MICIP
MICHIGAN INTEGRATED CONTINUOUS IMPROVEMENT PROCESS

Resource Allocation Review Process Guide

A Toolkit to Support Continuous Improvement Leaders, Facilitators, and Team Members

Second Edition, 2025

Abstract

The second edition of the *Resource Allocation Review Process Guide* breaks down the inquiry of resource allocation and utilization into six phases. Beginning with guidance on ensuring critical perspectives are informed and engaged to concluding with detailed instructions for recording the team findings. The toolkit provides guidance and resources to assist continuous improvement leaders, facilitators, and team members in successfully considering how available resources are distributed to ensure that each student receives the necessary resources to be college and career ready upon graduation from high school.

MICHIGAN Department of Education

Suggested Citation

Citation : Michigan Department of Education, (2025). *MDE Resource Allocation Review Process Guide: A Toolkit to Support Continuous Improvement Leaders, Facilitators, and Team Members* (2d. edition)

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Contents

Phase One: Setting the Stage 1
- Introduction 2
- Key Terms 3
- What is a Resource Allocation Review (RAR)? 4
- Purpose 4
- Primary Objective & Overview 5

Phase Two: Initiating the Inquiry 7
- Conducting an Inquiry in School Funding and Student Outcomes 8
- Comparability and the Resource Allocation Review 8
- Reviewing the Methodology for Distributed General Fund Dollars 9

Phase Three: Narrowing the Focus 10
- Selecting the Focus Area of Inquiry on Resource Equity 11
- Focus Perspectives for Consideration 11
- Resource Equity Questionnaires for Considerations 12
- Phase Three Appendix 13

Phase Four: Collaborative Inquiry 18
- Setting the Stage for Completing the Resource Equity Diagnostic Questionnaire 19
- Responding to the Questionnaire 19

Phase Five: Addressing the Inequity 20
- Resolving the Identified Resource Inequity 21
- Addressing the Inequity 21
- Developing a Challenge Statement 21

Phase Six: MICIP Platform Documentation 22
- Process for entering the Resource Allocation Review (RAR) information into the MICIP Platform 23
- Recording How to Address the RAR Finding 24
- Adding RAR Information to an Existing Data Story 25
- Adding RAR Information as a New Data Story 27

References 29

Phase One: Setting the Stage

Purpose and Overview of the Resource Allocation Review

Phase One Goals

- District- and school-level leadership commit to completing an informative resource equity inquiry.
- A district- and school-level team is formed.
- Both district- and school-level teams are trained and have a working knowledge of the Resource Allocation Review.

Estimated Time

Team leader preparation: 2 hours

Team collaboration (training & questions): 1.5 hours

General Resources

- *Resources for schools identified for CSI, ATS, or TSI*
- *MI Systems Support*
- Resource Equity Diagnostic Tool and Supports
- Access to the following documents can be located on the *MDE MICIP Resources* website:
  - MICIP Process Guide
  - Forming a Team

Introduction

The *Resource Allocation Review Process Guide* provides advice to continuous improvement leaders, facilitators, and team members for completing the Resource Allocation Review (RAR) identified within the Every Student Succeeds Act (ESSA). Collectively, each phase frames the RAR through the Michigan Integrated Continuous Improvement Process (MICIP). This guidance provides information to assist the district in completing each phase of the process for identifying any resource allocation/utilization inequities to be addressed within the continuous improvement plan.

The organization of this guidance is intentionally aligned with the MICIP Process Guide to assist the user in understanding the content and alignment with the MICIP process. The RAR has been designed in two tiers (universal guidance and intensive supports) based upon the legislative requirements. A separate guide detailing the process for a Periodic–Resource Allocation Review (P-RAR) addresses the intensive support provided to districts serving a significant number of schools identified for additional support (CSI, ATS, and TSI).

This approach to an inquiry of resource allocation offers district flexibility to ensure the allocation and utilization of resources are related to identified needs. The process of reviewing the allocation/utilization of resources generates intentional conversation focused on equitably aligning available resources with plans to improve outcomes for each student. The design includes universal guidance for completing a questionnaire aligned with Michigan-specific initiatives and supports that is based upon the Resource Equity Diagnostic. The district will address school funding and other dimension(s) aligned to efforts currently in place. The three focus perspectives include serving a specific student group(s), resourcing an identified initiative(s) related to identification, and a comprehensive system review. Phase Three (Selecting a Focus Area to Review) includes guidance, resources, and tools for collecting and analyzing resource allocation/utilization data.

Table 1: Overview of Resource Allocation Review Process

Tier	Resource Allocation Review Overview
Universal	• District/school completes a resource equity questionnaire on school funding and at least one other area from the perspective of its choice aligned to the reason for identification: ▪ Perspective 1: Centered on the needs of a specific student group ▪ Perspective 2: Centered on a MICIP strategy intended to address a root cause need related to the identification for support ▪ Perspective 3: Comprehensive system review • The district/school addresses the identified resource inequity within the CSI and/or ATS improvement plans
Intensive	• MDE collaboration and technical assistance is provided throughout the process • MDE conducts the P-RAR on school funding using state-level data • Based upon decisions made concerning district/school goals and reflections from the P-RAR, the district/school selects at least one other area from the perspective of its choice described in the universal supports to determine resource equity by completing a resource allocation review for each school identified for CSI and ATS • The district/school addresses the identified resource inequity within the CSI and/or ATS improvement plans

Key Terms

Term	Definition
Adequate Education Funding	The amount of money necessary to sufficiently provide the resources (people, time, materials, and facilities) for ensuring every public-school learner will have equitable opportunities for a rigorous, inspiring, engaging, safe, healthy, and caring learning environment that fosters creative and critical thinking to meet/exceed all State of Michigan academic standards on the journey to becoming college and career ready.
Area of Inquiry	Pre-populated or manually assembled data sets that help identify assets or areas of need.
Equity	Fair and just treatment that ensures access and opportunity for all people.
Educational Equity	When educational policies, practices, interactions, and resources are representative of, constructed by, and responsive to all people so that each person has access to, meaningfully participates in, and has positive outcomes from high-quality learning experiences, regardless of individual characteristics and group memberships (Great Lakes Equity Center).
MISchoolData	Michigan's official data portal for managing educational data.
Resource	An asset such as money, material (e.g., curricula and learning tools), course offerings, personnel, or facilities.
Resource Allocation	The process of strategically assigning or designating assets to obtain specific outcomes.
Resource Equity	The balance of available resources created when allocation and use of resources support student experiences that enable every student to reach the intended rigorous learning outcomes while meeting the various whole child needs of the learner.
Resource Inequity	An imbalance of available resources created when the allocation and use of resources is a barrier to supporting a particular student group to reach the intended rigorous learning outcomes while meeting the various whole child needs of the learner.
Resource Utilization	The actual use of an asset by an entity for a specific innovation, strategy, or activity.
Whole Child	The MDE has defined the Whole Child as "a unique learner comprised of interacting dimensions such as cognitive, physical, behavioral, social and emotional." The whole child lives within multiple and interconnected environments including home, school, and community.
Universal Support	Broadly disseminated and widely accessible information available to all independent users.
Targeted Support	Supports developed based on needs common to multiple recipients and not extensively individualized.
Intensive Support	Extensive, individualized support requiring an ongoing relationship between provider and recipient to ensure effective adaptation for the local context.
Data Protocol	A structured process guiding dialogue through exploring predictions and observing visualized data to construct inferences and questions that inform the generation and selection of solutions. (Adapted from Wellman & Lipton 2004)

What is a Resource Allocation Review (RAR)?

