

# Analyze and plan professional learning investments

The questions and guidelines below will help educators structure discussions and reflections about resource use.

## PURPOSES:

- Determine what current investments are made in professional learning.
- Determine adequacy (as measured by results achieved) of investments in professional learning.
- Establish guidelines for effective investments in professional learning.
- Maintain accountability for investments in professional learning.
- Improve results from investments in professional learning.

## CONSIDERATIONS FOR PRIORITIZING, MONITORING, AND COORDINATING RESOURCES FOR PROFESSIONAL LEARNING

Understanding the sources of funding for professional learning, how those funds are allocated, who is accountable for them, and how they may be used builds accuracy and consistency into the budgeting process for professional learning.

## SOURCES OF FUNDING

**General fund:** How are funds allocated, i.e. per pupil, employee, initiative, school/unit, etc.?

**Private/public grants:** How are funds allocated, i.e. per participant, program, activity, school/unit, etc.?

**Block grants** (federal, state, or local, i.e. Title I, II, A, B, D, Workforce Development, Department of Labor, Department of Agriculture, Perkins, etc.): How are funds allocated, i.e. per pupil, school/unit, etc.?

## ACCOUNTABILITY/RESPONSIBILITY FOR FUND MANAGEMENT

- Who manages and supervises each fund? What specific person/role is responsible and accountable for managing funds once they are allocated?
- What parameters are in place to ensure coherence, coordination, quality, and effectiveness of investments in professional learning? Who is responsible for these areas?
- What assumptions/beliefs guide investments in professional learning?
- What guidelines are in place to ensure that expenditures in professional learning are based on research, standards, and best practices in professional learning?

## APPROVED COSTS/EXPENDITURES

- What costs/expenditures are approved for the allocated funds for professional learning? How do those costs/expenditures vary by fund source?
- What budget codes represent each of the approved expenditures? Do definitions exist that define what expenditures are coded to each code? To what degree is there consensus about these approved expenditures? To what degree is there consistency in the coding of the costs/expenditures? How often are accounts audited for accuracy and consistency?

## POSSIBLE EXPENDITURE/COST CATEGORIES FOR PROFESSIONAL LEARNING

Establishing consistent cost categories for professional learning allows for cross-program, school, or district analysis of financial resources. Odden, Archibald, Fermanich, and Gallagher (2002) suggest the categories on p. 20.

## A COST STRUCTURE FOR PROFESSIONAL DEVELOPMENT

Cost element	Ingredient	How cost is calculated
Teacher time used for professional development	<b>Time within the regular contract</b>	
	When students are not present before or after school or on scheduled inservice days, half-days, or early release days.	Teachers' hourly salary times the number of student free hours used for professional development.
	Planning and collaboration time.	Not included as a cost; coded as costs for elective teachers.
	<b>Time outside the regular day/year</b>	
	Time after school, on weekends, or for summer institutes.	Stipends or additional pay based on the hourly/daily rate that teachers receive to compensate them for their time.
	Released time provided by substitutes.	Substitutes' wages.
Training and coaching	<b>Training</b>	
	Salaries for district trainers.	Sum of trainer salaries, consultant fees, comprehensive school design contract fees, conference fees, and tuition reimbursement for university training.
	Outside consultants who provide training.	
	<b>Coaching</b>	
	Salaries for district coaches, including on-site facilitators.	Sum of instructional coach/facilitator salaries and benefits OR consultant fees.
	Outside consultants who provide coaching.	Consultant fees or comprehensive/turnaround school design contract fees.
Administration of professional development	Salaries for district or school-level administrators of professional development programs.	Salary for administrators times the proportion of their time spent administering professional development programs.
Materials, equipment, and facilities used for professional development	Materials	Materials for professional development.
	Equipment	Equipment needed for professional development activities.
	Facilities	Rental or other costs for facilities used for professional development.
Travel and transportation for professional development	Travel	Costs of travel to off-site professional development.
	Transportation	Costs of transportation within the district for professional development.

**Source:** Adapted from Odden, A., Archibald, S., Fermanich, M., & Gallagher, H.A. (2002, Spring). How to figure the cost of professional development: Framework compares costs across a variety of initiatives. *JSD*, 23(2), 53-58.

## Guidelines for allocating resources for professional learning

Discuss these questions related to the guiding principles for allocating resources.

### Build individual and collective expertise.

- How much time have we allocated for individual and collective expertise?
- How do we increase time available for collaborative learning?
- How do we develop facilitators who will support collaborative learning?
- How are we supporting educators to spread effective practices throughout a school and district?

### Advance school and system vision and goals.

- To what degree is there tight or loose alignment between system and school visions and goals?
- How does individual, team, and school- and districtwide professional learning support attainment of the vision and goals?
- What professional learning can be eliminated or redesigned to increase coherence and alignment with school system and school goals?
- How can we repurpose time and funding to focus on priority areas?

