Getting Down to Facts III Bay Area Regional Convening

Aligning Governance, Policy, and Capacity to Support Student Success

East Bay Community Foundation

Oakland, CA / Ohlone & Muwekma

July 28, 2026

Welcome

Lange Luntao

Director of External Relations
Ed Trust West (ETW)

Continue this conversation at EdTrust-West's Ed Equity Forum!

Agenda

Morning

- **Welcome, Logistics & Regional Grounding,** Lange Luntao
- **The ABCs of California Education and School Governance,** Michal Kurlaender, University of California Davis
- **CA State and Local Finance ,** Jonathan Kaplan, Learning Policy Institute, Francis Pearman, Stanford University
- **Early Education and Math,** Austin Land, University of California Berkeley, Michal Kurlaender and Jacob Jackson, University of California Davis
- **Facilitated Community Conversations**
- **Reflections & Next Steps,** Lange Luntao, Nancy Waymack

Opening Keynote Address

Michal Kurlaender

Professor of Education Policy,
University of California Davis &
Faculty Director,
Policy Analysis for California Education (PACE)
Strategic Advisor
Ed Trust West (ETW)

WELCOME!

GDTF III Objective:

Provide the best possible evidence on where CA's education system is, where it can go, and how to get there so that CA can be a model of excellence for all of our students

Thank you!

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GDTF III Role

Up and down the state thousands of people are working to bring the best education system possible to California's children.

From policy makers and specialists in Sacramento to teachers and paraprofessionals in the the state's roughly 250,000 classrooms everyone has a role to play.

Our role, to the best extent possible, is to bring you the Facts.

The ABCs of California's Current Moment

CA has made Progress … but it is Uneven

- Implementation success depends too much on:
  - Local leadership
  - Local capacity
- Students experience very different systems across the state.
- **Three system-level challenges** help explain why those assets have not yet produced consistent results across the state.

Three system-wide challenges

Accountability and Alignment

Balance Between State Guidance and Local Control

Capacity

Accountability and Alignment

- Alignment and accountability mean everyone knows the goals, is working toward them, and is supported or redirected when needed
- Unlike other large states, California outsources oversight of schools, creating uneven oversight
- California has strong goals and multiple tools, but they are experienced as incoherent
  - Only ~20% of district leaders report the Dashboard drives priorities
  - Only 7.9% of LCAP goals include a numeric target, more than one-third are duplicated across districts
- Existing tools–including dashboards, LCAPs, and report cards–generate information, but do not clearly guide what should happen next
  - District leaders and families ask for clearer, more actionable information that supports implementation of ambitious state goals

California has many pieces of an accountability system, but they are not yet connected in a way that drives consistent action

Balance Between State Guidance and Local Control

- Many decisions are better made locally with local knowledge
- Other decisions are better made centrally with easier access to scientific information and to reduce decision-making costs
- Local control sits at the center of California's reform story. Local control reduced regulations and gave districts valuable flexibility.
- Districts and school leaders report needing clearer guidance, especially when navigating many options like curriculum choices.
    - State information is not always provided in ways that are usable or actionable.
- Compliance requirements take significant time away from focusing on students.
- California has not yet fully clarified what should be handled at the state level versus the district level

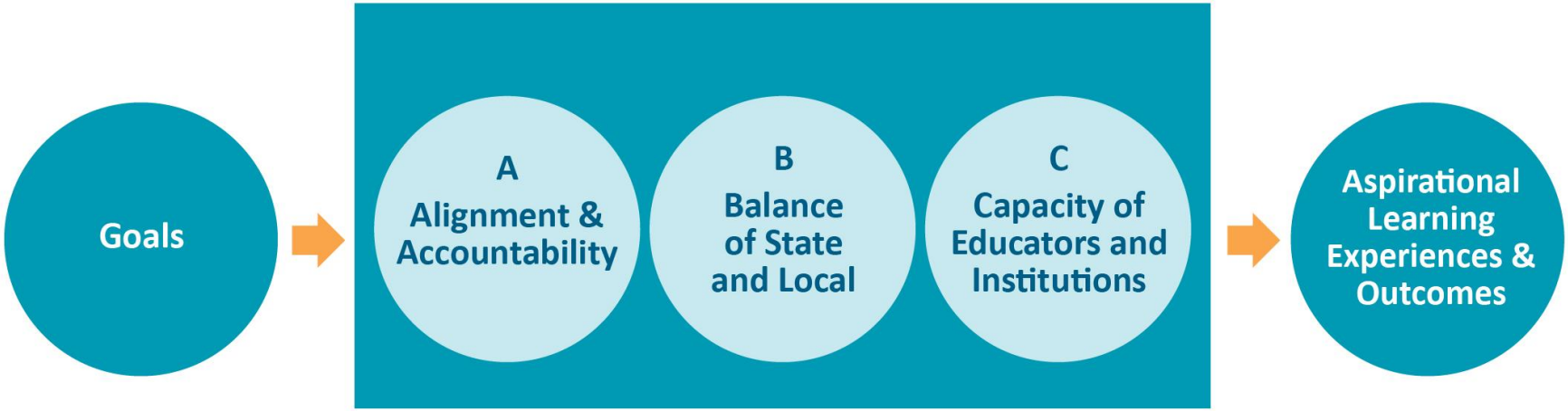
the balance is off, too much burden and not enough support

Capacity of Educators and of the System

- California's goals have expanded to include the whole child, belonging, civic participation, and multilingualism.
  - These goals require strong systems, prepared educators, stable leadership, useful data, and consistent support.
- Support across the state is uneven, with strong examples in some countries but not statewide.
- Teachers do not receive enough ongoing support to improve once they are in the classroom.
- Literacy shows what is possible with aligned investments, while math highlights a more fragmented approach.

success still depends too heavily on local capacity rather than a system that learns from and scales what works.

