

Allocating School Resources to Support Student and School Needs

A Workshop for School Budget Teams

Presented April 27, 2022

Full Transcript

- [Courtney] Well, good afternoon or good morning, depending on your time zone. My name is Courtney Leigh Beisel, and I am the deputy director of the National Charter School Resource Center. I am delighted to welcome you to today's event, Allocating School Resources to Support Student and School Needs. This is an interactive workshop that is designed for school budget teams. This event is being brought to you by the National Charter School Resource Center.

NCSRC provides technical assistance to federal grantees and resources supporting charter sector stakeholders. We're funded by the U.S. Department of Education and managed by Manhattan Strategy Group in partnership with WestEd. So, a few norms for today's workshop. This is a highly interactive workshop, and it will only be successful if you join in the conversation, share with us when we're in our breakout rooms, and take a deep dive into the content with us.

So we will be moving into breakout rooms in a couple of minutes, and we really hope that you will resist all urges to sign off when we go into those breakout rooms and engage with us and your peers throughout our conversation. A few other norms to support our discussion, remember to mute yourself when not speaking, stay engaged, listen actively, ask questions, avoid that urge to multitask.

Use the chat feature for questions and comments during our main presentation. Share airtime when you're in the breakout rooms. So, step up and then take a step back so you can listen to your peers and their ideas. Keep an open mind.

Remember that all ideas and perspective hold value. And please do respond to the survey at the end of the session to tell us how we did. The session is being recorded. And by participating, you are consenting to being a part of that recording. It will be posted on the resource center website following this session. We will also email you after the session with the recording and all the session materials so that you may share it with your peers within your organization, and you can go through these activities with them as well.

I am delighted to be joined by some of my colleagues today from the Resource Center to discuss this increasingly important topic. I'm joined by Aimee Evan and Tara Bergfeld. And I'm just going to turn this over to Tara to get us started.

- [Tara] Hi, good morning. Good afternoon. Thanks, Courtney. My name is Tara Bergfeld. I am a senior education finance associate at WestEd. And I have spent some time at the state and district level working in resource strategy and policy and helping with legislation related to charter schools.

I'm really excited to be here with you today to talk about resources and how to best get resources to our kids. So let's start with some of our session objectives for today. What are

the things that we're aiming to accomplish today to support you as school leaders and governing board members in effectively allocating resources?

In today's workshop, we'll explore with you how to think flexibly and creatively about how to allocate resources to support your priorities and why that is especially crucial now. We'll practice implementing this concept by thinking about how we allocate operational resources to align with data-informed priorities.

We'll practice making those decisions today. In particular, how do we allocate operational resources aligned to need? In terms of resources, we're not just thinking human such as time, talent, and interaction with each other but also financial, non-labor opportunities to engage with others at the school to align those data with data informed priorities.

The third objective for today is to ensure transparency of resource allocation decisions and to ensure that they drive equity of outcomes. That is to say that we are clear with ourselves and with our community about how resources are contributing to the equitable outcomes of every single one of the students that we serve on a daily basis.

So think flexibly and creatively about resources to support priorities, practice allocating operational resources, human time and talent and financial at the school to align with data informed priorities and ensure transparency of resource allocation to support needed improvements and ensure equity of outcomes drives resource allocation.

So aligned resource allocation planning. What is it and why is it important? By aligning resources, we're being deliberate about how resources are used and ensuring that they are used effectively.

Why? Schools that do this well are able to identify the right resources to spend on the right things at the right time to drive improvement of what matters for their school. Next slide, please. Thank you. So how many of you are familiar with Simon Sinek's Golden Circle.

Has anybody ever heard of that? Just raise your hand if you have. Okay, couple people. All right. We could go ahead and click forward on the slide. So he wondered why some leaders are more influential than others, and some businesses could outsell equally capable businesses that were providing the same thing.

So think about Apple, Motorola, they're providing the same thing. Google, Yahoo. Why is one better than the other? So as leaders, we tend to start with the what, implementing a new curriculum, rolling out a mentoring and induction program, revamping our remediation schedule. We likely have a reason for these changes, but we don't communicate the reason very well.

When leaders start with the what question first, they're appealing to their staff's rational side, but the what does not drive their behavior and produce results. The why is and should be your foundational consideration in determining your what. So what is your purpose?

