NATIONAL CHARTER SCHOOL RESOURCE CENTER

Allocating School Resources to Support Student and School Needs

Participant Guide for Small Group Discussions

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Small Group Discussions

Getting Started...

Your group is now a leadership team at a school.

1. You will be assigned to a school that serves grades K-5 or 7-12.
2. You will be assigned one of these roles: Academic Lead, Operations Lead, Special Populations Lead, Other (your choice)

Part I: Resource Allocation Plan Map (15 minutes)

Your facilitators will support this discussion and answer any questions you have. Using the information contained in Appendix A (grade K-5) or B (grade 7-12), your group will create a Resource Allocation Plan Map for your Mock School, page 3.

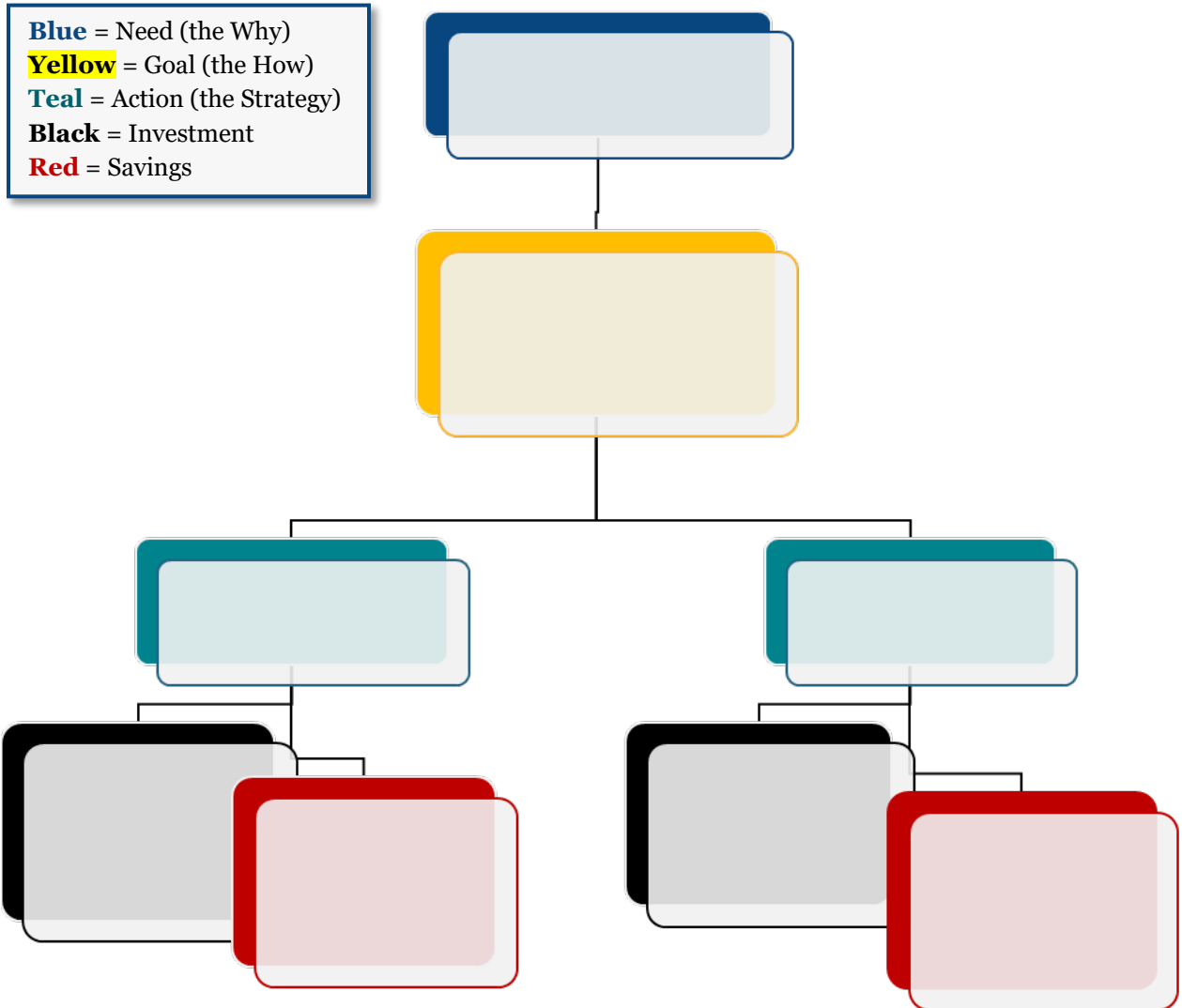Read through the information in Appendix A or B and determine:

