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California's First Year with Local Control Finance and Accountability

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Abstract: In 2013, Governor Jerry Brown and the California legislature radically restructured the state's school funding system and accountability systems with a weighted student formula and a mandated local planning process in each district. The new law substitutes local politics and grassroots agency for state-driven mandates and compliance reviews. While the Local Control Funding Formula has had immediate impact, early evaluations suggest that districts like the new system and are earnest in their implementation efforts, but it will take years to assess the effect of the multi-indicator Local Control Accountability Plans. Simultaneously, the state is implementing the Common Core State Standards and the associated Smarter Balanced

Assessment Consortium tests, which make creating local accountability plans more complicated.

Keywords: finance; accountability; California; politics; assessments; school board; Governor Jerry Brown; Common Core; Local Control Funding Formula

El Primer Año de California con Control Local del Financiamiento y el Sistema de Responsabilidad Educativa

Resumen: En 2013, el gobernador Jerry Brown y la legislatura de California reestructuró radicalmente sistema de financiamiento de las escuelas públicas y los sistemas de responsabilidad educativa con una fórmula basada en ponderaciones por estudiantes y procesos de planificación local en cada distrito. La nueva ley sustituye políticas y agencias locales por mandatos y revisiones estatales. Si bien la fórmula de financiamiento de control local ha tenido un impacto inmediato, evaluaciones tempranas sugieren que los distritos aprueban el nuevo sistema y se comprometieron en sus esfuerzos de implementación, tomará años evaluar el efecto de los múltiples indicadores de los planes de responsabilidad de control local de. Al mismo tiempo, el Estado está implementando los Estandares *Common Core* y los exámenes del Consorcio de Evaluación *Smarter Balanced*, que hacen que la creación de planes de responsabilidad locales sean aún más complicados.

Palabras clave: financiamiento; responsabilidad educativa; California; política; evaluaciones; junta escolar; gobernador Jerry Brown, Common Core; Fórmula de Control Local de financiamiento

O Primeiro Ano da Califórnia com Controle Local do Financiamento e Sistema de Responsabilidade Educativa

Resumo: Em 2013, o governador Jerry Brown e a legislatura de Califórnia mudaram radicalmente o sistema de financiamento das escolas públicas e o sistemas de responsabilização educacional com uma fórmula baseada em ponderações dos estudantes e processos de planejamento local em cada distrito reestruturado. A nova lei substituiu políticas e mandatos locais e agências estaduais de avaliação. Embora a fórmula de financiamento para o controle local teve um impacto imediato, as avaliações iniciais sugerem que os distritos aprovaram o novo sistema e se involucraram na implementação, vai demorar alguns anos para poder avaliar o efeito dos vários indicadores dos planos de responsabilização educacional. Ao mesmo tempo, o Estado está implementando os standards *Common Core* e do Consórcio de Avaliação exames *Smarter Balanced*, que complicam ainda mais a implementação dos programas de responsabilidade local.

Palavras-chave: finanças; responsabilidade educativa; Califórnia; política; avaliações; conselho escolar; Governador Jerry Brown, Common Core; Fórmula de Controle Local de Financiamento Home

California's First Year with Local Control Finance and Accountability

In 2013, the California Legislature radically restructured the state's school funding system, creating a student-weighted Local Control Funding Formula (LCFF) and abandoning dozens of state categorical programs. As they did so, they continued to take the state down an exceptional path, making elementary and secondary education policy in ways that differed sharply from national trends. In this case, they embraced legislative over judicial resolutions of equity and adequacy challenges, and modeled a new approach to resource accountability that deserves national attention.

On the surface, California's LCFF – as it is known – combines traditionally progressive and conservative aspirations in school finance. Progressives have long supported variants of the new law's student-weighted formula, which steers money toward children with the greatest educational

needs: the poor, English learners, and foster children. Conservatives, on the other hand, have often proposed something like the law's abolition of many categorical programs, which gives district and charter school leaders discretion as they allocate resources to schools, programs, and students.

