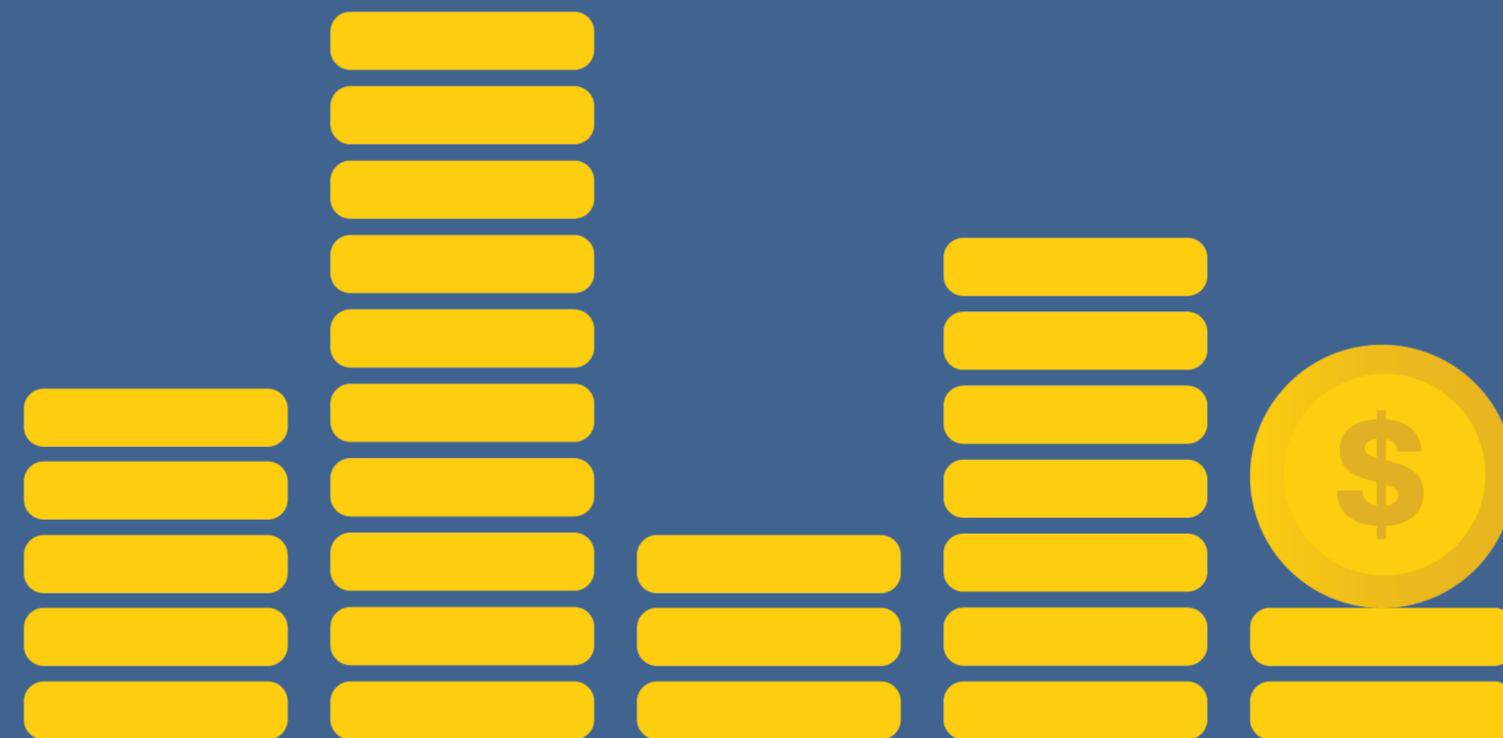




# One-Time Funding: How to Maximize Investments for Your Students

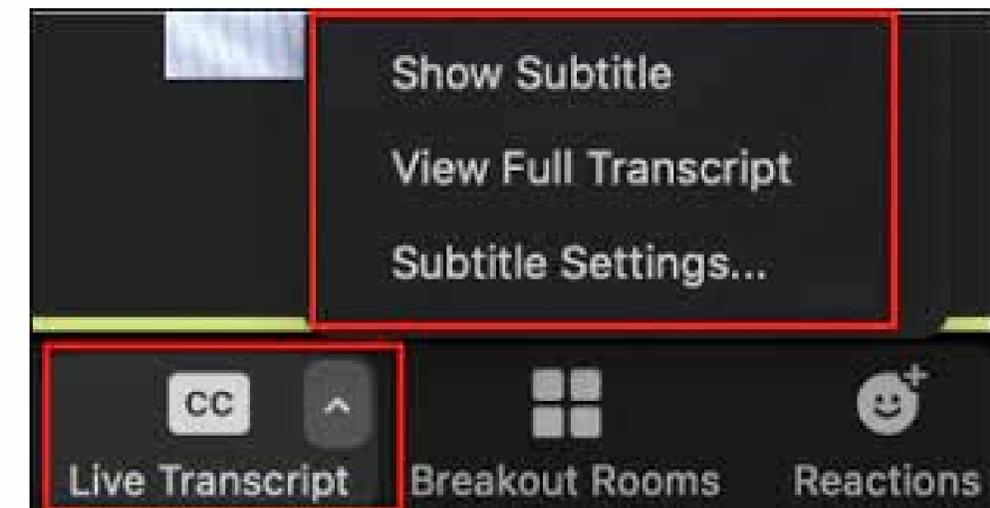
## Learning Session One

February 16, 18, and 23 and March 4, 2022



# Live transcription is available to all participants if needed.

1. Find the **CC** icon in your Zoom toolbar.
  2. Click Live Transcript; then select Show Subtitle. If enabled, you can also click View Full Transcript to view the transcript in the side panel of the meeting.
- ❖ Note: The provided subtitles can be clicked and dragged to move their position in the meeting window.



