



NATIONAL
CHARTER SCHOOL
RESOURCE CENTER

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

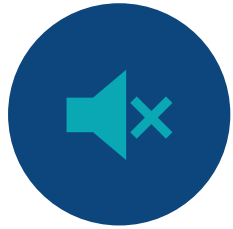
The National Charter School Resource Center (NCSRC) provides technical assistance to federal grantees and resources supporting charter sector stakeholders. NCSRC is funded by the U.S. Department of Education (ED) and is managed by Manhattan Strategy Group (MSG) in partnership with WestEd.



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



Aimee Evan, Ph.D.
National Charter
School Resource
Center



Tara Bergfeld
WestEd

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?

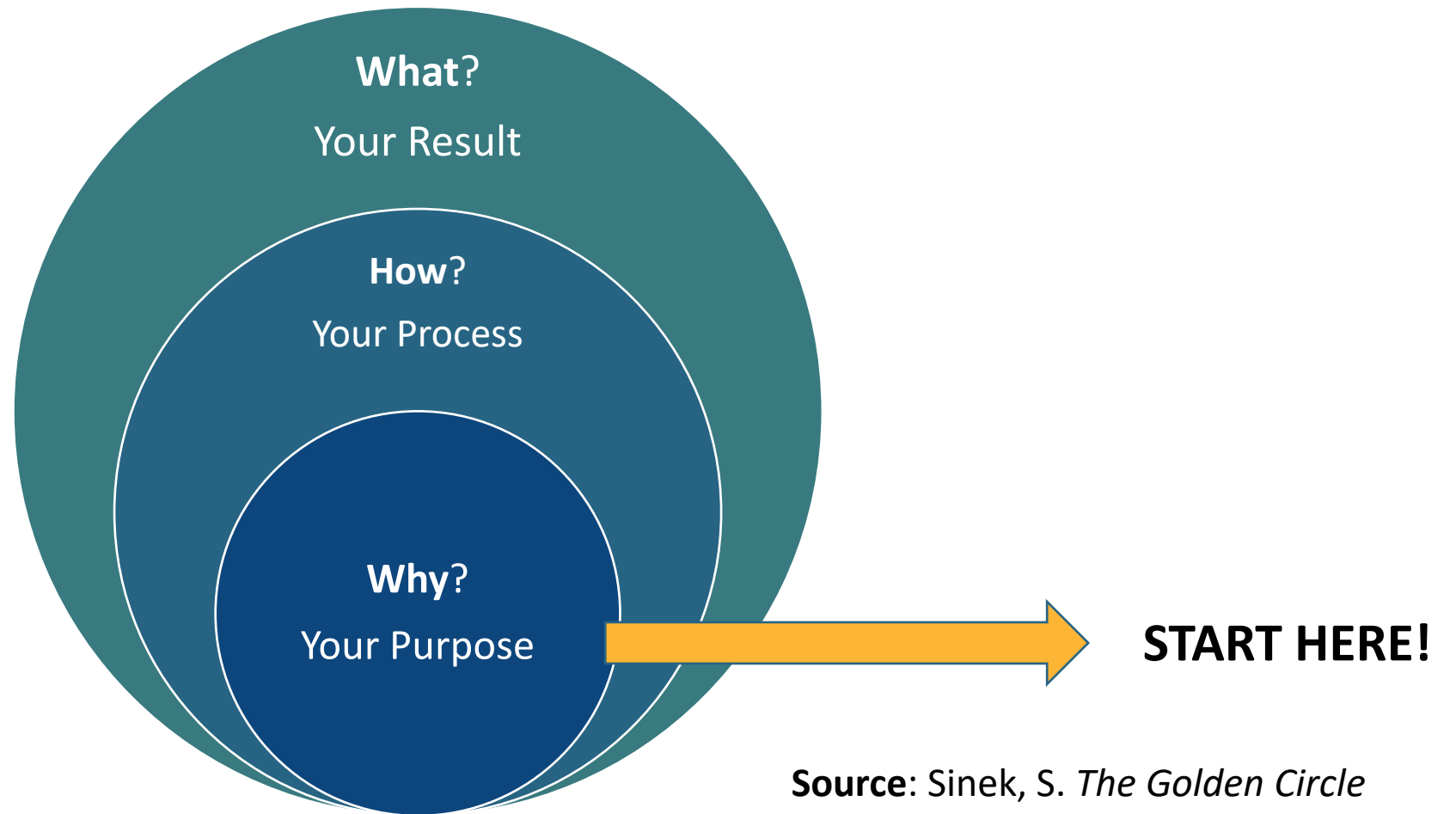


Your **School's Needs** (based on your student's and students' needs)

Planning

Collective Decision Making

Mission & Planning



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.



