



# STRATEGIC BUDGET PARTNER RETREAT

## Our Context & The Urgency

In the new reality of COVID-19, “doing school” differently has become a requirement for all of us. Schools are facing unprecedented challenges as they work hard to support their staff and students — especially students with the highest needs — and systems must prepare for a looming recession. In this moment, finance teams and budget offices are uniquely positioned to help principals explore resource tradeoffs and problem-solve for how to meet budget targets in ways that equitably serve students.



## What Is It?

Education Resource Strategies’ **Strategic Budget Partner Retreat** is an invitation-only retreat that helps CFO Network members’ finance/budget teams reimagine their role in supporting school leaders to use resources most effectively. Amidst the COVID-19 pandemic and looming economic recession, this skillset is even more critical.

## Retreat Structure

The retreat is in its sixth year — and for the first time, we are offering it remotely. Content will be a mix of cross-district collaboration time and “flipped-classroom” style sessions that will include videos, individual reflection, and team discussions. Interested districts should select to join **one** of the two weeks in which it will be offered in October and November. See the next page for more details on scheduling options and how to register.

## Content

ERS’ Strategic Budget Partner Retreat will provide teams with the knowledge, skills, and mindsets to support strategic resource allocation in schools and across the district. At the retreat, participants will be introduced to the tools, processes, and data that budget staff need to effectively support school leaders during these unprecedented times. Together, we will explore how finance teams can best support [Strategic School Design](#). Participating districts will collaborate through shared problems-of-practice and reflect within their own district teams about how to continuously improve the services they provide to schools. We will connect lessons learned to the current realities of virtual/hybrid schooling and the looming economic recession.

## Who Should Join?

Four to six members from your district should join. This typically includes: (A) the finance/budgeting analyst team who support principals in budget decisions, (B) the budget director who works with the finance/budgeting analysts, and (C) the CFO (for the first 1-2 sessions). We encourage you to invite others from your district who also support principals, not just finance. Please contact Renée Sullivan at [rsullivan@erstrategies](mailto:rsullivan@erstrategies) if you have any questions about assembling your team.

## Cost

Generous funding from The Michael and Susan Dell Foundation and The Carnegie Foundation have made it possible for us to offer this retreat **at a cost of \$2,500 per district**, to be invoiced by ERS the week prior to the retreat.

# Schedule



ERS' Strategic Budget Partner Retreat will be held twice this fall:

- ▶ **Option #1** runs from October 26-30
- ▶ **Option #2** runs from November 16-20

Districts should choose one week to participate in synchronous content, where we will focus on cross-district sharing and problem-solving. **All flipped-classroom sessions will be available beginning 2 weeks prior to your retreat, giving teams 3 full weeks (2 weeks prior, plus the week of retreat) to complete them.**

## Scheduling Options

<b>Option #1: October 26-30</b> Cross-District Collaboration (2 hrs each day, 8 hrs total)	
<b>Monday, October 26</b>	2:30-4:30 PM EST (11:30 AM-1:30 PM PST)
<b>Tuesday, October 27</b>	2:30-4:30 PM EST (11:30 AM-1:30PM PST)
<b>Wednesday, October 28</b>	<i>Not meeting as a group</i>
<b>Thursday, October 29</b>	2:30-4:30 PM EST (11:30 AM-1:30 PM PST)
<b>Friday, October 30</b>	2:30-4:30 PM EST (11:30 AM-1:30 PM PST)

OR

<b>Option #2: November 16-20</b> Cross-District Collaboration (2 hrs each day, 8 hrs total)	
<b>Monday, November 16</b>	12:00-2:00 PM EST (9:00-1:00 AM PST)
<b>Tuesday, November 17</b>	12:00-2:00 PM EST (9:00-1:00 AM PST)
<b>Wednesday, November 18</b>	<i>Not meeting as a group</i>
<b>Thursday, November 19</b>	12:00-2:00 PM EST (9:00-1:00 AM PST)
<b>Friday, November 20</b>	12:00-2:00 PM EST (9:00-1:00 AM PST)