A Coherent System for Learning and Improvement

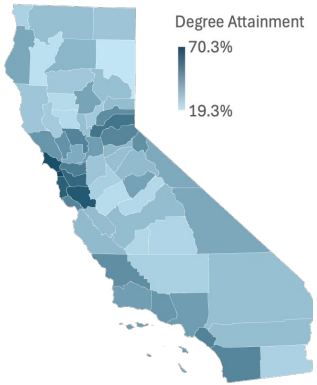


A Coherent System for Learning and Improvement–Curriculum

Accountability & Alignment

- College & Career Readiness Indicator
- Data Alignment

Balance state–local

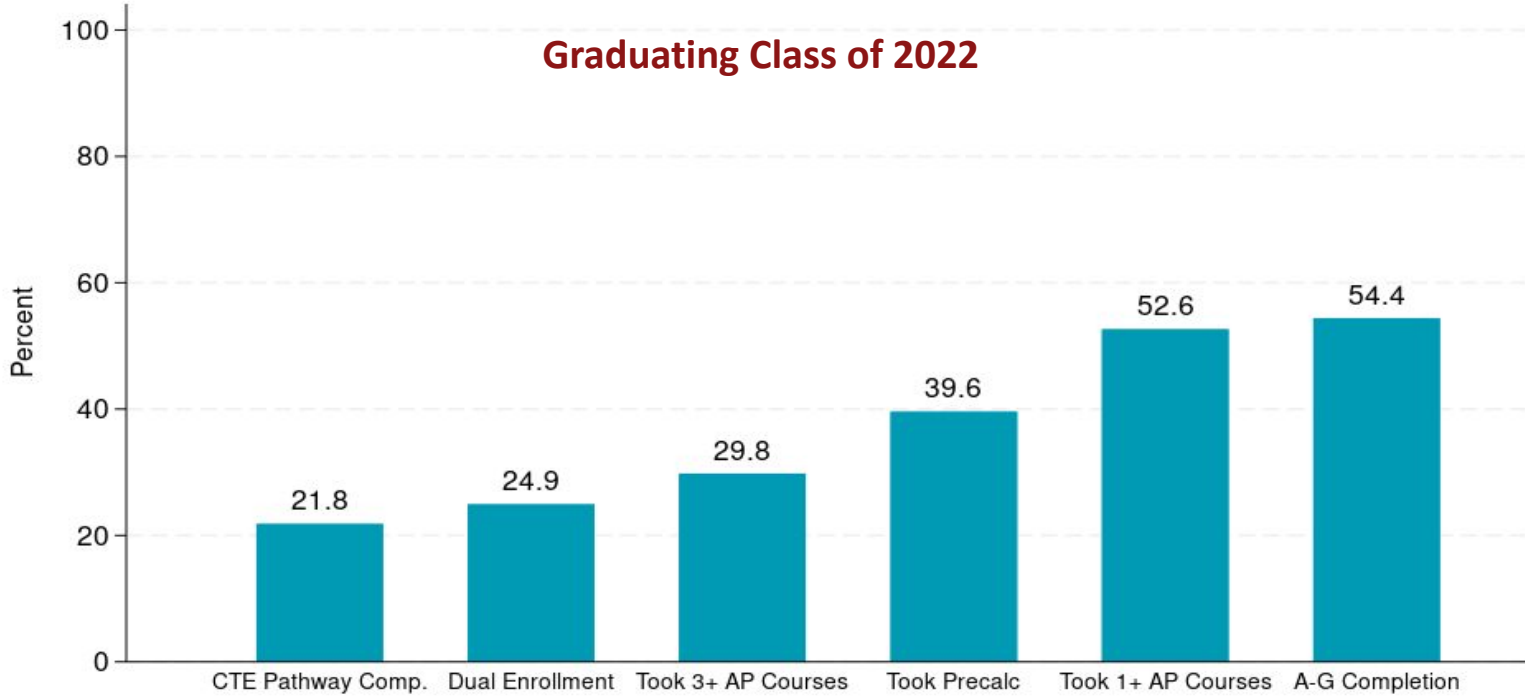


- LCAP
- Guidance & support on curricular choices

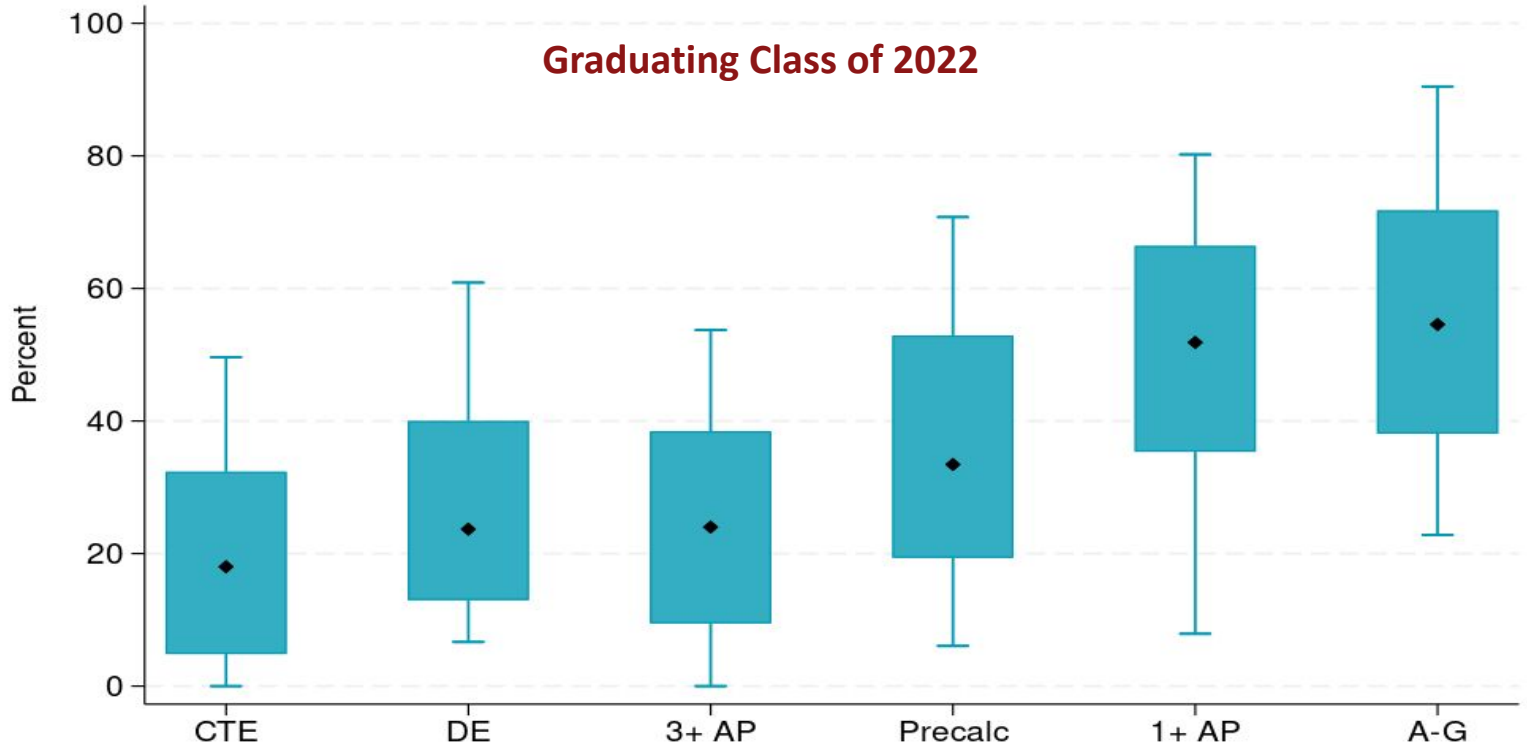
Capacity of educators and of the system

- Coherence
- Competing priorities
- Teacher workforce

Participation in college & career preparatory coursework



Participation varies across schools



Five implications follow from the research

- **Maintaining and building on LCFF while strengthening fiscal stability.** Preserving the equity logic of LCFF while addressing instability from volatile revenues, pension pressures, and facilities inequities could allow for effective financial planning and resource allocation.
- **Consolidating and aligning governance and accountability systems.** Strengthening alignment across planning, oversight, support, and intervention could reduce duplication and improve coherence.
- **Building stronger state capacity.** Supporting workforce development, instructional guidance for districts, and systematic learning from implementation across the state could create a more consistent, responsive, and effective system.
- **Reducing administrative burden.** Reducing overlapping plans, repeated reporting, and duplicative procedures could free time and capacity for instructional improvement and strategic planning.
- **Supporting disciplined innovation.** Developing, studying, and extending promising models in areas such as high school redesign, individualized instruction, educator pathways, and the thoughtful use of technology and artificial intelligence could create a continuously improving school system.

The Bottom Line

- **California has stronger foundations:** greater resources, broader goals, and visible examples of richer and more coherent educational experiences.
- **The central challenge is coherence:** connecting ambitions, policies, supports, and institutions into a system that supports implementation and delivers those opportunities consistently.

California's progress depends creating a stronger system for learning from experience, improving practice at both the school and district level, and extending the state's strongest examples to all students

State and Local Finance Update

Jonathan Kaplan
Learning Policy Institute

Francis Pearman
Stanford University

California Schools' Revenue Sources and Constraints

Jonathan Kaplan
Learning Policy Institute

Getting Down to Facts III:

California Schools' Revenue Sources and Constraints

Jonathan Kaplan

Learning Policy Institute | July 2026

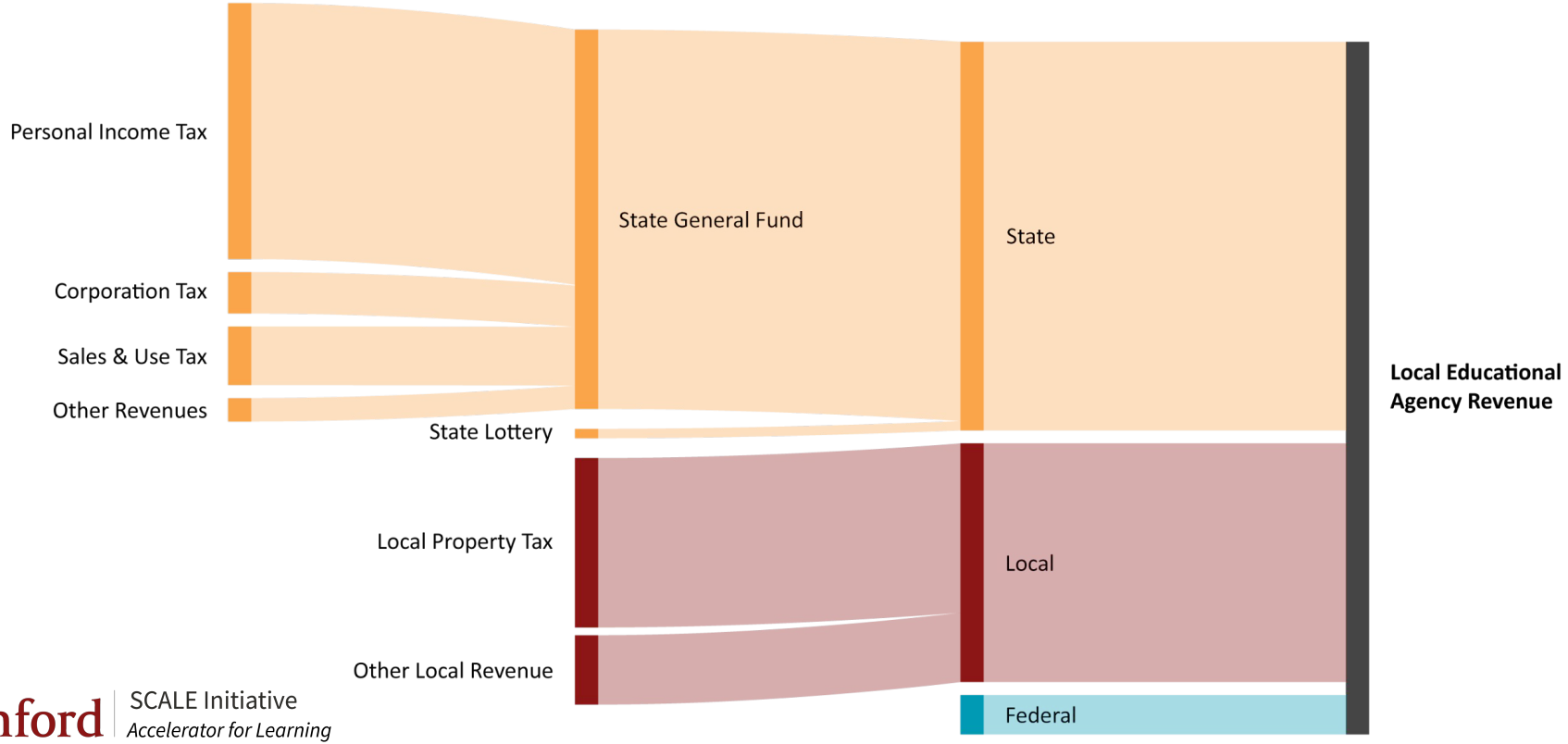
Constraints Limit Revenue and Fiscal Flexibility

- **Constitutional and statutory constraints** approved over decades restrict state and local revenue raising and flexibility, including:
  - **Prop. 13 (1978) caps local property tax rates** and limits reassessments of local property value for tax purposes.
  - **Prop. 26 (2010) tightens supermajority vote requirements** to adjust taxes.
  - **Prohibitions on levying sales taxes** on services or digital goods.