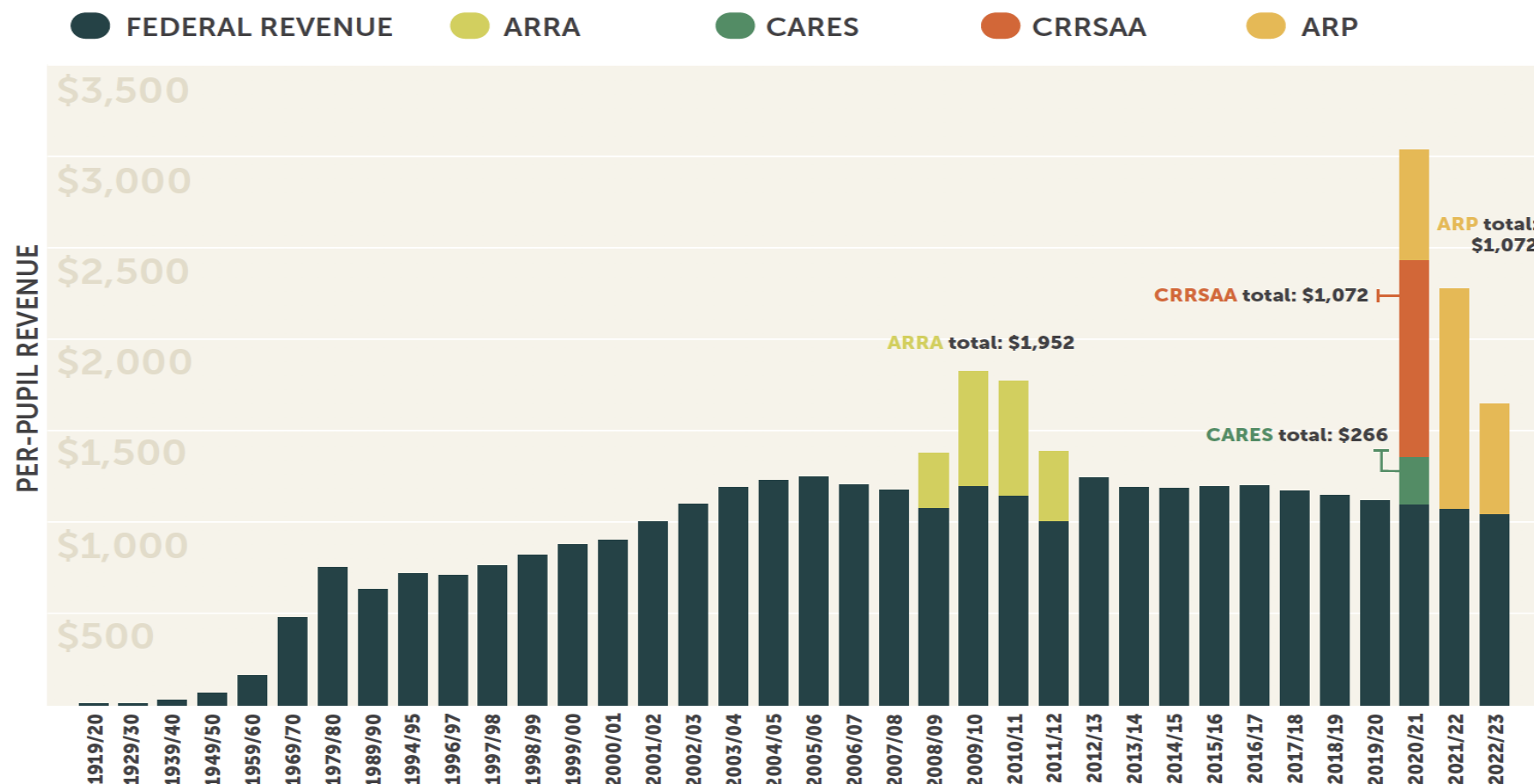
A key component of a successful school is determining the appropriate level of resources needed-for whom and for what.