# Poll

## 1. Where do you work?

- a. A county office of education
- b. A school district
- c. A charter school
- d. Other

## 2. What is your role?

- a. County superintendent
- b. School district superintendent
- c. Charter school leader
- d. School district business leader
- e. County office of education business leader
- f. Other

# Share in the Chat: Which image most closely relates to the current context of your work and why?



# Introductions



**Jason Willis**

Director of Strategic Resource  
Planning & Implementation



**Judy Ennis**

Senior Manager



**Jayne Christakos**

Retired CBO/Consultant



**Augustus Mays**

Director of Government Relations



**Kelsey Krausen**

Senior Manager



**Tia Taylor**

Senior Program Associate



**Bill McGuire**

Retired CBO/Consultant



**Josh Stern**

Improvement Specialist



# Learning Sessions & Resources

- Three learning sessions
- Takeaway resources after each session
- Opportunities for consultation



# Agenda

1. **Welcome and Introductions**
2. **Once-in-a-Lifetime Investment and Reorienting the Planning Mindset**
  - Breakout Groups: Performing an “After Action Review”
3. **Strategies for Maximizing Investments of One-time Funds**
  - Breakout Groups: Planning for the 2022/2023 Budget
4. **Wrap-up**

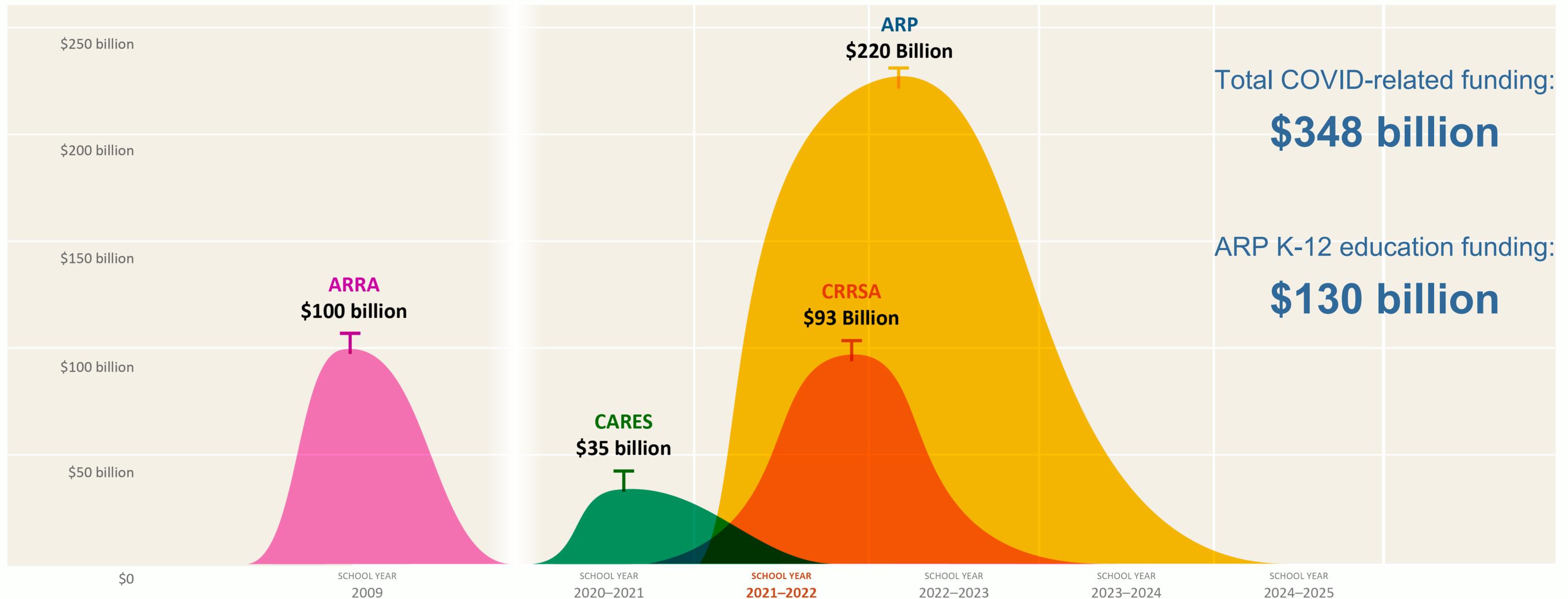


# Once-in-a-Lifetime Investment in Public Education

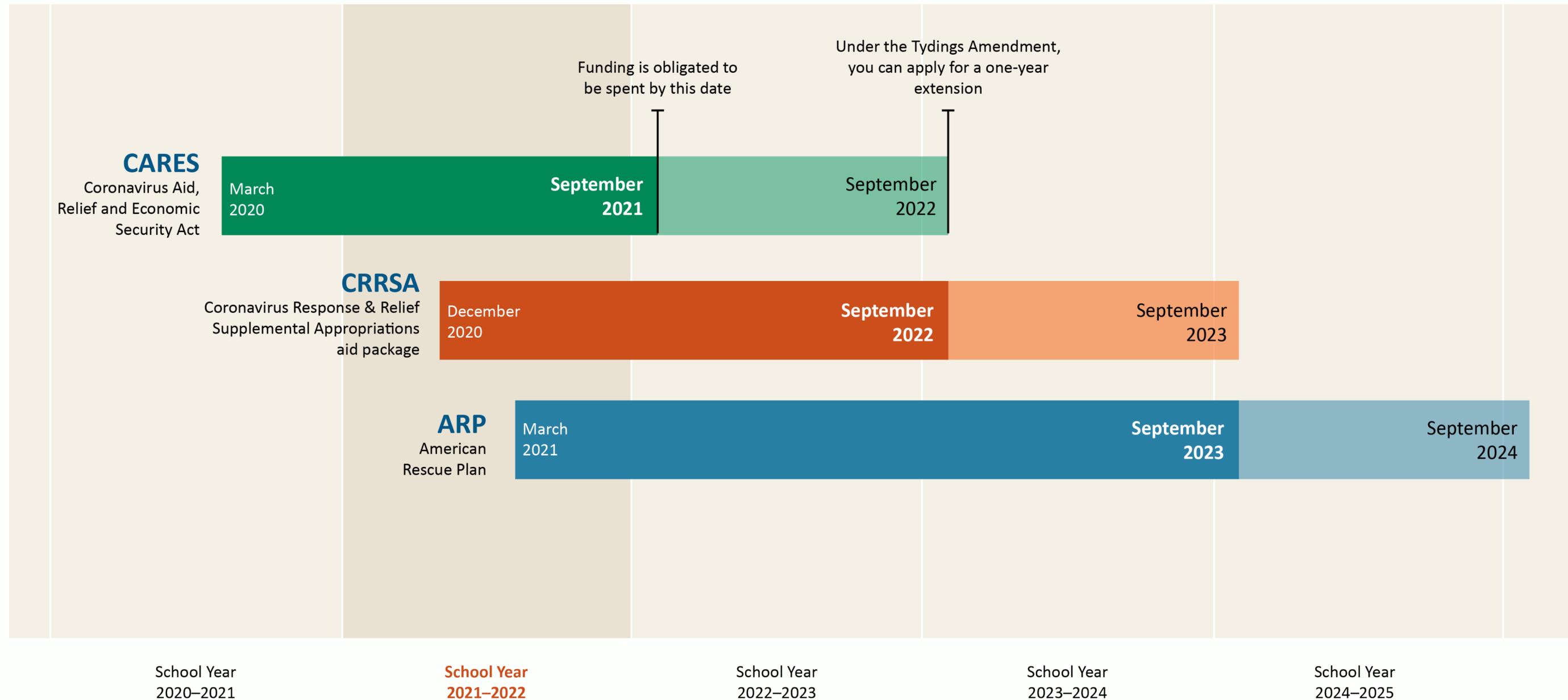
# Opportunities and Challenges

- The needs of students have accelerated since the onset of the pandemic.
- Short-term interventions and longer-term structural improvements are needed.
- Plans were required quickly, but there's flexibility to adjust the planned use of funds in the future.
