

Intentional Alignment

Mapping a Path Forward for Strategic Resource Management in K-12 Districts

By Christine Dickason, Alex Spurrier, and Nick Lee

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Introduction

School districts in the United States spend nearly \$1 trillion every year to educate K-12 students and serve communities and families.¹ How that money is spent matters, as budgeting decisions shape student learning outcomes. Despite the importance of these decisions, the budgeting process itself is often fragmented, disconnected from current data, or misaligned with the district's long-term strategic objectives. This misalignment between budgeting and desired student outcomes can result in an inefficient use of resources, limiting the ability of districts to serve their students effectively.

Strategic resource management (SRM) — the intentional alignment of financial, human, and political resources with clear educational goals — offers a framework to ensure that every dollar, every hire, and every stakeholder is contributing to the success of students. This brief outlines a definition of SRM, details common challenges with SRM implementation, and offers promising examples from organizations across the country that are working to support SRM in districts or deepen the field's understanding of its key principles.

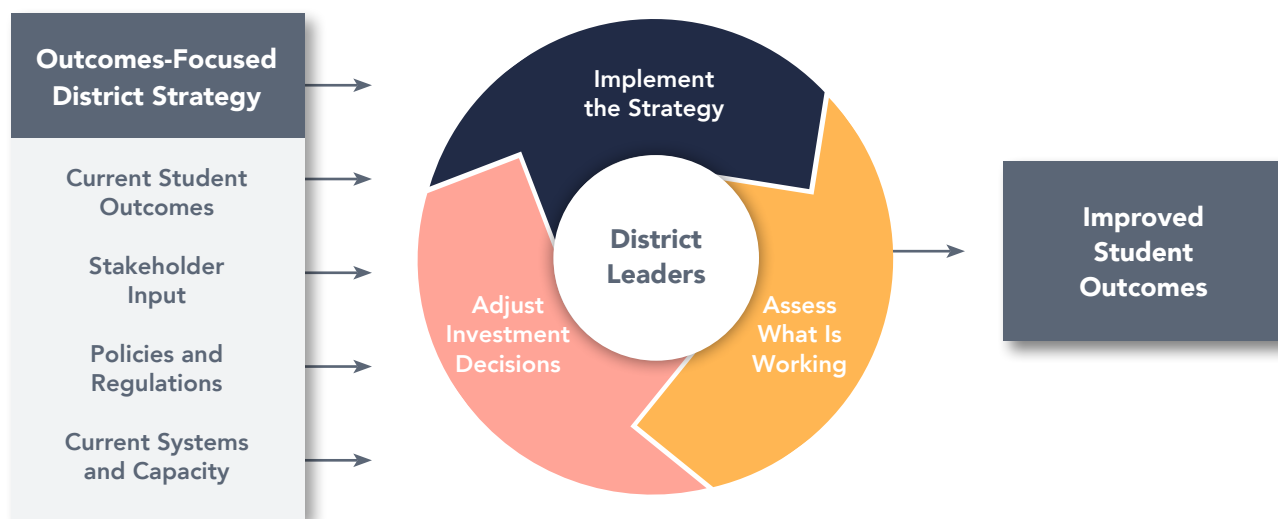
Defining Strategic Resource Management

SRM is the intentional alignment of districtⁱ resources (including time, people, technology, political capital, and money) to achieve a set of desired student outcomes. This investment is then paired with periodic diagnostics (e.g., formative or summative assessments, student and/or teacher feedback) of how well those investments are producing results and an orientation to adjusting based on these diagnostics (Figure 1). Such an approach becomes more critical when budgets are tight, which many districts are likely to face in the coming years due to declining enrollment and federal policy changes. Unlike traditional approaches to budgeting, SRM is iterative and requires the engagement of stakeholders across departments (e.g., academics, finance, human resources).

This work can be supported through state education agency (SEA) leadership, in partnership with other capacity building organizations, and thoughtfully designed tools and practices. Throughout the SRM process, leaders need to provide sufficient direction and support to those implementing strategic investments to ensure program — and ultimately, student — success.