A Resource Allocation Review (RAR) is a team-based inquiry process in which the participants focus on the equitable distribution of available assets within a school and/or district. The RAR will assist teams in identifying any existing resource inequities that impede the implementation of evidence-based strategies and related activities as intended.

Purpose

As part of the assess needs process, data is collected to assist the team in gaining an understanding of the strengths and challenges of how resources are utilized to support improved outcomes for each student. Studying the data in conjunction with other non-academic and academic data sets is critical to obtaining a robust picture of student needs and the current state of how district/school assets are designated/utilized for supporting efforts designed to meet that need. Through this process, the district and school(s) will examine the utilization of allocated and expended resources (fiscal, physical, and human resources). This review will enable the district to identify areas of strengths and opportunities to ensure each student is provided the necessary support.

Resource Allocation Review (RAR) Overview

RAR Objective: To collaboratively identify and develop an action plan for any existing resource inequities utilizing the assess needs process. Resource inequities and evidence-based actions will be addressed within the improvement plan as required by ESSA (Sec. 1111(d)(1)(B)(iv); ESSA Sec. 111(d)(1)(B)(2)(C)).

Enables sustainable systems and strategies to support desired outcomes for each student.

District and School Continuous Improvement

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Throughout the continuous improvement process, a representation of various perspectives is used to develop a cohesive improvement and fiscal plan. This engagement supports sustainable district-wide systems for implementing evidence-based strategies as intended.

Primary Objective & Overview

Why Must a School or District Complete the RAR?

Legal Requirements

Districts with schools identified to receive additional supports (Comprehensive Support and Improvement (CSI) and/or Additional Targeted Support (ATS)) are required to identify and address any resource inequities within its improvement plan [ESSA sec. 1111(d)(1)(B)(iv); sec. 111(d)(1)(B)(2)(C)]. Furthermore, the MDE must review resource allocations to support districts with a significant number of schools identified for improvement [ESSA sec. 111(d)(3)(A)(ii)]. Completing this review provides valuable data for contributing to a collaborative discussion of district resources from the perspective of equitable distribution and use. **The Resource Allocation Review must identify a resource inequity and develop a plan to address that resource inequity.**

Table 2: ESSA Requirements for Resource Allocation Review

Support Category	Is a RAR required?	Where does the RAR focus?	Can RAR include district-wide resources?	Who is responsible for conducting the RAR?	How often is the RAR required?	Must the RAR identify & address resource inequities?	Is technical assistance from the state for the RAR required?*
CSI	Yes	School	Yes	District	Every 3 years (matches the identification cycle)	Yes	No
ATS	Yes	School	Yes	**School	Every 6 years (matches the identification cycle)	Yes	No
TSI	No	N/A	N/A	N/A	N/A	N/A	N/A
Significant # (CSI, ATS, TSI)	Yes	District	Yes	State	***Periodically	Yes	Yes

* Technical assistance is available to all entities seeking support.
** If the RAR expands to include review of district budgets, then the district also is responsible.
*** ESSA leaves the definition of "periodically" to the states.

Forming A Resource Allocation Review Team

A meaningful Resource Allocation Review is embedded within the assess needs process and begins with examining how district funds are designated (allocated) to specific schools or programs. Throughout this process, it is important to reflect on the objectives driving the resource allocations. Ensure the team understands why resources are allocated and the anticipated outcomes. Therefore, teams are encouraged to assess resource allocation through the lens of student needs and the initiatives designed to address those needs. It is important for team members to be familiar with the continuous improvement plan, the status of the plan's implementation, the alignment between the use of resources and the improvement plan, and the outcomes that are being achieved. As the district and school leadership teams consider how to engage in this work, the *MICIP Process Guide* provides information that may be helpful for determining readiness and reviewing team membership to ensure necessary perspectives are represented.

In addition to the considerations found in the *MICIP Process Guide*, the district leadership team is encouraged to reflect upon the following items:

- Based upon district/school needs specific to the resource allocation review, what technical assistance will be needed to support the team(s) in conducting a meaningful review?
- What kinds of professional learning related to district budgeting and school finance processes will team members need?
- In what ways would the district/school like to collaborate with outside partners (e.g., MDE, ISD/RESA, and/or community organizations) to accomplish this review?
- Can team members access budget and other appropriate fiscal data needed to participate in the review?
- Are team members familiar with the necessary resources needed to implement district/school strategies?
- In what ways are the perspectives of fiscal, human, and physical resources represented on the team?
- In what ways will the resource allocation review team(s) be integrated with the current continuous improvement team(s)?

Team participation will vary based on district/school context, capacity, and anticipated RAR focus. It is **not required** to create a new team. A district/school may determine that all key perspectives can be represented by inviting a few additional individuals, such as the finance or human resource team member, to collaborate with an existing team (e.g., District Improvement Team (DIT), Building Leadership Team (BLT), or MTSS committee).

Task	Description
Review coordination	Determine the timeline, schedule meetings, prepare agendas, facilitate meetings, and monitor progress.
Collect data	Obtain appropriate data objects specific to the review (examples found later in this guide) and organize for analysis.
Anyalyze data	Synthesize, analyze, and interpret data as a team.
Communicate	Provide communication and training about the RAR, ensuring transparency by sharing regular updates, including the outcome. Record the resource inequity identified to be addressed in the improvement plan.
Develop a plan to address any resource inequity	Determine the solution(s) to resolve the resource inequity identified. Develop a plan to implement the solution that includes interim targets and a monitoring process.
Enter MICIP data	Enter RAR information into the data set and other appropriate locations (e.g., data story, task, activity) within the MICIP platform.

Phase Two: Initiating the Inquiry

Conducting an Inquiry of School-Level Expenditure and Student Outcomes

Phase Two Goals

- District- and school-level teams complete an inquiry on district-wide financial allocations and per-pupil expenditures using tools such as:
  - School-level Expenditure Report
  - Resource Equity Questionnaire

Estimated Time

Team leader preparation: 2–4 hours

Team collaboration (data protocol): 1.5–2 hours

Team Lead Preparation

- Review the school funding questionnaire before gathering any data to present.
- Collect data from the school-level expenditure report, spending vs. outcomes website, and any other helpful district and school data source. Note: For those districts utilizing the collaborative learning cycle (CLC) process, do not share this data with the team prior to your meeting. Part of this process includes exploring the data collectively.
- Create a PowerPoint with the data and have paper copies available for note taking.
- Meeting supplies: large sticky notes, post-it paper, pens/pencils/markers, projector
- It is recommended that the person gathering/compiling the data is the facilitator of the meeting. The team may select a recorder and timekeeper.

General Resources

- Applying the Equity Lens
- School Funding Questionnaire
- *School-Level Expenditure Report*
- *Spending vs. Outcomes by School*
- *Resources for schools identified for CSI, ATS, or TSI*
- Access to the following document can be located on the *MDE MICIP Resources* website.
  - *MICIP Process Guide*
- *MI Systems Support On-Demand Learning: Collaborative Learning Cycle*
- Access to the document below can be obtained by selecting "guide" on the *Data-Driven Decision-Making Resources - Templates & Tools* website.
  - *Guide for Teaming & Data Analysis*

Conducting an Inquiry in School Funding and Student Outcomes

The Michigan Department of Education (MDE) has developed questionnaires based upon the Resource Equity Diagnostic developed by the Alliance for Resource Equity to assist district teams in completing the Resource Allocation Review. Phase two begins with considering per-pupil expenditures by school and student outcomes.

When conducting this inquiry, it is important to consider various funding sources received by the district and how they are allocated. The team may elect to assess items such as the district method for allocating funds to each school prior to examining how the school allocates its resources within the school. The following list provides potential data sources to assist the team in exploring how funds are allocated and its correlation to student outcomes.