Federal Stimulus Funds

How can they be used? For how long?

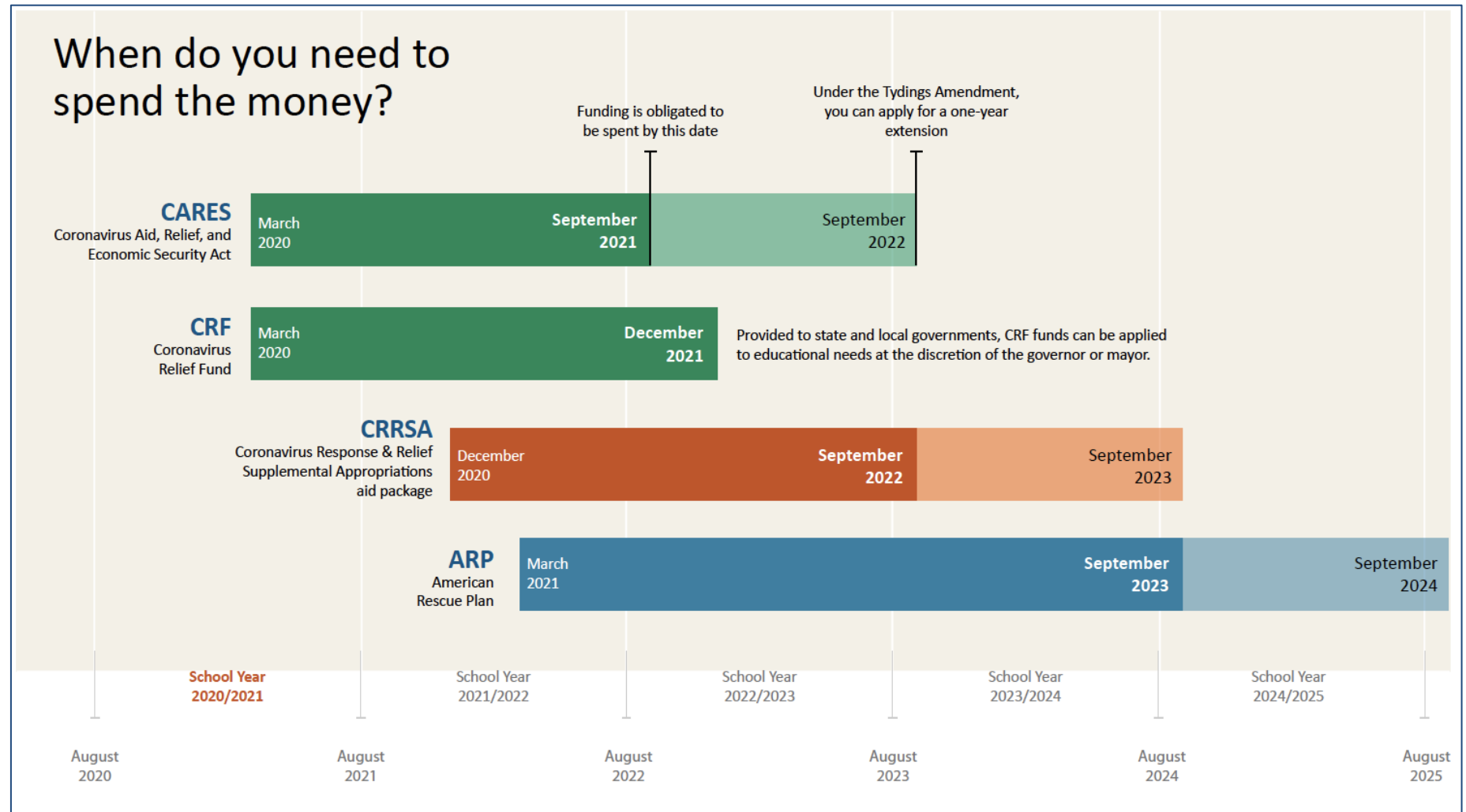
Federal Stimulus Funds: Additional Per-Pupil Revenue



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, CRRSAA, and ARP funds are not regular, ongoing federal revenues; these funds must be spent prior to 2024.

