

## AUDIO TRANSCRIPT

### “Ayers Institute Lunch & Learn” Podcast Episode 22 – July 2019

Title: *Budgeting with Students in Mind*

#### SPEAKERS

<b>JO</b>	Julia Osteen	Technology Integration Specialist, Ayers Institute for Teacher Learning & Innovation
<b>KW</b>	Kesha Walrond	Assistant Professor of Education, Lipscomb University College of Education
<b>SP</b>	Shawna Pierce	Principal, Metro Nashville Public Schools

#### FULL TRANSCRIPT

##### *INTRODUCTION:*

**KW:** I think that we know what our school needs or we think we know what our school needs. But there's a whole lot more that went into creating that budget than just finding out what the school needs. There were a lot of little nuances. How do we really determine what the students need? What's our end goal? And, how do we use this budget to accomplish that?

**SP:** In thinking about this whole budget process– I think that's the key word: it's a process. There's a process to get it started and then you're aligning your resource. You have to continue to monitor because we really want to look at return on investment.

**JO:** Welcome to the “Ayers Lunch & Learn” podcast presented by the Ayers Institute for Teacher Learning & Innovation at Lipscomb University, where we're all about education. These podcast episodes are sponsored by Edsouth, which promotes interest and awareness of higher education opportunities to students, families, and schools. Each Ayers Lunch & Learn podcast episode provides bite-sized portions of professional learning.

Today's topic is "budgeting with students in mind." We'd love to hear your thoughts on this topic, as well, using the Twitter hashtags #AyersLunchAndLearn and #SchoolBudgets. My name is Julia Osteen and I'm the Technology Integration Specialist for the Ayers Institute. Participating in the conversation today is Dr. Kesha Walrond, Assistant Professor in Lipscomb's College of Education and Dr. Shawna Pierce a Principal in Metro Nashville Public Schools.

##### *EPISODE BODY:*

**JO:** Let's start by having each of you telling us a little about yourself and what's brought you to this topic today.

**SP:** Good morning I'm Shawna Pierce, current Principal in Metro Nashville Public Schools. Throughout my educational career, I've always been involved in the budgeting process in the various positions that I've held as a teacher leader (giving input from the teacher perspective), as a literacy coach (giving that perspective), and then Assistant Principal and on to Principal where I just recently finished budget season for going into the next school year.

**KW:** And I'm Kesha Walrond. I spent the last 20 years in public education with Metro Nashville Public Schools. The last 13 as a school principal. This topic was really interesting to me because I spent half of

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my career not being responsible for the school budget and having someone actually tell me how funds will be allocated in my school. But then I spent the second half of my career as a principal being the person that was responsible for the school budget. And so, I thought a lot about this during the past year working with principals like Shawna. What is this process like for a new principal? And how are they navigating through the process of making sure they make the right decisions for kids in their building?

**KW:** So Shawna, the reason I thought about you— you and I have spent a lot of time together over the last year and I have seen you, like I said, navigate through all of the leadership responsibilities. One of the ones that we worked together in was school budgeting. And I just thought to myself, "How is she doing with this?" You know, "What questions does she have about this process? Where is she going to get the information that she needs to do it successfully?"

So one question that I have for you, first and foremost, is what was the process like for you this year as a first year principal?

**SP:** So first I have to say I was interested when you said that you spent the first half of your career kind of being told how to allocate those funds. I can say I've had an opposite experience. In all of my experiences, I believe I've had modeled for me up until this point how to correctly allocate funds for students. And so, what that has looked like— I can remember back to the very first school I started at was in Texas. Our principal had access to the funds just like we do. Student-based budgeting. And I remember he called us all together and we had a huge conversation around our data. We set down we looked at what was our data telling us and what do we think is going to help improve those student outcomes based on, you know, what do our students need? Was it resources? Was it more people? Whatever it may be. And everybody, kind of, has a different perspective about what would be useful, or useful way of using those funds.