FIGURE 1: STRATEGIC RESOURCE MANAGEMENT OVERVIEW

SRM is a cyclical process that aligns districtwide investment decisions with clear strategies to improve student outcomes.



Why should district leaders implement SRM?

Aligning budgeting decisions to strategic goals around student learning can lead to improved student outcomes. SRM can also help improve efficiency and realize cost savings of almost 25% in districts that implemented strategic budgeting versus traditional budgeting, indicating that strategic budgeting was helpful in identifying and eliminating unnecessary spending.² According to one study's participants, when using strategic budgeting, their teams "function[ed] in a more collaborative format [and] focused on goals more aggregated in nature." The study's findings suggest that implementing SRM is even more critical today, as several external forces in the education sector have pushed and will continue to push districts to invest their limited funds more effectively. These external forces include:

- **Declining Enrollment:** Federal projections indicate that the nationwide decline in enrollment among K-12 schools will continue, with 2.7 million fewer students from fiscal years 2022 to 2031. As enrollment declines, districts lose state funding, meaning they must align current and future investments to new budget realities.³
- **Elementary and Secondary School Emergency Relief Fund Fiscal Cliff:** During the height of the COVID-19 pandemic, significant federal funding flowed to schools in the form of emergency relief aid. With these funds now expired, districts are faced with smaller budgets, particularly in the highest-need communities.⁴

- **Stagnant and Declining Student Outcomes:** Recent data reveal a troubling trend in student outcomes across the country. A 2024 report by the Center on Reinventing Public Education found the “average American student in school during the pandemic is less than halfway to a full academic recovery.”⁵ At the same time, the 2024 National Assessment of Educational Progress scores show reading proficiency at historic lows.⁶ This sustained stagnation and decline will place mounting pressure on K-12 districts to implement more effective strategies to close these gaps and accelerate learning recovery — especially as federal pandemic relief funds phase out and public accountability intensifies.
- **Broader Federal Funding Uncertainty:** From the Trump administration’s threatened withholding of congressionally appropriated funding⁷ to administration and congressional proposals that would significantly change or reduce previously stable funding streams,⁸ districts are likely to be working with additional volatility in the coming months and years. This environment will make strategic, long-term financial planning even more critical.

These trends, coupled with high levels of uncertainty about federal policy changes, make future budget forecasting a difficult prospect for districts and put a premium on districts having a clear budget strategy and a proactive approach to planning for various scenarios.⁹

What is the current state of budgeting in districts without SRM — and how does it change in districts with SRM?

Districts Without SRM

Siloed decision-making is the norm in many districts, with academic, operational, human resources, and finance departments operating according to status-quo priorities. Investment decisions are often made based on individual departments’ requests — typically to support long-running initiatives — rather than on a thorough consideration of the entire budgetary ecosystem across departments. With limited capacity and competing priorities, there is often little or no assessment of how well investments support student outcome goals or if previously made investments in service of particular goals remain relevant, limiting the ability of district leaders to consider changes in budgets to improve returns on investments. Without SRM, there is less potential to achieve student outcome goals and support sustainable and coherent instructional systems.

Districts With SRM

Conversely, leaders in districts that embrace SRM establish clear goals for student outcomes and foster intentional collaborative decision-making processes across departments around those priorities. District leaders work together to regularly evaluate outcome data and adopt a continuous improvement approach to reflect on costs, benefits, and risks of investments to achieve goals. The data, outcomes, and lessons gathered from continuous improvement cycles inform future investments.

Findings suggest that implementing SRM is even more critical today, as several external forces in the education sector have pushed and will continue to push districts to invest their limited funds more effectively.

What and who are involved at each stage of the SRM process?

SRM is a multistage, collaborative process facilitated by district leaders.

PHASE 1: Set an outcomes-focused district strategy.