Beneath the surface, the law is even more radical than it first appears. It requires that each district regularly conduct a broadly inclusive and participatory budget process for identifying local goals, plan how resources should be allocated to advance those goals, and then document those goals in a programmatic Local Control and Accountability Plan, or LCAP. In subsequent years, local stakeholders can then assess whether district budget allocations match the written plan and, if they don't like the allocations, attempt to hold district decision-makers accountable. This new LCAP requirement ends the state's reliance on a single numerical indicator based on standardized tests, and instead ushers in a new multiple-indicator accountability system. It fundamentally changes the politics of finance and accountability, substituting local politics and grassroots agency for the state-driven mandates and compliance reviews.

The LCFF/LCAP law represents a shift from a low-trust system of targeting dollars toward programs to a high-trust capacity building system grounded in Gov. Jerry Brown's commitment to "subsidiarity," moving money and authority closer to the classroom. It also represents movement toward an aligned system of accountability, professional development, and assessment – along the lines of the system recently articulated by Darling-Hammond, Wilhoit, and Pittenger (2014). It's a big idea, and unique on the national scene.

The Origins and Enactment of the LCFF/LCAP Law

Brown returned to the California governor's office in January 2011 with long experience in state politics and education policy. He had first been elected to statewide office in 1970, served as governor from 1975 to 1981, and was the state's attorney general from 2007-2011. From 1999 to 2007, he was mayor of Oakland, where among other things, he encouraged the creation of two charter schools. He had participated in the development of the state's convoluted school finance system after the *Serrano* decisions of the 1970s (*Serrano v. Priest*, 1971; *Serrano v. Priest II*, 1976; Timar, 2006), endorsed the passage of the Proposition 13 tax limitation initiative in 1978, and had wrestled with the state's education laws and bureaucracy as Oakland's mayor.

Brown began his third term as governor after the 2010 election, which also created overwhelming Democratic legislative majorities and gave the party free reign in policy-making. In his 2012 State of the State address, he proposed using the annual budget to enact a new way of funding schools:

My budget proposes to replace categorical programs with a new weighted student formula that provides a basic level of funding with additional money for disadvantaged students and those struggling to learn English. This will give more authority to local school districts to fashion the kind of programs they see their students need. It will also create transparency, reduce bureaucracy and simplify complex funding streams. (Brown, 2012)

The legislature initially balked at this approach, in part because liberal interest groups opposed giving local school authorities so much discretion in choosing whether and how to serve disadvantaged students (Fensterwald, 2012). Brown responded in 2013 by adding the Local Control and Accountability Plan provisions to his proposal, explaining in his 2013 State of the State that his deference to local decision-making was grounded in his own Jesuit education about the importance of "subsidiarity," part of the Catholic social doctrine he had learned as a young seminarian: "higher or more remote levels of government, like the state, should render assistance to local school districts, but always respect their primary jurisdiction and the dignity and freedom of teachers and

students” (Brown, 2013). Legislators responded more generously to this revised proposal, making some minor modifications and enacting the law in July.

The Local Control Funding Formula provisions of the law are relatively simple, requiring districts and charter schools to count their enrolled students by grade level, then identify how many of those students are low-income, English Learners, or in foster care. They report these numbers to the state, which then applies three formula stages to the reported numbers. For the 2013-2014 school year, the formulas initially included

- **Base grants** by grade level: \$7557 for each K-3 student, \$6947 for each grade 4-6 student, \$7154 for each grade 7-8 student, and \$8505 for each 9-12 student;
- **Supplemental grants** of 20% more for each student who fits one or more of the following categories: low-income, English Learner, or in foster care; and
- **Concentration grants** of an additional 50% for each of these disadvantaged students above 55% of a district or charter school’s enrollment. (Taylor, 2013, p. 2–6)

Based on this formula, the state figures out each district’s and charter school’s allotment, and cuts the checks. The formula led to substantial redistribution of funds among school districts, but Education Trust-West reports that “[b]y full implementation of LCFF, all districts should receive at least as much as they did in the 2007-08 school year, when the economy was at its peak,” before the financial crisis led to deep cuts in education spending (Hahnel, 2014, p. 6).

As one big city superintendent was quoted as saying, "This governor and this state board [of education] did something that has never been done in the United States without a court case. It changed the distribution mechanism from an equality formula to an equity formula. ... I think that that unto itself is noteworthy, stunning, and amazing" (Humphrey & Koppich, 2014, p. 11).