- Some recent, emergent barriers exist to enacting investment plans, such as staffing shortages and cash flow challenges.
- One-time funding can create a fiscal cliff if used for ongoing expenditures with no end date and a plan is not developed.
- Declining enrollment in many school districts creates an uncomfortable duality for district messaging.
- The economic forecast for future years' growth is showing signs of softening.

# An Unparalleled Investment in Education and Child Care



# By When Do You Need to Spend the Money?



# Why Do We Have ESSER Funds?

## Open and Safe

Keep classrooms *open and safe* for students and teachers during this global pandemic.

## Recover

Expand access to existing services and bring an “all-hands-on-deck” approach to *recover* from disrupted learning and kick-start accelerated learning.\*

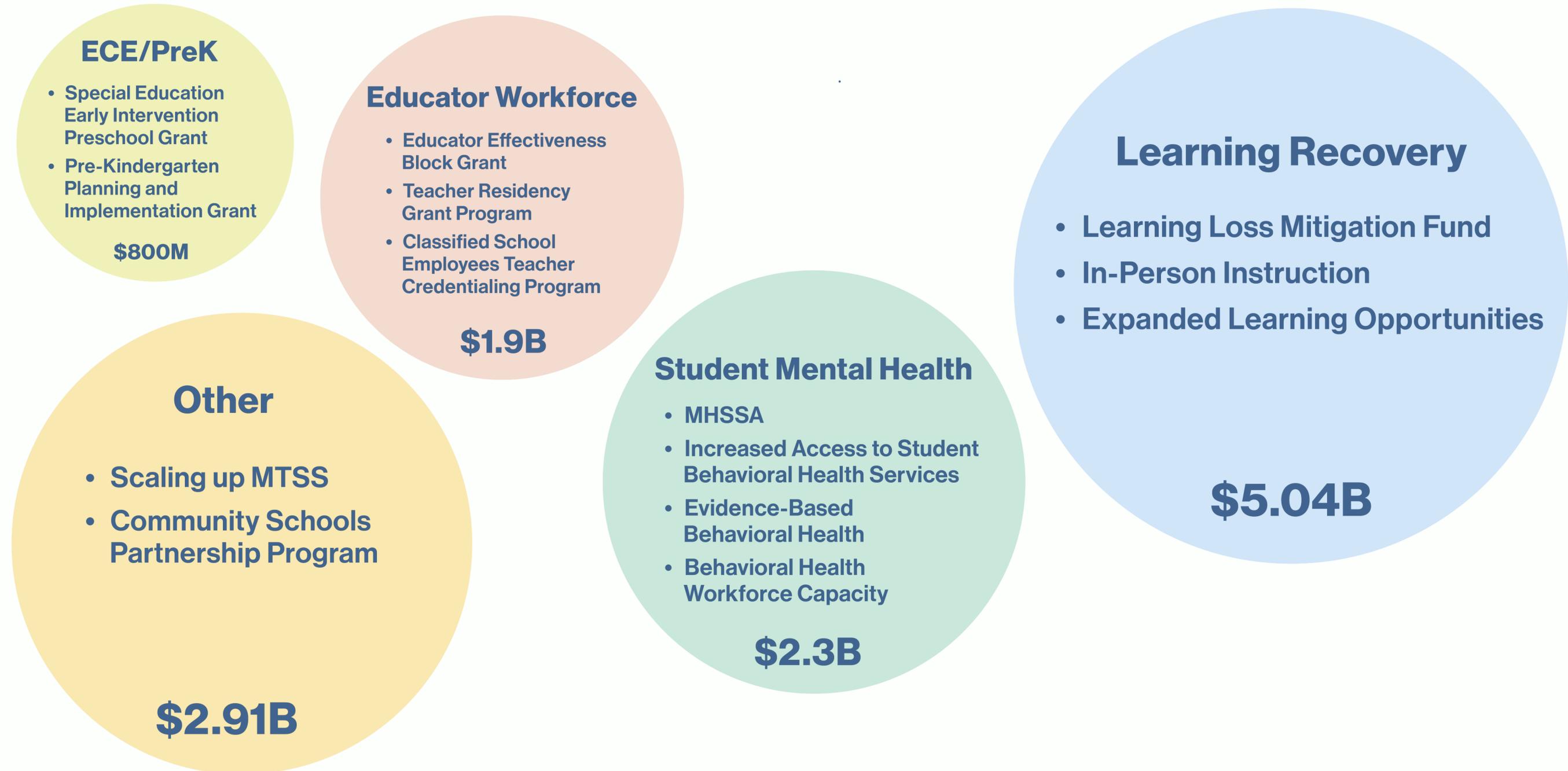
## Redesign

Lay the groundwork for long-term *redesign* of instruction and underlying cost structures to address heightened student need.\*

*\*The extent of our progress on priority #s 2 & 3 is fully dependent on the course of the pandemic in our community and the resulting costs incurred under priority #1.*

Slide content courtesy of Education Resource Strategies  
[www.erstrategies.org](http://www.erstrategies.org)

# California's One-Time Funding



# Segmenting Fund Use Into Three Types of Investments

**One Time**

**Truly one-time investments in infrastructure**

- Hardware and software (3-year to 4-year lifecycle)
- Wi-Fi/broadband
- Building upgrades and maintenance (10-year to 15-year lifecycle)
- Curriculum adoption