And so, just in my very first interaction of dealing with how to allocate these funds it was modeled for me how to get people involved. Bringing everybody to the table. And when I say everybody— not just teachers not just administrators— but parents. What did they have to say about what's going on in the school? What do they think that their child needs or the school may be lacking? Community members, getting them involved as well. Because in their community they have just as much stake as everybody sitting around the table. And so, I've been fortunate. Having that first experience.

I've just used that, what was modeled for me, also in my own practice. And so, the very first thing I did this budget season was get my team together I started with my leadership team. We did a very deep analysis of the data. After going through our data— and I mean qualitative and quantitative data. So, we're looking at all kinds of things from behavior data to you know walk through. What is what are we seeing in our instructional practices? What are we seeing in our quantitative data such as measures from text level assessment to map things like that? And then after we really started looking that, we narrowed down, because there's always so much we can improve upon. But we narrowed it down to three main foci in our priorities that we said. And then we took that to the rest of the faculty and we presented it. Kind of did like a gallery walk where they were able to walk around, familiarize themselves with the data as well, and then give input as to what they were seeing. Because we really wanted to know what had we missed. And then, after that, we made some changes based on their feedback and then we brought it to parents. It was a it was a revise and edit process and it took a couple of months.

**KW:** Yeah. I'm glad to hear you mention how you got started. Because as I think back on my experience as a principal and this whole budget process I often think about, 'what are some things that I could have done to make it better?' And so, when you talk about sharing that information gap, gathering that information, analyzing the data. One thing that I've thought about, that I wish I had done more, is create

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some focus groups so that our stakeholders could really have some input and some say into how we were going to allocate these funds.

I thought about those focus groups and making sure that we had one for human capital and the people that we need to purchase. Also a focus group around curriculum supplemental curriculum and resources that we might need. And then a focus group around things like technology and all of those different things that we need to successfully run a school. And having those focus groups come together and decide, based on our current needs, based on past experiences, and past successes and failures, what they would suggest needed to be a line item in the current budget. So that's one thing that I— if I was going to tell a new principal— don't just survey your parents and your stakeholders and your community members, actually bring them in and let them have conversations with you about their thoughts around this process.

**SP:** In hearing you talk about the focus groups, it makes me think about how— when you're really preparing a budget you really have to identify what your right your priorities are. And it's not a one time thing. You can't have one meeting and be done with it and know exactly with the direction that you're going. So in thinking about those focus groups that would be a great idea. It's a— while we didn't do focus groups— it's very similar in the sense that it was a process that took months.

We started in March February and ended in April. So it took us months and it was back to the drawing board after new ideas were created. So I think the focus group idea would be a great way to make sure that we're really getting in-depth conversations around what would be best for the students.

**KW:** I agree. You know I don't know how large your budget was this year but I was managing about five million dollars. And I've never managed that much money before. And so, another thing that— I don't want to say concerned me, but— I just wish the district had spent a little bit more time with the training that we really needed to create a good budget, right. So, you know, I don't know. I don't have a degree in accounting and I'm sure you don't have a degree in accounting either. But it would have been nice to learn a little bit more about how to utilize the tools and what the steps that we actually needed to take from beginning to end. Making sure that we have the proper training to do this.

I think that we know what our school needs or we think we know what our school needs. But there's a whole lot more that went into creating that budget than just finding out what the school needs and saying we're gonna put two-hundred thousand dollars here and five-hundred thousand dollars here. But there were a lot of little nuances that I felt like we missed out on in terms of training and support. So, moving forward I think there needs to be more training there as well.

**SP:** Absolutely. Being the visual learner that I am as you are speaking and makes me think of like a flowchart. First you start with a focus group, and then you move move on to refining the process, and then aligning your resources. One struggle that that I encountered— and I don't know if it's because of previous experiences with my faculty, but— a lot of times the question would come up, "Do we have enough money for this?" And, "Could we buy this? Or could we add this position?" And, at the time when these questions were being brought forth, we didn't know how much money. At that time I hadn't seen the amount of money that we were allocated. And so I would always say, "My question would be, how does that align with what we say we need?" So instead of focusing on do we need this person or do we need this program— how is that going to help us meet our priority? And so, I think it's key. And I think part of that may go back to past experiences of having a set amount of money and then saying OK this is how we're gonna allocate it, without the proper planning. So, I agree with you that having proper training and what are the steps you should take to prepare before you even see the amount of money that you're allocated.

