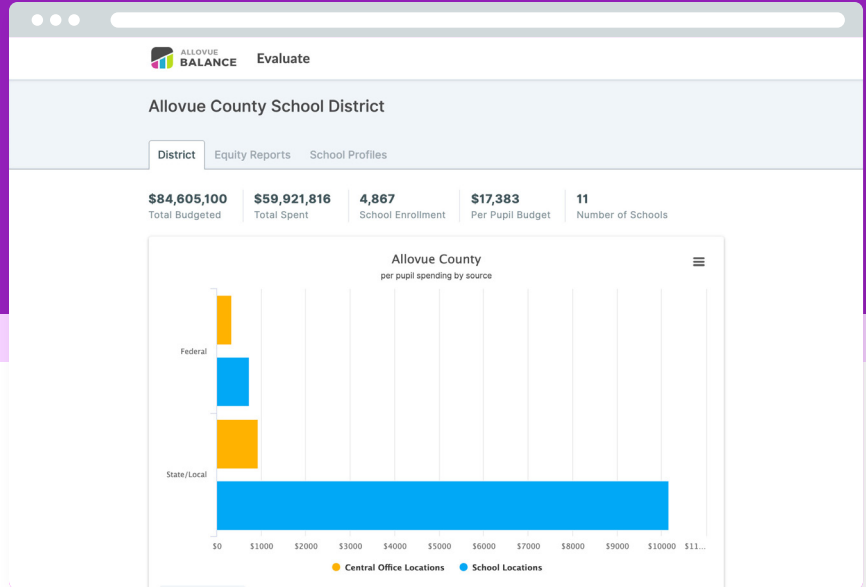


Streamline communications and improve transparency with *Balance Evaluate*.



With *Balance Evaluate*, examine the distribution of expenditures against underlying drivers and performance measures to reveal insights that can drive decisions.

## Stakeholder Engagement

A knowledgeable public is a more engaged public. Help each local community understand how their school's expenditures compare to the district average and peer schools, as well as trends in spending and top vendors.

## Equity

Equitable does not mean equal; we recognize that varied student populations require different resources. *Balance Evaluate* provides K-12 district administrators crucial insights into resource equity across their district, spurring actionable next steps.

## Spending Efficacy

Connect budgets and expenditures—by source, location, and targeted student group—to performance metrics and other non-financial indicators. With *Balance Evaluate*, you will understand the relationship between spending across locations and school-based initiatives and practices that impact student learning and drive costs.

### *Balance Evaluate* also includes:

#### School Profiles

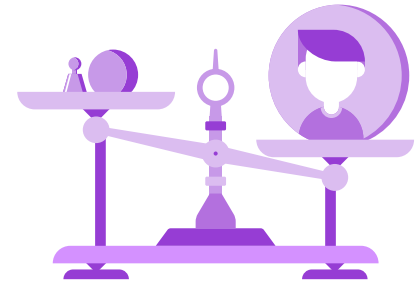
Review tailored, regularly updated public profiles for each school to better understand budgets and spending patterns at the school-level and in comparison to district averages.

#### Equity Reports

Analyze actual spending by location, student characteristics, academic performance, and other factors to better understand whether resource allocation processes are supporting fiscal equity.

#### Scatterplot

Analyze relationships between non-financial outcomes and your investments and allocations using all of the power of *Balance Manage's* filters.



## Equity Reports

Analyze actual spending by location, student characteristics, academic performance, and other factors to better understand whether resource allocation processes are supporting fiscal equity.

**Why is one school receiving more than the other?**

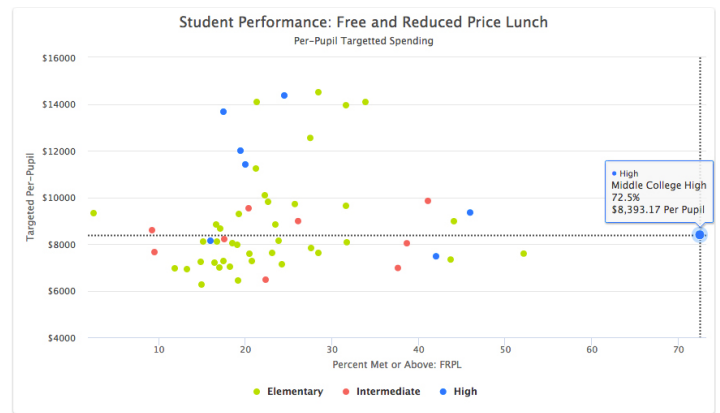
**Is every student receiving equitable resources?**