- School-Level Expenditure Report from MI School Data
- Spending vs Outcomes data charts
- Detailed district and school budgets
- Consolidated Application (federal Title grants)
- Interim fiscal reports
- Final Expenditure Reports (FER)
- Year-end fiscal reports for state categorical funds (e.g., Sec.31a APFR, Sec. 41)
- Academic data (state and local)
- Title I, Part A Comparability Report
- Student/teacher ratio
- Count of one-to-one devices compared to student count; identify what students may not have access to devices or reliable home internet
- Teacher experience (e.g., certification types, number of permits, years of experience, placement)
  - Does the identified school(s) have a higher percentage of inexperienced or permitted teachers?
  - Identify patterns of teacher placement and student performance
- Identify the number and type of support staff per school; identify patterns of support staff and student performance

Comparability and the Resource Allocation Review

The comparability test could be one part of the resource allocation review for some districts. Comparability is a federally required fiscal test to compare the distribution of state and local resources between schools in grade spans where the LEA provides Title I services to one or more schools. The MDE requires districts to examine student-to-instructional staff ratios as a basis for the comparison.

The Comparability Report resides in NexSys and is due in the fall of each year. Only districts with overlapping grade levels, where one or more school is a Title I building, are required to complete this report. Through the completion of this report, districts might identify that an inequity exists related to the allocation of human resources across its schools. The district, along with schools, may then elect to conduct a deeper inquiry of the available staffing that may include certification and endorsements, level of education, effectiveness ratings, years of service to the district, placement, retention, and/or other data objects as the team considers the impact of equitable staff assignments on student outcomes.

More information regarding Comparability can be found on the *MDE State and Federal Programs* website under current topics (Title I, Part A Comparability).

Reviewing the Methodology for Distributed General Fund Dollars

Districts serving two or more schools may elect to review how funds are distributed and utilized across each of the schools served. A district has a methodology or formula for determining the amount of funding each school receives. Analyzing the policy against district- and school-level budgets will assist in understanding the funds that are allocated across the district. Utilization of funds can be analyzed through the review of final expenditure reports and the School-Level Expenditure Report found in MI School Data. The school-level expenditure report will provide information to assist with a comparison of per-pupil expenditures in the following categories: state/local funds, federal funds, site-level, district-wide, and total expenditures (including all the categories listed).

Questions for consideration:

- What was discovered when analyzing multiple years of the school-level expenditure report?
- What was discovered when comparing the district's methodology for allocating funds with actual school-level budgets?
- How does/doesn't the allocation methodology meet the needs of every student in each school building? What might need to be adjusted?
- In what ways does the methodology for distributing state and local (general unrestricted) funds provide for students with additional needs?
- Did items get budgeted that were not expended (utilized)? If so, why? How are students impacted? What students are most impacted by this occurrence? What might need to be adjusted to address the difference in allocation and expenditure (use)?
- In what ways does the allocation plan ensure that necessary/essential functions of an initiative are met and sustained?
- In what ways do action plans for district/school initiatives consider acceptable variations to the gold standard (risk management plan/plan "B") for essential functions enabling implementing a strategy or initiative as intended? (A risk management plan outlines a "plan B" or contingency plan for utilizing an alternative resource that can fulfill the essential function of the initiative. For example, when baking a cake, if you do not have oil to use, an acceptable variation is apple sauce. Therefore, the apple sauce becomes the contingency plan or plan "B").

Phase Three: Narrowing the Focus

Selecting a Focus Area for the Resource Allocation Review

Phase Three Goals

District- and school-level teams identify:

1. A perspective by which the remainder of the resource allocation review will take place.
   - Centered on the needs of a specific student group.
   - Centered on a MICIP strategy.
   - Systems framework supporting initiatives intended to improve student outcomes.
2. A focus area to study resource equity.

Estimated Time

Team leader preparation: 2 hours

Team collaboration (training & questions): 1.5 hours

General Resources

- *Resources for schools identified for CSI, ATS, or TSI*
- The *MICIP Process Guide* is located on the *MDE MICIP Resources website*.
- The *Fiscal Guide for Implementing a Multi-Tiered System of Supports (MTSS)* document is located in the MTSS - Fiscal section of the *MTSS Resource* website

Selecting the Focus Area of Inquiry on Resource Equity

Focus Perspectives for Consideration

The context of the district and school will impact the approach employed to complete the resource allocation review. The MDE highlights three perspectives to assist districts in determining the lens by which the inquiry on resource allocation will occur. The first perspective is through the lens of the needs of an identified student group (e.g., English Learners, racial/ethnic group, economically disadvantaged, students with disabilities). The second perspective evaluates resource allocation through the lens of a particular strategy selected to improve student outcomes. By comparing the necessary elements required to implement the strategy as intended with the use of available resources, the team may identify additional resource needs or an alternative strategy for allocating resources. The third perspective considers resource allocation and usage through the lens of district systems supporting human capacity and programming. The following graphic provides an overview of each perspective that is described in greater detail in the Phase Three Appendix of this guidance document (p. 13).

	Perspective 1: Centered on the needs of a specific student group	**Perspective 2:** Centered on a MICIP strategy intended to address a root cause need related to the identification for support	**Perspective 3:** Comprehensive system review
Informed by the identification indicators for additional support	The team completes the inquiry on resource allocation and utilization from the lens of the particular student group(s) that underperformed on state and other assessments.	The team completes the inquiry on resource allocation and utilization from the lens of a MICIP goal or strategy intended to address factors contributing to the identification for additional supports.	The team completes the inquiry on resource allocation and utilization from the lens of district systems supporting initiatives intended to address factors contributing to the identification for additional supports.
Considerations	• Current strategies designed to serve the focus population of students • Resources currently utilized to serve the focus population of students • Identify allowable funding sources that are not currently being utilized to implement strategies intended to improve learner outcomes for the focus group(s) (e.g., Coordination of Funds for English Learners).	• Identify currently used evidence-based strategy(ies) intended to address a root cause that is most directly related to the identification for additional supports. • Which strategy has the greatest probability to rapidly improve student outcomes? • What resources are necessary to implement the strategy as intended? • Is there a gap between necessary resources and provided resources? • Identify all funding and other resources that are available/ allowable to directly support the specific evidence-based strategy identified in the MICIP platform.	• Talent Management System ▪ Teacher/ administrator placement ▪ Teacher/ administrator development ▪ Teacher/ administrator retention • Instructional System ▪ Instructional model ▪ Instructional practice ▪ Instructional resources • Student Support System ▪ Additional instructional time & attention ▪ Positive & inviting school climate ▪ Student support and intervention

	Perspective 1: Centered on the needs of a specific student group	**Perspective 2:** Centered on a MICIP strategy intended to address a root cause need related to the identification for support	**Perspective 3:** Comprehensive system review
Resources	• School Index Report • MICIP Continuous Improvement Plan • Demographic data • Attendance and behavior data • Participation by the focus population of students in various support programs • Staffing and course offerings	• MICIP Continuous Improvement Plan • Hexagon Tool • Initiative Inventory • MiMTSS or School Capacity Building • Strategy action plan • Detailed budgets • Budget-to-actual reports • Strategy monitoring documentation	• MI Systems Support • MiMTSS or District Capacity Building • MICIP Continuous Improvement Plan • Detailed budgets • Budget-to-actual reports • Strategy monitoring documentation

After considering the perspectives outlined above, the team selects the most appropriate one for its context. The following considerations may be helpful as the school examines each perspective:

- Based upon the school's identification for additional supports, what common themes or unique features appear? This is informed by evaluating data consistent with the school identification, student outcomes, demographics, and previously identified needs. Reviewing the data story and documentation from the root cause analysis found in the MICIP platform may be a beneficial starting point.
- In what ways is a particular student group impacted by the school's identification for support?
- How might the consideration of resource allocation and utilization through the lens of a particular student population impact improving the school's student outcomes?
- How might the consideration of resource allocation and utilization through the lens of a particular school or district's MICIP strategy have a positive impact on the school's student outcomes?
- In what ways might the school and district goals be realized through a greater understanding of resource allocation and utilization?
- In what ways might a review of resource allocation and utilization impact the school data story?
- Considering the school's challenge statement(s) written in the MICIP platform, what might need to be understood about resource allocation and utilization?
- Upon reviewing the dimensions of the resource equity questionnaires, which questionnaire(s) can provide additional insight about resource allocation and utilization related to the district/school's story, challenge statement, and/or data related to the school identified for additional support?