What are your Student's Needs (the Why)

What are your School's Needs (the Why)

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

What action(s) can you take to achieve the goal? (the What)

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Once you've answered the proceeding questions on your own, discuss and decide as a group, one need, one goal, and two strategies you will use to address the need. Your facilitator will use the following resource allocation plan template to capture your group's decisions.

Blue = Need (the Why)
Yellow = Goal (the How)
Teal = Action (the Strategy)
Black = Investment
Red = Savings

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Part II. Budget Hold'Em exercise for charter schools to identify long-term investment and savings (35 minutes)

Your facilitator will answer questions about the rules below and share their screen while your group reviews the savings and investments options and makes decisions about which to choose based on the mock data provided.

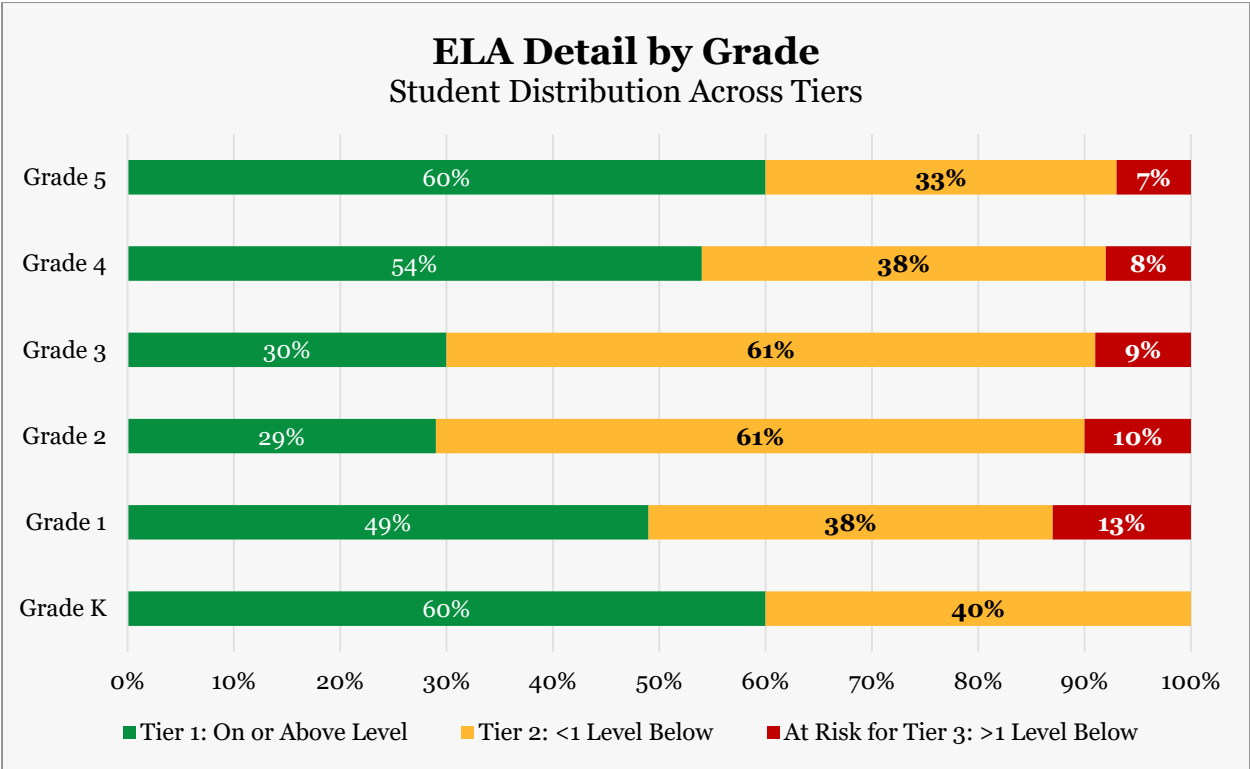|	
2 min.	**Introduce the Exercise** The goal of Budget Hold'Em is to create a "hand" of long-term investment and savings options that meet the school's budget target and support the strategies identified to address the need, while maximizing the way resources are used to improve student performance. The final investment and savings decisions will be added to the group's Resource Allocation Plan Map begun in Part I.
13 min.	**Review the Cards** Your group will quickly review the cards that the facilitator will share. Your group will review the cards by category (i.e., review all class size cards together, then all the special education cards) then determine whether each card falls into the "yes," "no," or "maybe" pile.
10 min.	**Finalize Your Hand** Your group will tally up the cards in the "yes" pile and make final decisions about which to keep to finalize your group's hand. • What proportion in "new investments" did you identify? Are there investments that are higher priority? • What percent in savings did they identify? Are there more challenging savings opportunities in the "no" pile that you want to consider to balance the budget? It's important to select investments before considering savings. You've identified opportunities to invest and must now find savings to meet the target budget reduction.
10 min.	**Full Group: Debrief and Discuss** The groups will reconvene to give you the opportunity to discuss your experiences and share some of the difficult trade-offs your group made, and why and how to ensure equity in outcomes for all students. See Resources in Appendix C for further information. **Potential Discussion Questions:** • 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? • Were you able to make some transformative changes, or did you feel compelled to add back items? If the latter, what impact will this have on student performance over the long run? How might this impact be different for different students? • What options were the most controversial? Why? • What are your next steps to identify specific strategies in your budget formulation, examine its impact, and plans for adjustment as needed to ensure equitable resource allocation?

