



Site Level
Autonomy



Management



Alignment of
Spending to Goals



Resource
Equity



Transparency

Case Study

Gonzales Unified improves resource allocation and spending transparency

Key Takeaway

Aligning spending to goals within a zero-based budgeting model allows school leaders to paint a clearer picture of how district monies are being spent and highlights how resources should be allocated to improve equity. Implementing *Balance* relieves district leaders and their finance teams from the burden of housing this information within intricate spreadsheets, allowing them to collaborate with school sites to build and manage budgets that support the district's vision.

Challenge

To enhance spending visibility within the district and improve resource equity for high-need students, the Superintendent and Associate Superintendent/Chief Business Official at Gonzales Unified School District decided to implement a zero-based budgeting model. The current budgeting method consisted of creating and updating a multi-tab spreadsheet that took district leadership two months to build and prepare. The finance office staff would then spend weeks reviewing and finalizing the spreadsheet before sharing it with district administration.

Additionally, the district was facing rising health and welfare costs, contract negotiations, and continuous increases in the retirement funding, forcing the district to re-evaluate spending patterns.

District Highlights

Student Enrollment	2,371
Number of Schools	4
Employees	167
State	California
ERP	Escape

Solution

Gonzales Unified used *Balance Budget* to implement a zero-based budgeting model that tied district goals to the budget and *Balance Manage* to monitor and track spending throughout the year. As a result, *Balance* helped the district improve site-level autonomy in adherence to the California Local Control Accountability Plan and identify goals that increased equity and improved outcomes for students.

With *Balance*, the Central Office and HR departments can oversee the creation of site-based budgets and manage staffing logistics to ensure school sites have appropriate resources. Additionally, Central Office can focus on improving the district's equity model in support of the district's vision. Lastly, Principals now have access to their budgets and can track spending throughout the year.

Using *Balance*, Central Office has improved visibility into site-based budgeting and spending patterns without shuffling through a multi-tab spreadsheet. When district administrators are given access to their school budgets and spending plans, they are empowered to make the best use of their resources and foster equitable spending.

SMART Pathways is a district financial management and strategy rubric with five Pathways and 48 indicators of success designed to move districts to holistic and sustainable financial management practices. When districts work to improve their **alignment of spending to goals**, they will have clearly articulated outcomes-based goals tied to dollars, with the appropriate infrastructure in place to monitor and update resource allocation decisions regularly.

Interested in learning more about the **SMART Pathways**? Let's talk.

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