Resource Equity Questionnaires for Considerations

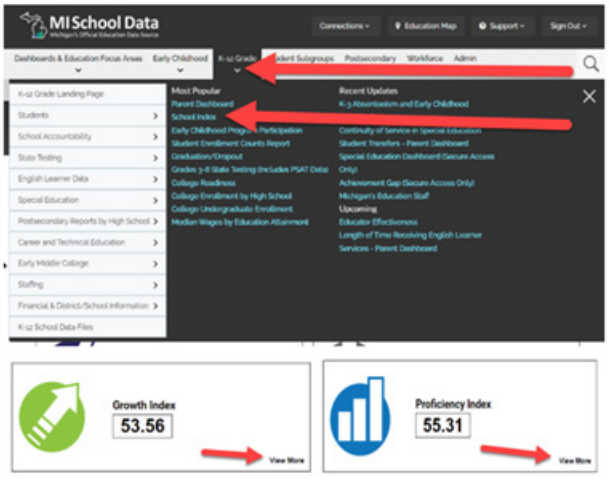
1. Using the responses from the fiscal allocation inquiry (Phase Two), continuous improvement data, information recorded in the MICIP platform, and assessment data associated with identification for additional supports. The team is encouraged to review the questionnaire templates below and select any that meets the teams need. To download a questionnaire (Google Form), select "USE TEMPLATE." This will enable the team leader to maintain the form and responses as local data. The instructions in phase four will guide the team in responding to the questions.

    - Teaching Quality & Diversity Questionnaire
    - School Leadership Quality & Diversity Questionnaire
    - Empowering Rigorous Content Questionnaire
    - Additional Instructional Time and Attention (Tier II and III instruction) Questionnaire
    - Positive and Inviting School Climate Questionnaire

- Student Supports & Intervention (Tier I SEL) Questionnaire
- Student Supports & Intervention (Tier II & III SEL support) Questionnaire
- Student Supports & Intervention (Tier II & III Physical, Mental Health, & Family Support)
- Student Supports & Intervention (Post-Secondary Success) Questionnaire
- High-Quality Early Learning Questionnaire
- Learning Ready Facilities Questionnaire
- Diverse Classrooms & Schools Questionnaire
- District/School Initiative Specific Questionnaire

2. Create a list of the various data objects that will provide a well-rounded perspective on resource allocation and utilization for analysis.
3. Assign the individual(s) to collect, organize, and present the data to the review team.
4. Using the district data protocol and the selected resource equity questionnaire(s), analyze the data, respond to the questionnaire, and determine if more data is necessary.

Phase Three Appendix



Perspective 1: Centered on the needs of a specific student group.

When conducting a resource allocation review from the perspective of a specific student population, there are additional items to consider. One way a team can determine the specific student group that underperformed across the components is by reviewing the school index score information within MISchoolData. Select "view more" on the bottom right of the growth index or proficiency index boxes and select one of the subject tabs to view additional data details. The team may then elect to have student, parent, and community representation from that population on the team to assist with understanding their perspectives.

The following questions are important to answer for a meaningful review and are embedded in the resource equity questionnaires:

- Are current strategies designed to serve the focus population of students associated with the reason for the identification for additional support?
  - Are resources equitably utilized to serve the focus population of students?
  - Are there allowable funding sources that are not currently being utilized to implement strategies intended to improve learner outcomes for the focus group(s) (e.g., Coordination of Funds for English Learners)?

There are many other items that can be considered when focusing the RAR for a particular student population. The district and school context significantly impact what information is examined. In addition to student outcome data related to the school being identified for additional supports, the following considerations will assist in selecting the data objects to begin the review. The team may choose a limited number of items for initial examination. During the analysis of the data, it may be determined that additional information is required, which may or may not appear on this list.

- School-level expenditure report (MiSchoolData)
- District methodology for allocation of resources

- School detailed budget
  - General funds
  - Section 31a (State categorical funds – At-Risk)
  - Section 41 (State categorical funds – English Learners)
  - Special education funding
  - Funding to support Career and Technical Education (CTE)
  - Consolidated application (federal Title grants)
- District improvement plan
- District improvement plan with a single-building report
- Year-end fiscal reports for state categorical funds such as 31a.
- Demographic data
- Attendance and behavior data
- Participation by the focus population of students in various support programs
- Staffing, course offerings, and/or course attendance

Perspective 2: Centered on a MICIP strategy intended to address a root cause need related to the identification for support

When conducting a resource allocation review from the perspective of a specific strategy, resources specific to that strategy need to be assessed. The team will first determine which evidence-based strategy intended to address an identified need and root cause is most directly related to the identification for additional supports. If there is more than one, the team may consider the strategy with the greatest probability to rapidly improve student outcomes. The following items will assist the team in collecting data that will contribute to a meaningful review:

- Identify all funding and other resources that are available to directly support the specific evidence-based strategy identified in the MICIP platform.
- Identify the resources necessary to implement the strategy as intended.
- Identify the resources that are currently allocated to support the strategy as intended:
  - Assess if the resources are utilized as allocated.
  - Are funds allocated to positions that are difficult to fill?
- Does a contingency plan exist for when an allocated resource cannot be acquired?
- Identify the necessary resources that are not currently available to ensure the strategy is implemented as intended. Then, assess the impact of unavailable resources on strategy implementation and student outcomes.
- Identify allowable funding sources that are not currently being utilized to implement the strategy intended to improve learner outcomes:
  - Are resources being utilized for other items?
  - Are there any resources that can be reallocated?

As the team responds to the above list, it may consider the following items to obtain the necessary data points:

- Detailed district budget
- Detailed school budget
- Consolidated application (federal Title grants)
- Interim fiscal reports
- Final expenditure reports

- Year-end fiscal reports for state categorical funds
- Strategy implementation plan (action plan)/monitoring reports
- MICIP district/school continuous improvement plan
- Initiative inventory

Perspective 3: Comprehensive system review

A comprehensive system review can be utilized to analyze how aspects of the district system contribute to high-quality instruction and support for each student. Districts that are considering, developing, or continuously improving a framework of district systems supporting student growth and desired outcomes will benefit from approaching resource allocation from this perspective. Below are some reflection questions with references to the corresponding resource allocation questionnaire to assist a team in narrowing its focus of resource equity through the lens of a particular district system.

Talent Management System

Many of the following questions have been added to the questionnaires focused on teacher quality & diversity (2) and leadership quality & diversity (3).

Assign (teacher placement):

- What process is used to ensure high-need schools have an equal or higher concentration of effective teachers?
- What process is used to ensure students with additional needs have highly effective teachers?
- What process is used to ensure high-need schools have highly effective leaders?
- What district policies encourage the most effective teachers to work in the highest-need schools?