Provisions of the law’s Local Control and Accountability Plan passages are much more complex, and patterns in their impact will take years to emerge. The law requires each district to conduct an inclusive and transparent public planning process to identify specific goals and budget priorities in eight areas:

1. **Basic services** like equipped classrooms, qualified teachers, and standards-aligned textbooks and curricular materials.
2. **Implementation of Common Core State Standards (CCSS)** for all students, including English Learners (ELs).
3. **Parental Involvement**
4. **Student Achievement** as measured by tests, college and career readiness, English Learner reclassification to fluency, and several other named criteria.
5. **Student Engagement** evident in rates of attendance and absenteeism, middle school and high school dropout, and graduation.
6. **School Climate** evident in rates of suspension and expulsion, as well as other locally-identified measures.
7. **Access to a Broad Curriculum** evident through student enrollment across grade levels and subject areas.
8. **Other Student Outcomes** as identified locally, which may include locally chosen tests and assessments. (Fuller & Tobben, 2014, p. 8–12; Taylor, 2013 p. 10–18)

Charter schools must develop a similar document, though the law allows their governing boards to do so through internal deliberations rather than public participation. Both districts and charter schools were required to develop their first LCAPs by July 1, 2014, and then every three years afterward, with annual updates. School districts submit their LCAPs to their County Offices of Education for approval in order to win eligibility for their LCFF funding the following year. Charter schools submit their LCAPs directly to the state Department of Education (Taylor, 2013, p. 16).

Another policy development complicated LCFF/LCAP even further: in 2010, California embraced the Common Core of State Standards (CCSS) and joined the Smarter Balanced Assessment Consortium (SBAC) in developing tests that would align to the Common Core. In late 2013, Brown noted that the Common Core and the SBAC tests would supersede the existing state curriculum standards and the annually administered California Standards Tests. Any comparison of test scores between the old and new systems would be impossible, he said, just as it would be impossible to hold schools and districts accountable for making improvements from year to year in student outcomes. With the support of the state legislature, Brown suspended California Standards Tests for 2014, and any possible connection between statewide testing and accountability went into hibernation.

Instead, in the spring of 2014, schools across California participated in the national field test of SBAC assessments. Scores on the spring 2015 administration tests are scheduled to be released publicly, and calculations based on field tests indicate that only about half of students will measure up to the college-ready standard (Gewertz, 2014).

LCFF/LCAP as a New Approach to Resource Accountability

There are thus two sides to the LCFF/LCAP coin. On the LCFF side, Brown proposed a weighted student funding formula that would change the allocation of funds across districts and schools, and then give wide discretion to school districts and charter schools on how to spend that money. On the LCAP side, he proposed requiring districts and charters to set clear goals and be transparent about whether they were achieving those goals, to enable the public to hold them accountable.

Both sides of the coin challenge decades of policy development and practice in Sacramento and Washington, D.C. First, the Local Control Funding Formula replaced much of the fragmented system of school finance that had been cobbled together since the 1960s, built by merging an alphabet soup of “categorical” programs and funds with attempts by the state legislature to satisfy the *Serrano* equalization mandates, all in the context of Prop 13 tax limitations. For decades, school districts have spent enormous amounts of time building their budgets bit-by-bit, starting with base per-pupil funding and then accumulating a portfolio of state and federal categorical programs to cover the rest of their budgets. Districts then filed various reports throughout the year documenting what they did to comply with the requirements of each program to secure the money for the following year (Timar, 2006). Most of these categorical programs have been built through legislative action and ballot initiatives, but they operate in a context strongly shaped by litigation: suits seeking overall equity in the system, or provision for particular student populations. Some of these features remain – and federal categoricals remain untouched – but the LCFF legislation has swept aside much of the state categorical system.

Second, the Local Control and Accountability Plan’s locally-driven, multi-indicator accountability approach overturns nearly two decades of test-centered policy. In 1999, California enacted the Public Schools Accountability Act (PSAA), which mandated California Standards Tests for every student in most grades. The state then aggregated scores for those tests to create a single score, a school’s or district’s Academic Performance Index, or API. Those scores ranged from 0 to 1000, and the law required each school and district to make a specified amount of progress toward a target API of 800 or face escalating interventions.