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**KW:** I love the idea of the flow chart! You know, based on what you said, going back to ‘what do the students need?’ How do we get our faculty and staff members and even our parent community (because a lot of times we all have different ideas of what the students need), right? I don't know about you but my parents really felt sometimes that the students needed a new playground. And sometimes teachers thought the students needed more technology. But how do we really determine what the students need? What's our end goal? And, you know, what do we want to accomplish with our students? And, how do we use this budget to accomplish that?" I think that needs to be one of the first questions that we ask because trying to corral all of these opinions and thoughts about how to use this money can be very difficult.

**SP:** I think if you just continue to go back to what your needs are and then, everything that's brought to the table, ask yourself how is this going to help us accomplish what we say our priorities are. So for example, if a parent is dead set on getting a playground you can say, "You know we say that our number one focus here is increasing reading achievement, how is this going to help us meet our goal?"

And so, using those questions to drive and bring it back every single time. Which is why I think again having your priorities first and knowing steps you're going to take to meet those priorities, then you can always drive it back to the plan.

**KW:** And I think that's why the school improvement plan is so critical. And it's a working document and not just something we create at the beginning of the year and put on the shelf. That we have to use that as a tool to help guide us along the way. And then I think that that will help us be more responsible and accountable for how we utilize those funds at the end. Right. Being good stewards of the money we've been given. You know, people may think five-million dollars is a lot of money, but once you start allocating those funds in an elementary school with 700 or 800 kids it goes pretty quick.

So you know we've gone through this process. We have you know analyzed our school data. We have made decisions about our school budget. We've utilized our school improvement plan and our team to do this. Now, I think we have to think about— How are we going to monitor how we're using these funds? How are we going to make sure that we're responsible and accountable for the way we've used these funds? And showing the stewardship of the money that we've been given.

**SP:** In thinking about this whole budget process— I think that's the key word: it's a process. So as I mentioned, it's a process to get it started and then you're aligning your resource. And I agree with you that you have to continue to monitor. If you say that you're going to utilize this program— Is it working? how do you know it's working? Because we really want to look at return on investment. And I feel like if we are looking at return on investment, then we're able to see if we really were good stewards of our money. So that way when we go into the next budget season— Did it work? Or did it not? So I think we have to make sure that we're monitoring throughout the entire budget process. Not just when we're creating the budget.

**KW:** Absolutely.

*CONCLUSION:*

**JO:** In our conversation today, Kesha and Shawna shared how to get started with school budgeting processes, some best practices leaders should consider when setting budgets, and some things to think about in the areas of financial responsibility and accountability. They have given us a lot to think about and discuss with our colleagues. A probing question for you and your colleagues to explore is, "What

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processes will you establish in your school to keep student needs at the center and include all stakeholders?"

As we close today's episode, we would like to encourage you to continue the conversation on budgeting with students in mind with your colleagues. There is a graphic organizer file available for download as you continue thinking about this topic. The graphic organizer, along with links to references and resources, are found on eduTOOLBOX at <https://www.edutoolbox.org>.

The Ayers Lunch & Learn podcasts are produced by Julia Osteen with technical production by Forrest Doddington. Don't forget, we'd love to hear your thoughts on school budgeting processes using the Twitter hashtags #AyersLunchAndLearn and hashtag #SchoolBudgets. Also follow in like the Ayers Institute and Lipscomb's College of Education on Twitter and Facebook at @AyersInstitute and @LipscombCofED. You can also follow Shawwna at @dr\_spierce and Kesha at @kwalrond.

We hope your appetite for bite sized portions of professional learning was satisfied with this podcast presentation sponsored by Edsouth. Look for other episodes of the Ayers Institute Lunch & Learn and other professional learning podcasts at <http://podcast.ayersinstitute.org>.