Develop:

- How does the district ensure that staff receive high-quality job-embedded professional learning that supports school and individual needs?
- How does the district ensure that leaders receive high-quality job-embedded professional learning that supports school and individual needs?
- How do schools assign leaders and/or coaches to differentiated roles that increase the impact of highly effective teachers and enable additional support for new and struggling teachers?
- In what way is staff placement utilized to enable colleagues to provide additional support to each other?
- What does the district have in place for teacher or leader career growth and/or succession planning?
    - How does the district develop an educational assistant to become a teacher?
    - How does the district develop a teacher to be a teacher leader/department chair?
    - How does the district develop a teacher leader/department chair to become a school leader?
    - How does the district develop a school leader to become a district leader?

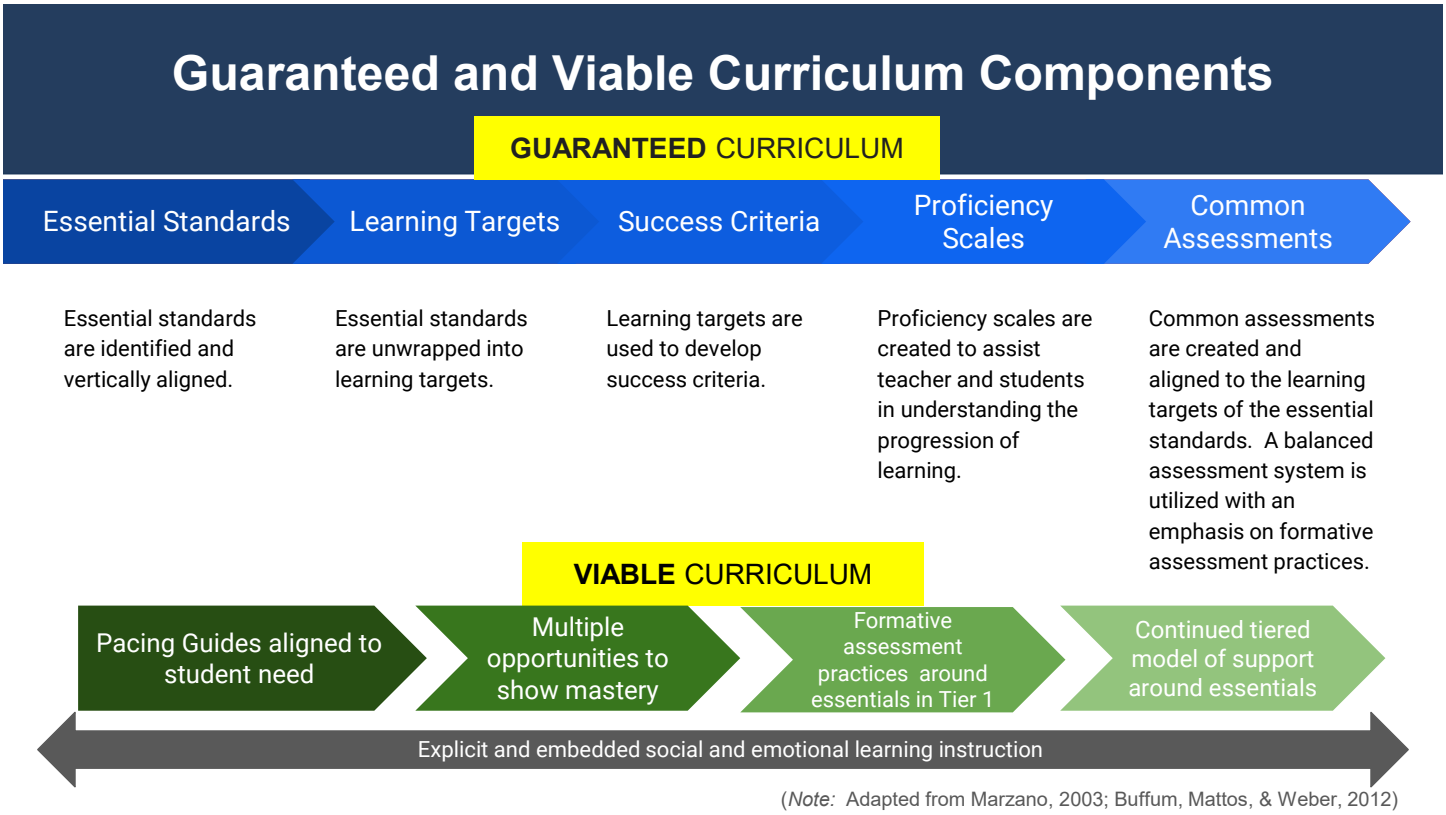
Retain:

- How does the district retain effective teachers and encourage consistently ineffective teachers to leave the system?
- How does the district retain effective leaders and encourage consistently ineffective leaders to leave the system?
- What practices or policies encourage effective teachers to stay working in high-need schools?

Instructional System

Questionnaires focused on empowering, rigorous content (4) and high quality early learning (8).

The instructional system provides the structures necessary to support research-based practices around the design of curricula and content aligned to state standards, as well as implementation and monitoring of instruction and learning. An instructional model is how to put an instructional practice/framework into action; essentially, it outlines what should be observed in classrooms. The following reflective questions will guide teams in considering instruction and instructional resources.



(*Note:* Adapted from Marzano, 2003; Buffum, Mattos, & Weber, 2012)

Instruction:

The previous chart shows the components of a guaranteed and viable curriculum and begins with essential standards that drive tiered instruction. The questions below correlate to the information presented in the following graphic.

- How is the district/school mindful about how the essential standards are being taught to each student?
- How are essential standards driving instruction for each student in a tiered model of support?
- How are students able to have multiple opportunities to demonstrate mastery in a variety of ways in every classroom?
- In what ways does the district/school ensure high expectations for mastery of the essential standards for each student?
- In what ways are teacher and administrative evaluations aligned to the instructional model to ensure that desired instructional practices are being implemented as intended to equitably support learning for each student?
- What does evaluation data indicate about expected instructional practices being evident in all classrooms?
- Are all classrooms being observed equitably? Are appropriate supports being provided to each staff member based upon observations?

- What percentage of administrators and instructional staff are able to recognize what the expected best instructional practice looks like? Where might there be gaps in understanding that lead to an inequity in the implementation of instructional practices?
- What supports are available to assist administrators, instructional leaders, coaches, and instructional staff to recognize the desired instructional practices within a classroom? How does the district ensure that supports are scaffolded and differentiated based upon individual needs?

Instructional Resources:

- How are curriculum and instructional resources distributed according to student need?
- In what ways do the curricular resources and instructional materials represent the demographic of the district/school?
- In what ways are student needs informing the selection and utilization of instructional resources to accomplish the desired outcomes?
- In what ways do the instructional resources align with the district's written curriculum?
- Is the alignment of curricular resources to the curriculum equitable across content areas? How might you know?

Student Support System

Questionnaires focused on instructional time and attention (5), positive and inviting school climate (6), and student supports and intervention (7 a-c).

A student support system provides the structures necessary to support various academic and non-academic needs of each learner. In addition to academic needs, a student support system "provides structures to address social, emotional, health, nutritional, and behavioral needs of the whole child (Student Support System – MI Systems Support, n.d.)." The whole child lives within multiple and interconnected environments including home, school, and community. Therefore, when considering resource equity, it is important to consider the influences of the learner's home and community that impact the various needs that may be addressed within the school. As such, the following reflective questions are organized to assist a team in completing a resource equity inquiry based upon the district/school student support system.

