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.

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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

- Total COVID-related funding: $348 billion
- ARP K-12 education funding: $130 billion

Source: WestEd, 2021
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
California’s One-Time Funding

ECE/PreK
- Special Education Early Intervention Preschool Grant
- Pre-Kindergarten Planning and Implementation Grant
  $800M

Educator Workforce
- Educator Effectiveness Block Grant
- Teacher Residency Grant Program
- Classified School Employees Teacher Credentialing Program
  $1.9B

Learning Recovery
- Learning Loss Mitigation Fund
- In-Person Instruction
- Expanded Learning Opportunities
  $5.04B

Other
- Scaling up MTSS
- Community Schools Partnership Program
  $2.91B

Student Mental Health
- MHSSA
- Increased Access to Student Behavioral Health Services
- Evidence-Based Behavioral Health
- Behavioral Health Workforce Capacity
  $2.3B

Other
- MHSSA
- Increased Access to Student Behavioral Health Services
- Evidence-Based Behavioral Health
- Behavioral Health Workforce Capacity
  $2.3B
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)

Source: WestEd, 2021
Reorienting the Planning Mindset
Reorienting the Planning Mindset
LEA Continuous Planning Process

- Conduct a Comprehensive Needs Assessment
- Research and Select Evidence-Based Strategies
- Develop LEA Plan to Improve Student Outcomes
- Allocate Available Resources
- Implement and Monitor Progress
- Reflect and Adjust
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.

Source: WestEd survey, 2022
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

California ESSER Expenditures Through December 31, 2021

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

<table>
<thead>
<tr>
<th>Open &amp; Safe</th>
<th>Recover</th>
<th>Redesign</th>
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<tbody>
<tr>
<td><strong>As of Spring 2022</strong></td>
<td></td>
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<tr>
<td>• Further waves of the pandemic</td>
<td>• Observed learning acceleration from programs leading to expansion of programs</td>
<td>• Strategic planning with experts to identify opportunities for redesigning schools</td>
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<tr>
<td>• Return to remote learning</td>
<td>• High interest from students, families &amp; staff in programs</td>
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<td>• Sustained enrollment loss reducing state funding</td>
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<tr>
<td>• Rising costs of services due to inflation</td>
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<tr>
<td><strong>What could make us spend more?</strong></td>
<td><strong>What could make us spend less?</strong></td>
<td></td>
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<td><strong>As of January 2023</strong></td>
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<tr>
<td>• Retention of existing staff</td>
<td>• Need to allocate additional funds to keep schools open &amp; safe</td>
<td>• Need to allocate additional funds to keep schools open &amp; safe and/or recover</td>
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<tr>
<td>• Supply chain issues</td>
<td>• Difficulty hiring staff to fill new positions</td>
<td>• Alternative sources of funding provided to sustain programs</td>
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<td>• Additional federal funding for infrastructure costs releasing ESSER funds from those planned investments</td>
<td>• Observed lack of impact or capacity to maintain programs</td>
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Adapted from Education Resource Strategies www.erstrategies.org
Make Strategic Investments Today to Reduce Operational Costs Tomorrow

**Alternative Learning Environments**
- Outdoor learning spaces
- Shade structures
- Activity areas
- Technology based

**Capital Investments**
- Improving ventilation
- Modernizing HVAC
- Cleaning equipment
- Centralizing services
- Control centers
- Weatherizing

**Operational Savings**
- Energy costs
- Labor efficiency
- Maintenance costs

\[ \text{Alternative Learning Environments} + \text{Capital Investments} = \text{Operational Savings} \]
Statewide District Utility Costs vs. Enrollment

Source: Forecast5 Analytics 5Sight Program, 2022
Historical Enrollment Trends of Traditional Districts and Charter Schools

Source: Forecast5 Analytics 5Sight Program, 2022
Engage All Stakeholders for the Long-Term
## Segment Fund Use Into Three Types of Investments

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*Source: WestEd, 2021*
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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