

Following Through: 5 Strategies for Getting Federal Relief Aid to Students Who Need It Most

Kelsey Krausen, John Diaz, Jason Willis, and Cosette Lias

August 2021

Across the country, the effects of COVID-19 have disproportionately impacted the lives and learning progress of student groups¹ that are historically underserved,² exacerbating disparities in educational opportunity that have existed within K–12 education for decades.³ To address the increased needs of students and schools resulting from the COVID-19 pandemic, the federal government has enacted a series of three relief and stimulus bills — the Coronavirus Aid, Relief, and Economic Security Act (CARES Act), the Coronavirus Response and Relief Supplemental Appropriations Act (CRRSAA), and the American Rescue Plan (ARP) — that have collectively infused nearly \$200 billion directly into K–12 public education.⁴

Under the CARES Act, the CRRSAA, and the ARP, federal aid guidelines stipulate that a large proportion of relief funding set aside for K–12 public schools will flow to local education agencies (LEAs) on the basis of the Part A formula of Title I, a federal program designed to provide additional funding for students on the basis of need. Moreover, in their state plans for the use of ARP funding, states must also describe how they are building capacity at the state education agency (SEA) and LEA levels to collect and report on the use of relief aid and “safeguard funds for their intended purposes.”⁵

However, current regulations on the use of federal aid alone cannot ensure that funds are allocated and spent equitably for students. LEAs have considerable autonomy in fund use, and neither Title I nor the federal relief aid packages require that funding be allocated equitably

from the LEA to the school level. Furthermore, although ARP Elementary and Secondary School Emergency Relief (ESSER) funds have a maintenance-of-equity provision, which ensures that the highest need districts and schools (as determined by Title I) do not experience disproportionate decreases in per pupil funding relative to the rest of the state, the provision is retrospective in its application. That is, the reporting and investigation into the use of those funds occurs only after the funds have been allocated and spent. Yet, research demonstrates the importance of allocating resources on the basis of need.⁶ WestEd’s research in Kansas, North Carolina, and Utah indicates that higher student need is associated with higher costs in order to achieve equivalent academic growth.⁷ To reach equitable outcomes for students, resources must be allocated equitably.

This policy brief offers five strategies that SEA and LEA leaders can use to follow through on the intended use of federal relief aid — ensuring it is allocated equitably at the school level based on need — so that students who face the highest barriers to learning during the pandemic receive additional support. SEA leaders play a critical role in providing guidance and technical assistance to LEAs regarding the equitable allocation and use of funding and regarding approaches to measuring, monitoring, and disseminating information on the impact of local investments in order to support students most impacted by the pandemic. These efforts can help ensure that dollars reach and positively affect the students with highest need. In addition, states have an opportunity to support LEAs in thoughtfully engaging community stakeholders, elevating the voices of underserved communities and utilizing their input in strategic resource decisions, and strengthening LEAs' ongoing planning processes.

Opportunity and Challenge: Flexibility in the Use and Timing of Federal Relief Aid

Though determined under separate legislation, federal relief funds from the ARP, the CARES Act, and the CRRSAA are all governed by the same general rules for fund allocation and use. Several key provisions, outlined below, allow for considerable flexibility in how funds are allocated and used.

Key Flexibility Provisions for Use of ARP, CARES, and CRRSAA Funds

- A state must subgrant at least 90 percent of its total allocation of ESSER funding to LEAs.
- LEA funds may be used for a wide range of activities to address needs arising from the coronavirus pandemic, including any activity authorized by the Every Student Succeeds Act (ESSA), the Individuals with Disabilities Education Act, the Adult Education and Family Literacy Act, and the Strengthening Career and Technical Education for the 21st Century Act.
- *ARP only:* LEAs must reserve at least **20 percent** of award funds to address **learning loss** through the implementation of evidence-based interventions and to ensure that those interventions respond to students' needs and address the disproportionate impact of COVID-19 on student groups that are historically underrepresented (i.e., students from underrepresented racial and ethnic groups, students from low-income families, students with disabilities, English learners, girls, students who are alternatively gendered, students who are children of migrants, students experiencing homelessness, and students in foster care).⁸
- *ARP only:* LEAs must make a Safe Return to In-Person Instruction Plan within 30 days of receiving ARP ESSER funds.
- *ARP only:* To receive the last third of ARP funding, states must submit a plan for how they will use ARP ESSER funding to "address the needs of students disproportionately impacted by the COVID-19 pandemic, including students in underserved communities,"⁹ and how they have and will support and monitor LEAs' use of federal relief aid.

