While conversations about equity have accelerated since 2020, discussion is one thing, while successful and practical implementation is entirely another. When the Northshore School District began efforts to implement a strategic plan and transform its budgeting process through an equity lens, staff knew that change would be challenging. Now in the sixth year of its strategic plan, the Northshore School District has seen tremendous progress toward its intended goals, while also having successfully navigated the challenges of the COVID-19 pandemic, staff changes, and planning for the future.

Creating the Strategic Plan

The Northshore School District had strong performance across the district, from academic outcomes to staff resourcing. In 2017, however, the district’s board of directors decided that more could be accomplished, especially regarding students who were “furthest from educational justice.” District leadership defined equity as “addressing the unique needs of each student.” With this focus, the district sought to solidify its goals for student learning by creating a strategic plan. To ensure the plan’s equity lens was as broad as possible, district leadership involved the community and included students’ voices through a variety of forums and listening tools.

The plan clarified the goals and the building blocks needed to pursue them, but ultimately, successfully bringing the plan to life required establishing new systems and evidence-based performance measures. Four years ago, the district hired a new superintendent to lead the charge in aligning staff and resources toward these goals. One of the
adjustments included a new approach to budgeting that would create greater alignment between dollars and resources to meet plan goals.

Mike Bailey joined the district at this time as director of strategic projects and internal audit. He recalled: “The superintendent was concerned that there wasn’t enough change occurring across the district to create alignment with the plan, and one area was alignment of finances and resources. For the past four years, I have been here with the specific purpose of grading that alignment. In my experience, it takes a long time for change to permeate through an organization and affect its culture. And yet, in only a few years, we have seen tremendous change take root in our district.”

Northshore identified five goal areas for the strategic plan:

1. Success in the early years
2. Responsible, resilient, empathetic learners
3. Growth for every student, and elimination of outcome and opportunity gaps
4. Innovative, creative, critical thinkers
5. Ready for lifelong success after graduation

The elements of the strategic plan include:

1. District vision and policy
2. Strategy and implementation
3. Structure and systems
4. Support and supervision
5. Classrooms and teachers
6. Successful students

The plan and goals reinforce the district’s mission to strengthen the community through education. They informed numerous operational and financial steps to align efforts at every level in the district—from the board to the classroom—toward the identified goals. These efforts are reinforced by a series of performance measures that identify progress as well as continued areas of opportunity. The data from these measures is used to confirm or adjust approaches that lend themselves to success in each of the goals, for each student.

Goals and performance measures also inform policy decisions, including those related to resource allocation and specific equity goals that are aligned with student learning goals. The district hired a consultant to assist in developing the strategic plan, but full-time staff have been hands-on in implementing plan goals. The intent was to ensure that the district could sustain the plan’s goals in day-to-day work.

As an example of evidence-based performance measures and equity in action, the goals—for reading—are translated down to the classroom level, with progress visible at the group and individual levels. This insight helps teachers tailor instruction to each student. Collected data illustrates the journey each student makes during the year, as they may start at or below grade-level and then progress with classroom activity and custom instructional support. The equity lens allows each student to be met where they are and provided what they need to improve.

“The executive cabinet has been working very hard over the past few years on the equity process, and we’re making a lot of progress,” said Chief Financial Officer Tracy Patterson. “A lot of our discussions involve equity, whether it’s around program delivery, or budget, or preparation and development—in everything that we do, we put equity first.”

ADOPTING A NEW BUDGET PROCESS

In addition, the district made a significant change in its budget practices. Previously, the district strictly followed the direction of the Washington State Office of Public Instruction guidance. While this resulted in a budget that passed muster with the state, it did not support the district’s intention to align resources with the strategic plan. The district began participating in GFOA’s Excellence in School Budgeting initiative and the Award for Distinguished Budget Presentation for guidance in adopting a new approach to budgeting. These resources have reinforced the district’s commitment to putting its strategic plan into action through resource allocation. Ultimately, the district moved away from the traditional approach of rolling last year’s budget over into the next year with only minor changes.
Reimagining the way the district approaches an annual budget of $500 million to serve 24,000 students would not be easy—but it was necessary to align shared goals and resources. Now, Northshore faced the challenge of bringing the business side of the organization into harmony with the instructional side.

“It was challenging at first, to bring along the instructional side of leadership with the concept of trying to identify the return-on-investment metrics as we moved forward with the process of a new budget development and thought about how we were going to deliver and distribute resources,” Tracy said. “Today there’s heightened awareness of the connection between the budget development and resource management, change management, and prioritizing the instructional side to improve student achievement and close the gaps that we recognize. I think we’re getting much closer to developing reasonable and meaningful metrics.”

As both Tracy and Mike noted, change management implementation takes time, and a strategic plan is more than just a document—it’s a living, breathing set of goals to inform day-to-day work. “Change is a pursuit,” Mike added, “and nobody’s got this all figured out. It’s in front of us all the time, and we have continual and ongoing conversations about how we’re doing.”

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TRACY PATTERSON, NORTHSHORE SCHOOL DISTRICT CHIEF FINANCIAL OFFICER

FACING THE UNEXPECTED AND PLANNING FOR THE FUTURE

The district was gaining ground on plan goals when the COVID-19 pandemic hit, forcing a rapid shift to a remote learning environment for 24,000 students. District leadership quickly adapted by creating playbooks to support the remote learning model, maintaining engagement, and helping students through new challenges like changes to student traditions and addressing social and emotional learning. Despite the obstacles, Tracy recalled with pride what the district accomplished. “We had a lot of champions here in the district who did wonderful things during that difficult time.”

The district and its administrative leader have earned national recognition. Superintendent Michelle Reid was named the 2021 School Superintendents Association’s National Superintendent of the Year for her leadership in establishing school equity and navigating through the COVID-19 crisis, and Northshore was recognized as one of the leading districts in its approach to the pandemic. While Michelle has since moved to a new role in another district, staff are sustaining progress, which can be particularly challenging after such a high-profile departure.

“What we have created outlives those of us who have been working to institute it from the beginning,” Mike explained. “We continually remind ourselves that one, there’s always room for improvement, and two, we must make this sustainable.” In addition, a committed board and staff continually champion the plan and its goal of equity for all students. Throughout the creation of the plan and the performance measures, students have been invited to actively participate to ensure their voices are incorporated.

“I really appreciate the way Northshore looks at equity,” Mike said. “Regardless of where the students are coming from, the goal is that they feel that Northshore is a place where they belong.”

GFOA BEST PRACTICES

Northshore School District followed two GFOA best practices in creating its strategic plan, Establishment of Strategic Plans and Performance Measures. In creating a strategic plan and aligning organizational resources, the district used plan objectives to determine how its available resources can be tied to future goals. The district used performance measures to collect information about day-to-day activities, achievement of academic goals, community conditions, and other environmental factors to understand the needs of students and to make informed decisions. GFOA best practice stipulates that performance data should be integral to an organization’s decision-making processes and that leaders within an organization should set expectations that key decisions are supported by evidence, such as the measures taken by Northshore to consistently review and respond to data and feedback from students and staff alike.

While these best practices may be more accepted practice within municipalities, Northshore has led the way in implementing them in an academic setting. In addition, the district’s approach to strategic planning, performance measures, and equity illustrates how organizations can connect the policy, operational, and financial elements of the best practices into an interactive system that becomes more than the sum of its parts. For more information on GFOA best practices for school budgeting, please visit smarterschoolspending.org.