

Resource Allocation Review – Self-Guided Discussion Protocol

The following protocol aligns with the Self-Guided RAR PowerPoint Template, however districts completing a self-led Resource Allocation Review are welcome to adapt the protocol and PowerPoint to best suit their needs.

Introductions and Context [10 minutes]

- District leadership reviews norms.
- District leadership reviews RAR objectives and protocol.
- District leadership reviews [Properties of Effective Resource Allocation Systems](#).

Establishing District Goals and Priorities [15 minutes]

- Standard of Practice
 - Team reviews the [Rubric](#) to clarify strong practice for a resource allocation system that aligns with district goals and priorities.
- Establishing District Priorities
 - What are the district's top three strategic priorities for the coming school year? Where does the district currently have momentum?
 - Invite school leaders to share school-level priorities, especially as they relate to draft goals in School Improvement Plans.

Equitable Resource Allocation and Distribution Processes [30 minutes]

- Standard of Practice
 - Team reviews the [Rubric](#) to clarify strong practice for equitable resource allocation systems and distribution.
- Evidence of Current Practice
 - Team summarizes documentation regarding formulas or procedures for allocating resources to schools.
 - Team summarizes evidence of resource distribution patterns, including school-level spending and teacher experience, disaggregated by student demographic information.
- Discussion
 - What are the strengths and growth areas of the district's current practice based on the aligned rubric categories?
 - Questions to consider:
 - **Resource Allocation:** *What is the general approach for allocating resources to schools? Is it explicitly documented, or does it just follow an existing and internally understood process? How are the needs of specific student populations addressed in your allocation approach? What is the district's approach to allocating Title I funding? Is there any overlap between Title and Improvement Status? What funds, if any, are discretionary at the school level?*
 - **Resource Distribution:** *Are there any surprises in the spending or resource distribution patterns? What drives year-over-year differences in spending across*

schools? Do you have any concerns about the accuracy of the spending data? Do the patterns reveal any school-level resource inequities?

- Evaluation
 - Participants independently evaluate current practice for equitable resource allocation **and** equitable resource distribution using a printed copy of the rubric. Individual scores will be collected at the end of the RAR for averaging.

Transparent Resource Allocation [10 minutes]

- Standard of Practice
 - Team reviews the [Rubric](#) to clarify strong practice for transparent resource allocation practices.
- Evidence of Current Practice
 - Team reviews relevant details on the district's resource allocation methodology and process for distributing funds to schools.
 - Team reviews survey results regarding school leaders' understanding of resource allocation practices and school/district leaders' perception of equity in resource allocation.
- Discussion
 - What are the strengths and growth areas of the district's current practice based on the aligned rubric categories?
 - Questions to consider:
 - **Transparent:** *Is your process for allocating funds documented and accessible to all stakeholders? How accurately could each stakeholder group describe the process (district staff, principals, teachers, support staff, community members)?*
- Evaluation
 - Participants independently evaluate current practice for transparent resource allocation using a printed copy of the rubric. Individual scores will be collected at the end of the RAR for averaging.

A System that Engages Stakeholders in Planning for Resources [20 minutes]

- Standard of Practice
 - Team reviews the [Rubric](#) to clarify strong practice for a system that engages stakeholders in resource planning.
- Evidence of Current Practice
 - Team summarizes budgeting procedures and evidence of stakeholder engagement in planning for resources.
 - Team reviews survey results regarding staff perception of quality and efficacy of existing stakeholder engagement practices.
- Discussion
 - What are the strengths and growth areas of the district's current practice based on the aligned rubric category?
 - Questions to consider:
 - **Engages Stakeholders:** *What challenges does the district face when it comes to engaging stakeholders in resource allocation decisions? Are the challenges*

different for stakeholder groups (teacher, parents, school leaders)? Does the district do a better job with some groups but not others? Are there times when it is especially important to provide financial information to the school community? What processes are in place to gather stakeholder feedback regarding the use of funds? What kinds of support or resources would be most helpful for improving engagement in financial decision-making?

- Evaluation
 - Participants independently evaluate current practice for stakeholder engagement using a printed copy of the rubric. Individual scores will be collected at the end of the RAR for averaging.

Resource Allocation that Aligns with District Goals and Priorities [20 minutes]

- Revisit Standard of Practice
 - Team reviews the [Rubric](#) to clarify strong practice for a resource allocation system that aligns with district goals and priorities.
- Revisit District Priorities
 - Review the district priorities shared at the start of the RAR.
- Discussion
 - What are the strengths and growth areas of the district's current practice based on the aligned rubric category?
 - Questions to consider:
 - **Aligns with District Goals and Priorities:** *Thinking about the data and our discussion of current practices, are the district's goals/priorities clearly reflected in resource allocation patterns and systems? How closely aligned are district priorities and student needs, especially as they relate to summative designations? Is there clarity about the cost of initiatives the district has committed to? What systems are in place to evaluate the cost of these initiatives relative to student outcomes/performance at regular intervals? What is important to the district, and how is it reflected in resource allocation practices?*
- Evaluation
 - Participants independently evaluate current practice for district alignment using a printed copy of the rubric. Individual scores will be collected at the end of the RAR for averaging.
 - Participants complete and submit their individual surveys to district leadership.

Closing [10 minutes]

- Opportunities
 - Based on this discussion and the evaluation of current practices, what opportunities exist for the district?
 - What steps or actions is the district considering?

Next Steps

- District leadership prepares and submits RAR discussion notes, average rubric scores, and the RAR Reflection Questionnaire.
- ISBE will schedule a 30-minute meeting with district leadership to debrief the RAR process, provide feedback on district materials, and hear feedback from the district.
 - ISBE highlights technical assistance opportunities that may be relevant to the district.
 - ISBE and district staff review and discuss the rubric averages for each standard.
 - ISBE summarizes opportunities nominated by the district and indicates next steps.