What is your intent in running this school on behalf of these students? What are the outcomes that you intend to achieve? Every other decision you make outside of the why such as how you organize resources, how you organize adults in your building, what programs you choose to implement. It becomes rooted and anchored in that answer to your why.

And it helps people to understand what you're about and what it is that you're aiming to achieve. Next slide. Resources are the time, money, materials, and staff used to support an organization or an initiative.

When we think about leveraging both businesses and operations, it's critical to consider a few things. First, it's important to plan for resource allocation. Align or identify supportive strategies to the available resources. You need to be able to understand and paint the road that people are going to need to walk down in pursuit of these better outcomes for students.

Second, develop the budget. Once you have a plan and have identified your strategies, it's time to develop the budget itself. How you mobilize and monitor the use of those resources that have been set in place by that plan is really critical. In particular, if there's a change, environmental or otherwise outside of your control, that would impact the way that you think about the execution of that strategy relative to the plan that you've created.

The budget becomes a critical component in helping to shift, change, and mobilize those resources to shift along with the environment that's changing. So, third, it's also critical to think about talent management. As mentioned earlier, when we think about our financial resources, a lot of those resources support people.

Our professionals in the system both individually and more importantly collectively can drive the improvements. Considering the recruitment, the selection, development, and retention of staff to meet those improvement needs, especially when it's associated with high-quality staff, it is critically important for driving school improvement strategies and actions.

Lastly, finally, it's important to consider the use of time. Time as a resource. Next to the actual work of professionals in our school, time is a precious asset. How do we want staff to dedicate their time to students? This involves being strategic about scheduling and ensuring that staff are devoting most of their time on the improvement priorities.

We should also dedicate time to building the capacity of our staff to continually drive improvement in our schools. Making aligned resource allocation decisions is not just a practicality, but it is tested in research as well. Our knowledge has grown over the course of the last 10 to 15 years in the field of school finance.

We've learned that the way resources are used affects how well students learn. Therefore, the decisions that school leaders and school communities make about how to use resources can have a clear impact on how well students are learning. It's also important to be judicious in determining the number of priorities you have and therefore how thinly your resources are spread.

It's important to consider whether you have sufficient resources to support all of your priorities. In other words, there are linkages between capacity, implementation, and resources. Federal stimulus funds. In response to the COVID-19 pandemic, the government passed three relief aid stimulus bills and each provided significant funding to K-12 education.

The first bill was the Coronavirus Aid, Relief, and Economic Security Act or the CARES Act, which was passed in March 2020 and provided \$13.2 billion for K-12 education. In

December of 2020, the Coronavirus Response and Relief Supplemental Appropriations Act or CRRSAA was passed.

It provided \$54.3 billion for K-12. And lastly The American Rescue Plan or ARP, it was passed in March 2021 and provided an unprecedented \$125 billion in funding for K-12. It's important to note that the funds provided under each bill are for one-time use only.

As such, it is critical that charter school leaders, finance team members, and governing boards plan strategically to use these funds in a way that is sustainable. The next slides will cover some of the high-level details of these bills and additional details including important considerations and proposed funding strategies that are provided in the paper that will accompany this workshop.

To demonstrate the enormity of the federal relief funding provided by the COVID-19 stimulus bills, this figure shows the approximate per-pupil funding amount provided by the three bills through each stimulus as compared to historical federal revenue per pupil for the last major stimulus bill, the American Recovery and Reinvestment Act of 2009 or ARRA.

You can see just how much more money was invested in the last couple of years compared in 2009. Here's an overview of the timeline to spend those stimulus funds specific to each bill passed in Congress.

These timelines are important to keep in mind as you move forward with budgeting and planning. While the timeframes overlap and funding can be combined and braided together, each bill and therefore each funding stream has its own timeline for when the funds need to be spent. And there are specific rules about the allowable use of the funds. State and district leaders will need to plan to use the funds strategically over a short period of time.

State and local education agencies have until September of this year of 2022 to use their CARES Act funding, until next September of 2023 to use their CRSAA funding, and until September 2024 to use their ARP funding.

The Charter School Resource Center will be releasing a report that describes further the allowable uses of these funds to help you make the best use of this one-time funding. The fiscal cliff. I'm curious how many people have heard this word over and over again. Can anybody raise their hand if you've heard this word?

Yes, the fiscal cliff. The fiscal cliff is a situation in which a particular set of financial factors causes or threatens sudden and severe economic decline. September 2024, when these last funds expire, this could be a potential fiscal cliff. Planning for this conclusion of funding will be important for schools in avoiding having to lay off staff, expansion of classroom sizes, etc.