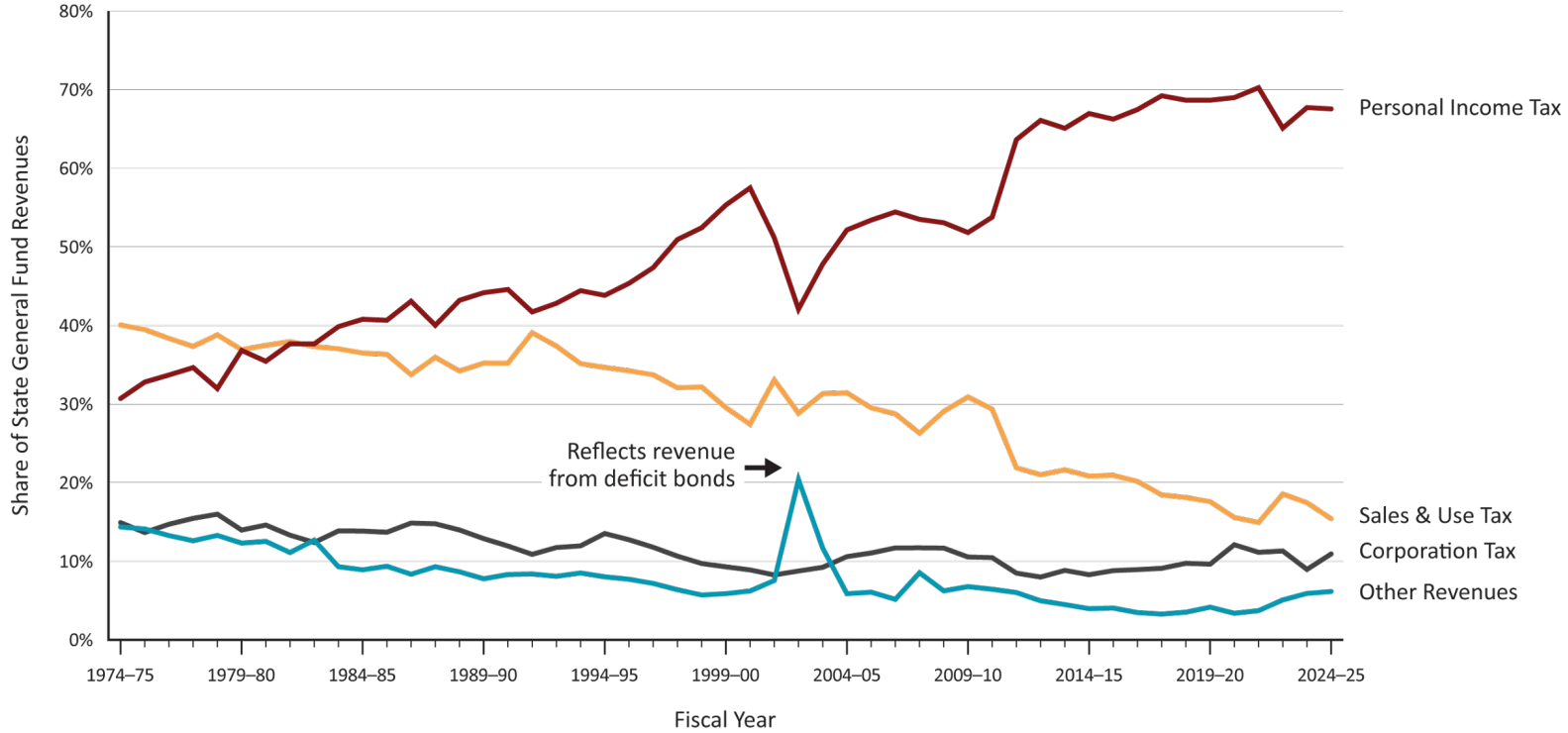
The Impact of Revenue Constraints

- Revenue constraints **negatively impact** TK-12 schools, students, and their families
  - **Restricts funding levels for TK-12 school districts**
  - **Contributes to large student-to-staff ratios**
  - **Limits investments in** programs that support **students' families,** such as child care

Where Does TK-12 School Funding Come From?



Share of General Fund Revenue Has Changed Over Time



Excludes loans and transfers. Personal income tax and corporation tax revenues are adjusted in fiscal years 2021-22 through 2024-25 to reflect California Department of Finance estimates of the impact of tax credits related to the Pass-Through-Entity-Elective Tax (PTET).

Revenue Instability Creates Uncertainty and Challenges

- **General Fund instability** can limit legislature's ongoing TK-12 spending
  - One-time spending prioritized over sustained investments (e.g., educator salaries)

Principles of High-Quality Revenue Systems

- Adequacy
- Reliability
- Fairness
- Neutrality
- Simplicity
- Accountability

Options for Improving California's Revenue System

- **Employ equitable revenue sources that focus on long-term adequacy**
  - Sustain progressive personal income tax rates
  - Establish graduated corporation tax rates
- **Diversify and stabilize revenue sources**
  - Broaden the sales tax base (e.g., taxing digital products)
  - Limit inequitable tax expenditures
- **Improve adequacy and fairness of property taxes**
  - Tax commercial and industrial property based on market value
  - Establish statewide tax on commercial and industrial property

Each option has tradeoffs — the point is there ARE choices.

The Bottom Line

- California is the 4th largest economy in the world — many resources exist
- Constraints are real but not immovable — voters and legislators have acted before
- The cost of inaction: schools in fiscal distress, overcrowded classrooms, unequal opportunity
- Policymakers and advocates have tools — there are many options for addressing revenue constraints

What constraints should we tackle first?

Jonathan Kaplan

jkaplan@learningpolicyinstitutue.org

The Fiscal Consequences of School Closures in California: Evidence from a Statewide Synthetic Difference-in-Differences Design

Francis Pearman

RESEARCH QUESTION

Do school closures improve the financial health of school districts?

Setting

- All California public school districts, fiscal years 2011–2019
- ~796 districts; 7,164 district-year observations
- Pre-COVID window; post-Great-Recession baseline

DESIGN

Synthetic Difference-in-Differences (Arkhangelsky et al., 2021)

Combines synthetic-control reweighting with DID; doubly robust

Treatment: absorbing indicator equal to 1 from a district's first closure onward

Outcomes

- Per-pupil funding deficit
- Balanced-budget indicator
- Per-pupil expenditures
- Per-pupil revenues

DESCRIPTIVE EVIDENCE

Post-closure fiscal trajectories are heterogeneous and not systematically tied to pre-closure standing.

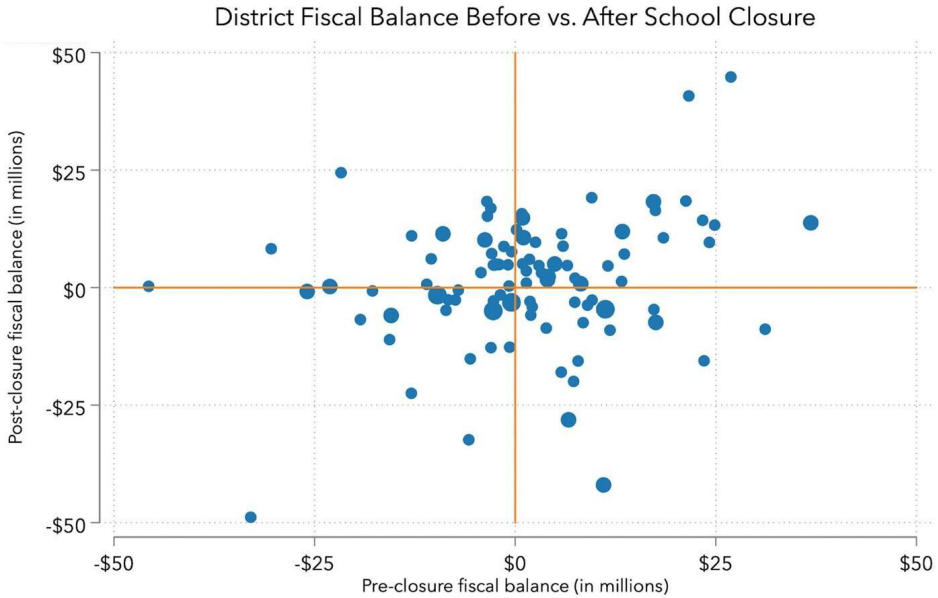


Figure 1. Each marker is a district enrolling ≥5,000 students with at least one closure, 2011–2019. Axes in $ millions (2019).

MAIN RESULT

Closures did not, on average, improve district fiscal health.

Outcome	Estimate	SE
Per-pupil funding deficit	−$70.46	(204.62)
Balanced-budget indicator	+0.03	(0.05)
Per-pupil expenditures	−$447.30	(387.86)
Per-pupil revenues	−$432.70	(443.78)

No estimate is statistically distinguishable from zero. Expenditures and revenues fall by similar magnitudes — net fiscal position is unchanged.

EVENT-STUDY DYNAMICS

Pre-trends are flat. Post-closure expenditures and revenues both decline; net fiscal position is unchanged.

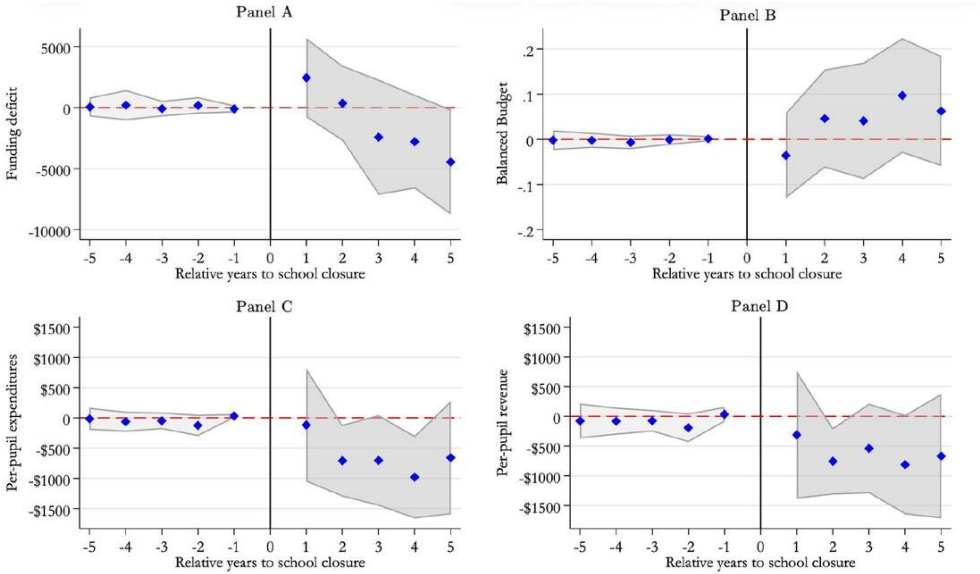


Figure 2. SDID event-study estimates with 95% block-bootstrap CIs. k = −1 is the omitted reference year.

THE MECHANISM

Enrollment falls. Staff doesn't. LCFF revenue contracts.

- Closure lead to 287 fewer students on average ($p < .05$)
- No significant change in teacher, principal, or total staff counts
- State General Assistance accounts for the largest single revenue movement (≈ −$350,000)
- Fixed-cost structure remains largely intact; expected expenditure savings do not fully materialize
- Null results are stable across specifications.

Figure 2. SDID event-study estimates with 95% block-bootstrap CIs. k = −1 is the omitted reference year.

SUBGROUP RESULTS

Null effects on fiscal health hold across every subgroup.