- **Outcomes-Focused District Strategy:** Leadership must set a strategy that focuses on achieving specific student outcomes, using a collaborative, iterative approach.
 - **Student Outcomes and Trends:** District strategy should be informed by current student outcomes and trends and future outcome goals. This includes defining and assessing leading metrics, such as changes in instructional practices, given the lagging nature of some student-level outcomes.
 - **Stakeholder Input:** The district strategy should incorporate input from stakeholders such as teachers, parents, and community members.
 - **Policies and Regulations:** Consideration must be given to federal, state, and local policies and regulations when setting district strategy.
 - **Current Systems and Capacity:** Districts should consider their organizational structure, their physical and digital infrastructure, and the human capital at their disposal when setting a strategy to ensure that the desired outcomes are realistic.

PHASE 2: Implement, assess, and refine the strategy and adjust investments in a cyclical process, ensuring sufficient support for implementation.

- **Implement the Strategy:** District leaders put the strategic plan into action by allocating resources, launching key initiatives, and coordinating staff and systems to drive progress toward student outcome goals.
- **Assess What Is Working:** Regularly reviewing leading indicators of success can help track progress toward goals and ensure investments are aligned with priorities.
- **Adjust Investment Decisions:** Continuous assessment and review of student outcomes inform decisions about where to adjust current and future resource investments.

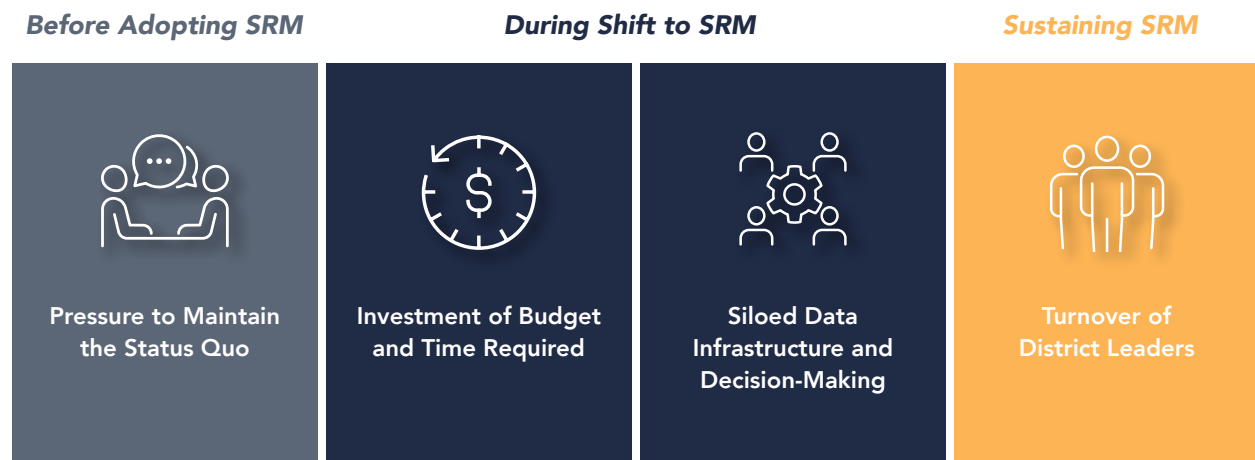
PHASE 3: Achieve improved student outcomes.

- **Improved Student Outcomes:** Over time, this cyclical, strategic process will lead to improved long-term student outcomes through continuous review and adjustment of districtwide priorities and investments.

Overcoming Common Challenges in Adopting, Implementing, and Sustaining SRM

Despite growing awareness of the importance of strategic decision-making in the budgetary process, district leaders face many challenges to implementing SRM, even if they are fully on board with the necessity of the approach (Figure 2).