The PSAA, and laws like it in Texas, Florida, and elsewhere, served as the model for President George W. Bush and the bipartisan coalition that enacted No Child Left Behind at the end of 2001. Like the PSAA, NCLB set test score targets for every school in the United States, and promised escalating interventions to hold schools accountable if the targeted proportion of students

did not achieve “proficiency” on state tests. After more than a decade, Californians became accustomed to test-score accountability, and the publication of single-number evaluations of every school and district.

The Local Control Funding Formula and its associated Local Control Accountability Plans turned this system inside out. The eight state priorities included in the LCAPs launched a far more complicated, ambiguous, and diverse set of standards for each school and district. The LCAP plans would include many different goals – many different *kinds* of goals – for students and schools, and the new law did not spell out any particular way that schools or districts might be held accountable for achieving those goals. There would certainly be no simple measures or summary scores for easy summary evaluations or intervention systems, and the public would have no easy way of comparing schools or districts. “I do not think we can reduce everything on that diagram to a number,” California State School Board President Michael Kirst said in an interview (Kerchner, 2014).

“I don't have a complete vision in my head,” he said. “I just know what it isn't. I go back to the idea of a dashboard. When you are looking at your RPMs, and your oil pressure, and your brake linings, you are not merging them all into one. When your engine is getting hot, you are not looking at the gas gauge.” The dashboard idea is more useful because looking at different indicators tells you where to act, and gives clues about what to do, he said.

Test scores will certainly be one of the gauges on this dashboard, eventually. By embracing the Common Core State Standards and the associated Smarter Balanced Assessment Consortium, California created the likelihood that the new LCFF finance system and the new LCAP accountability system will be linked to the CCSS curriculum and instruction system, as districts and charter schools include SBAC scores in their “Student Achievement” goals.

Thus, California exceptionalism: after decades of separating finance from accountability grounded in anything other than test scores, and separating both from curriculum and instruction in anything other than punitive interventions, the state is in the early stages of attempting to bring all three together in an integrated and constructive way.

Early Implementation of this New Approach

When the legislature enacted local control funding and accountability, they expected full implementation to take several years, and deferred the tasks of creating and enforcing implementing regulations to the State Board of Education (SBE). Development of these regulations would not be a simple automatic process of spelling out self-evident details. As the California Budget Project reported in the early stages: “At the core of the debate regarding these regulations is how to strike a critical balance: ensuring that LCFF dollars are spent to support the disadvantaged students for whom they are intended while providing school districts more authority over how to spend those dollars” (California Budget Project, 2013, n. p.).

The broad grant of authority to the SBE owes partly to the four-decade relationship between Brown and board chair Kirst, and partly to the unusual relationship that Kirst had to the legislation's origins. In his role as a Stanford University professor and policy scholar, Kirst had written that the state's school finance system was among the most centralized in the nation, and “has no coherent conceptual basis, is incredibly complex, fails to deliver an equal or effective education to all children, and is a historical accretion” (Kirst, Goertz, & Allan, 2007, p. 2). The LCFF contains most of ideas Kirst, Alan Bersin, and Goodwin Liu advocated in a 2008 academic paper, and thus he had a rare opportunity to transform this academic policy idea into legislation when he became president of the state board (Bersin, Kirst, & Liu, 2008). The regulations bear the stamp of his ideas.

The funding provisions were perhaps the simplest aspect of the law, requiring only that districts and charter schools count their students and note whether each student could be classified as low-income, an English Learner, or a foster child. The SBE developed these regulations quickly, and implemented these provisions immediately.

The LCAP regulations took the State Board of Education nearly 18 months: they published a preliminary version in January 2014, and a final version that November. This created real difficulties for districts and charter schools, who were required to submit their first LCAPs to the state in July 2014 based on “preliminary” rules (available online at <http://www.cde.ca.gov/fg/aa/lc/>). SBE’s work continues in 2015, as the board develops elaborate “rubrics” to guide local development of LCAPs, and evaluation of those LCAPs by county offices of education.

At least three independent teams of researchers have set out to monitor the implementation of LCFF/LCAP, so some initial findings are available from the first year. Daniel Humphrey and Julia Koppich (2014) led a team that interviewed policy makers in Sacramento and followed the work of ten districts across the state. Bruce Fuller and Laura Tobben (2014) of the Graduate School of Education at University of California-Berkeley looked at implementation in eight districts, and reported both on their observations and their implications for building systems capable of carrying out the goals of the legislation. Carrie Hahnel (2014) led a team of researchers from Education Trust-West that focused on public engagement and the law’s impact on equitable educational provision.