Source: Education Resource Strategies

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Appendix A: School Scenario and Budget for School XYZ Grades K-5

XYZ School Scenario 1

- School with grades K-5
- Persistently low-performing
- 26 teachers: 7% ineffective (vs. 13% across all schools); 83% 0-3 years' experience (vs. 28% across all schools); 75% average daily teacher attendance
- 1 nurse, 1 counselor
- Trend data in math and ELA have been declining for the past three years
- Fall 2020 state assessment data show a stark decline in grades 4 and 5
- Local assessments are as follows (Jan. 2022):

ELA Detail by Grade
Student Distribution Across Tiers

Grade	Tier 1: On or Above Level	Tier 2: <1 Level Below	At Risk for Tier 3: >1 Level Below
Grade 5	60%	33%	7%
Grade 4	54%	38%	8%
Grade 3	30%	61%	9%
Grade 2	29%	61%	10%
Grade 1	49%	38%	13%
Grade K	60%	40%	

■ Tier 1: On or Above Level ■ Tier 2: <1 Level Below ■ At Risk for Tier 3: >1 Level Below

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Math Detail by Grade
Student Distribution Across Tiers

Grade	Tier 1: On or Above Level	Tier 2: <1 Level Below	At Risk for Tier 3: >1 Level Below
Grade 5	68%	24%	8%
Grade 4	61%	34%	5%
Grade 3	34%	59%	7%
Grade 2	29%	61%	10%
Grade 1	52%	42%	6%
Grade K	56%	44%	