**Short Term**

**Short-term intensive investments to address students' immediate needs**

- Extended learning and/or summer learning for targeted student populations
- High-dosage intensive tutoring
- Additional staffing to assess and address social-emotional well-being for students, staff, and families

**System Innovation**

**Investments in system innovation for sustainable improvement in practice**

- Core staff capacity building to increase instructional quality and advance equity
- Improved coordination of services for students with multiple types of needs (e.g., English learners who also receive special education)
- Universal screening and intervention data systems
- Talent pipelines (teachers and classified staff)

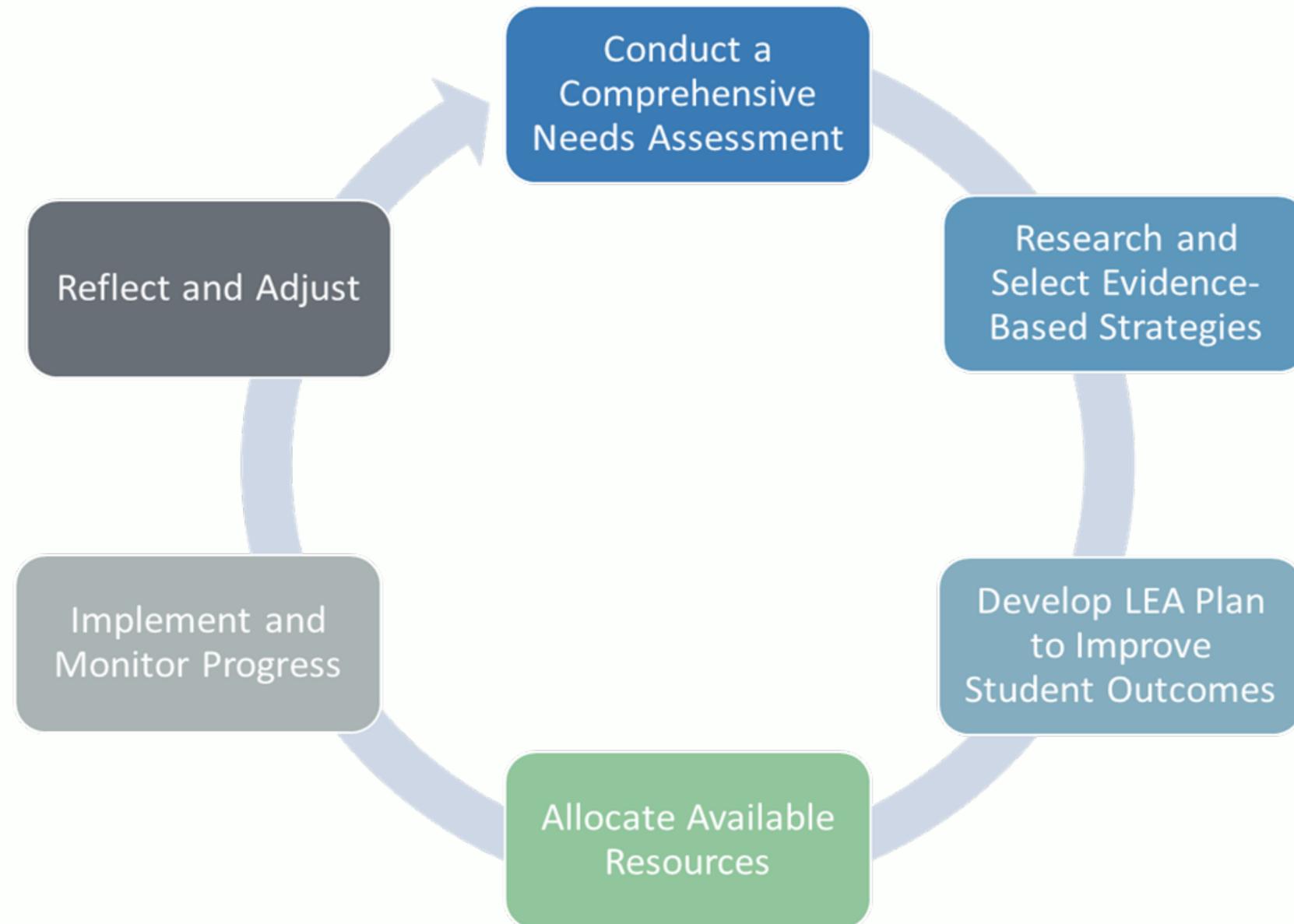


# Reorienting the Planning Mindset

# Reorienting the Planning Mindset



# LEA Continuous Planning Process



20 min

# Breakout Groups:

## Performing an “After Action Review”

- What was the process that you used to determine how to allocate funds?
- What successes did you have with your investment of one-time funds? Where could investments have been strengthened?
- Did your investments result in improved outcomes for students with the greatest need?





## Share in the chat:

- **What promising strategies were shared during the breakout sessions?**
- **Other takeaways?**



# Strategies for Maximizing Investments of One-time Funds

# Most Districts/COEs Have Been Able to Identify Priorities

- **Over 65 percent of districts/COEs have established 1-3 priorities for the use of state and federal one-time funds and another 26% have started the process of identifying priorities.**
- **Over 70 percent of districts/COEs report that they have been able to stay focused on their identified priorities.**
- **Two-thirds of districts/COEs report spending more than a day a week managing one-time funding.**