Subgroup	Result
Urban	Expenditures −$1,224 (p<.05) and revenues −$845 (p<.001), but symmetric → no change in deficit or budget balance
Rural	No significant effect on any outcome
Cash-strapped	No significant effect — even districts with the strongest fiscal motive to close show no improvement
Fiscally solvent	No significant effect on any outcome

Closure alone is unlikely to deliver the fiscal improvement districts anticipate.

- Fiscal returns to closure are limited by closure-induced enrollment decline
- Districts pursuing closure for fiscal stabilization should treat revenue optimization as a first-order objective, especially large urban districts
- Levers: enrollment retention during transitions; repurposing or monetizing closed facilities
  - Naylor Act and Surplus Land Act constraints extend the timeline between closure and any realized revenue — candidates for reform
  - Potential inclusion of hold harmless provisions to LCFF
- Null fiscal returns must be weighed against documented social and academic costs of closure

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Transition

As we transition, turn to your neighbor and discuss:

what's something you've learned from this panel that could help address a practice or policy problem in your district?

Early Education and Math Snapshot

Austin Land
University of California Berkeley

Jacob Jackson
University of California Davis

Who Benefits from Public P-3 Investments? Dynamic Complementarity in CA Education Policies

Rucker Johnson & Austin Land, *UC Berkeley*

P-3 Investments in Educational Opportunity

2009 – CSPP consolidated contracts for center-based care for preschool-age children

- Created streamlined, simplified vehicle for preschool expansion and regulation
- Preschool for 3- & 4-year-olds, family income below 75% SMI (50-60% of children eligible)

2012 – The Kindergarten Readiness Act and Transitional Kindergarten

- Delayed kindergarten entry to mitigate redshirting advantage
- TK: PreK for 4-year-olds, or ”the first year of a two-year kindergarten program”
- Universal eligibility for children born between Sept. 2 and Dec. 2

2013 to 2018 – LCFF Implementation

- Base grant per student + supplemental grant (20% of base) for each EL, low-income, or foster youth student
- Concentration grant (up to an additional 50% of base) for students above a 55% unduplicated count threshold

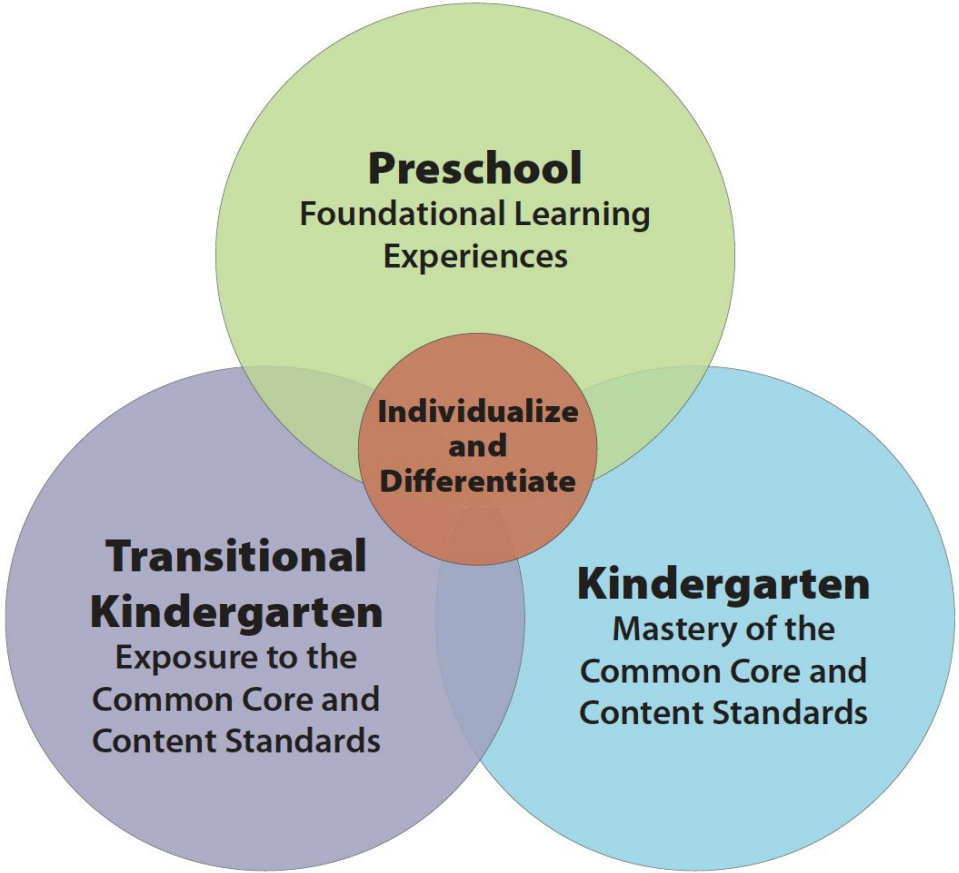
The California context

We study 3 California education policies

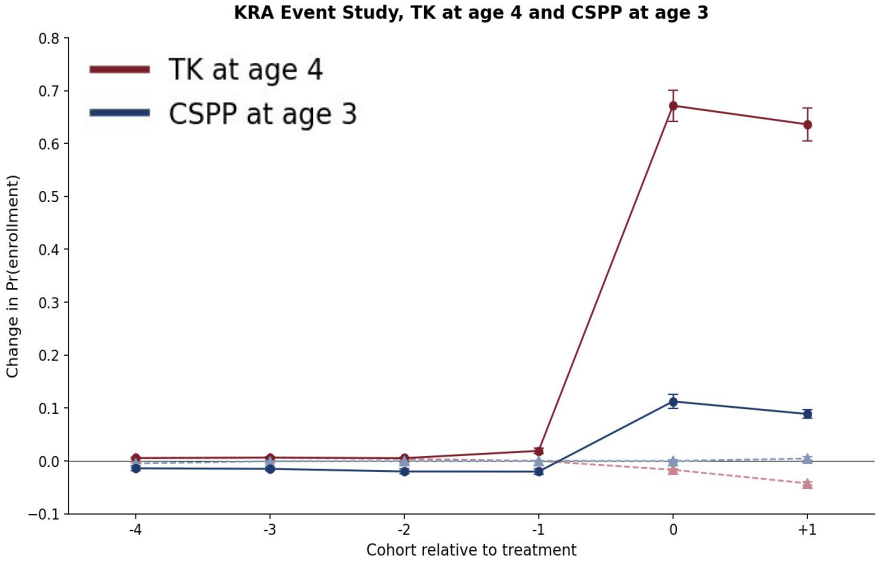
1. The California State Preschool Program (CSPP)
2. Transitional Kindergarten (TK)
3. The Local Control Funding Formula (LCFF)

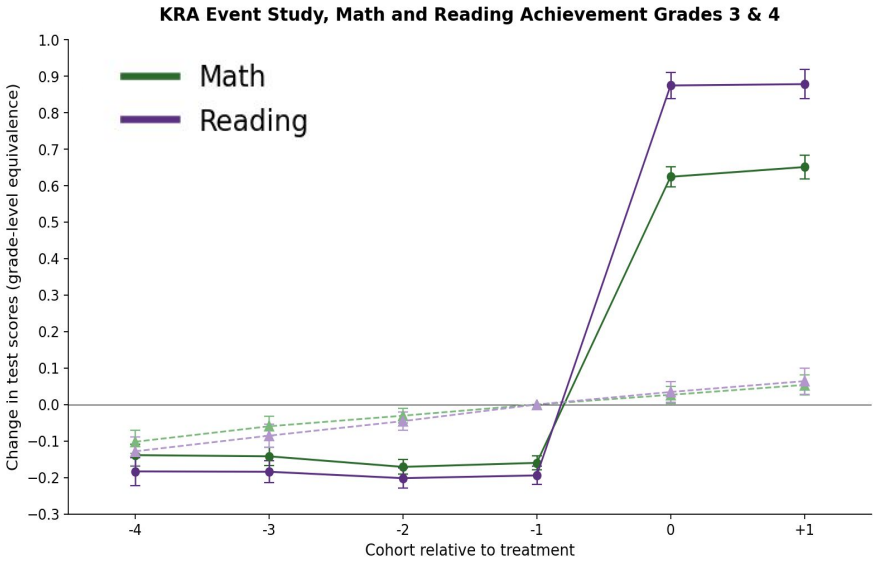
We ask

1. What were the independent impacts of each investment?
2. Did they interact?
3. And were the effects equity-enhancing?



The Kindergarten Readiness Act (Difference-in-differences)