<b>Plus: Flipped-Classroom*</b> Independent & Team Work Time	
<b>Part 1: Setting the Stage for Reimagining Our Roles</b>	
<b>~3 hrs</b>	<ul style="list-style-type: none"> <li>• Setting the Stage: School Funding</li> <li>• District Theory of Action</li> <li>• Characteristics of Effective Funding Systems</li> </ul>
<b>Part 2: Strategic School Design</b>	
<b>~3-4 hrs</b>	<ul style="list-style-type: none"> <li>• Supporting Principals in Your District</li> <li>• Intro to School Design</li> <li>• Budget Hold'em for Schools</li> </ul>
<b>Part 3: Strategic Budget Development</b>	
<b>~1-2 hrs</b>	<ul style="list-style-type: none"> <li>• Connecting School Design Lessons to Your Budgeting Process</li> </ul>
<b>Part 4: Bringing It All Together</b> <i>(after the end of synchronous content)</i>	
<b>~2 hrs</b>	<ul style="list-style-type: none"> <li>• Wrap Up &amp; Debrief Explicit Next Steps as a Team</li> </ul>
<b>Part 5: Optional Content</b>	
<b>~2 hrs</b>	<ul style="list-style-type: none"> <li>• Optional: Budget Hold'em for Districts</li> <li>• Optional: Difficult Conversations</li> </ul>

*\*Flipped-learning will be available beginning 2 weeks prior to your retreat. It will include videos with core content, guided reflections, and team activities to be completed before the end of retreat.*

## Session Information

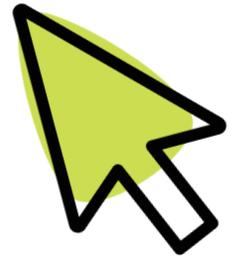


Overview: For Both Options #1 & 2					
	Monday	Tuesday	Wednesday	Thursday	Friday
<b>Cross-district collaboration</b> <i>(2 hrs each, 8 hrs total)</i>	<ul style="list-style-type: none"> <li>Welcome</li> <li>Introductions</li> <li>Setting the Stage</li> </ul>	<ul style="list-style-type: none"> <li>Discussion from Monday's flipped-learning</li> <li>Introduction to Education Resource Equity</li> <li>District-Specific Problem-of-Practice #1</li> </ul>	<i>Not meeting as a group</i>	<ul style="list-style-type: none"> <li>Discussion from Tuesday's flipped-learning</li> <li>District-Specific Problem-of-Practice #2</li> </ul>	<ul style="list-style-type: none"> <li>Closing discussions and application of learnings to our new reality: COVID, remote school, racial justice, and looming recession</li> </ul>

Session Details: For Both Options #1 & 2		
	Session	Additional Details
Synchronous	District-Specific Problem-of-Practice	Each district will have 1 hour to share a specific problem-of-practice with the group to gain collective insight and input. ERS will work with each district's lead on crafting your problem-of-practice prior to retreat
Asynchronous	District Theory of Action	ERS' overview of the critical link between district governance and what it means for resource-use and the role of the budget office
	Budget Hold'em for Schools	ERS' collaborative budget activity examines the tradeoffs needed to drive school-level success
	Finance & Budgeting Gurus in Action	An exploration of what it means to be a strategic thought partner to principals, building on learnings from previous sessions
	<i>Optional:</i> Budget Hold'em for Districts	ERS' collaborative budget activity that examines the tradeoffs needed to drive system-level success
	<i>Optional:</i> Difficult Conversations	An exercise to help unpack difficult conversations and a framework for navigating them effectively

# Registration and FAQs

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## Register Here

[https://info.erstrategies.org/ers\\_budget\\_partner\\_retreat\\_2020](https://info.erstrategies.org/ers_budget_partner_retreat_2020)

## Registration Deadline

The registration deadline is **Wednesday, September 30**. Please contact Renée Sullivan at [rsullivan@erstrategies](mailto:rsullivan@erstrategies) if you need an extension.

## Does every individual person attending need to register?

**Yes.** Since this is a virtual retreat, each person will receive Zoom links to the sessions. If there is any change to a link or technical difficulties occur, this will be the most efficient way for ERS to communicate and ensure that everyone's experience is as smooth as possible.

## Should I wait to sign up until our full team is determined?

**No.** Please sign up as soon as you know you'll be joining! Typically, this means the CFO and team lead (e.g., Budget Director) are the first to sign up, and the remaining team members are decided a few days later. By signing up even one person from your district as early as possible, ERS will be better able to plan facilitation and support.

## How is the CFO involved?

The CFO is expected to set the tone and purpose for team's engagement in the retreat. Given that this retreat is virtual, we encourage the CFO to engage with the team in the first and last meetings the team holds internally to work through the flipped-classroom material. The CFO should also work with the Budget Director (or similar team lead who leads the team through the entire process) and ERS on designing the team's Problem of Practice (ERS will reach out to schedule this once your district is registered). While the CFO is welcome to join synchronous content and engaged in flipped-classroom materials, it is not expected.

# Questions?

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Contact Renée Sullivan at [rsullivan@erstrategies.org](mailto:rsullivan@erstrategies.org) with any questions.