# Establish Strategic Objectives

Get to and/or Reinforce “1–2” Anchor Strategies to Focus Investments on

# Leverage Existing Plans

**Strategic Plan**

**LCAP**

**Facility Master Plan**

**Deferred Maintenance**

**Technology Plan**

**Restricted Maintenance Plan**

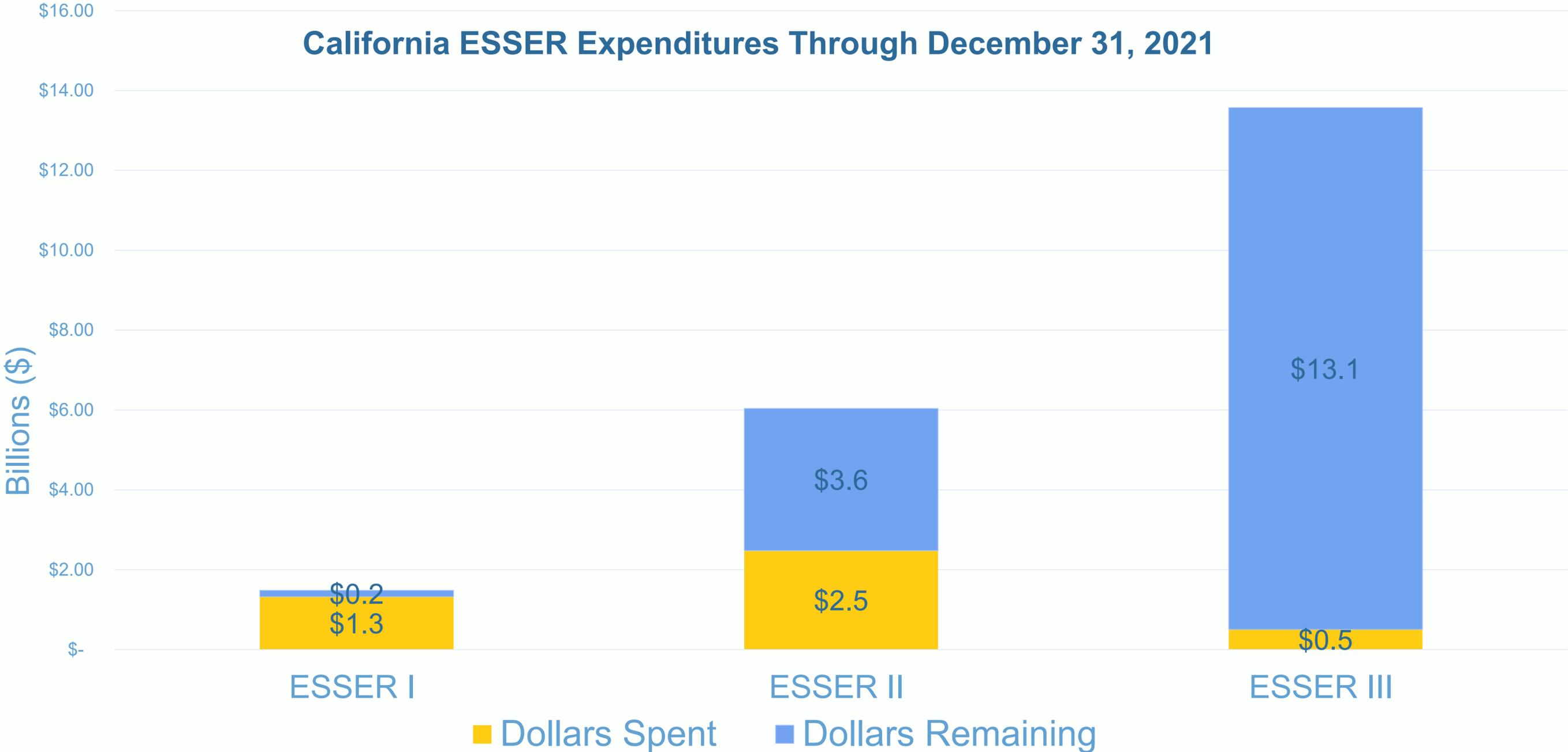
**UPK Plan**

**Single Plan for Student  
Achievement**

**And so on...**



# Considerable Funding Still Available to Address Student Needs



Source: CDE Quarterly Expenditure Reports



# Plan for Uncertainty

# Poll

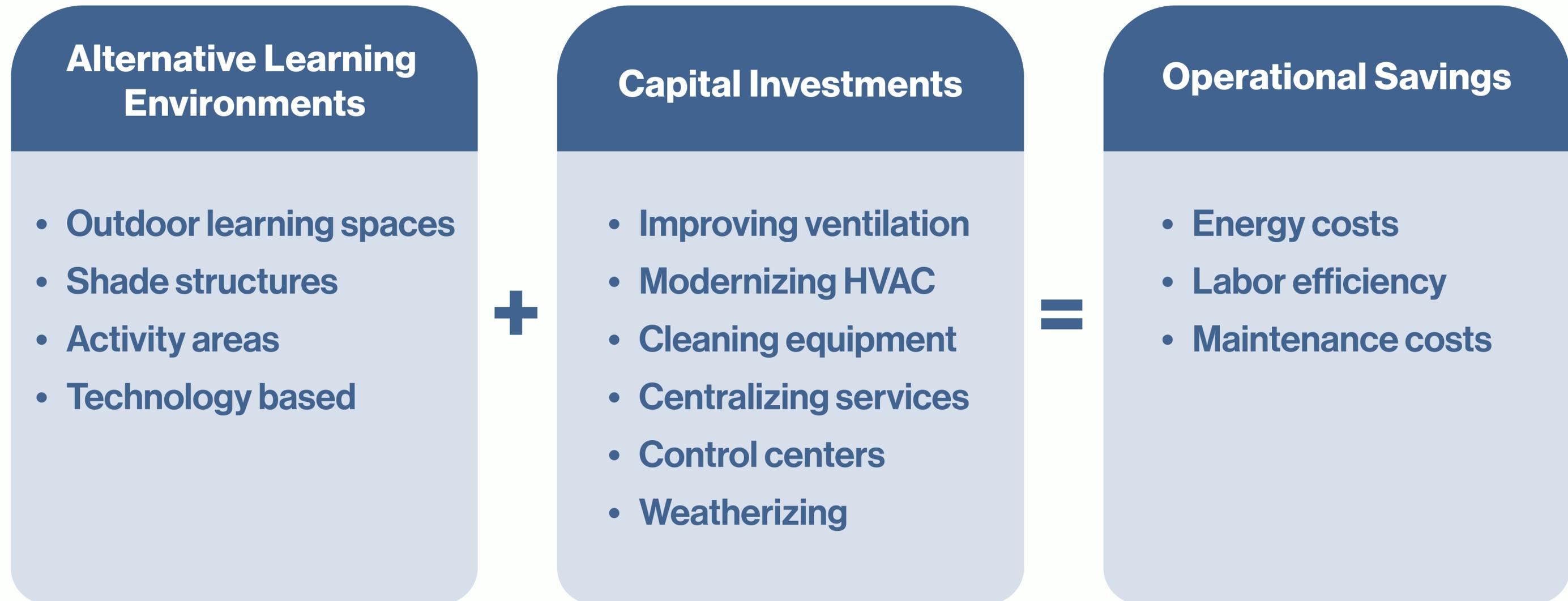
**What are the biggest uncertainties your LEA faces in planning for the 2022/2023 budget? (Check all that apply.)**