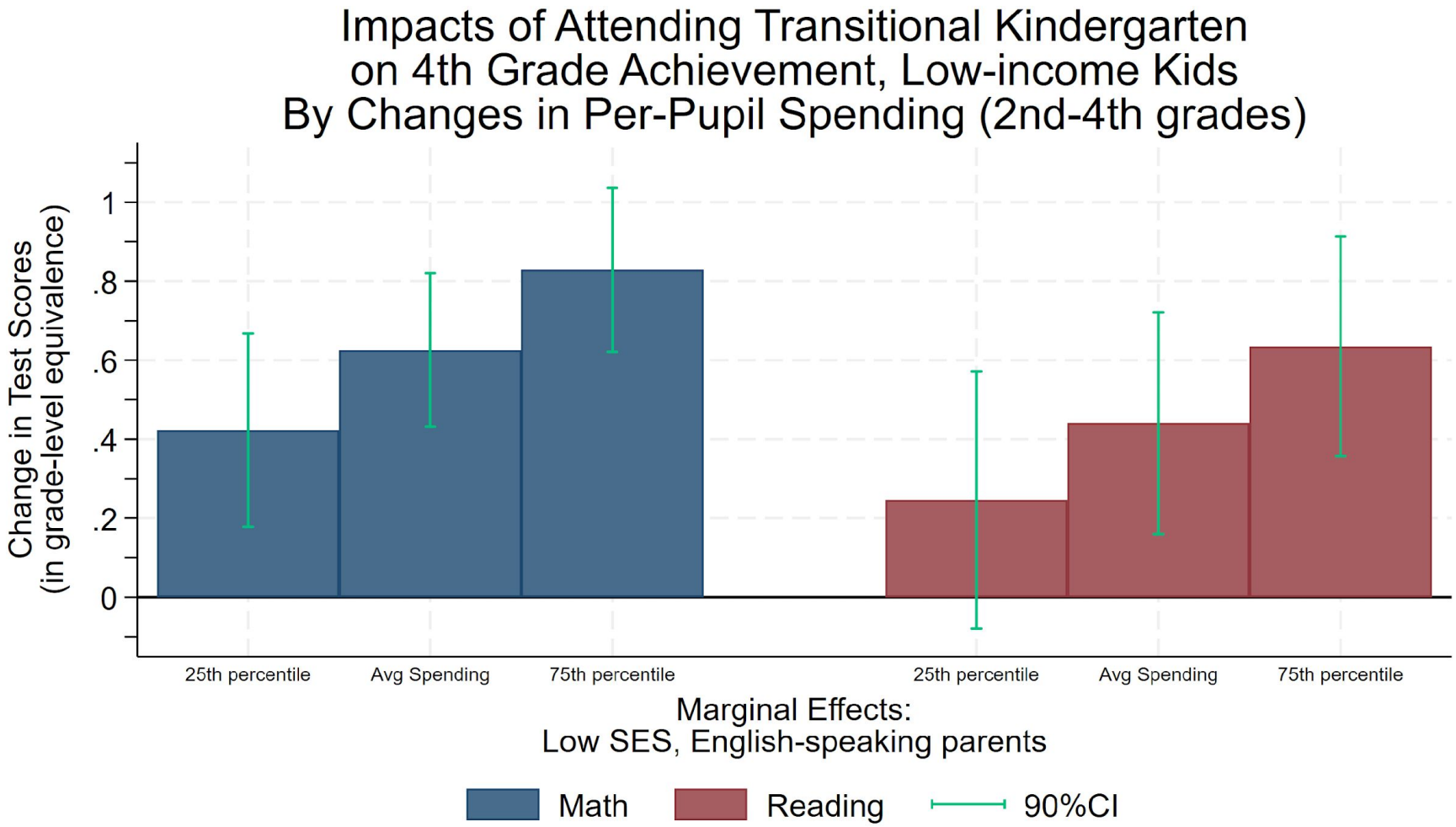


Research Designs

(1) a shift-share approach: exploits contractor-level funding changes to estimate the effects of **CSPP** spending;

(2) a regression discontinuity design: uses the December 2 birthday cutoff to identify the effect of **TK** attendance; and

(3) a simulated-instrument approach: isolates **LCFF**-induced changes in elementary school spending.


Impacts of Attending Transitional Kindergarten
on 4th Grade Achievement, Low-income Kids
By Changes in Per-Pupil Spending (2nd-4th grades)
Change in Test Scores
(in grade-level equivalence)
1
.8
.6
.4
.2
0
25th percentile
Avg Spending
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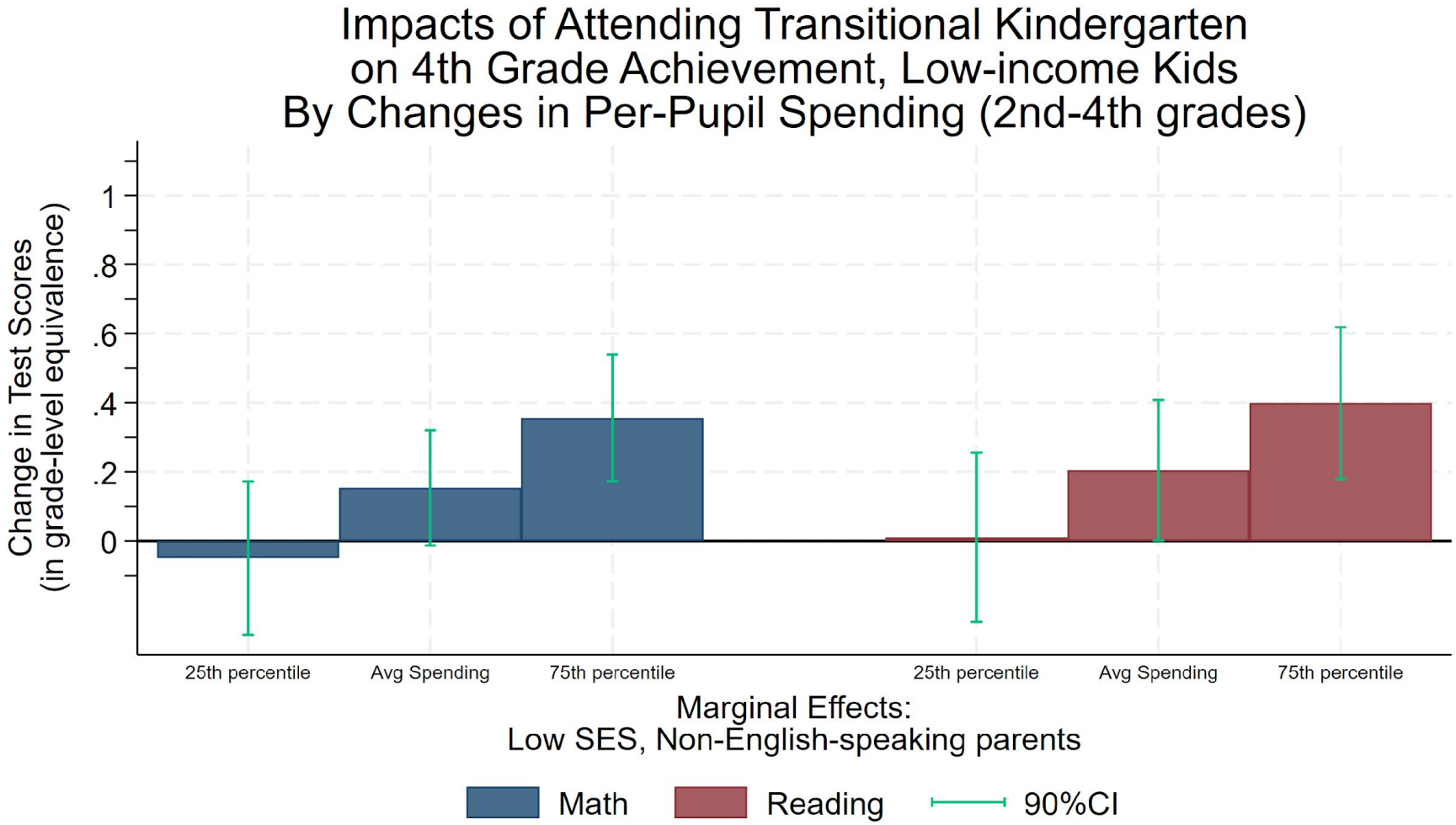
25th percentile
Avg Spending
75th percentile
Marginal Effects:
Low SES, English-speaking parents
Math
Reading
90%CI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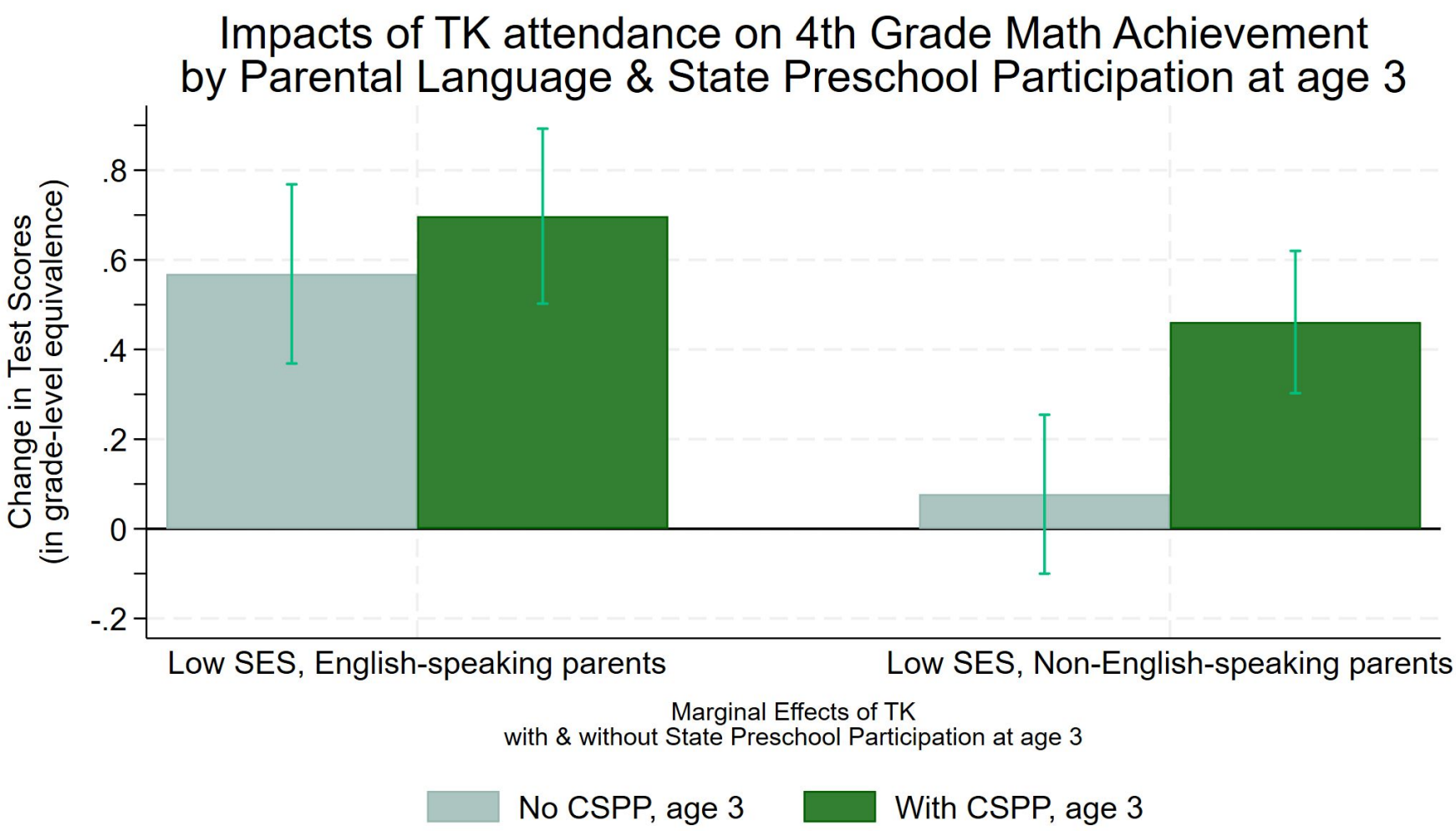
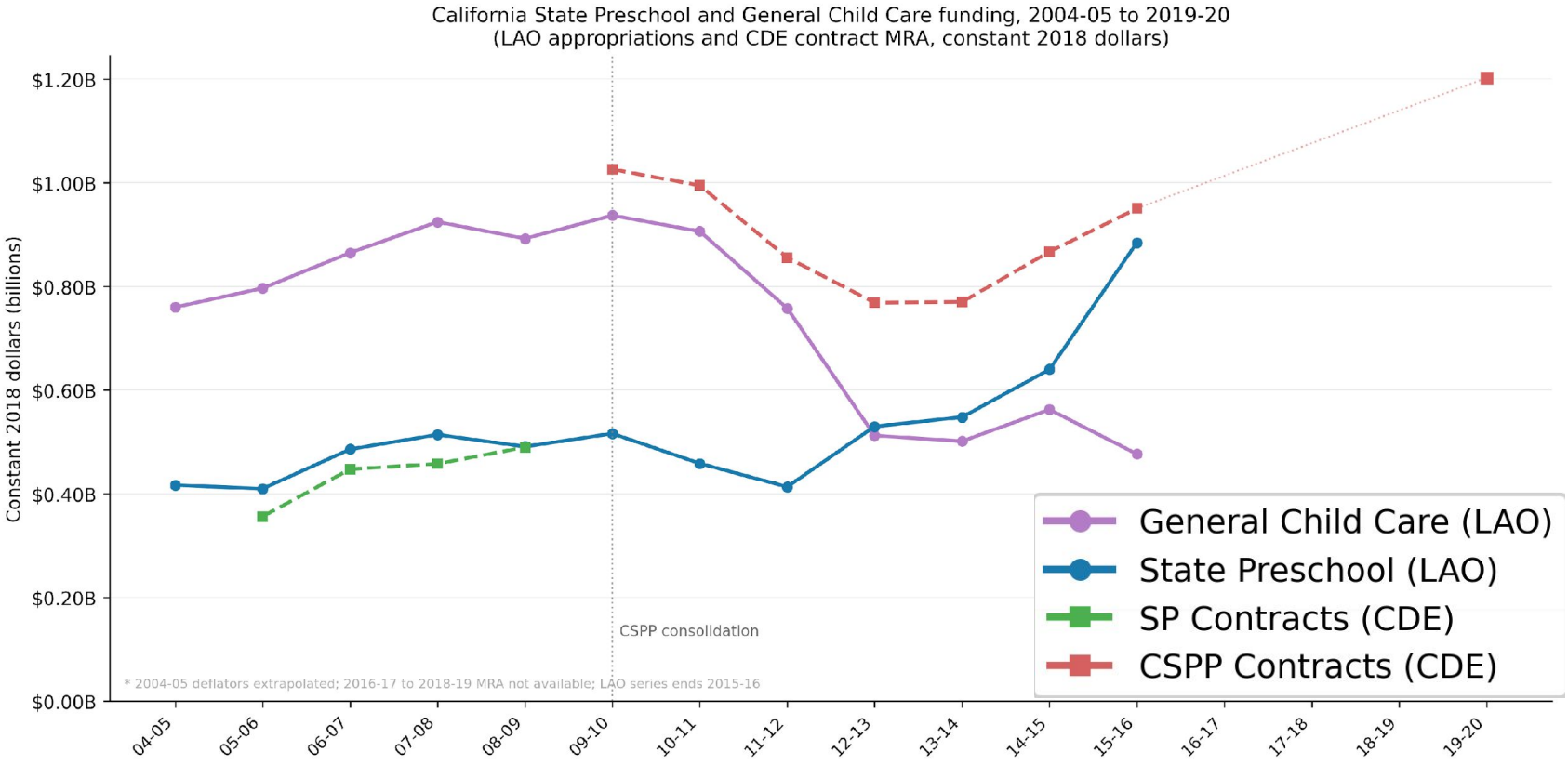
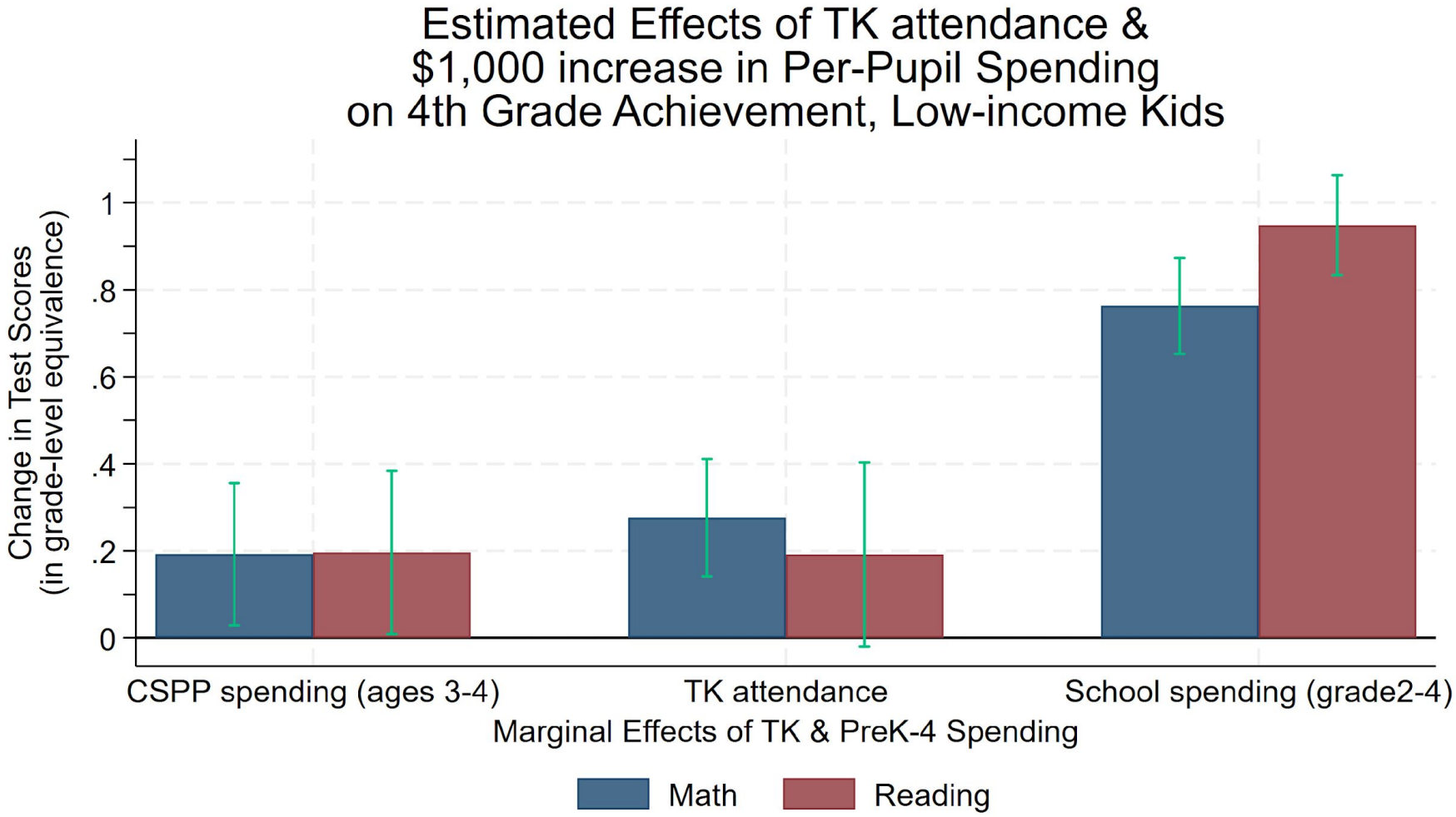