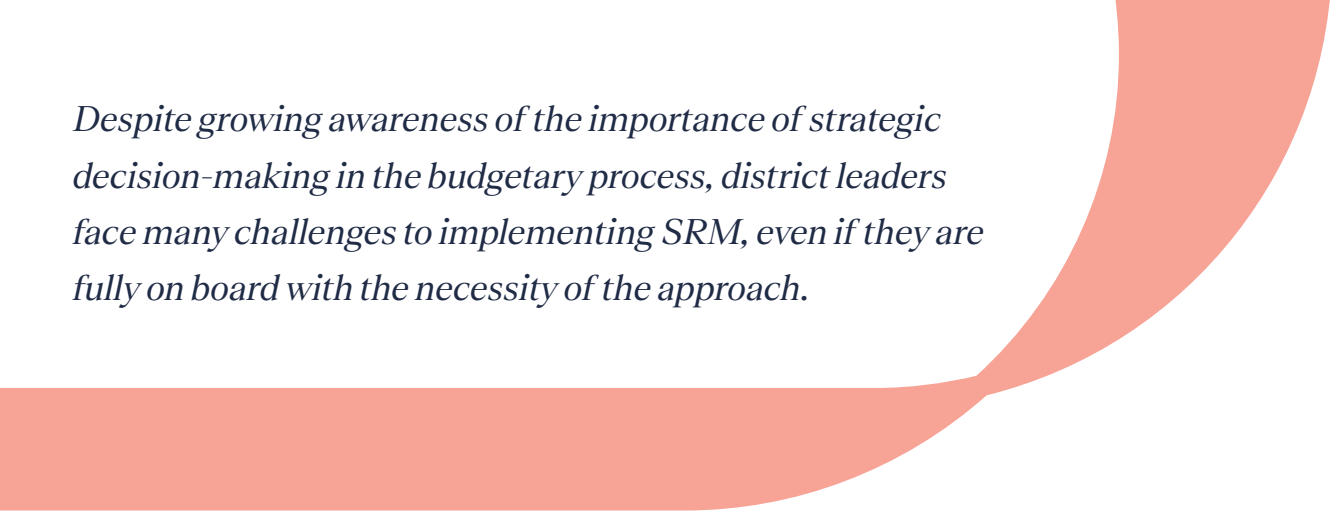
FIGURE 2: COMMON BARRIERS TO SRM IMPLEMENTATION



Challenge 1: Pressure to Maintain the Status Quo

Many district leaders face resistance from stakeholders — school boards, teachers unions, families, and staff — who are accustomed to and invested in existing funding structures, staffing models, and programmatic investments. Changing resource allocation can disrupt long-standing practices, raising concerns about equity, job security, student services, and community expectations. Political considerations can make leaders hesitant to shift resources, even when data suggests a reallocation could better support student outcomes. This resistance to change can stall efforts to implement SRM, leaving districts locked into legacy systems that may not be the most effective or efficient in meeting student needs.

To address this challenge, districts need strong leadership, transparent communication, and collaboration with stakeholders to build a shared understanding of how shifting from current structures to more strategic resourcing can drive better outcomes for students. Importantly, mid-level managers (e.g., budget directors) must also be brought along in this learning process, as they are often the ones in charge of implementing SRM changes.



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Challenge 2: Investment of Budget and Time Required

Implementing SRM creates cost pressures for districts, particularly in the early stages when investments in data systems, staff time and training, and external expertise are often required. Many districts operate with tight budgets, making it difficult to justify upfront costs for SRM initiatives, even if they promise long-term efficiencies and improved student outcomes. Actions such as upgrading data systems for tracking resource allocation and training leaders in data-driven decision-making all require funding that may not be readily available. Additionally, grants or temporary funding streams that support SRM implementation may not cover ongoing costs, creating uncertainty about long-term sustainability. Without the necessary initial investments, districts may struggle to build the capacity needed to assess the effectiveness of their resource use and make informed adjustments.

To address this challenge, district leaders need creative financing and human capital strategies, support from state education agencies, and partnerships with nonprofit organizations to build SRM capacity in a financially sustainable way.