Source: Willis, J., Krausen, K., & McClellan, P. (2021). Meeting the moment: How education leaders can maximize federal COVID relief aid to support more equitable student learning. WestEd.

Federal Stimulus Funds: Timeline



Source: Willis, J., Krausen, K., & McClellan, P. (2021). Meeting the moment: How education leaders can maximize federal COVID relief aid to support more equitable student learning. WestEd.

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 ≠ 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

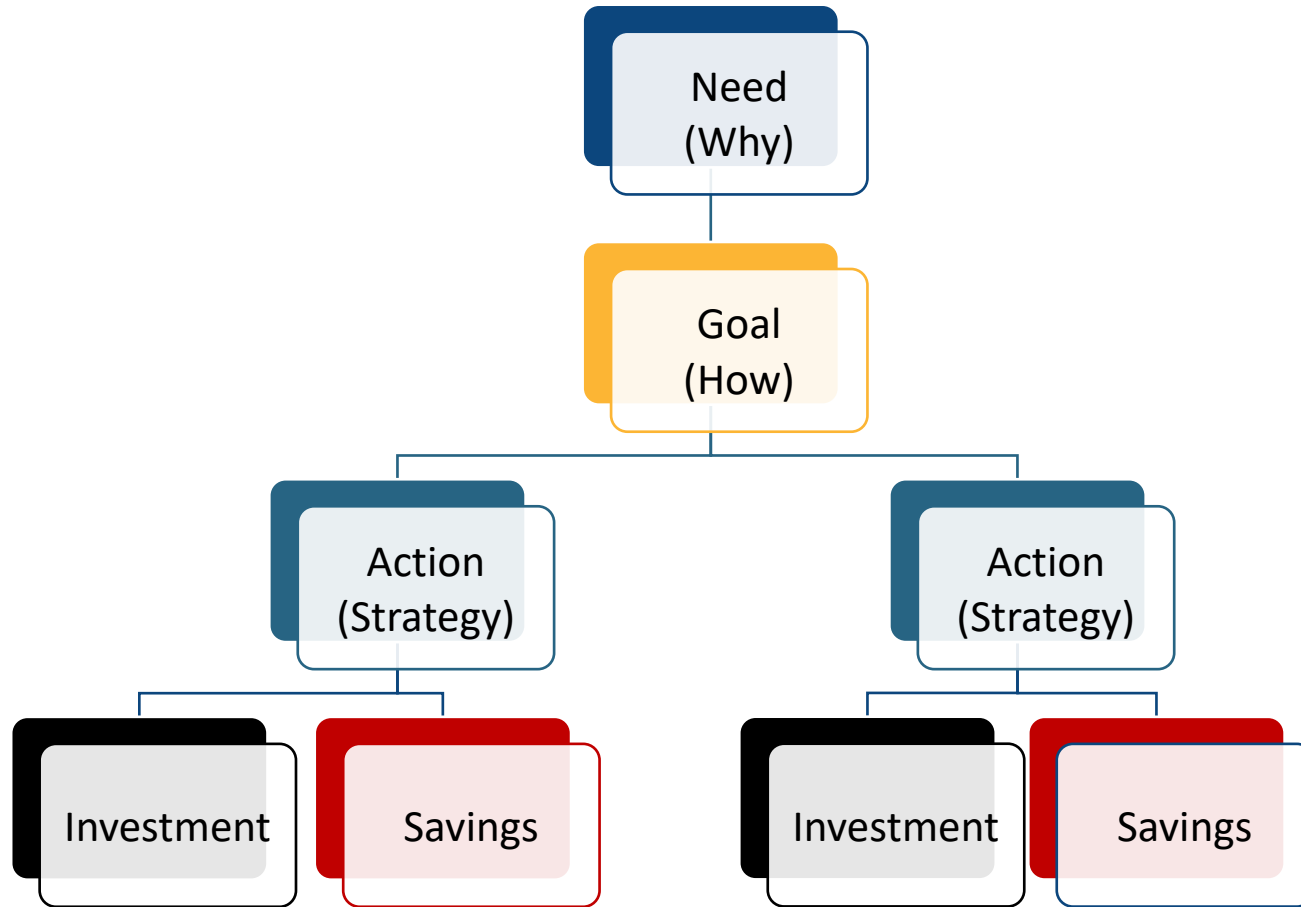
Resource Allocation Plan Map, Part I (Full Group)

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)



Resource Allocation Plan Map, Part II (Full Group)



- 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)



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

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?