The Local Control Funding Formula

How is the finance side of the new law working in its early stages? Humphrey and Koppich found that districts prefer the new program to the system it replaces. “I am much more convinced after the study that local districts are taking the idea very seriously,” Koppich said in an interview (Kerchner, 2014). “We talked to many people who were very thoughtful. Impressive.” “Not a single person wanted to go back to categoricals,” she said (Humphrey & Koppich, 2014).

Still, the new law is a major “jolt” to school financing, as Fuller and Tobben (2014) put it, and it will take a few years to get all the moving parts to work together (p. 8). Replacing dozens of categorical grants with a lump sum from the state may be simple in theory, but it is deeply disruptive. It requires dramatic change within the bureaucracy of district offices, which have long been organized around these programs, with highly specialized offices and staffs. County offices of education and the California Department of Education will have to make similar changes, at the same time that they try to meet expectations that they will help school districts through this transition (Warren, 2014).

Implementation comes as the state continues to dig out of the deep post-2008 recession and severe cuts to K-12 funding. Hahnel (2014) notes that:

Some districts saw 2013-2014 as a year of rare financial opportunity. It was a Wild West year – one of newfound flexibility, fuller coffers, and few rules to follow. Spending regulations had not yet been drafted, and LCAPs wouldn’t be required until 2014-2015. Some districts pushed as much funding as possible into what they called “structural deficits,” the gap between their revenues and the cost of their ongoing programs.” (p. 8)

This dynamic, and the inertia that comes with it, may slow alignment of actual budgets with LCAP planning.

Nevertheless, both districts and education advocacy groups have embraced the system with vigor, and school district finance and instructional administrators have responded by working together more closely to gather reliable data on students and program costs. Humphrey and

Koppich also report that the districts had worked to develop budget processes that explicitly connect spending with teaching and learning, as the legislation intended.

All of these researchers saw many districts shift to joint fiscal-program teams to develop their budgets. Under the categorical funding system, district finance administrators would tell the curriculum and instruction administrators how much money they would be getting the following year. Those administrators would count students, budget programs within the categorical restrictions, and then allocate staff, classrooms, and other resources accordingly. Under LCFF, This year we began the [budget development] process from ‘What do we need?’ rather than from ‘What can we afford?’” the report quoted one superintendent as saying (Humphrey & Koppich, 2014, p. 5).

LCAP Performance Assessment

Researchers found districts moved quickly to begin implementing the Local Control and Accountability Plan provisions of the law, despite lacking specific guidance from the state.

Seven districts had received waivers from the NCLB reporting requirements, and they created a multiple measures accountability index for themselves (California Office to Reform Education, 2014). In other places, the LCAP was an exercise in filling out a template that the state board created and subsequently replaced. As David Plank, executive director of Policy Analysis for California Education, noted in an interview, “some of the superintendents are inserting an ‘R’ into ‘LCAP’.” At this early stage, the new accountability mechanism is perhaps best evaluated as one would a dog trained to walk on its hind legs: not beautiful but wondrous in that it happens at all.

Not surprisingly, “districts offer only modest innovation in this first year. Instead, most districts are shoring up rising staffing costs, restoring programs and personnel cut during the Great Recession, preserving programs previously funded by categorical aid, and adding one or two new programs for high-need students,” the evaluation from Education Trust-West noted.

[I]n the LCAPs we reviewed, it is difficult at best and impossible at worst to tell whether districts have complied with the law’s requirement to “increase or improve services” for low-income, English learner, and foster youth students. Though many advocates pushed for significant budget transparency, the reporting template that was adopted by the State Board of Education doesn’t demand it, and most districts have not chosen to provide more detail than required. Further, most LCAPs present an incomplete picture of a district’s programs and services, instead listing only the activities that align with the state priorities or accounting for just a portion of the district’s total budget. In all, we are left with LCAPs that offer frustratingly little insight into how LCFF will help accelerate efforts to close our state’s opportunity and achievement gaps. (Hahnel, 2014, p. 4)

Universally, observers saw changes in public engagement in the budget and accountability processes, as the law intended. The Education Trust-West report found: “that LCFF has created an unprecedented level of engagement among school district leaders, community leaders, parents, teachers, and students. This has not been without tension in some communities; and to be sure, not all stakeholders experienced a deep level of engagement. But the overall trend is toward more participatory planning and budgeting in K-12 schooling” (p. 4).