**Are resource inequities contributing to differences in student learning?**

### Equity Reports include:

We update the equity report on a scheduled yearly basis, and they can be accessed by leadership on a district-specific website. Each equity report includes valuable visualizations with financial and non-financial data such as:

- Per Pupil Expenditures by School and School Level
- School Composition and Expenditures by Student Subgroup
- Discretionary, Personnel, and Targeted Spending Comparisons
- Student Performance and Resource Comparisons



### Additional Supports

We can also help your district with developing customized visuals like:

- Efficacy Analysis of Targeted Funds
- Supplemental Program Analysis
- Central Office Spending Equity

### Why Equity Reports?

- Review the distribution of spending by school and how it interacts with student populations
- Identify outliers in both spending and performance to identify potential areas for further study
- Gather insights on how targeted funds flow to schools with the students they are intended to benefit
- Facilitate informed conversations with stakeholders, including parents and community groups

**Balance Evaluate** also includes access to two additional services:

#### School Profiles



Review tailored, regularly updated public profiles for each school to better understand budgets and spending patterns at the school-level and in comparison to district averages.

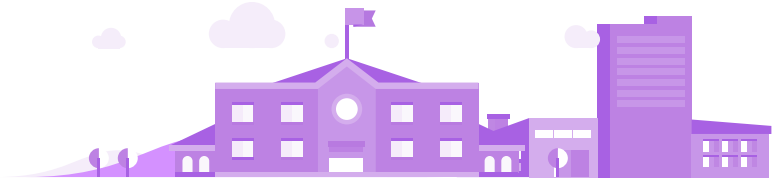
#### Scatterplot



Analyze relationships between non-financial outcomes and your investments and allocations using all of the power of *Balance Manage's* filters.

## School Profiles

Review tailored, regularly updated profiles for each school to better understand budgets and spending patterns at the school-level and in comparison to district averages.



Our profiles are designed to answer the most common questions principals, teachers, and parents have about spending in their schools in an easy-to-read and understand format.

### School Profiles include:

A monthly update of each school's data and each school profile includes insights and 10 visualizations with financial and non-financial data such as:

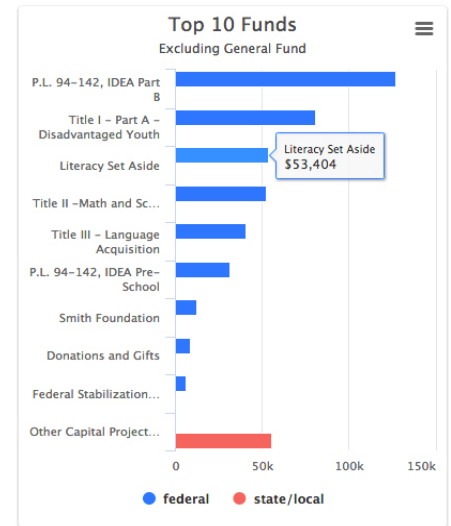
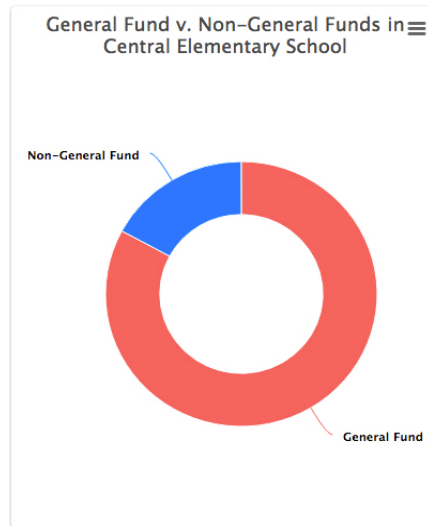
- Total Expenditures, Enrollment, and Per-Pupil Expenditures
- Funds Analysis
- Top 10 Vendors
- Spending by Month and Budget Pacing Chart
- Budget vs. Actual by Object

### Additional Supports

We can also help your district with developing customized visuals like:

- Additional demographic indicators
- Grant funding (private and non-federal grants)
- Tax credit dollar funds vs. target revenue
- Multi-year spending comparisons

### Funds Analysis



### Why School Profiles?

- Evaluate and monitor spending patterns throughout the year
- Examine what schools are spending their dollars on, broken out by funding source and purpose
- Compare spending school to school
- Facilitate informed conversations with stakeholders, including parents and community groups

Balance Evaluate also includes access to two additional services:

### Equity Reports



Analyze actual spending by location, student characteristics, academic performance, and other factors to better understand whether resource allocation processes are supporting fiscal equity.

### Scatterplot



Analyze relationships between non-financial outcomes and your investments and allocations using all of the power of Balance Manage's filters.