So here are a few tips to keep in mind as you plan for and use these federal stimulus funds. These funds, as we all know, are available for one-time use only, so make sure you plan accordingly to avoid that clip. The American Rescue Plan Act specifically requires school districts to meaningfully engage with their school communities on their planned use of the funds.

Districts must also engage their communities should their plans for the use of funds change. And lastly, make sure to monitor and track how you use these funds as you're required to

report how you use them and how you engaged with your school communities on them. I'm sure many people have also seen this image as well.

And the aim of aligning resources to school need is to create equitable systems that provide the right set of resources for the right situation that a student is encountering. The aim should not be for all students to get the same resources but to accommodate students where they are and help them accelerate academically, socially, or otherwise.

In many schools, resources are allocated based on formulas that prioritize equal distribution such as the same amount per student or the same amount per teacher on the basis that such a distribution is the fairest practice. This however is not equity.

This is called equality. One of the hallmark areas of autonomy in charter schools is being able to allocate your resources effectively for what students need based on equity. And now I'm going to turn it over to my colleague, Aimee. And she's going to take us through some really fun exercises.

- [Aimee] Thanks, Tara. So, in a moment, we're going to move into small groups. As Tara mentioned, when we say things like we're aligning resources, we're being intentional about how time, staff, skills are being used to the best of their ability to meet our students' needs and how are we using funds strategically.

Schools that optimize the use of resources spend the right resources on the right things at the right time. How do you do that? How do you get everything right? The process that we're going to take you through today will get you a little bit closer to that perhaps, and it begins with data.

Next slide, please. So I'll give you a quick overview of what we're about to do in small groups. Don't worry about taking notes. We'll have a facilitator. Can we put the participant guide in the chat? So, each of you will have access to a participant guide that we're going to use in this two-part activity. In this participant guide is mock data from two fictitious schools—one's a K-5 and the other is 7 through 12.

Apparently sixth graders don't go to school in our fake school system. But you are now, as a group, going to be the leadership team of one of these fictitious schools, and you'll find out which grade levels when we get into our group. We're going to ask that you read through the description of the mock school to get a sense of what the school has experienced in the last couple of years. And I'm going to warn you.

It's purposely vague, and it's done so that it helps you get thinking about what other information you might need to truly understand what's been going on. Next slide, please. So this activity will be done in two parts. The first part is examining the data and, as a team, deciding on a couple things. First, can you click it, Courtney?

You'll identify what's going on in your school. What are your students' needs? What are your school needs? What is a high priority need at your school? The next thing you'll decide—if you can click it, Courtney, thank you—is how to address that need.

So what's a goal that you and your team can really rally and get around to address the need. And then the third are, how will you address that need? What are the actions or strategies

that you want to put in place, that you want to align your time, talent, resources around that will help you address the goal or, sorry, meet the goal to address the need?

And you'll visually represent that alignment in a resource allocation plan map. So the map itself really identifies the why, which is that mean, the what, and the how. The next part, I'm not going to give too much away about the next part.

Part two, you'll work together with your group to identify areas of long-term investment and savings. And I want to give you a couple of pointers here about the long-term and the part two. So, one, as you're reading through your mock school, context, and last three years and what they've been spending their money on and what resources they have, please know that all of that is up for discussion.

So if you decide that you want to invest your staff differently, or your time differently, or your resources differently, that's up to you as a leadership team. That's the beauty of being [inaudible] while having that kind of autonomy is you can look to see what seems to be working and what's not, and how can we rethink how we address and align what we have to be the best to work for our students' needs.

So part two is really about, do we have what's necessary to accomplish our goal and address our needs? Do we have the right people with the right skills, with the right amount of time, with the right amount of funds? And if not, how do we get that? We get that through investments and savings. So, I will turn it over to Courtney to get us into groups before we do.

And are there any questions before we start? Are there anyone who has any trouble getting the participant guide? So for this portion, you're going to spend time practicing allocating resources, including how to think flexibly and creatively about resources to support your priorities.

These steps can be used at any time to help create a plan that connects organizational resources to goals. Organizational resources primarily include human resources, such as time and talent, and financial resources, though other things like non-monetary sources of support should also be considered.