- a. Declining enrollment
- b. ADA percentages to enrollment in 2021/2022
- c. COVID-related issues (e.g., masks, vaccines, testing, case rates, etc.)
- d. Staffing issues (e.g., turnover, shortages)
- e. State funding levels
- f. Planning for universal TK and other state priorities
- g. Other (type other uncertainties in the chat)

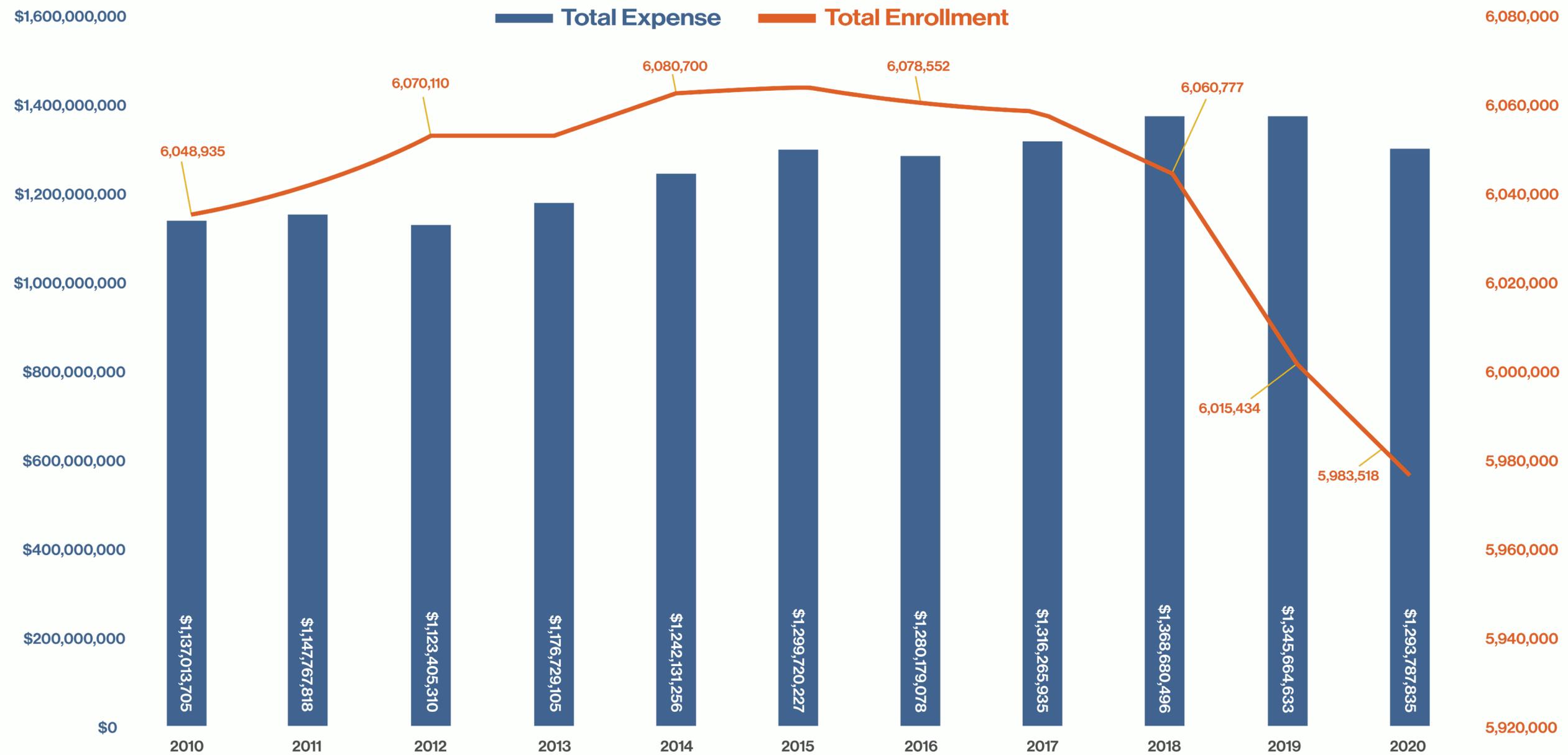
# Outline Assumptions and Potential Reasons for Budget Adjustments

	Open & Safe 	Recover 	Redesign
 <b>As of Spring 2022</b>	 <b>X M</b>	 <b>X M</b>	 <b>0M</b>
 <p><b>What could make us spend more?</b></p>	<ul style="list-style-type: none"> <li>• Further waves of the pandemic</li> <li>• Return to remote learning</li> <li>• Sustained enrollment loss reducing state funding</li> <li>• Rising costs of services due to inflation</li> </ul>	<ul style="list-style-type: none"> <li>• Observed learning acceleration from programs leading to expansion of programs</li> <li>• High interest from students, families &amp; staff in programs</li> </ul>	<ul style="list-style-type: none"> <li>• Strategic planning with experts to identify opportunities for redesigning schools</li> <li>• High interest from students, families &amp; staff in programs</li> </ul>
 <p><b>What could make us spend less?</b></p>	<ul style="list-style-type: none"> <li>• Retention of existing staff</li> <li>• Supply chain issues</li> <li>• Additional federal funding for infrastructure costs releasing ESSER funds from those planned investments</li> </ul>	<ul style="list-style-type: none"> <li>• Need to allocate additional funds to keep schools open &amp; safe</li> <li>• Difficulty hiring staff to fill new positions</li> <li>• Observed lack of impact or capacity to maintain programs</li> </ul>	<ul style="list-style-type: none"> <li>• Need to allocate additional funds to keep schools open &amp; safe and/or recover</li> <li>• Alternative sources of funding provided to sustain programs</li> </ul>
 <b>As of January 2023</b>	 <b>X M</b>	 <b>X M</b>	 <b>X M</b>