The LCAP experience is transforming grass roots politics rapidly. At least in some districts, parents are on the case, as this report about Eastside Union High School District shows. Public attention is focusing on what districts count and how they do it, and education advocacy groups are learning that they need to move their focus from Sacramento – getting the state to do something – to enlisting attentive and active parents in the districts.

Districts had long been required to engage parents, and the categorical funding system required parent input, but the new LCAP “encourages broader, more substantial input and offered both parents and the district freedom to develop a plan that meets the unique needs of the community” (Hanel, 2014, p. 9). Particularly in cities with strong traditions of community activism – such as Los Angeles, San Francisco, and Oakland – seasoned organizers and vocal activists asked for more than the district could give. “These stakeholders, friends and partners in many ways, suddenly found themselves competing to influence a limited pot of LCFF dollars,” Hanel’s report for the Education Trust-West said. “In the end, districts weren’t the only ones who had to make trade-offs: advocates from different circles also found themselves coming together to prioritize their demands. In Los Angeles this resulted in a strong coalition that ultimately had a tremendous influence on the district’s spending decisions – a level of influence usually only enjoyed by teachers’ unions” (p. 9).

Also, student voice increased. Organizations, such as the foundation-supported Californians for Justice, have trained activists and successfully pressured the State School Board to require student voice in the LCAP process (Californians for Justice, 2014).

Humphrey and Koppich (2014) point to the challenges ahead: “Research on public engagement underscores the difficulty of achieving a deliberative democratic process, or, in other words, finding a way for citizens and their representatives to make justifiable decisions for the public good in the face of the fundamental disagreements that are inevitable in diverse societies. Parents naturally view district priorities through the lens of their child’s best interests, advocacy groups advocate for their constituencies, and the majority of citizens have little or no experience with the kind of direct local democracy envisioned by the LCFF” (p. 10).

Uncertainty about Future Implementation

If LCFF is audacious, empowering for school districts, and popular with educators what could derail its successful implementation? Three things: time, money, and distrust.

LCFF will take time, several years, to fully implement. Both educators and policy makers will make mistakes. The State Board of Education’s template for reporting how funds were aligned with educational priorities didn’t work as intended. And it has been replaced. Educators fear – both in the report and in meetings and conversations throughout the state – that they won’t be given time to self-correct.

And they fear that the money won’t last. Proposition 30, which boosted school revenues from the depths of the recession, is due to expire unless the legislature extends it. And the LCFF logic is based on projections of increasing tax revenues over several years. So far, those predictions have been accurate, but the new tax receipts have largely come from capital gains. Californian’s wages have been relatively flat.

But most significantly, educators fear that advocacy groups won’t trust schools enough to reset from the historic equality politics to the politics of creating equity. Equality politics were based on well-founded mistrust of school districts and educators. It was school boards that drew attendance boundaries that separated white children from black children. It was vocal professional class parents that got their local districts to favor enhanced programs for our children and ignore their children.

Targeted funds for disadvantaged children was the answer. Compliance data could be obtained, and the courts could be counted on to intervene giving advocates leverage over school districts. Categorical compliance created a good way of tracking money. But it created a terrible way of running schools. By the time LCFF was enacted, the old system had few supporters.

Building a higher-trust equity politics around LCFF will require both new measures of

achievement and new ways of understanding whether districts are using their supplemental dollars for the benefit of the children in the groups that are part of what they are doing.

In other words, local control funding requires both trusting schools a bit and also trusting local democracies to monitor them.

Could all this come unraveled? Certainly. More grounded forms of assessment have a long history of losing out to numbers that can be ranked, so that fingers can be pointed. Complex assessments are expensive to produce and administer, and the politicians like easy to understand answers. Concluding that schools are working on getting better on several fronts does not have the ring of hard-edged accountability that creates losers among schools, districts, and students. Board chair Kirst summarized his hopes and fears: "The governor's subsidiarity principle [of moving decisions closer to classrooms] is very important here, because he's going to push back... There's an understanding and even a pronounced principle of public policy here." "I just hope that folks can keep from pulling it [the assessment experiment] up by its roots to see if it's growing."

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