As you go through these activities, feel free to pause the video and start again, or pause the video, rewind, and then start again. To start, you can decide if you want to be a leader of your current school or the leader of a fictitious school located in the appendix of the participant guide. If you choose your own data at your own school, you want to have available the following: the last benchmark or standardized assessment information, and that's fine if the information you gather is from last year, your budget, a list of staff that you currently employ, including their qualifications.

It would also be helpful to have a list of programs and interventions you're currently using, but I wouldn't worry too much about that right this second. We'll talk a little bit more about what you need to make some decisions around interventions and programs as we work through the activities. Feel free to try this activity with you and your leadership team using the mock information in the participant guide.

You can decide if you want to be the leadership team of a K-5 school or 7 through 12 school. Either way, having the participant guide handy as I walk through the instructions would be really helpful. So, during this session, you're going to create, as I mentioned earlier, a resource alignment plan map. We would strongly recommend because these conversations are so much more beneficial and meaningful if you do them with your leadership team instead of just you as a loan leader.

But as a leadership team and broadly speaking that can include building leaders, governing board members, different heads of departments such as special populations, it's important to ask the question, what are the needs of your students?

And by students, we mean individually and collectively and more broadly what are the needs of the school, which really builds on the collection of those needs of students. After going through your outcome information, whether they be your own or if you're using the X, Y, Z scenarios in the participant guide, decide what are your student needs. Based on your data and what you know about your students and your school and your staff or what you've read in the mock, you may end up with several high-priority needs.

For this activity, you're going to choose one. And this is really going to be your why, your anchor that will drive the rest of your decisions. So how do you choose one? You could think about this in a couple of different ways. You can either think of this as, if we only have the time, the staff, and the funding to focus on one thing, what would it be?

Or you could think of it as, in order to address the other things we've identified, we need to work on this thing first. So think about identifying your high priority need from either one of those scenarios. Now, at this point, I will caution you.

As you're reading through either your own data or the data and the X, Y, Z scenarios, you may fall victim to what we call solutionitis where the needs you identify are really solutions. For example, if the need you identify is something like leadership development, that's really a solution. What need are you trying to address with leadership development?

What goal are you trying to accomplish? Identifying those will help you design solutions such as that leadership training that will in fact meet the need. So here's some examples of high-priority needs that you may identify based on either your own school or the scenario.

By the time students reach third grade, less of them as time goes on can read on grade level. Another high priority need might be around our students who receive special education services, their attendance rates are 15 percentage points below students who do not receive special education services. A third example may be our eighth graders' writing is not up to the level it needs to be successful in high school.

We know that they will need strong writing skills in high school and to pass the high school exam. Their writing starts strong. And then we know watching them in the classroom, it poops out midway through the process without really fully forming and developing and supporting their ideas. So, feel free to pause the video, read through the scenario, or read through your own data and brainstorm a list of priority or needs that you've identified, and then prioritize.

Prioritize and just pick one. Once you've picked a high-priority goal or need, sorry, you'll want to develop a goal that you can rally around and align resources to that need. So if your need, I'm just going to pick the eighth-grade writing piece because it's not something that would be identified in the X, Y, Z scenario, so I'm not stealing any thunder if you're using these scenarios.

If your need is around eighth-grade students writing stamina, what could be a smart goal to help build up their stamina and quality? What might you want to accomplish this year? Well, we know that when we work on advancing students' critical writing skills, their reading skills also improve. And for this year, what we've identified is our goal will be to spiral developing a central idea and supporting that idea in our reading and writing activity.

And we want to increase eighth-grade writing stamina by increasing the writing time from 20 minutes to 75 minutes. So once you've identified and decided your goal, think about what actions or strategies you want to implement to achieve that goal. And as you're thinking about what those goals are, you can also start to see what milestones you might be able to identify.

If you're going from 20 to 75 minutes, you can easily identify milestones along the way. But work backwards from that high priority need to the goal and think about what strategies you may want to put in place to address that goal. Again, if your need is around eighth grade writing stamina and quality, and your goal is to increase that, what areas of their writing skillset are you looking to increase?

What actions do you want to implement to support and improve writing skills and how should those actions be sequenced? What would you need to do to meet that goal and address that need. To determine actions and strategies to meet the goal, consider a couple of things. Do I have what's necessary to accomplish the goal and address the need?