# Make Strategic Investments Today to Reduce Operational Costs Tomorrow

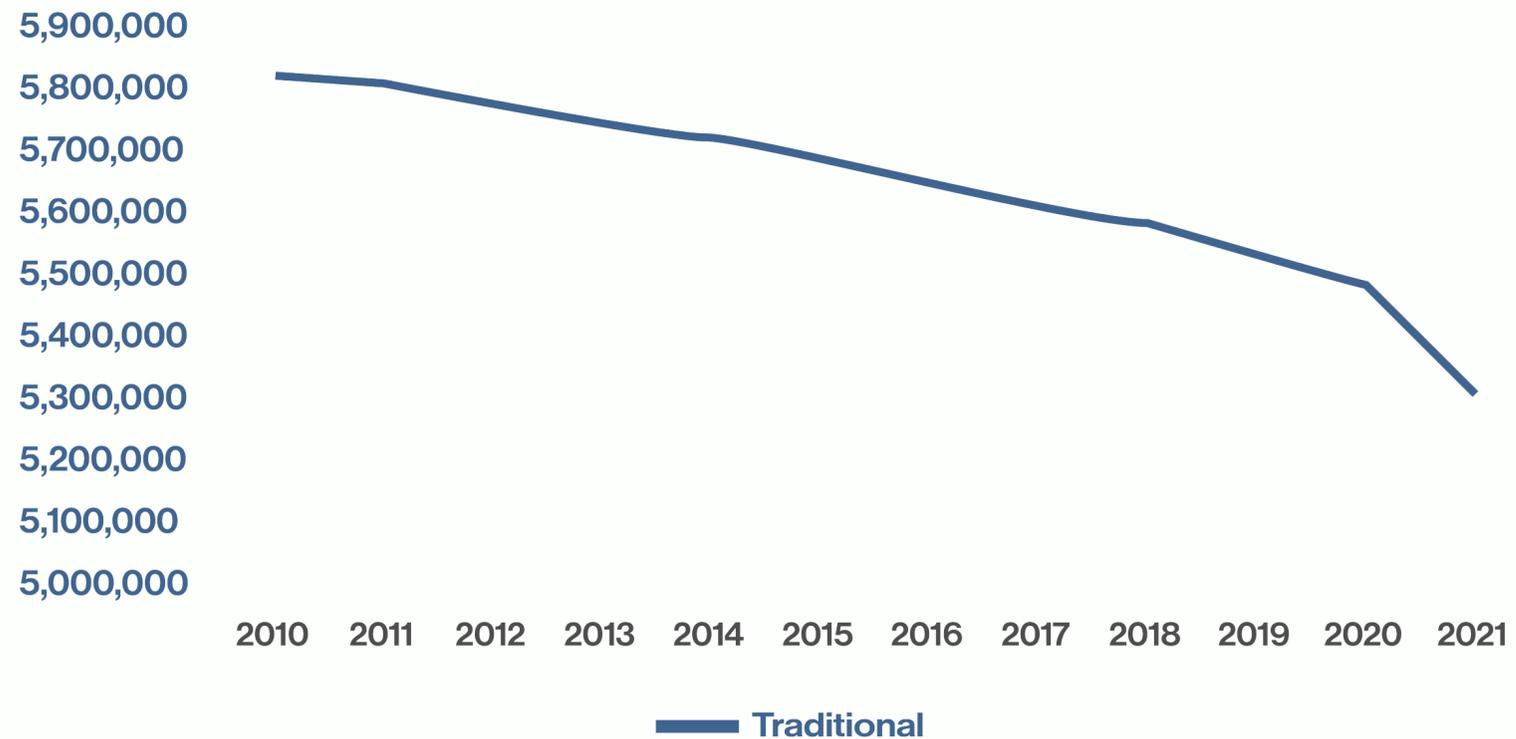


# Statewide District Utility Costs vs. Enrollment

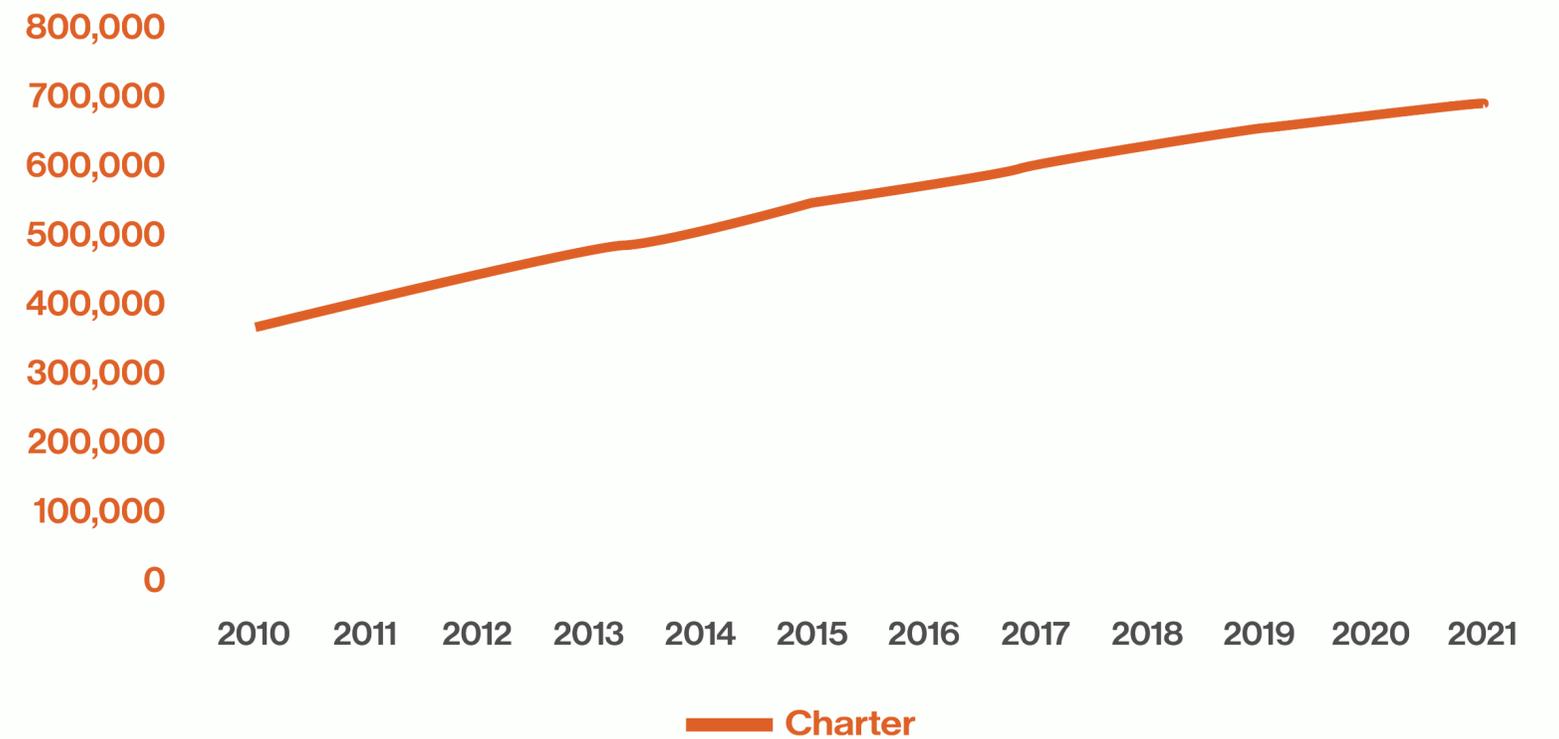


# Historical Enrollment Trends of Traditional Districts and Charter Schools

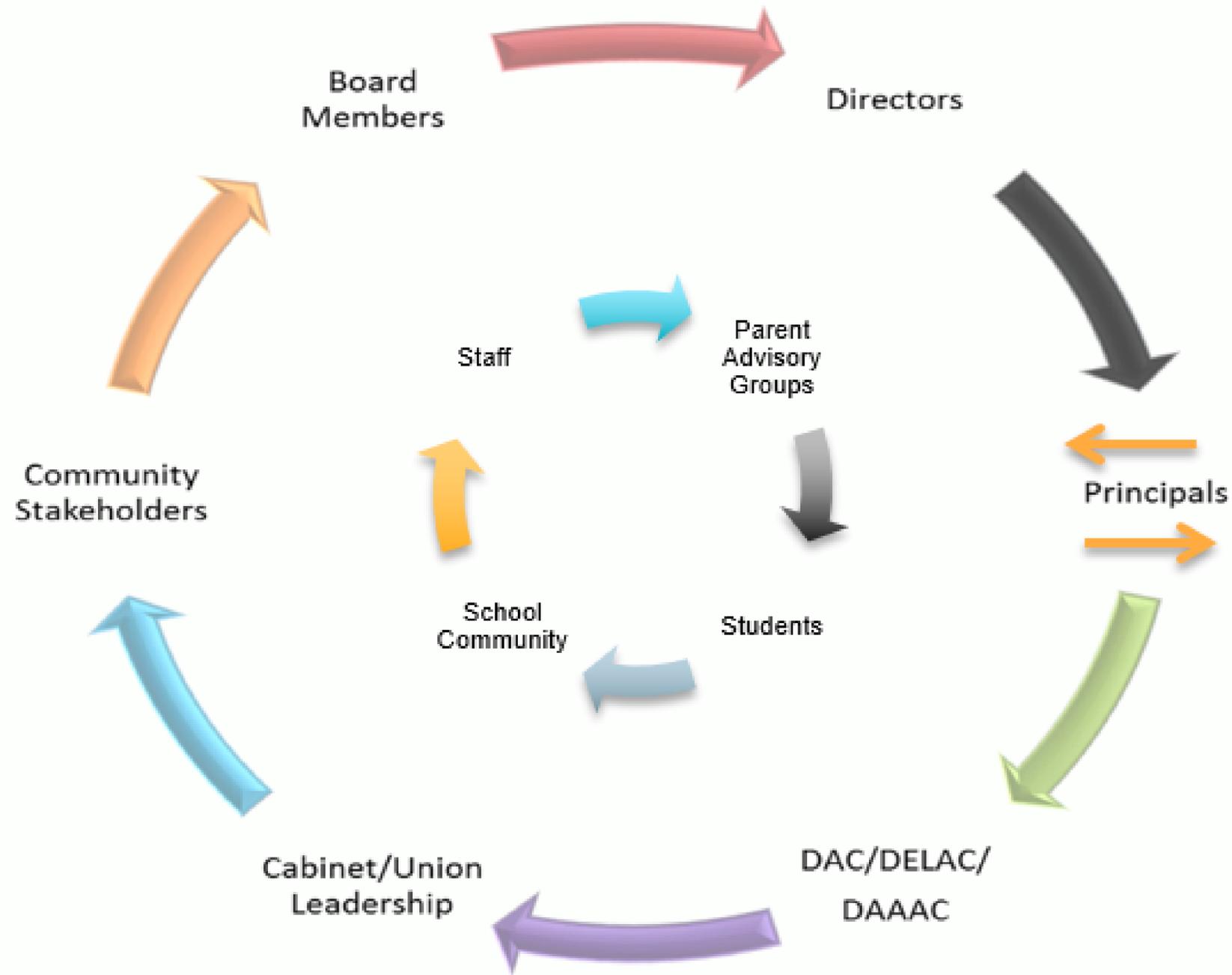
## CA Traditional School Enrollment



## CA Charter Enrollment



# Engage All Stakeholders for the Long-Term



# Segment Fund Use Into Three Types of Investments

One Time
<b>Truly one-time investments in infrastructure</b>
<ul style="list-style-type: none"><li>• Hardware and software (3-year to 4-year lifecycle)</li><li>• Wi-Fi/broadband</li><li>• Building upgrades and maintenance (10-year to 15-year lifecycle)</li><li>• Curriculum adoption</li></ul>

Short Term
<b>Short-term intensive investments to address students' immediate needs</b>
<ul style="list-style-type: none"><li>• Extended learning and/or summer learning for targeted student populations</li><li>• High-dosage intensive tutoring</li><li>• Additional staffing to assess and address social-emotional well-being for students, staff, and families</li></ul>

System Innovation
<b>Investments in system innovation for sustainable improvement in practice</b>
<ul style="list-style-type: none"><li>• Core staff capacity building to increase instructional quality and advance equity</li><li>• Improved coordination of services for students with multiple types of needs (e.g., English learners who also receive special education)</li><li>• Universal screening and intervention data systems</li><li>• Talent pipelines (teachers and classified staff)</li></ul>

20 min

# Breakout Groups:

## Planning for the 2022/2023 Budget

- Which types of investments (one-time, short-term, system innovation) are you planning?
- What strategies and potential approaches will you use for new one-time funds or funds that need to be reallocated/are unspent?
- How will you plan for uncertainty and ensure funds are directed to students with the greatest need?





# Closing Reflections and Looking Ahead to Learning Sessions Two and Three

**Thank you!**  
**Please take our short survey.**



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