The benefit of this flexibility is that it allows for targeted investments based on local need. And although the allocation rules do not guarantee that funds actually reach the students who need the resources the most, state and local leaders can create new systems for the equitable allocation of resources. The new systems can also be developed through participatory budgeting practices that achieve greater levels of transparency.

It is important to recognize that the pressure SEA and LEA leaders are under is immense. They are wrestling with the urgency of responding to immediate student and community needs while also contending with the opportunity to transform and remake a system that has been substantially challenged in educating students effectively through the pandemic. To that end, SEA and LEA leaders should consider the strategies contained in this brief as developmental — the timeline associated with the federal relief aid will afford several annual strategy and budgeting processes to implement the strategies.¹⁰

Strategies

The following strategies include suggestions for state and local education leaders to act now to plan, discuss, and execute the allocation of federal relief aid. These strategies are known and well documented and are based on research and on WestEd's experience with providing strategic resource allocation support across state, regional, and local levels of the public education system.

Strategy 1: Create a Funding Formula Based on Need

Districts can more equitably utilize federal relief aid by employing formulas that allocate resources based on identified need factors, with an emphasis on students

most impacted by the pandemic. Traditionally, funding formulas that allocate dollars based on identified factors of need are called weighted student funding (WSF) systems. In a WSF system, dollars are allocated based on the number of students instead of on staffing or materials, and objective and measurable student characteristics are used as weights.¹¹ Generally, WSF systems include a base weight (a dollar per pupil amount that all students receive) and student-need weights (additional funding to students with additional needs).

In the context of supporting students from communities that have historically faced the most barriers to education, WSF systems can be anchored in student characteristics such as eligibility for free and reduced-price lunch and English learner status. Other student characteristics such as grade enrolled, students in foster care, and students with disabilities are also frequently used as measures of need. As of 2019, 43 states were using a form of WSF in at least one component of their state allocation formula.¹² Some school districts have also adopted a form of WSF to allocate resources to their schools.¹³

SEA leader action to get started: Train and build the capacity of local leaders to develop and implement a new methodology for allocating state and federal resources so that they are allocated to maximize the benefit to schools serving students with higher needs.

LEA leader action to get started: Begin development of an allocation method that targets additional funding (via weights or proportion over a base allocation) to schools that serve students with amplified learning loss or social-emotional needs.

For example, LEAs can apply a WSF system to regions in which access to technology and other educational resources has been particularly low.¹⁴ Adjusting for disparities in access can help LEAs provide funds to schools for use in bolstering distance-learning materials, increasing preparedness, improving technological acumen among students and staff, and ensuring consistent long-term access to technology. In addition, using a weighted system to distribute funds can also make the district's allocation of resources, its priorities, and its focus on equity more transparent to stakeholders.

Strategy 2: Use COVID-Related Data to Guide Resource Allocation Decisions

Research supports the method of allocating resources based on need,¹⁵ and federal relief aid is intended to provide additional support to those students with the greatest needs as a result of the COVID-19 pandemic. In most cases, the students most impacted by COVID-19 are the same students who faced additional barriers, including having less access to opportunity, prior to the pandemic — students with disabilities, English learners, students from low-income households, students of color, students experiencing homelessness, and students in foster care.¹⁶ Therefore, state and local leaders should use experience during the pandemic and data related to educational opportunity to guide resource allocation decisions, prioritizing the needs of student groups most affected by the pandemic.

For instance, state and local education leaders have begun to use data on student access to digital devices and connectivity at home and at school to determine how to allocate digital resources and ensure access to equitable learning opportunities with distance learning. States have also begun tracking — by school district and by school — the mode of instruction to which students have had access: distance learning, hybrid, or in-person. Students from low-income households, students experiencing homelessness, English learners, and students of color were all more likely to be enrolled in schools that remained in distance learning during the pandemic.¹⁷ Research suggests that students in distance learning had access to fewer instructional opportunities, which may translate into poorer student outcomes when compared with students who attended school in person.¹⁸

Data on COVID-19 infection and hospitalization rates can also help identify areas of a state in which students may have experienced higher stress and trauma. Collectively, COVID-related data, when looked at by region, by district, by school, and by student characteristics, can help inform how to allocate federal aid in a state to support students' learning and social-emotional needs. Accordingly, state and local education leaders may want to consider whether to allocate additional resources to schools that serve more students who remained in distance learning for the duration of the 2020/21 school year. In addition, to directly address the disproportionate impact of the pandemic on low-income, Black, Hispanic/Latinx, American Indian, and immigrant communities, SEAs and LEAs can use COVID-related data to conduct a racial equity impact assessment that can inform their plans for allocating federal relief aid.

