

Equity-Based Budgeting Readiness Checklist

VISION

How to create an equity vision:

- Include representatives of the district community, specifically marginalized students and families.
- Looking at your community's specific population and needs, establish which students in your community will receive funds to supplement the per-pupil allotment.
- Decide on a feasible but meaningful amount to allocate to these students.
- Check out EJP's "[Where Do We Start?](#)" post for more info and guidance about creating your equity vision.
- If you're just starting the process of creating an equity vision, get in touch with Allovue and EJP! We'd love to support you in establishing your equity vision, readying data systems, and developing change management strategies.

Share the equity vision:

- Make sure that community members—administrators, educators, staff, family and caregivers, students (high school at a minimum), and the district or school's governing board—understand and share the equity vision.
- District leaders regularly and effectively communicate the equity vision to stakeholders.
- Key district leaders regularly articulate how implementing equity-based budgeting is a strategic part of fulfilling the equity vision.
- District leaders can communicate how and why working toward realizing the equity vision contributes to changes in various district functions.

NEXT: DATA

DATA

Data Structure:

- Student, staff, and school data are aligned, with consistent identifiers
- Datasets are integrated or easily combined

Enrollment Projections:

- Grade-level enrollment projections are finalized in time to inform school allocations (usually by January)
- Enrollment projections include student characteristics aligned to the district's equity vision.
- Projections are within 5% of actual enrollment for each school.
- Data systems are updated throughout the year to reflect changes in student body composition, allowing for budgeting adjustments.

NEED HELP?

Check out the [Allovue Manage](#) tool to help your district pull all of its data together.

Finance Data:

- Detailed budget codes clearly distinguish staff positions, specific services, and other relevant resource buckets.
- School budgets list all staff, services, and resources (including SPED, ELL, categorical, non-instructional, etc.) at the school.
- Budget and position control files accurately show how employees are funded, including those who are split-funded.

HR Data:

- Employee records show where employees are working, including employees who work across multiple school sites.
- For teachers who change subject areas or grade levels, employee records accurately reflect their current position.
- Teacher compensation (base pay, stipends, benefits) is accurate at the individual level so that schools can account for full compensation while creating equity-based, school-level budgets.

NEXT: CHANGE

CHANGE

People:

- Ensure that district staff and school leaders support the equity vision and are prepared for the challenges, problem solving, and continuous improvement involved in realizing this vision.
- Provide district leaders the time, expertise, and resources to design and execute equity-based budgeting.
- Communicate with external and internal stakeholders around the changes and tradeoffs involved in equity-based budgeting.
- Engage internal and external stakeholders whose voices need to be a part of the equity-based budgeting process.
- Build a strong relationship with unions and a strategy for engaging with them throughout the equity-based budgeting process.
- Allow principals the time, training, resources, and support to exercise flexibility under equity-based budgeting.
- Train district staff to support principals as they implement equity-based budgets.

Practices:

- Determine how much flexibility to award to principals under equity-based budgeting.
- Prepare to navigate substantial change (preferably using successful past strategies).
- Orient district office staff toward providing support to school leaders.
- Form goal-focused collaborations across departments and job functions in the district office.
- Work toward alignment across academics, budget, and staffing planning processes.
- Integrate district planning processes in a way that is easy for office staff and school leaders to see.

WANT TO LEARN MORE?

Visit our Equity Budgeting resource:
learn.allovue.com/equity-budgeting