Impacts of TK attendance on 4th Grade Math Achievement
by Parental Language & State Preschool Participation at age 3
Change in Test Scores
(in grade-level equivalence)
.8
.6
.4
.2
0
-.2
Low SES, English-speaking parents
Low SES, Non-English-speaking parents
Marginal Effects of TK
with & without State Preschool Participation at age 3
No CSPP, age 3
With CSPP, age 3

State Preschool Funding: Budget Items & Contracts




Estimated Effects of TK attendance &
$1,000 increase in Per-Pupil Spending
on 4th Grade Achievement, Low-income Kids
Change in Test Scores
(in grade-level equivalence)
0
.2
.4
.6
.8
1
CSPP spending (ages 3-4)
TK attendance
School spending (grade2-4)
Marginal Effects of TK & PreK-4 Spending
Math
Reading

Conclusion

CA's P-3 investments in educational opportunity via CSPP, TK, and increases in school spending each has substantial, equity-enhancing impacts on student achievement.

None operate completely independent of the other and the effects we document are best interpreted as reflecting complementary, synergistic impacts that unfold throughout the P-3 years.

Conclusion

Socioeconomic Disadvantage

- A $1,000 increase in per-pupil spending translated to nearly 0.25 grade levels of additional math and reading gains by 3rd or 4th grade.
- Among SED children, TK attendance led to 6 months more learning gains in 3rd grade reading and math achievement on average. These impacts were larger for students who first attended CSPP.
- For low-income children, Transitional Kindergarten magnifies the impacts of LCFF-induced increases in elementary school spending (& vice-versa)