### Tap expertise of internal and external experts.

- How are we allocating funds toward internal and external capacity building?
- If high-performing companies are currently investing 70% of their resources for professional learning internally and 30% externally, how do we compare?
- Are we moving toward an environment where internal

capacity building focuses resources on developing the expertise of internal staff who will then facilitate professional learning of others rather than using the expertise of external consultants to facilitate professional learning?

### Reward contributions, performance, and results.

- What rewards are available for professional learning?
- What accompanying expectations do these rewards carry?
- Have the criteria for granting the rewards been collaboratively established with broad-based input from employee groups who will benefit from the rewards?
- What accountability systems are in place to ensure the rewards are fairly awarded?
- Are there ways to leverage these rewards to increase their impact on educator performance and student success?

### Provide comprehensive professional learning.

- To what degree does professional learning meet the criteria of effective professional learning as identified by the Standards for Professional Learning?
- To what degree do current professional learning initiatives include support to build knowledge, skills, dispositions, and practices?
- How essential is any professional learning that does not provide support to build knowledge, skills, dispositions, and practice?
- What professional learning currently fails to provide support for implementation?
- How essential is this professional learning?

- How can it be redesigned to include support for both learning and implementation?
- What professional learning can be eliminated so that resources can be reallocated to provide comprehensive professional learning rather than merely introductory professional learning?

**Invest in teachers, support staff, and administrators.**

- To what degree are principals getting the support they need to fulfill their roles and responsibilities as leaders of professional learning?
- Are there dollars supporting others to fulfill these responsibilities that can be reallocated to investing in principal development?
- Are adequate funds allocated to supporting professional learning for support staff, particularly those providing direct support to students and those with key roles in supporting families, educators, or community members?

**Support both collaborative and formal learning.**

- Where is informal learning occurring in schools and the school system?
- What support and resources are allocated to improve the immediacy, quality, and results of informal learning?
- How do schools and school systems account for investments in informal learning?
- How do they monitor the results of informal learning?
- Who is responsible for resources allocated to informal learning?

**Differentiate support for educators at various career and performance stages.**

- How is professional learning differentiated to support educators at various career and performance stages?

- What specific resources are used to support differentiation, e.g. coaching, options for alternative learning, advanced learning opportunities, differentiated roles and responsibilities, etc.?
- How are educators who have demonstrated mastery supporting the development of their colleagues?
- How does the system account for costs in providing differentiated professional learning?

**Allocate resources to schools and departments based on a weighted formula.**

- How does the school district allocate funds for professional learning?
- How does the formula or process for allocation account for differing levels of needs among schools, their students, and staff?
- How are funds allocated to central office departments for professional learning?
- How do those allocations account for district goals, vision, and priorities?
- How do central office staff budget their allocated resources to serve learning needs associated with the school system's goals, vision, and priorities?
- What accountability measures are in place to measure and monitor results from expenditures in professional learning?

**Expend resources on authentic professional learning.**

- What whole-school or district events for information sharing or celebrations are currently paid for from funds professional learning?
- To what degree do these events meet the criteria of authentic professional learning, i.e. is their intent to improve educator performance and student success; do they meet the Standards for Professional Learning, etc.?

- How else can these events be supported through technology to minimize cost or alternative funding perhaps from corporate or community sponsors if they are deemed essential?
- To what degree are these essential to the core function of school systems?
- How can we redesign meetings that are typically information sharing as authentic professional learning?

#### **Align professional learning to individual, team, school, and system improvement goals.**

- What parameters are in place that ensure alignment of individual, team, and school professional learning with school system and school vision and goals?
- Who monitors individual, team, and school professional learning plans and expenditures to maintain alignment, monitor effectiveness and results, and make recommendations for improvement?
- What proportion of resources for professional learning is allocated to individual, team, school, and district professional learning?
- Does this allocation ratio reflect the district's beliefs about professional learning, provide the greatest leverage for improvement in performance and student results, build a collaborative culture, support implementation of the Standards for Professional Learning, and support differentiation?
- How can the ratio be adjusted to achieve better results for students and educators?

#### **Employ technology to increase efficiency, effectiveness, and results.**

- What technology solutions are available for professional learning?

- To what degree do the technology solutions support increased access to learning opportunities, greater efficiency, and variety of learning designs?
- To what degree do they create personalized or collaborative learning experiences?
- Are technology solutions informed by the analysis of student and educator data?

#### **Build schedules to include time for ongoing collaborative learning.**

- What time is currently available that can be repurposed for professional learning within existing guidelines for time use?
- To what degree do existing guidelines for time use support or hinder the desire to have time for ongoing collaborative learning?
- Which guidelines create the greatest challenges to creating time for professional learning? How can they be changed?
- What beliefs guide the current allocation of time for professional learning?
- What beliefs about professional learning do we want to guide the allocation of time for learning to educators?
- Is the existing time for professional learning producing the results we want or supporting educators in meeting district, school, team, and individual goals?
- What small changes can lead to more time for professional learning?
- Will these small changes be adequate to achieve the vision and goals?