SEA leader action to get started: Leverage relationships with state agencies to make cross-agency data on students in various local communities readily available in order to inform resource allocation choices that combat the negative effects of the pandemic on student well-being.

LEA leader action to get started: Invest federal aid resources to develop new and unique data collections in schools to understand student well-being more deeply, including their academic, social, medical, and mental health needs.

In the wake of the pandemic, quality data is more critical than ever in understanding student needs. Furthermore, comprehensive data is needed to help understand both the academic needs and the social-emotional needs of students. Recent assessments of student learning are generally insufficient to understand the depth of current student needs. Many assessments were delayed due to the pandemic or are still in progress, large numbers of the students who face the greatest barriers to education were not assessed over the course of the last 15 months, and assessments were generally narrowly focused and therefore do not present the full picture of student needs.¹⁹

Consequently, local education leaders should consider conducting assessments in the fall of the 2021/22 school year to understand the depth of student needs by student group and to determine how to target funding to meet those needs. State education leaders can help support these efforts by providing guidance and technical assistance on test administration and on how to use these data to guide resource allocation decisions.

Strategy 3: Elevate and Utilize Stakeholder Voices to Guide Investment Decisions

Decisions on how to prioritize the use of federal relief aid should be made in consultation with stakeholders, should be grounded in data, and should target the specific needs of the community. Understanding the needs of the community requires meaningful engagement with stakeholders. Once the needs of students and schools are determined, student, family, and community stakeholders are important partners for helping state and local education leaders determine solutions and strategies for addressing those needs and setting priorities for investments. To this end, meaningful community engagement is a powerful budget-making resource.²⁰ However, it is helpful to keep in mind that it is often the loudest voices, not the voices of those with the greatest need, that are heard. In a California survey, more than half of superintendents agreed with this statement: “District engagement activities tend to be dominated by a few stakeholders, and that impedes a balanced representation of stakeholders’ interests.”²¹

Once student and school needs have been identified, state and local leaders can engage stakeholders to help prioritize investment decisions. Rather than ask open-ended questions to solicit ideas for investments, state and local leaders can make stakeholder engagement more actionable by sharing data on student needs and outlining plausible investment priorities — that are responsive to the data — for stakeholders to choose from. In doing so, state and local leaders should clearly articulate

- » the purpose of federal relief aid,
- » the needs identified in the community,
- » the timeline for use of the funds,

- » that the funds are one-time investments and generally should not be used for ongoing expenses, and
- » how each investment priority relates to existing state and local priorities for more effectively serving student groups that are traditionally underserved.

One approach, developed by the Edunomics Lab, is to involve teachers, parents, and other stakeholders in a “would you rather” exercise.²² Through this exercise, education leaders present participants with cost-equivalent investment options and ask which allocation they would prefer. LEAs could, for example, ask teachers if they would rather reduce their class size by two students per year, hire a teacher’s aide 20 percent of the time, or receive a raise of \$5,000 per year.²³ Engaging in these discussions promotes financial transparency and allows stakeholders to make informed decisions based on real-world tradeoffs. This activity can provide an accessible entry point to productive spending debates about which strategies are most valued by stakeholders.

SEA leader action to get started: Share a synthesis of input from meaningful community engagement on the state’s ARP ESSER plan and share the state’s plan for ongoing, targeted outreach to community stakeholders who represent federally defined priority student groups.

LEA leader action to get started: Develop a plan for ongoing opportunities for stakeholder engagement regarding the allocation of funds to schools and the impact of those investments, with targeted outreach to communities most impacted by the pandemic.

Prioritizing student and community input in planning efforts is an effective and widely used strategy across the United States.²⁴ Targeted and multimodal engagement efforts, directly related to decision-making at the state and local levels, can ensure that funds are directed toward improving outcomes for students who need it most. Accordingly, state and local leaders, as required in ARP state plans and in local reporting, should plan for ongoing, meaningful engagement with stakeholders, with particular emphasis on those most impacted by the pandemic. Stakeholder engagement can take the form of community meetings; consultation with existing advisory groups; surveys of students, parents, teachers, staff, or administrators; or, preferably, a combination of these. Including the voices of stakeholders from populations who are traditionally unheard can enrich planning and decision-making around resource allocation.