Additional Instructional Time & Attention (Tier II and III Instruction)

- Does each student who needs more high-quality instructional time and attention receive it?
- Do schools have the flexibility to adjust student schedules to differentiate instructional time?
- How does the amount of scheduled instructional time spent on core subjects vary by student proficiency level across student groups and/or across schools within the district?

Positive & Inviting School Climate

- In what ways does the school provide a safe school experience with transparent, culturally sensitive, and consistently enforced rules and discipline policy?
- Does each student have a positive relationship with staff and other students?
- Does each student have access to effective social-emotional learning opportunities?
- Does each student attend a school that actively and meaningfully engages families?

Student Support & Intervention

- Does the district provide an integrated Tier I social-emotional learning program?
- Does each student who needs targeted social-emotional support receive it?
- Does each student who needs targeted physical and mental-health support receive it?
- Does each student who needs targeted family support receive it? (school-family partnerships)

Phase Four: Collaborative Inquiry

Conducting the Resource Allocation Review

Phase Four Goals

- The team leader:
  - Review the questions found in the selected questionnaire.
  - Collect data the team may need to have for analysis.
- The team:
  - Utilizes the district data protocol to review data and respond to the questions provided.
  - Identifies resource inequity.
  - Completes a root cause analysis.

Estimated Time

Team leader preparation: 2–6 hours

Team collaboration (training & completion of questionnaire): 2–6 hours

General Resources

- *Resources for schools identified for CSI, ATS, or TSI*
- Access to the following documents can be located on the *MDE MICIP Resources* website.
  - *Resource Equity*
  - *MICIP Process Guide*
  - *Evaluating Current and New Initiatives and Strategies*
  - Connecticut Department of Education *Needs Assessment Toolkit*

Setting the Stage for Completing the Resource Equity Diagnostic Questionnaire

1. In phase three, the team selected the resource equity dimension(s) the team will review.
2. Upon downloading and saving a copy of the questionnaire, the team leads are encouraged to review the questions and gather any data that may assist the team.
3. As the team leader considers the questions and the available data, the team leader estimates the amount of time the team needs while considering the potential benefit of designating separate blocks of time to chunk the work.

Responding to the Questionnaire

1. Have the team select individuals to serve the following roles:
    a. Facilitator
    b. Recorder (NOTE: Having the screen of the recorder projected is beneficial for the team to observe and respond to the information being recorded into the questionnaire)
    c. Timekeeper
    d. Data collector (in the event additional information is needed)
2. The questions provided have been placed in a specific order to assist with walking through the data protocol (based on the work done by Wellman & Lipton) commonly utilized in Michigan. Therefore, it is strongly recommended that the questions be answered in order.
3. The team may determine that some questions do not apply to the school or district. Additionally, the team may elect to create and respond to separate questions to gain greater insight.
4. Root cause analysis - The questionnaire includes opportunities to utilize the "fishbone" and "5 WHYs" to assist in determining root cause.
5. Consideration of resource inequity determination - The questionnaire provides space to suggest a determination of resource inequity and potential solution. The team is encouraged to respond to these questions; however, in this stage, be cautious. Though it is important to record the team's current thoughts on the topic being considered, the team will want to avoid making a final determination before considering each question within the questionnaire.

Phase Five: Addressing the Inequity

Planning the Resolution of the Identified Resource Inequity

Phase Five Goals

- Develop a plan to address the identified inequity.
- Compose a statement that both identifies the inequity and summarizes how the inequity will be addressed.

Estimated Time

Team leader preparation: 1–2 hours

Team collaboration (training & engagement in task): 2–6 hours

General Resources

- *Resources for schools identified for CSI, ATS, or TSI*
- The *MICIP Process Guide* is located on the *MDE MICIP Resources* website

Resolving the Identified Resource Inequity

Upon completion of the team review and reflection of the responses to the resource equity questionnaire, the team determined an inequity to be addressed within the improvement plan. In phase five, the team develops a plan to address the identified inequity. The goal is to ensure that each student receives the necessary resources and appropriate experiences to address the needs of the whole child while meeting or exceeding state academic standards.

Addressing the Inequity

1. The team reviews the causal information recorded within the questionnaire and develops a plan to address the identified inequity.
    a. Ensure team understanding of the inequity and the identified causation.
    a. Consider what internal actions can be taken to resolve the resource inequity.
    a. Brainstorm ways to adjust the allocation of currently available resources.
        i. What resources are necessary to resolve the inequity (e.g., time, money, people, materials, training, transportation, etc.)?
        ii. What other priorities might be impacted by the restructuring of the resource allocation to address the identified concern?
        iii. What adjustments can be made immediately?
        iv. Will some adjustments require prerequisite tasks to be accomplished?
        v. What is the impact on students if planned adjustments are not accomplished?
        vi. What outside resources might be obtained to support resolving this issue?
2. Depending on the district context, the school-level team confers with the district-level administration to reach agreement on the determination and associated plan to address the finding(s).

Developing a Challenge Statement

The following stem may be utilized to compose the resource allocation review statement that will be entered into the MICIP platform.

> As a result of the resource allocation review focused on [enter the title of the questionnaire or the focus area the team selected here], the team determined…To address the identified inequity, the [school/district] will … So that …

Special note: The challenge statement can be a high-level response. In phase six, a designated district employee will enter this statement in the resource equity modal as part of the data story in the MICIP platform.

Phase Six:
MICIP Platform Documentation

Connecting the Resource Allocation Review to the MICIP Platform

Phase Six Goals

- Upload Resource Allocation Review data objects into the appropriate data story.
- Enter Resource Allocation Review Summary Statement into the resource equity consideration modal of that data story within the MICIP Platform.
- Enter any end targets, interim targets, and/or tasks in the MICIP platform.
- Under strategy implementation identify any strategies and/or activities to address the inequity
- Under Monitor, record how the district implemented the strategy, activity and/or target measures.

Estimated Time

Team Lead preparation: 1 – 3 hours for entering information into the MICIP platform

General Resources

- *Resources for schools identified for CSI, ATS, or TSI*
- Access to the following documents can be located in the Guides/Tools section of the *MDE MICIP Resources* website.
  - *MICIP Process Guide*
  - *MICIP Platform Guide*

Process for entering the Resource Allocation Review (RAR) information into the MICIP Platform

1. When entering details related to the RAR into the MICIP platform, it is recommended that all information is recorded as part of the defined goal most impacted by the inequity.
2. Upload any data object utilized in the RAR inquiry that will inform the monitoring of the plan to address the identified inequity via interim and end targets within the **data story** and/or within the strategies and activities.
    a. The Resource Equity Diagnostic questionnaire responses and corresponding data sources identified in phase two are examples of information to that may be included.
3. Enter the summary statement(s) of the RAR finding(s) in the **Resource Equity** modal found in the **Assess** portion of the platform.
4. Under **Plan**, select the goal that is associated with the resource equity to record the district **End Target**(s), **Interim Target**(s), and any **Task**(s) that are required to be accomplished prior to engaging in an activity.
    a. When developing end and interim targets be mindful of the cycles for identification for additional supports.
        i. Comprehensive Supports and Intervention (CSI) is a 3-year cycle, therefore establishing end targets for three years is reasonable. Establish multiple interim targets that will inform progress towards meeting the end target.
        ii. Additional Targeted Supports (ATS) is a 6-year cycle, it is recommended to establish end targets for three years as it may contribute to meeting requirements for being invited to early exit. Establish multiple interim targets that will inform progress towards meeting the end target.
            a. At the three-year point, the school will **evaluate** the plan to address the identified inequity.
                i. If the school is **eligible for early exit and resolved the identified inequity**, resource equity considerations continue as part of the continuous improvement process.
                ii. If the **school did not qualify for an early exit**, an end target **must** be established for the remaining three-years of the ATS cycle. This can be accomplished by adjusting the end date of the target measure.
5. Once the end and interim targets are recorded, in **Create Strategy Implementation Plan** complete the following:
    a. Identify a new strategy to address the inequity.
        i. Then Add an Activity (activities) under **Strategy Implementation Activities**.