- The school contracted with ABC School Solutions for the past three years using Title I funds.
- The school is requesting to contract with ABC School Solutions again for next year to develop mathematics and ELA instructional coaches and to provide support for individual mathematics and ELA teachers using their trademark ScoresUp Coaching Program.
- ABC School Solutions has one quasi-experimental study that demonstrates significant improvement in student achievement in mathematics in a comparable school.
- Remaining Title I funds are proposed for:
- An instructional coach at the school;
- Time to Know Reading Program, a computer-based intervention for struggling readers in grades 3-5;
- New laptops for students to use when doing the computer-based intervention; and
- HMH Math in Focus intervention for grades K-5.
- The school's comprehensive needs assessment identified: (1) a toxic school culture, (2) a culture of low expectations, (3) a lack of fidelity to the mathematics program, and (4) a lack of adequate supports for struggling readers in grades K-5.

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Budget for School XYZ Grades K-5

Budget Narrative	FY21 School Funds Allocation				Insert Total Allocation
XYZ School Grades K-5	List additional funding sources that are being used for intervention strategies.				Briefly explain how the expenditure addresses the implementation of one or more of the evidence-based strategies
Line Item	*Description*	*Calculation*	*Total Budget*	*Funding Source*	*Rationale*
Salaries & Wages	Professional Learning	• 26 teachers X 4 hours per month = 104 hours • 104 hours X 10 months = 1,040 hours		FY 21 Title II Funds	Teachers will participate in after-school professional learning for at least three hours each month from September through June. After-school sessions will be aligned to intervention plan initiatives.
Salaries & Wages	Instructional Coach	2 FTE coaches (salary only); 1 each, ELA and Math		FY 21 Title I Funds	An instructional coach will provide weekly support to ELA and Math teachers at all grade levels.
Total Salaries & Wages					
Contracted Services	School Solutions	Monthly consultation with leadership team: • 4 hours X 12 (through summer) = 48 4- hour training in ELA and Math (2 consultants) X through the summer		FY 21 Title I and II Funds	Consultants will provide ongoing 1/2-day training to ELA and math teachers every other week.
Total Contracted Services					
Supplies & Materials	HMH Math in Focus			FY 21 Title I Funds	A mathematics intervention will be used with struggling students in grades K-5.
Supplies & Materials	Time to Know Reading Program			FY 21 Title I Funds	A computer-based intervention will be used with struggling readers in grades 3-5.
Total Supplies & Materials					

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Line Item	Description	Calculation	Total Budget	Funding Source	Rationale
Other Charges					
Total Other Charges					
Equipment	28 New Laptops			FY 21 Title I Funds	The laptops will be used to implement the Time to Know Reading Program.
Total Equipment					
GRAND TOTAL					

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Appendix B: School Scenario and Budget for School XYZ Grades 7-12

XYZ School Scenario 2

- School with grades 7-12
- Persistently low-performing
- 60 teachers: 7% ineffective (vs. 13% across all schools); 83% 0-3 years' experience (vs. 28% across all schools); 75% average daily teacher attendance
- 1 nurse, 1 counselor, 1 social worker/psychologist shared with 3 schools
- Trend data in math and ELA; AP declining for past three years; Fall 2020 state assessment data show stark decline in grades 7 and 8
- Local assessments are as follows:

Reading Assessments
Percent of Students On or Above Level

[Bar chart showing percent of students on or above level by grade, comparing Oct-21 and Jan-22:
Grade 12: Oct-21 ~72%, Jan-22 ~45%
Grade 11: Oct-21 ~85%, Jan-22 ~54%
Grade 10: Oct-21 ~77%, Jan-22 ~43%
Grade 9: Oct-21 ~49%, Jan-22 ~22%
Grade 8: Oct-21 ~83%, Jan-22 ~58%
Grade 7: Oct-21 ~75%, Jan-22 ~39%
X-axis: 0% to 90%]

