Allocating School Resources to Support Student and School Needs

A Workshop for School Budget Teams
April 27, 2022 | Virtual Presentation

charterschoolcenter.ed.gov
About the NCSRC

The National Charter School Resource Center (NCSRC) provides technical assistance to federal grantees and resources supporting charter sector stakeholders. NCSRC is funded by the U.S. Department of Education (ED) and is managed by Manhattan Strategy Group (MSG) in partnership with WestEd.
Icebreaker
Workshop Norms

- Remember to mute yourself
- Stay engaged
- Share airtime
- Keep an open mind
- Use the chat for questions and comments
- Respond to the survey

*This session is being recorded, so you and your peers may access it at a later date.*
Introductions: Today’s Presenters

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Learning Objectives

Flexibility & Creativity
Think flexibly and creatively about resources to support priorities

Practice
Practice allocating operational resources (time, human talent, and financial) at the school to align with data informed priorities

Transparency
Ensure transparency of resource allocation to support needed improvements and ensure that equity of outcomes drives resource allocation
Aligned Resource Allocation Planning

What is it? Why is it important?
What is Aligned Resource Allocation Planning?

Your School's Needs (based on your student's and students' needs)

Planning

Collective Decision Making
Mission & Planning

What? Your Result
How? Your Process
Why? Your Purpose

Source: Sinek, S. The Golden Circle
Leveraging Resources

How can you leverage resources and operations management to drive academic achievement?

**Planning**: aligning (identifying supportive) strategies to available resources

**Budgeting**: mobilizing and monitoring the use of resources

**Talent Management**: recruiting, selecting, and developing staff to meet needs

**Time**: understanding how staff are spending their time with students; scheduling and ensuring that staff are devoting most of their time on improvement priorities
The Benefits of Alignment

School finance research demonstrates that:

How resources are allocated impacts student learning.

A key component of a successful school is determining the appropriate level of resources needed—for whom and for what.
Federal Stimulus Funds

How can they be used? For how long?
Federal Stimulus Funds: Additional Per-Pupil Revenue

Notes: Data prior to 1996/97 from the National Center for Education Statistics on federal revenue per pupil is available only for selected years. Federal revenue from 2018/19 through 2022/23 is a forecast, assuming these years follow the same trend as the prior seven. The CARES, CRRSA, and ARP funds are not regular, ongoing federal revenues; these funds must be spent prior to 2024.

Federal Stimulus Funds: Timeline

When do you need to spend the money?

- **CARES** (Coronavirus Aid, Relief, and Economic Security Act):
  - March 2020
  - September 2021
  - September 2022

- **CRF** (Coronavirus Relief Fund):
  - March 2020
  - December 2021

- **CRRSA** (Coronavirus Response & Relief Supplemental Appropriations Act):
  - December 2020
  - September 2022
  - September 2023

- **ARP** (American Rescue Plan):
  - March 2021
  - September 2023
  - September 2024

School Year:
- 2020/2021
- 2021/2022
- 2022/2023
- 2023/2024
- 2024/2025

Federal Stimulus Funds: Using the Funds

Tips for Using COVID-19 Stimulus Funds:

- Avoid the cliff!
  - Stimulus funds are only available through 2024.
- Engage stakeholders on use of funds
- Monitor progress towards the goals specified in your stimulus funding plans
Laying the Foundation: Equality vs Equity

EQUALITY vs EQUITY
Small Group Discussions
Two-Part Activity to Align Resource Allocation to School Needs

Part I: Use data to determine priorities
- Take inventory of current resources
- Make decisions on how to allocate resources based on priorities determined by data

Part II: Identify areas of long-term investment and savings
Resource Allocation Plan Map, Part I (Full Group)

Use *Plan Map*:

1. Use data to determine priorities
   - **Blue** = Need (the Why)
2. Take inventory of current resources
   - **Yellow** = Goal (the How)
3. Make decisions on how to allocate resources based on priorities determined by data
   - **Teal** = Action (the Strategy)
Add to your *Plan Map*:

1. Identify areas of long-term investment and savings:
   - Black = Investment
   - Red = Savings

2. Designate year
Part I: Discussion Questions

As a leadership team consider the following:

1.) What are your students’ needs?

2.) What are your school’s needs?
Discussion Questions (Continued)

**As a leadership team take the following actions:**

3.) What is a goal to address one high-priority need? (the How)

In what way is this goal about raising student achievement as demonstrated by state assessments? In what way is it about long term improvement in student outcomes?

4.) What actions can you take to achieve the goal? (the What)

How should actions be sequenced?
Resource Allocation Plan Map, Part I (Small Group)

Use *Plan Map*:
1. Use data to determine priorities
   - *Blue* = Need (the Why)
2. Take inventory of current resources
   - *Yellow* = Goal (the How)
3. Make decisions on how to allocate resources based on priorities determined by data
   - *Teal* = Action (the Strategy)
Add to your *Plan Map*:
1. Identify areas of long-term investment and savings:
   - Black = Investment
   - Red = Savings
2. Designate year
Laying the Foundation: Decision-making

Purpose of this activity:
- To identify resources to meet your school’s most urgent needs, while staying within your school’s current or reduced budget.
- What resources are required to reach your goals?
- What are potential barriers and/or ideas that may arise?
- How can you plan to address these issues?

Source: ERS Strategies
Reflection: Ensuring Equity in Outcomes for All Students

Source: ERS Strategies

- What is your why?
- How does your plan support an instructional vision and measurable goals for the progress of ALL students?
- How does your plan leverage time, staff capacity, class size, technology, and community partners to reallocate resources to students with the most needs?
- What are the biggest insights and/or surprises in your choices?
- What are your next steps to identify specific strategies in your budget formulation, examine their impact, and plan for adjustments as needed to ensure equitable resource allocation?
Pulling It All Together
Key Takeaways

Resource allocation that is strategically aligned to student needs supports student learning and equity of outcomes for all students. To do so:

- Identify resources that support your allocation plan and strategies
- Remain flexible when making resource allocation decisions
- Promote transparency by involving your community; engagement supports successful implementation
- Be mindful about funding availability and take steps now to avoid the fiscal cliff
Any questions? Reactions? Ideas?
What’s Next? Additional Tools & Resources

- Use this presentation to conduct this exercise with your school finance teams
- Refer to NCSRC upcoming publication on the strategic use of ESSER funding guidance
Resources

Meeting the Moment: How Education Leaders Can Maximize Federal COVID Relief Aid to Support More Equitable Student Learning

Adapting a Cardinal Rule of Finance: Five Strategies for Using One-Time Federal Funding on School Staffing

Recently Released NCSRC Virtual Events & Resources
Tell Us How We Did!
How can you contact us?

charterschoolcenter.ed.gov

contact-us@charterschoolcenter.org
Thank you for joining us!