    And/or

    b. Identify an existing strategy to address the inequity.
        i. Then Add an Activity (activities) under **Strategy Implementation Activities**.

Special Note: Upon entering all the above information, the RAR requirement for the improvement plan(s) is complete. The next step in the continuous improvement process is to implement, monitor, and adjust as needed to ensure reaching the desired goal of addressing the identified inequity. The MICIP platform provides a location for recording the district's progress and impact on student outcomes. This information will be highly valuable during the evaluation process at the end of the identification for additional supports cycle. **In the event a school is re-identified for additional supports, this information can be used for the next required RAR.**

The directions below will enable the designated team member to include the RAR information in MICIP Platform. For additional assistance, access the *MICIP Platform Guide* found on the MICIP Resource Page under Guides.

Recording How to Address the RAR Finding

After uploading the RAR data objects, entering the RAR finding in the resource equity modal, and completing the data story, the team records how the inequity will be addressed. This is accomplished in multiple ways as shown in the examples below:

Option One

Create a new goal to address the resource inequity finding

1. Create interim targets, end targets, and/or tasks
2. Select a strategy
3. Create activities supporting the strategy

Option Two

Revise an existing goal to include the resource equity finding

1. Create interim targets, end targets, and/or tasks
2. Select a strategy
3. Create activities supporting the strategy

Option Three

Create interim targets, end targets, and/or tasks to address the RAR finding within an existing goal

1. Select a new strategy from the strategy bank to address the inequity
2. Create activities supporting the strategy to address the inequity.

Option Four

Create interim targets, end targets, and/or tasks to address the RAR finding within an existing strategy supporting a current goal.

1. Create activities supporting the strategy to address the inequity.

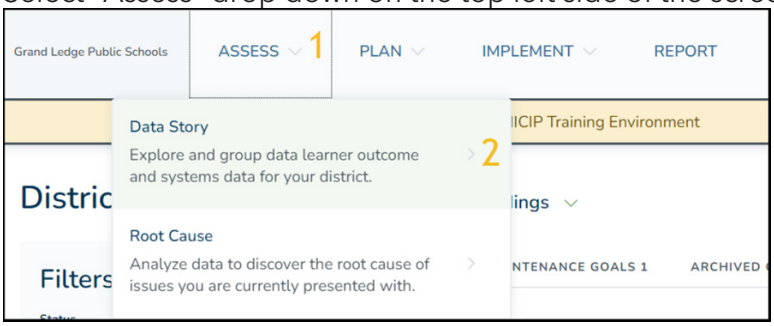
Special Note: If the district elects to create task to address the RAR finding, it will not be able to monitor progress on the task in connection with an uploaded data object in the data story. The district can make a note after indicating that the task is completed or create a note in **Monitor** under **adjust** or **impact**. Maintaining this information will be important for evaluating if the resource inequity was adequately addressed during the improvement cycle.

Instruction for adding or revising goals, strategies, activities, and/or tasks are located within the *MICIP Platform Guide* found on the MICIP Resource Page under Guides.

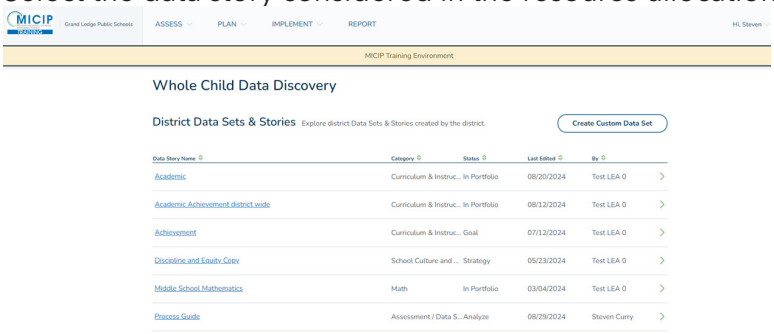
Adding RAR Information to an Existing Data Story

In considering a focus for the Resource Allocation review, the district/school team may have elected to focus the inquiry on a current data story recorded in the MICIP platform. To include the additional data object(s), complete the following steps:

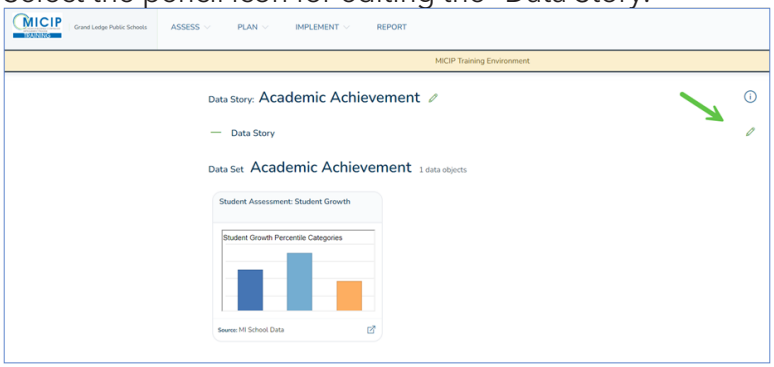
1. Log into the MICIP platform
2. Select “Assess” drop down on the top left side of the screen and select “Data Story.”



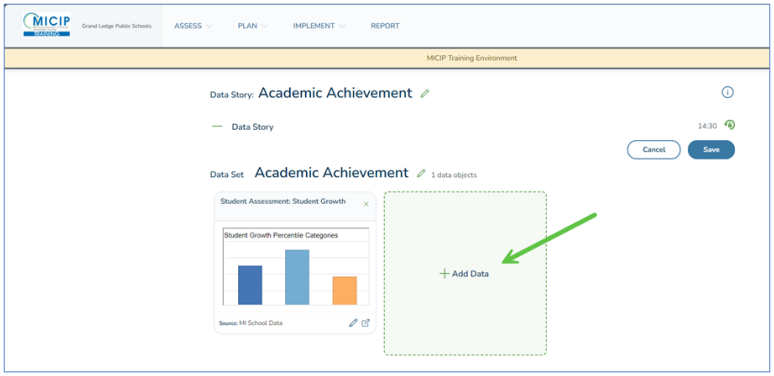
3. Select the data story considered in the resource allocation review.



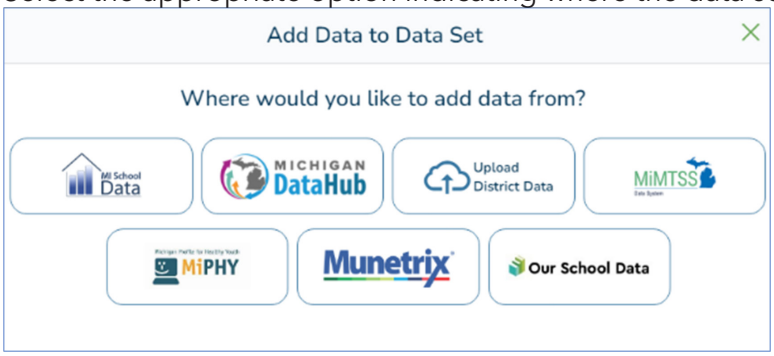
4. Select the pencil icon for editing the “Data Story.”