Do I have the right people with the right skills who have the right amount of time and whatever monetary resources might be needed? If not, then what actions and strategies do I need to take to achieve the goal and address the need? And so really, for part one, you're identifying a need, you're developing a goal, and then you're taking stock of, do I really have what's necessary in order to accomplish my goal and adjust my need?

Again, do I have what I need to achieve? And if not, then where do I need to go to find it? Now oftentimes here's the step where, as educators and in schools, we normally forget because we're really good at adding things to our makeup. What we're not so great at is taking things off the table?

Because anytime we add, we really need to take stock of what we're doing, and what we're using, and what we have available to see whether it's working or not. And if you've ever seen the show on Netflix called Marie Kondo's tidying up, I love her idea of how to go about taking stock of what we have.

She does it by category. So if you're in the throes of spring cleaning right now, you may be tempted to go room by room. You know, let me clean up the closet in this room. Let me clean up the boxes in this room. Let me look and see what I have in my kitchen cabinet.

No, she said pull everything by category. So get all your clothes together from all the little nooks and crannies you have them hidden. Put them all together in a big glorious pile and then start to go through. And do the same thing for your shoes and for your kitchen gadgets. And we would encourage you as a school to do the same thing by interventions and support.

So, what are all of the interventions and supports do you have around? You could do this by content area. You could do this by grade level, but the idea is to really go through and take stock of all that you have. Now, that's not to say you have to get rid of everything that doesn't have to do with this priority need and this goal.

Those interventions and supports may be addressing other needs and other goals, and that's fine. However, going through and doing spring cleaning to determine whether still these interventions and supports are still addressing needs and helping you achieve goals would be really important at this stage. So, part of what actions can you take to achieve the goal, do I have, what I need is also do I have things that I don't need, and take those off the table.

So, once you map out your high-priority need, your goal that you can rally around, the actions that you can take to achieve that goal, I would encourage you to play a game called Budget Hold'em.

And I'm going to try to take you there and walk you through that game. So this is our... Based on the last activity, this is what your plan map will look like before we go to Budget Hold'em. You'll identify your need, you'll identify your goal, and then actions and strategies that you'll employ to meet that goal.

And it is visually set up this way so that, as you can see, everything maps back to the need, and that's really what you use as the anchor to making these decisions. So, you can play this game in two forms. You can order the game from ERS strategies and play in-person with the game or you can play online.

And you can play in teams. You can play individually. You can play individually and then come together as a team because the decisions that we are making when prioritizing needs can be very difficult, this game will help you think through them more deeply and set you and your team up for successful implementation when you do.

So, we're going to move further. Don't discard your map quite yet, that you created in part one where you identified your need, your goal, and your actions. For this part and this game will help you to move further into how you can address the need. There are two things I want you to keep in mind as you play this because the beauty of this game helps you think your implementation more broadly and more deeply.

The other thing is it exposes you to different options of how to address your need and give you other investment examples. So, there's two things that I would keep in mind when playing this game, that we've had groups kind of fall victim to a lot, solutionitis.

And the first is just because you see it doesn't mean you need it. So this could be true when reading through. And for those of you who attended conferences, there's conference sessions. Sometimes you come back with all these great ideas and you think, "Oh, my gosh, we need to do this." And that may be true.

However, the idea is to always come back to, does it help us achieve our goal? Does it help us address our need? So, even though you see it, make sure you need it before you pick it. The other thing is, sort of, the flip side of that guidance is let's not sacrifice a good plan for a pretty poster.

So just because you've gone through the steps of laying out your need, goal, and actions doesn't mean that that plan is set in stone. The point of this game is to really help you think deeper and more fully about all of it, about your actions, about your goals, about your need.

So I would encourage you to make changes, and that's okay. And the one thing though that can be tricky is ensuring that the need you've identified does in fact exist within your context. Okay, so a little bit about the game.

The goal of Budget Hold'em is to create a hand. And if you've ever played Texas Hold'em, none of that at all. But it is a card game much like Texas Hold'em, and you create a hand of long-term investment, and this is where. interesting, savings.

So let's say we're at a 2% cut from last year. We're going to go ahead, and here on my screen are the different categorizations of budget targets. So you can either have a budget cut or you can have a budget surplus. And they go 2%, 5%, 10% on either side.

So let's just say we'll be conservative and say we have a 2% budget cut. We would click start. And then depending on what your needs and goals were, you can start to go through the options based on different categories.