■ Oct-21 ■ Jan-22

Reading Assessments
Percent of Students On or Above Level

[Bar chart showing percent of students on or above level by grade, comparing Oct-21 and Jan-22:
Grade 12: Oct-21 ~72%, Jan-22 ~45%
Grade 11: Oct-21 ~85%, Jan-22 ~54%
Grade 10: Oct-21 ~77%, Jan-22 ~43%
Grade 9: Oct-21 ~49%, Jan-22 ~22%
Grade 8: Oct-21 ~83%, Jan-22 ~58%
Grade 7: Oct-21 ~62%, Jan-22 ~36%
X-axis: 0% to 90%]

■ Oct-21 ■ Jan-22

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Graduation rate climbing

- School contracted with ABC School Solutions for past three years using Title I funds

  o School budget indicates a contract with ABC School Solutions again for next year to assist with mathematics and ELA instructional coach development and support for individual mathematics and ELA teachers using their trademark ScoresUp Coaching Program.
  o ABC School Solutions has one quasi-experimental study that demonstrates significant improvement in student achievement in mathematics in a comparable school.

- Remaining Title I funds are proposed for:

  o An instructional coach for each dept at the school,
  o Time to Know Reading Program, a computer-based intervention for struggling readers in grades 7-8
  o New laptops for students to use when doing the computer-based intervention
  o HMH Math in Focus intervention for grades 9-10

- The school's comprehensive needs assessment identified: (1) a toxic school culture, (2) a culture of low expectations, (3) a lack of fidelity to the mathematics program, and (4) a lack of adequate supports for struggling readers in grades 7-12.

Budget for School XYZ Grades 7-12

Budget Narrative	FY21 School Funds Allocation				Insert Total Allocation
XYZ School Grades K-5	List additional funding sources that are being used for intervention strategies.				Briefly explain how the expenditure addresses the implementation of one or more of the evidence-based strategies
Line Item	*Description*	*Calculation*	*Total Budget*	*Funding Source*	*Rationale*
Salaries & Wages	Professional Learning	• 60 teachers X 4 hours per month = 240 hours • 240 hours X 10 months = 2,400 hours		FY 21 Title II Funds	Teachers will participate in after-school professional learning for at least three hours each month from September through June. After-school sessions will be aligned to intervention plan initiatives.
Salaries & Wages	Instructional Coach	6 FTE coaches (salary only); 1 each for ELA and Math		FY 21 Title I Funds	Instructional coach will provide weekly support to ELA and Math teachers at all grade levels
Total Salaries & Wages					

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Line Item	Description	Calculation	Total Budget	Funding Source	Rationale
Contracted Services	ABC School Solutions	Monthly consultation with leadership team: •4 hours X 12 (through summer) = 48, 4- hour training in ELA and Math (2 consultants) X through the summer		FY 21 Title I and II Funds	Consultants will provide ongoing 1/2-day training to ELA and math teachers every other week
Total Contracted Services					
Supplies & Materials	HMH Math in Focus			FY 21 Title I Funds	Math intervention used with struggling students in grades 7-8
Supplies & Materials	Time to Know Reading Program			FY 21 Title I Funds	Computer based intervention used with struggling readers in grades 9-10
Total Supplies & Materials					
Other Charges					
Total Other Charges					
Equipment	28 New Laptops			FY 21 Title I Funds	Used with Time to Know
Total Equipment					
GRAND TOTAL					

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Appendix C: Resources

Determining Evidence-Based Interventions:

Intervention Evidence Review (REL-West)

Equity-based Budgeting:

Budgeting for Educational Equity Podcast Series Episode 1: Getting Our Resource Equity Bearings (WestEd)

Defining an Approach to Equity (WestEd)

Reimagining How we Make School Spending Decisions (EdTrust)

Transforming School Funding for Equity, Transparency, and Flexibility: An Introduction to Student-Based Budgeting (ERS)

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