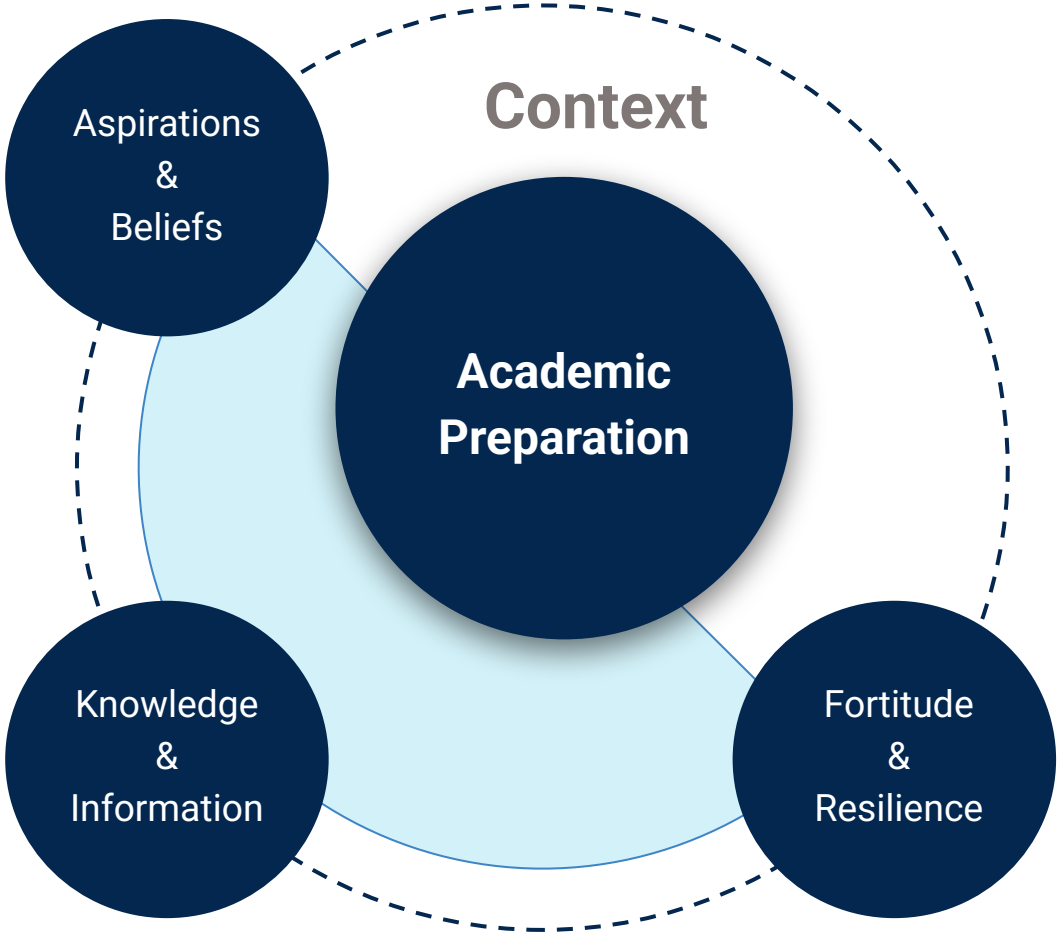
English Learners

- At a time when policy dictated English-only instruction, TK effects on achievement among students with non-English-speaking parents were relatively modest.
- These students benefited more from TK if they first attended CSPP, where they were more likely to find culturally and linguistically aligned program.

Does your Math Pathway Make a Difference? High School Mathematics and College Outcomes

Jacob Jackson and Michal Kurlaender
California Education Lab, *UC Davis*

Key Predictors in Educational Attainment

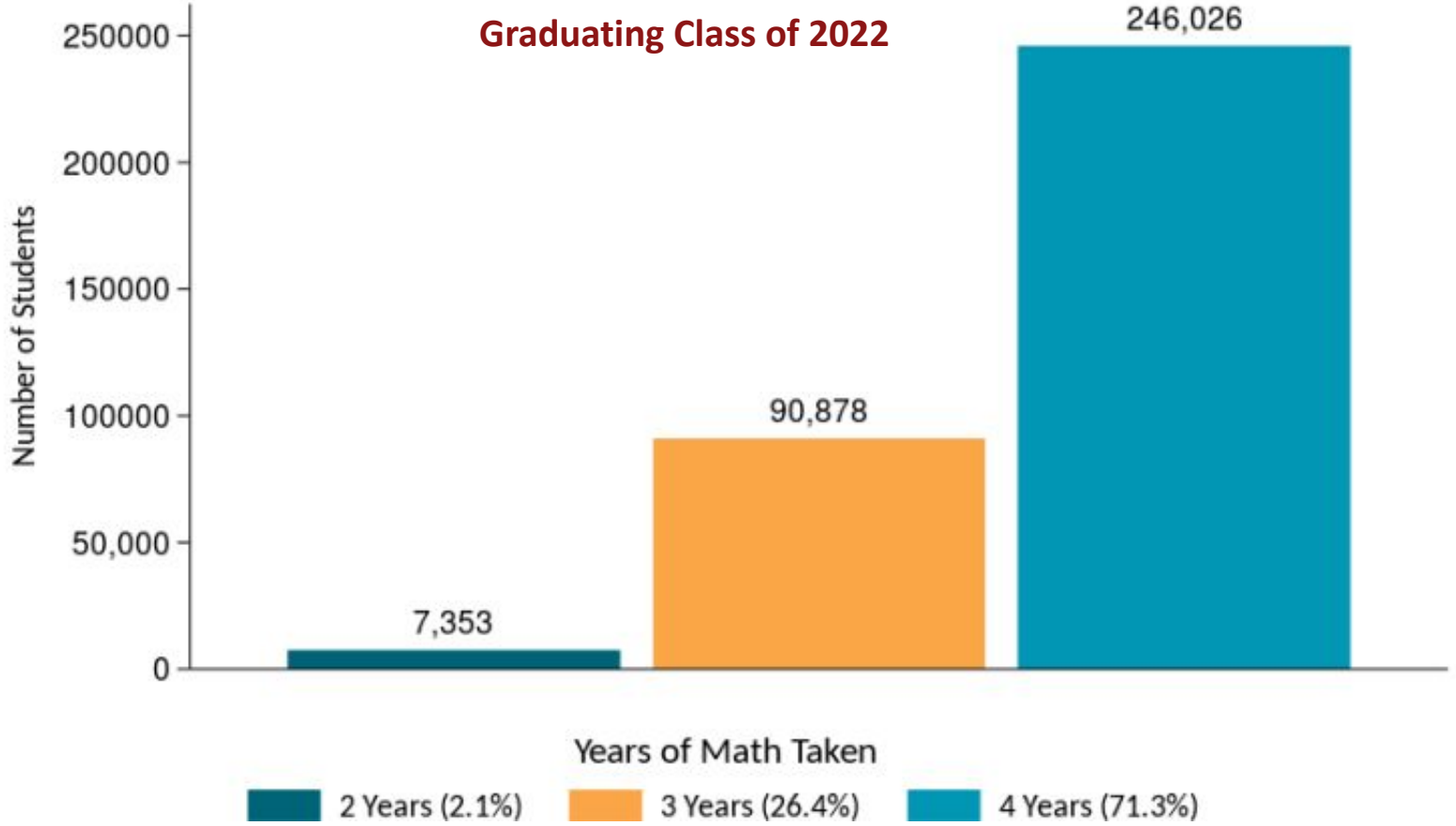


Source: Kurlaender, M., Reed, S., & Hurtt, A. (2019). *Improving college readiness: A research summary and implications for practice.*

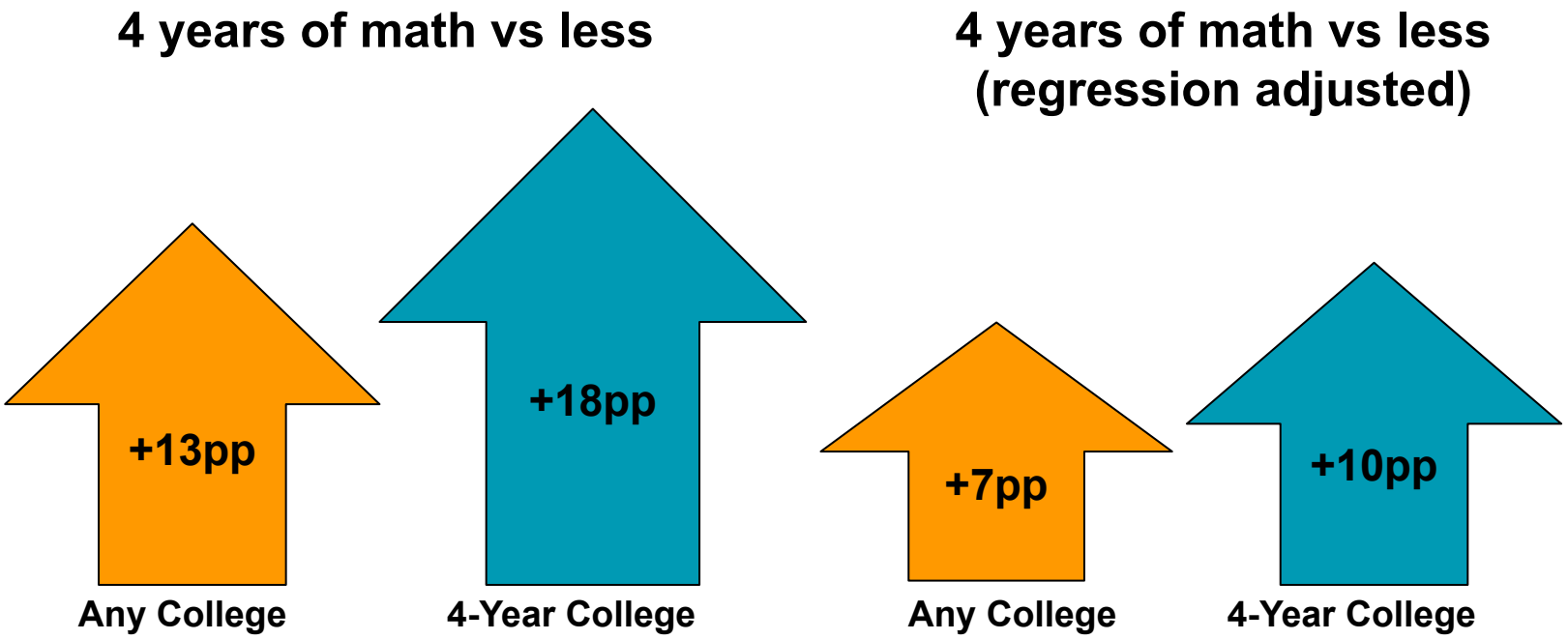
A closer look at math and college attainment

1. How many years of math do CA high school students take?
2. How are years of math related to college enrollment?
3. Which courses are related to college enrollment?
4. How do these relationships vary by student characteristics?

