

Drowning in Documentation

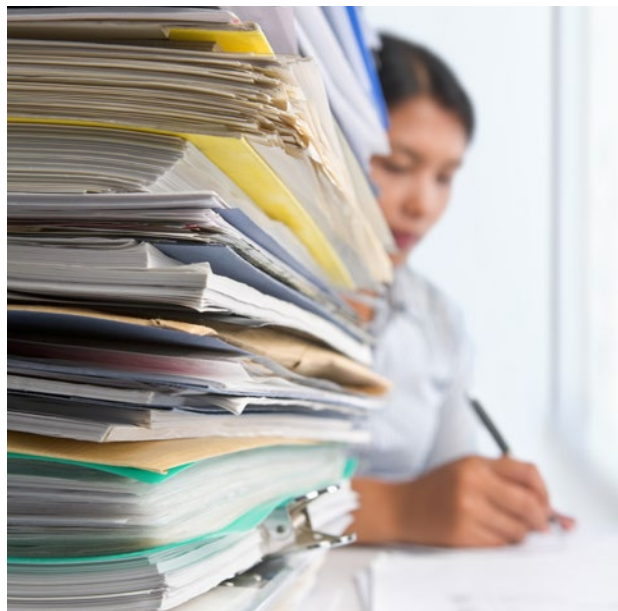
Executive Summary

California's local educational agencies (LEAs) are grappling with an overwhelming array of reporting requirements from both state and federal authorities. While these requirements serve important purposes, such as ensuring proper use of public funds, promoting transparency, and driving continuous improvement, the sheer volume and complexity of the requirements has become increasingly burdensome for LEAs.

These excessive reporting requirements have several negative impacts on LEAs. The steep costs in labor and time are particularly acute — a single new reporting requirement can generate thousands of hours of additional work annually across the state. The quality and value of reporting have also decreased as administrators struggle to meet constant deadlines, often leading to a compliance mentality rather than thoughtful planning and reflection. This diminishes the value of reporting and its intended purpose. Morale has suffered as administrators feel unsupported and question whether the data they submit is being effectively utilized. The burden is especially heavy for smaller districts with limited staff capacity, often limiting superintendents' time to focus on their core school leadership and improvement responsibilities.

Despite the well-intentioned goals behind many reporting requirements, such as promoting transparency and understanding the impact of state investments, the current system often fails to realize these benefits fully. While the state collects vast amounts of data, it unfortunately lacks the capacity and mechanisms to systematically analyze and act upon the information to address problems or drive improvements. The Local Control and Accountability Plan (LCAP), while designed to provide local accountability and drive thoughtful budgeting, often falls short of providing genuine transparency for parents, communities, and school boards due to its complexity and length.

While resources and support systems are available — such as training, guidance, and assistance from county offices of education and the California Department of Education (CDE) — many LEAs still struggle with the sheer volume of work



compared to available staff time. Staffing shortages and legal limits on the number of administrators a school district can hire present additional difficulties.

Several systemic issues contribute to the growth of reporting mandates. First, there is a lack of comprehensive oversight at the state level, with no single entity monitoring the full array of LEA reporting requirements or having responsibility to keep it in check. Second, the initial simplicity of Local Control Funding Formula (LCFF) reporting has given way to detailed plans and reports for nearly every new categorical funding stream and has expanded the already onerous LCAP. This does not account for the numerous reporting and plan requirements for all of the categorical programs outside of the LCAP. Additionally, limited feedback loops between the state and LEAs exacerbate the issue.

This report includes recommendations for the Legislature, Administration, the State Board of Education, and state agencies to take a multifaceted approach to address these challenges:

1. Recommit to the logic of LCFF by:

- › Reconsidering the use of categorical programs outside of the LCFF model.
- › Committing to a three-year goal of significantly reducing the number of data elements in the LCAP.

2. Reduce the reporting load by:

- › Conducting a comprehensive review of current requirements, aiming to reduce LEA time spent on reporting by at least 25 percent.
- › Prioritizing the removal of redundancies and data elements that are not actively used for decision-making.
- › Considering district size when determining reporting obligations, waiving certain requirements for districts with an enrollment under 1,000 students, and developing shorter formats for small districts. Encourage succinct narratives in standalone reports that capture only essential information.
- › Better distinguishing and defining the purpose of the audit system versus expenditure reporting.

3. Increase support for LEAs by:

- › Shifting the data compilation burden to higher levels (county, state) and allowing greater investments in staffing and/or technology. Aim for the majority of districts' time to be spent uploading data into existing systems, not repeatedly pulling data from local systems to populate individual reports. (This model has been effective in handling many federal reporting requirements.)
- › Investing in better tools and technology such as advanced programming that can assimilate data elements from various sources and forms. Additionally, develop portals that pre-populate with existing district data and provide drop-down options for short responses.
- › Developing sample content for required plans that LEAs can adapt or adopt.
- › Enabling very small districts to choose an intermediary, such as county offices of education or regional hubs, to write plans and reports on their behalf.



- › Normalizing and providing guidance for using artificial intelligence (AI) to generate content at the district level and harvest insights from data at the state level.

4. Develop better feedback loops between the state and LEAs by:

- › Establishing standing advisory groups that provide opportunities for end-users to weigh in on existing requirements and future changes.
- › Encouraging statewide organizations to compile annual lists of issues that could reduce administrative burden through statutory change.
- › Regularly analyzing State Board of Education waiver requests to identify common challenges and potential statutory fixes.