Strategy 4: Leverage Resource Allocation Reviews to Ensure Equitable Allocation

Under ESSA, SEAs must review resource distribution through a resource allocation review (RAR) for LEAs with a significant number of schools identified for improvement based on low performance. The purpose of these reviews is to evaluate whether existing resource allocation supports the improvement of low-performing schools. In turn, LEAs with schools identified for improvement must examine and address resource inequities within their district, and schools must examine and address resource inequities within their school.²⁵ For RARs, resources are defined as all funding, not just federal funding. As part of the RAR process, state and local leaders can also review how federal relief aid is being used to support students most impacted by the pandemic. In doing so, state and local education leaders can leverage an existing policy structure to advance resource equity in their state, districts, and schools.

Many states are still in the process of designing, refining, and implementing their RAR processes, which can include data worksheets for LEAs to complete in order to compare per pupil expenditures across schools, analyses of the relationship between per pupil expenditures and student performance, discussion protocols for examining resource allocation patterns, and plans for state-led technical assistance for LEAs. In some cases, the RAR may be just a conversation between the SEA, the LEA, and school leaders about resource allocation and student outcomes. Regardless of the design of the RAR process in each state, the RAR is intended to guide LEAs through a process of examining how resources are allocated and to interrogate existing practices.²⁶

SEA leader action to get started: Incorporate a review of the allocation of federal relief aid by school as a part of the RAR process in order to ensure schools serving students with greater needs due to the pandemic receive additional federal relief aid.

LEA leader action to get started: Work with schools identified for improvement to ensure they are using federal relief aid to address student well-being and to accelerate learning.

SEAs should consider how to leverage RARs to help local education leaders think critically about how federal relief aid can be leveraged to address systemic inequities in student access to resources and opportunity gaps that have been exacerbated by COVID-19 for students of color, students experiencing homelessness, English learners, and students from low-income households.²⁷

SEAs can support their LEAs by providing technical assistance and protocols on how to conduct meaningful RARs that help demonstrate how LEAs are following through on the intended purpose of federal relief aid or by taking steps to address inequities in existing resource allocation practices. SEAs can also partner with community-based organizations and education advocates to provide specific supports to school districts on resource allocation.²⁸ Finally, SEAs can offer guidance for making meaning of the results of the reviews, for determining where investments of federal relief aid are making the biggest differences for students, and for sharing this information with stakeholders to inform future resource allocation decisions.

Strategy 5: Provide Guidance and Technical Assistance on Fund Use

SEAs have an important role in ensuring fiscal accountability and providing guidance and support to LEAs on how to direct funds toward students most impacted by the pandemic and on how to ensure that dollars are being spent efficiently and equitably. The ARP ESSER state plan template asks states to consider collection of fiscal data that is comparable across the state (e.g., per pupil expenditures at the LEA and school levels) as a way to monitor how funds are being used.²⁹ The way SEAs ask LEAs to report these data is important, and states should consider designing plans that prompt LEAs to make a clear connection between student needs and investments and to disaggregate these investments by student groups, mirroring ESSA.

SEA leader action to get started: Develop an aligned system of guidance, technical assistance, and reporting and monitoring to build LEA capacity to equitably allocate federal relief aid based on student need.

LEA leader action to get started: Develop a plan for monitoring progress on investments of federal relief aid and adjusting (i.e., increasing, decreasing, or abandoning) investments based on their success in improving student learning and well-being.

Collection and review of the data included in local plans can help SEAs identify where LEAs need additional support in order to direct funds to underserved students. States can offer technical assistance to ensure that expectations are clearly understood and that dollars are used in ways that match state priorities and the intended use of federal relief aid. Furthermore, SEAs can use local expenditure reporting as a source of data to inform their own investments of funds, filling gaps where there are unmet needs and helping LEAs to blend and braid funding sources in order to increase the impact of federal relief aid from different funding sources.

Strategic Resource Allocation That Lasts

Federal relief aid offers a critical opportunity for directing additional resources to students and communities hardest hit by the pandemic. These resources hold the potential to positively and significantly impact the lives of students in underserved communities. The strategies described in this brief — all of which are designed to more equitably allocate educational resources — not only can be applied to allocating and monitoring federal relief aid, but also should guide state and local education leaders in serving students when federal relief aid is no longer available.

Endnotes

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For more information or to request a presentation on strategies for investing ARP funds to accelerate student learning and address student well-being, please contact Jason Willis, jwillis@wested.org, or Kelsey Krausen, kkrausen@wested.org.



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Suggested citation: Krausen, K., Diaz, J., Willis, J., & Lias, C. (2021). *Following Through: 5 Strategies for Getting Federal Relief Aid to Students Who Need It Most*. WestEd.