money Matter – More, Different, and Better

March 2017 • Jannelle Kubinec

Education and Money



Education and Money

!

Education and Money

%

Education and Money

&

Education and Money



Education and Money

?!%&#

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

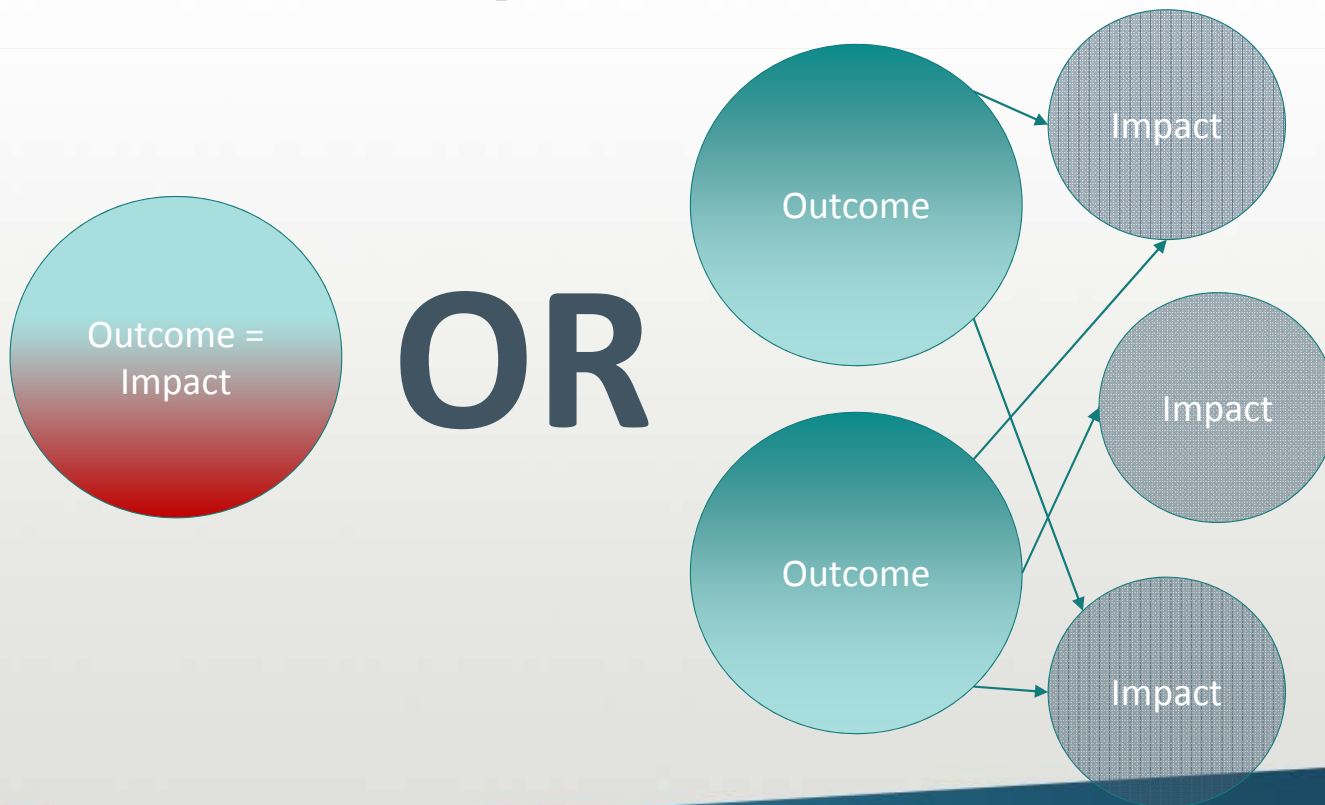


Making Meaning of Data

- **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



Perspectives and Data



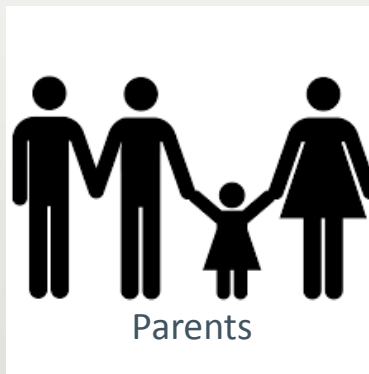
Students



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

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

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!

Jannelle Kubinec

jkubinec@wested.org