Challenge 3: Siloed Data Infrastructure and Decision-Making

Within districts, critical information about budgeting, staffing, student performance, and program effectiveness is often housed in separate systems that do not communicate with one another, making it difficult for district leaders to get a comprehensive view of how resources are being used and their impact on student outcomes. Without integrated data systems, leaders may struggle to identify inefficiencies, assess the effectiveness of investments, or make informed decisions about reallocation. This fragmentation not only slows down decision-making but also limits leaders' ability to conduct periodic return-on-investment assessments that are central to SRM and driving better student outcomes. This problem is compounded by disparate decision-making structures across departments.¹⁰

To address this challenge, districts need investments in data integration, cross-departmental collaboration, and technical capacity building to ensure that resource decisions are informed by a holistic, real-time understanding of student needs and outcomes.

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Challenge 4: Turnover of District Leaders

High turnover among district leaders impedes the implementation and continuation of SRM. Superintendents frequently change roles, and while national data are limited, this trend likely applies to other decision-making roles in districts.¹¹ This instability disrupts long-term planning and can stall SRM initiatives, as new leaders may bring different priorities, lack familiarity with existing resource strategies or technology systems, or feel pressure to make immediate changes rather than build on previous efforts. Frequent leadership turnover can also erode institutional knowledge, making it difficult for districts to maintain momentum on data-driven decision-making and continuous improvement efforts. Without strong systems in place to ensure SRM practices are embedded at multiple levels of leadership, districts risk reverting to short-term or reactionary resource allocation rather than making sustained, strategic investments in student success.

To address this challenge, district leaders must build SRM capacity across leadership teams, foster continuity through board and staff engagement, and institutionalize data-driven processes that endure beyond any one leader's tenure.

Bright Spots in the Field

Districts do not need to tackle SRM in isolation. Several organizations across the country are providing support to address some of the challenges districts face when adopting, implementing, and sustaining SRM practices through technical assistance, capacity building, and information sharing. Below are five examples of how different organizations are currently tackling this work in the field, including:

- Allovue, a PowerSchool Company
- Education Resource Strategies (ERS)
- Education Week
- Project Evident
- Edunomics Lab

✦ **ALLOVUE, A POWERSCHOOL COMPANY**

District leaders want to make sure that interventions they use in their schools are supported by research that is relevant to their context, but the body of literature on educational interventions is vast and challenging to navigate. Allovue is testing a new data tool, Implement for Impact, to help districts with this challenge by increasing access to intervention cost and outcome data, breaking down siloed data infrastructure and decision-making.¹² The tool provides a structured platform for districts to evaluate strategic investments, allowing leaders to connect expenditures directly with student outcomes. Through its guided process, districts can align their budgets with strategic goals, ensuring that resources are directed toward interventions that deliver measurable impact.

✦ **ERS**

In the traditional, siloed approach to budgeting, district leaders often make decisions about what to cut, maintain, or double down on without information to fully assess whether a particular strategy or program is delivering results. To address this challenge, ERS has developed System Strategy Return on Investment (SSROI), an outcomes-based approach that helps districts assess their resource use against desired student outcomes by examining the alignment among investments, implementation quality, and impact.¹³ ERS has supported cohorts of districts in Alabama, Massachusetts, Texas, and elsewhere to implement SSROI.

This work highlights that when SEAs establish clear and coherent policy priorities, provide consistent guidance, and offer tools and accountability structures, they can scale the adoption of SRM in their state. For example, in partnership with the Texas Education Agency and the Texas Impact Network, ERS brought SSROI to 26 districts across the state in school year 2024-25. Thirteen districts were able to quantify meaningful budget impacts, reporting new investments, re-allocated dollars, or savings ranging from \$75,000 to \$40 million. According to ERS, one district leader noted that "The work we've done with ERS has changed our approach ... we went from doing an 'autopsy' report after the fact to doing this thinking and planning ahead of time."