5. Select "Add Data."



6. Select the appropriate option indicating where the data set is being uploaded from.



   a. When uploading "District Data",

      i. Drag and drop the PDF data file from your computer

      ii. Name the data object and provide a summary describing the data

      iii. Use the drop down to select where the data originated from

      iv. Click the box confirming that Personally Identifiable Information (PII) is not included in the data object and select "Add Data Object"

      v. Be sure to rename the data object utilizing the district naming protocol.

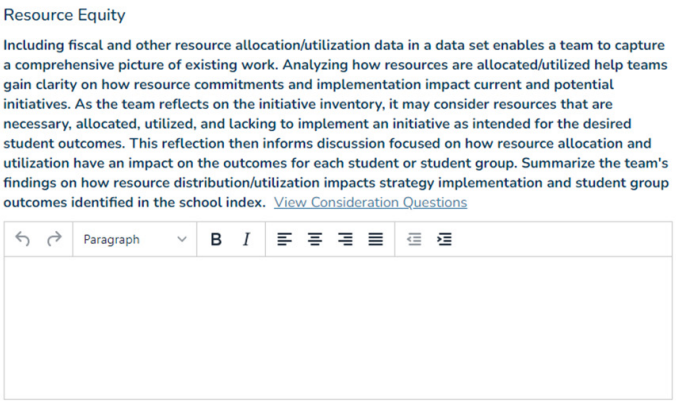
   b. When uploading data from MI School Data, click on SUPRESS DATA selecting information to ensure that FERPA requirements are satisfied.

   c. Continue these steps until all desired data objects are uploaded.

   d. Select "save"

7. Update the summary statements under ASSESS for the data story as appropriate.

   a. Include a summary statement in each of the appropriate modals (boxes) impacted by the resource equity inquiry findings.



Record the findings of the RAR in The Resource Equity modal. If multiple schools completed a RAR, add the summary statement for each school in this box. Below is a sample of how a district may include this information:

Happy Elementary School [No identification- optional]: (2024.03.14)

As a result of the resource allocation review on _____, the team determined that …… This finding will be addressed by …. So that, ……

Growing Middle School [TSI- optional}: (2024.03.14)

As a result of the resource allocation review on _____, the team determined that …. This finding will be addressed by …. So that, ……

Adventure High School [ATS-required]: (2024.03.14)

As a result of the resource allocation review on _____, the team determined that …. This finding will be addressed by …. So that, ….

Young Adult Alternative High School [CSI-required]: (2024.03.14)

As a result of the resource allocation review on _____, the team determined that …. This finding will be addressed by …. So that, ….

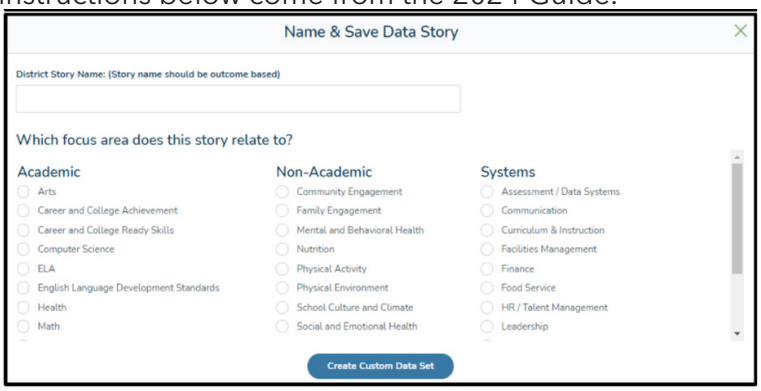
District wide summary statement: (2024.04.04)

After analyzing the school and district resource allocation reviews, the team determined that…. This finding will be addressed by…. So that, …

Adding RAR Information as a New Data Story

Uploading a NEW Custom Data Set

1. To inform the data story within the MICIP Platform
2. The *MICIP Process Guide* provides specific instructions for uploading a Custom Data Set. The instructions below come from the 2024 Guide.

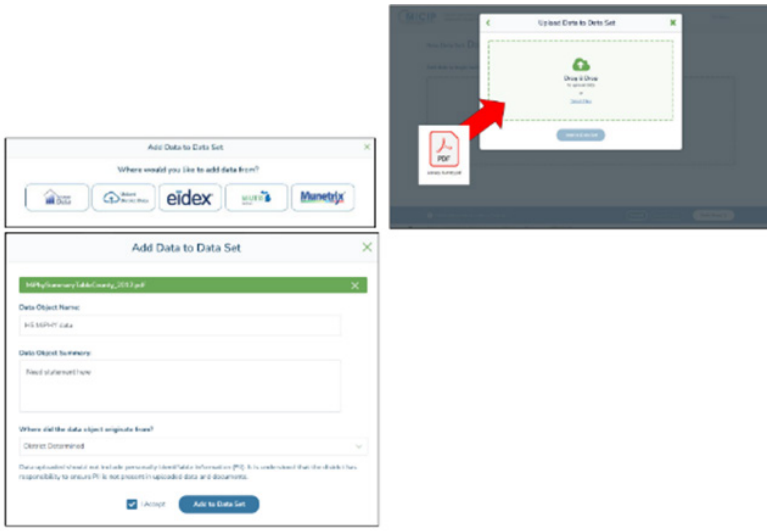


   a. Click on "Create a Custom Data Set." Name the data set and choose what primary focus the story is related.

   b. Click on "Create a Custom Data Set"

      i. **Hint:** *Keep in mind that any data objects entered as part of the data set can be revisited throughout the monitoring process to help measure the impact of the actions taken to address the identified inequity.*

c. Click on “Add Data”



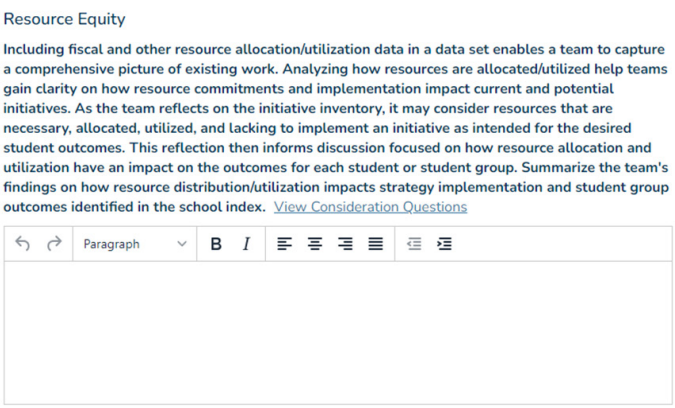
d. Upload the data object(s) supporting the RAR inquiry. Ensure that personally identifiable information is not included in the data object. For example, if the team chose to utilize one of the Google form questionnaires, the various data objects and the spreadsheet with team responses can be uploaded as a PDF document. It is highly recommended that data objects being uploaded to be saved using a standard naming protocol. A sample file naming convention for the PDF or other file type is below:

RAR_Name of Data Object_YYYY.MM.DD
RAR_Happy Elementary School_ Questionnaire 4 Responses _2024.02.23”

Or

YYYY.MM.DD_ RAR_Name of Data Object
“2024.02.23_RAR_HES_Questionnaire 4 Responses”

3. Enter the RAR summary statement into the resource equity consideration box in the MICIP platform. If more than one school in the district is required to complete the RAR, add the summary statement for each school in this box. Some districts elect to have schools identified for TSI supports complete a RAR. The results from each review are recorded in the Resource Equity modal as described in the previous section. Example statements are provided in the previous section titled "Adding RAR information to an Existing Data Story."



4. Complete the remaining modals in this portion of the platform and select “save”
5. Select “analyze” at the bottom of the page and following the instructions provided in the MICIP platform guide

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