So in your upper right hand corner are the categories of your school or...sorry, categories of your options, and they are adult culture, collaborative work and professional growth structures, curriculum instruction and assessment, personalized learning. I'm going to skip savings for right now. School community and social, emotional learning, talent management and teacher leadership.

So depending on your goal, or your actions, or your need, pick a category that you think would match what you're trying to accomplish. So let's just say we have a toxic school environment. We want to work on our adult culture.

What that will bring up are different options that we can employ to work on adult culture. Now up here in the upper right hand corner of each card is the cost associated, the funding, the monetary cost associated with each of these options.

Now, I will caution you that that does not include the time. So just because something doesn't cost any money doesn't mean it doesn't cost time and it doesn't cost staff. So, you may be reallocating principal time or reallocating teacher time, etc. But reading through each of these options will give you a sense that, in your own expertise and experience with implementing some of these similar options, will also give you a sense of what are the consequences or what are the costs associated with each of these.

So let's say we want to dedicate time and professional learning for specialized training on key topics. We would play that card open. It also gives us a warning that in order for this option, if we really want to do this to be successful, we should consider pairing it with the development of the vision and values for the school's adult culture to ensure that the professional learning aligns with core goals and needs.

So, some of these also give you some implementation guidance. If you ever want to know how these options could be helpful, you could just click on the why, and that will give you more of a description of how this investment option would be helpful in attaining goals and meeting needs.

So that's Budget Hold'em. So our goal is to get to a 2% budget cut. So we could play all of these four. None of them cost any monetary funds. Obviously, they cost time and perhaps reallocation of staff, but let's take a look at our savings options. So our savings options, and, again, this gives us a sense of how much we're saving, and oftentimes if we're saving many, it means that we're cutting something.

We're either cutting staff, we're cutting programming or both. So if we replaced 50% of school provided afterschool programs with programs provided by community groups, we save close to what we need to almost a whole 2%.

If we provide 10% of non-core elective classes through community partnership resources, we don't save as much less than 1% but it's your job to really think through what would be the consequences of these cuts.

So, one group was really trying hard to determine which of these savings they wanted to make, and where they ended up was that it was easier to get buy-in for community partnerships to provide a class than it was to get them to provide afterschool programs.

And they felt more that this option, this savings option would be easier to manage than trying to manage multiple afterschool community groups than if they were just doing a non-elective class.

And so those are the conversations you will want to have as you go through the savings options as well. So, once you've decided to play your cards, and I would adjust if you're going through this activity as a team, play all the cards that sound interesting, and then go back through, and make some final decisions about which ones you really want to keep and which ones you're going to discard much like we play in card games, and then go through and identify your savings as well.

And feel free to pick any cards from any of these categories, but it might be easier and more efficient to go through them by category. So pick what you want from adult culture, from collaborative work, from curriculum, from personalized learning.

Excuse me. You don't have to pick cards from every category. You can ignore some categories or you can. I mean, you could pick adult culture, personalized learning, school and community, whatever you determine would help you, again, meet your goal and address your needs. So that's the Budget Hold'em, and you can add those decisions to your resource plan allocation map.

And I'll show you what that would look like. So you've already identified your need. Maybe this changed slightly. Your goal, this may have changed slightly, too, after playing the game. Your actions and strategies, those may have changed slightly given what you are making investments in from your Budget Hold'em game, and the areas that you've designated as savings.

So, that was Budget Hold'em. And then I would encourage you, as a team, to reflect. What was your why? What was the need that you initially identified? How close did you come after going through these steps to meeting them?

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, community partners to reallocate resource to students with most need? What were the biggest insights and/or surprises in your choices?

What are your next steps to identify specific strategies in your budget formulation, examine the impact of the decisions you've made, and plan for adjustments as needed to ensure that equitable resource allocation has been made? Good luck.

Let us know how it goes and if there's anything else we can provide to help you in making these tough decisions and meeting the needs of your students. Thanks so much for joining.

- So, let's reflect. I'd love to hear how it went. Before we start though, please keep in mind. There are no right or wrong answers. As you all know, working in schools, these are really tough decisions and there's always a positive and a consequential tied to any time we make decisions, especially when we're cutting and having to back into a budget cut.

So, they're also very multifaceted, and I know I'll speak for our group. You know, oftentimes what we found is that we just didn't have any that's information to make what we felt like was an informed decision. So you also may have felt that way in your group. So, why don't we start with...I'll just kick us off in terms of our group.