Most high school students take four years of math

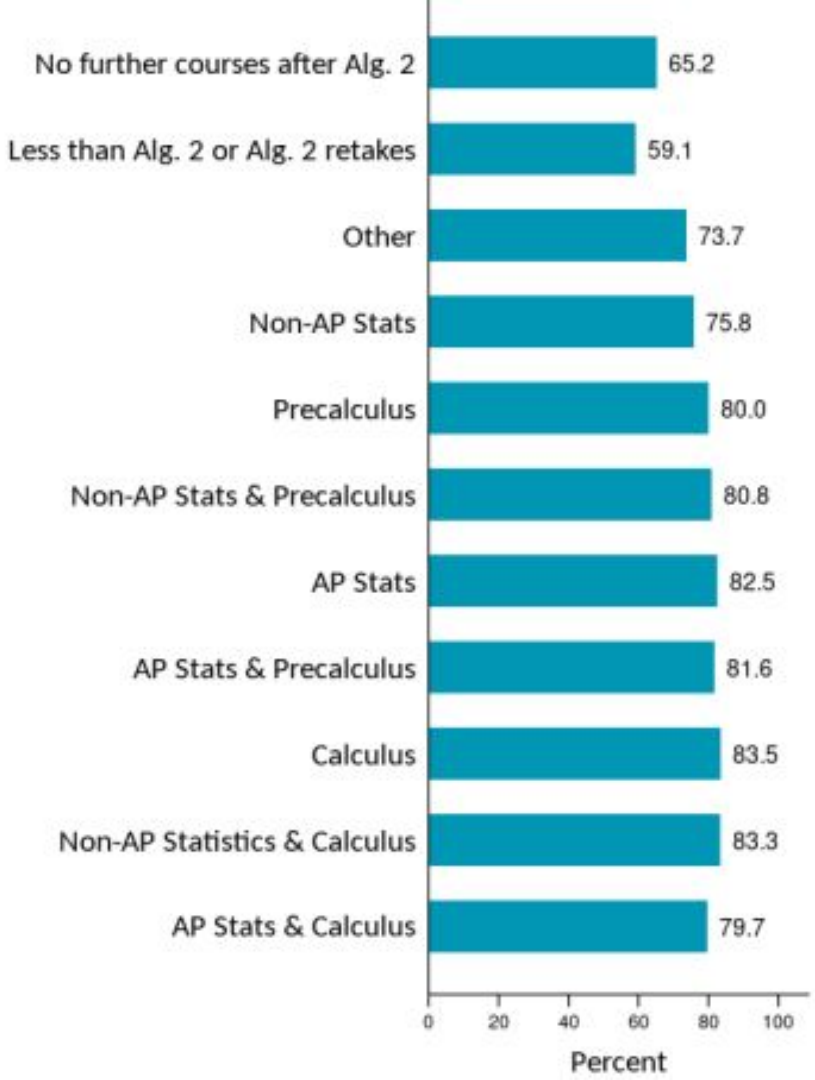


Students who take four years of math are more likely to enroll in college



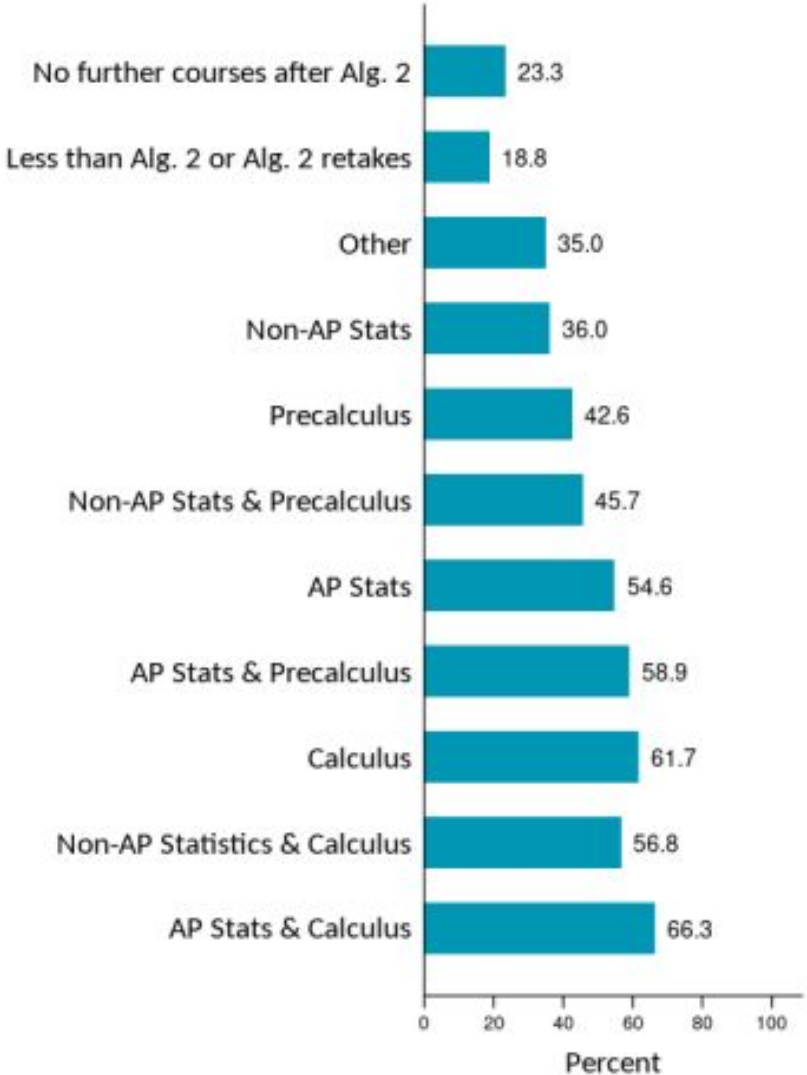
Does the math course matter?

The probability of <u>any college</u> enrollment is higher after taking an advanced math course beyond Algebra 2

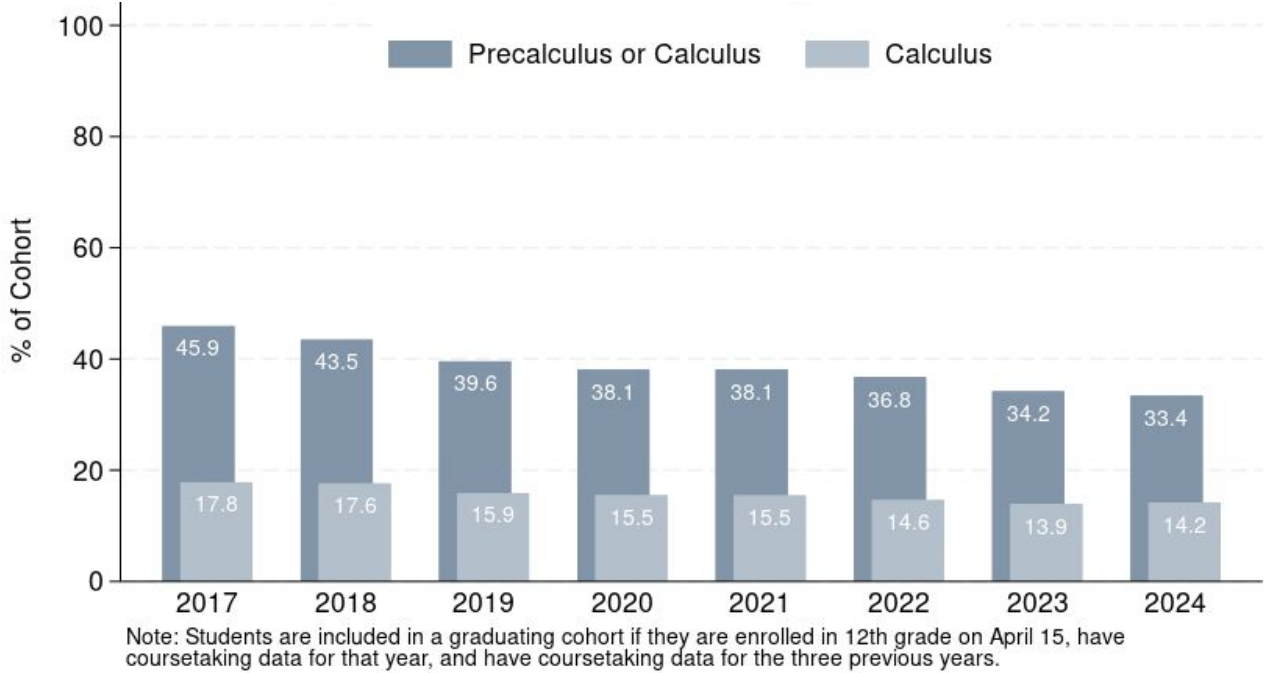


Does the math course matter?

The probability of 4-year college enrollment is higher for those in more advanced math courses



Percent of students reaching precalculus or calculus before graduation is declining



Note: Students are included in a graduating cohort if they are enrolled in 12th grade on April 15, have coursetaking data for that year, and have coursetaking data for the three previous years.

Source: Dykeman, K. Kurlaender, M., Larson, B., & Reed, S., (forthcoming). *Subtraction and substitution: Shifts in high school math course-taking*. Policy Analysis for California Education.
https://edpolicyinca.org/publications/subtraction-and-substitution

Takeaways

- A majority of students are already enrolling in 4 years of HS math
- More math is related to college-going, especially at 4-year colleges
- More advanced math courses are related to college going
  - Especially at 4-year colleges
  - Especially among SED students
- Ensuring access to rigorous math coursework has the potential for increasing degree attainment and closing postsecondary gaps

https://gettingdowntofacts.com/reports/does-your-math-pathway-make-difference-high-school-mathematics-and-college-outcomes

Your Turn - Community Conversations

A. Accountability and Alignment: *How should your district identify and prioritize its goals? Who should be involved in setting those priorities?*

B. Balance Between State Guidance and Local Control: *Which decisions are best made locally by districts and schools, and which should be made at the state level? Why?*

C. Building Capacity: *Where do you see the greatest opportunities to strengthen capacity in your district or community? Which ideas, tools, or strategies from today's presentations could help move this work forward?*

Share Your Thoughts - Participant Reflection

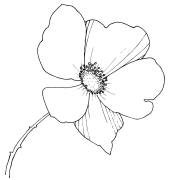
GDTFIII Reflection

We will be collecting feedback from all our community events and sharing with partners and policymakers in Sacramento.

Learn More

Getting Down to Facts III website (gettingdowntofacts.com)

Learn More



Use “Poppy” the GDTF III Bot to find what you’re looking for.

Use the QR code to go to a stand-alone page or use it on the GDTF III website in the bottom right-hand corner of the page.

What's Next

- Additional Regional Convenings in the Central Valley
- Subject Area focused webinars in the late summer/ fall
- Conversations in Sacramento
- Continued engagement with policymakers, educators, families, and community leaders to translate research into action

THANK YOU!