✦ **EDUCATION WEEK**

SRM is gaining traction across K-12 but understanding how it is being implemented — and where barriers remain — requires robust, field-informed research. Education Week is contributing to this understanding by conducting quantitative and qualitative research on districts' current budgeting approaches and publishing accessible, public-facing analyses to inform the field.¹⁴ Its November 2024 report on the state of SRM revealed that although districts see clear benefits to SRM, they encounter barriers to implementing it.¹⁵ The report also highlighted a shared perception among educators and communications vendors of being siloed within district structures, creating a missed opportunity for critical collaboration. Education Week's analysis provides insight for both district leaders and policymakers, clarifying where support is most needed to build the infrastructure and collaboration necessary to implement SRM.

✦ **PROJECT EVIDENT**

Districts are increasingly expected to demonstrate how their investments drive student outcomes, but many lack the capacity or structures to make SRM a sustained practice. Project Evident is fostering ecosystems for continuous improvement and SRM by seeding networks of districts committed to aligning resources with student outcomes. Through targeted technical assistance, Project Evident supports districts in using data and evidence to guide resource decisions and building tools to sharpen their analytical skills. Additionally, Project Evident hosted a national convening on strategic resource allocation to build leaders' skills and capacity to engage in SRM. Its model focuses on strengthening local capacity for SRM while encouraging peer learning across districts, ensuring that SRM is not a one-off initiative but a sustainable practice that can lead to a more effective use of resources.

✦ **EDUNOMICS LAB**

School boards play a pivotal role in shaping how district resources are allocated, yet they are often under-equipped to engage in strategic resourcing deliberations. Edunomics Lab is advancing the conversation on SRM by illuminating the current state of school boards' engagement in budget deliberations. Its research reveals that board members often miss opportunities to engage in thoughtful, student-centered discussions around financial trade-offs and outcomes.¹⁶

To address this, Edunomics Lab not only recommends nudges from SEAs to shift board norms but also pilots targeted interventions — such as redesigned board materials and training supports — to promote deeper engagement with budget decisions. One practical innovation is Edunomics Lab's Smart Contracting Cover Sheet, a tool that helps district leaders and the boards that approve contracts evaluate proposed investments through the lenses of cost, evidence, and alignment with district goals.¹⁷ By equipping boards with tools to engage meaningfully in the SRM process, Edunomics Lab is helping shift governance culture toward one that views budgeting as a lever for advancing student outcomes.

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Conclusion: Next Steps for District Leaders

Implementing SRM can transform the way districts approach the budgeting process and serve students. This is especially important for district leaders in states with tightening education budgets amid uncertainty in federal funding and a volatile economic climate.

As district leaders assess the current state of their budgeting processes and student outcomes, SRM is an effective approach to align resources with educational goals. To better leverage SRM and implement it with fidelity in districts, leaders should consider the following set of strategic questions:

- Are the district's budgeting decisions tied to student achievement goals? If not, what stands in the way of this approach?
- Is the district using data about student outcomes to change resource allocation decisions, or is it relying more on historical patterns or reacting to political pressures?
- Do departments work collaboratively districtwide to inform budgeting decisions?
- How does the district track the impact of its budgeting decisions on student outcomes? How should the district adjust its strategy if it is not achieving its intended goals? ✨

Endnotes

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About the Authors



CHRISTINE DICKASON

Christine Dickason is a senior analyst at Bellwether in the Policy and Evaluation practice area. She can be reached at christine.dickason@bellwether.org.



ALEX SPURRIER

Alex Spurrier is an associate partner at Bellwether in the Policy and Evaluation practice area. He can be reached at alex.spurrier@bellwether.org.



NICK LEE

Nick Lee is a partner at Bellwether in the Policy and Evaluation practice area. He can be reached at nick.lee@bellwether.org.

About Bellwether

Bellwether is a national nonprofit that exists to transform education to ensure systemically marginalized young people achieve outcomes that lead to fulfilling lives and flourishing communities. Founded in 2010, we work hand in hand with education leaders and organizations to accelerate their impact, inform and influence policy and program design, and share what we learn along the way. For more, visit bellwether.org.

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