And I welcome anyone from our group to dive in. Our why was... And we did the 7 through 12 grade level. So our why was around addressing the toxic culture.

We really felt like unless we dipped a toe into why that was happening and to try and build a more positive culture, that addressing really anything else was going to be quite difficult. And a couple of the strategies that we've identified were around leadership development in particular, around recentering our staff around our mission and vision, and really getting folks back to why they went into education begin with.

I think one of the most difficult conversations we had was really about prioritizing the need. And I opened it up to our group to say, what were some of the biggest insights or surprises in the choices that we made?

I don't want to speak for you all, but what would you say were some of the biggest surprises that we made?

- [CJ] This is CJ. I apologize. I don't have my camera. We had a very diverse group, and I guess I was surprised that we didn't focus on a lot of the data.

We went straight for that toxic culture. We were like, the culture drives everything. And if we don't fix that, the data doesn't mean anything. So I actually appreciated the fact that in our diverse little group, we all were driving right into that toxic culture, which was like one small, little line out of all the info given to us, but that was a meaningful one, I believe, for all of us in the group.

- Thanks, CJ. Oh, sorry, go ahead, Tara.

- For your group, when you first started talking, I was like, "Wait, that was our group." Like, very similar things in our group. The very first thing we're thinking about is that culture and we're looking even at the teacher turnover rate.

Like, you know, how much of that culture is affecting the turnover rate? And if we make any investment in teacher professional development but we lose those teachers because of the culture, we've lost any investment we've made. So it wasn't beneficial. So very similar conversation, it sounds like, that we are having.

- It's really funny. Any other insights to the activity?

- I don't know if this is a surprise, but also from our group, Aimee, I thought that we had the most difficulty in figuring out which strategies to choose for the savings. And I think that was because we had different perspectives and experiences with each of those strategies.

Well, you know, some of us thought that some of the strategies were valuable. Others thought, "No, well, this is really difficult to implement, you know, based on our experience." So, we really needed more information about how some of the strategies would work and how effective they were in practice in order to make that decision.

- I agree too. We also went back to that same point of just needing a little bit more data, like, specifically around what funds were already being used to support core instruction to see where they were getting the most benefit and figure out where we can realign what currently is already being used. So a lot of our strategies also went back to what's already being utilized.

Like, in the school day, how can we maximize the instructional time? How can we maximize other partners and what are some other things we can do? So we were also looking for more information too, but definitely thank you for the opportunity to have the discussion.

- Yeah, absolutely. No, and thank you for that because it's often we're in a meeting and we're trying to make decisions and we're like, "Wait a second. What are these four teachers doing? How can we..." You know, there's always more, and more, and more, and more, and more. And we were hoping that this activity would help give you...

I mean, you're having these meetings all the time, but help give you a preview of what would be helpful to collate together before sitting down and talking through. What else?

- It definitely prompted more questions. You know, that's sort of the point of the exercise too I think is to really get you thinking about what are the things we need to be considering when we're talking about investments. What do we not know that we need to know? And I think that is even sometimes more important than what we do know is, what do we not know? And we honed in on the culture issue.

It's like, "Well, of course, the goal is to improve student achievement and outcomes, but dig a little bit deeper." And it's like, "Well, why would they have a poor culture?" And Christie made a really great point. She was like, "Well, the school leader might need support for strategic planning." I mean, you have to go back to base level.

If they're not on the same mission, nobody knows what they're supposed to be doing and why. So, maybe this is more than just improving tier-one instruction. This is "go a little bit deeper." Does the school leader understand this? So it just kept...it was like an onion. We just kept peeling back more layers of questions that we didn't have answers to but were good to ask.

- Yeah, I really liked your analogy, Tara, about if we don't have a map, that strategic plan and that vision, if we don't have a map, we all end up in a different location.

- Anyone else have takeaways, thoughts, insights?

- ...encouraged to hear that everyone lit on the culture because when I saw those reading scores and I thought about meeting with our district sponsors, I was like, "These reading scores are the thing that we would have to explain," but the fact that people from all different backgrounds honed in on the culture as the first priority is really encouraging to me.

- Agree. So, as we move forward, as you move forward, think about what specific strategies in your budget formulation, and how you examine the impact, how you plan for adjustments really ensure equitable resource allocation.

I think one of the things that we didn't include were disaggregations of data. So if you go back to that participant guide, we don't have a breakdown of how different groups of students are doing, how different groups other than experience of teachers are doing.

But that's really the next step of examining the, sort of, where are we at our school is, is our school working and for whom? And if not, really digging into those reasons why much like the conversations in our groups went. So I want to thank you for your engagement, and your insights, and bringing your expertise to those groups, and stretching yourself into different roles and areas of expertise, and we'll put a few pieces together as we wrap this up in terms of a few key takeaways.

And what I'll say is, when we are aligning resources, as you noticed in our discussion, we're really trying to be intentional about how things like time are used. Even some of the savings.

When we looked at it, we were like, "It's really time-consuming to get...like, if we wanted to get some of the community partners involved, we also have to understand that that's an investment sometimes in and of itself. That may be saving funding dollars, but it's utilizing people's time." And so really being thoughtful about the things you're investing in and making sure that when you're implementing a plan, you're really judicious in the way that you think about both the number of the priorities that you're trying to accomplish as well as the way you're thinking about how the resources can be spread and how we can think about resources more broadly.

So, as Tara mentioned, we're not just talking about money, but a lot of money is buying people's time. And we know that between 65% and 85% of every dollar in public education goes to personnel and what our personnel are doing.

So it's just as important to understand and prioritize the time our staff has and what they're doing with it because we know it's limited and why we need to be so specific about what we're asking folks to do, because we can easily burn people out. We can easily create this

toxic culture if folks feel like they're stretched too thin or they're asked to do too much without support.

And the last thing I'll say is around the fiscal cliff that Tara mentioned. While we may have those funds now and some areas are still contending with budget cuts, if what the projections are looking like to be true, then we know that we are going to be addressing some challenging budget cuts to come.

And we know that sufficient resources are necessary for quality schooling, but the process that we go by to allocate those resources is really important too. So what's next? We have a couple of things for you. This webinar has been recorded. We're also going to record some instructions to walk through the activity that we just did as a group, because the groups were not recorded.

We invite you and welcome you to use the recording. Go back with your school with your board and conduct the exercise. You have the participant guide. We can even send you our clunky little resource allocation plan map. I'll call it clunky because I'm clearly not a visual artist.

But really to make... And then we have a product coming out to make these stimulus funds that we'll be publishing shortly. So, Courtney, can you next slide, please. So those are the two things coming up for you. Are there any questions, comments before we close out?

- So if you have a question or comment, feel free to unmute or you can type it in the chat or share anything that you learned today or any action items that you plan on taking following this session. You can add those in the chat, too.

And I'm just going to move us along. And if anything pops up in the chat, I will...we'll pause again. Keep an eye on it. And thank you all for engaging with us in the small group discussion. So as Aimee mentioned, this presentation has been recorded.

You'll receive an email next week with that recording and all the session materials. So please use that with your teams. Please pass it along to any of your colleagues that you think might benefit from it. And then to help you make the most use of the stimulus funds for short and long-term investment strategies, NCSRC is publishing a resource to help charter schools leverage their ESSER funding strategically.

That resource should be hitting your inboxes early this summer or late spring. If you're not on our mailing list, you can do so...you can join it by visiting our website and signing up for our mailing list that way. So we just shared the link to the participant guide.

Again, these are three additional resources that are included in the appendix of the participant guide to just provide you with some additional information on using stimulus funds strategically to support equitable student outcomes. And they are in that appendix, you can take a look at that. The Resource Center website is chock full of wonderful resources to help you within your school.

This is just a sample of those. So if you're looking for information on Founding Native American Charter Schools, or developing programs for English learners, how to serve students with disabilities, you can go to our website to find all of these.

Our website is charterschoolcenter.ed.gov. Your feedback is valuable to us. We'd love for you to take a moment to respond to our post-session survey. Austin is going to throw a link to that in the chat right now and it'll also appear in your browser as you sign off of this session. You may access all of the resources we mentioned at charterschoolcenter.ed.gov.

If you have any questions or comments regarding this session or any other offerings from the Resource Center, you can email us at contact-us@charterschoolcenter.org. I'm not seeing any questions in the chat, so we're just going to call this session. Again, you can reach out to us any time.

Thank you so much to Aimee and Tara for leading our sessions and our breakout rooms today. Thank you, all of you, for taking time out of your busy schedules to join us. We know that your plates are full and we're so grateful that you spent these 90 minutes with us, and we hope you have a great afternoon, and we will see you soon on a future Resource Center event. Thanks, everyone.