How should actions be sequenced?

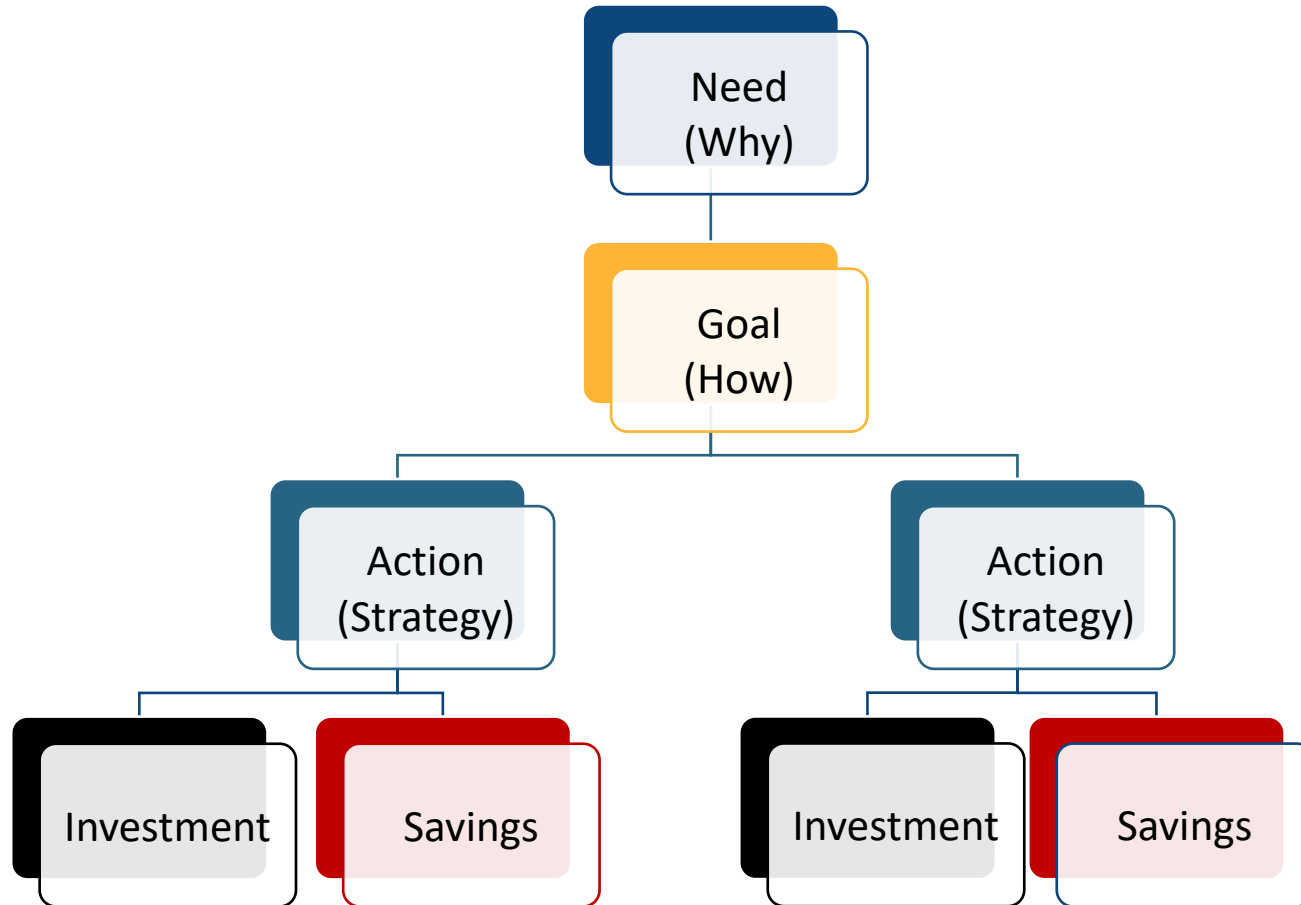
Resource Allocation Plan Map, Part I (Small Group)

Use *Plan Map*:

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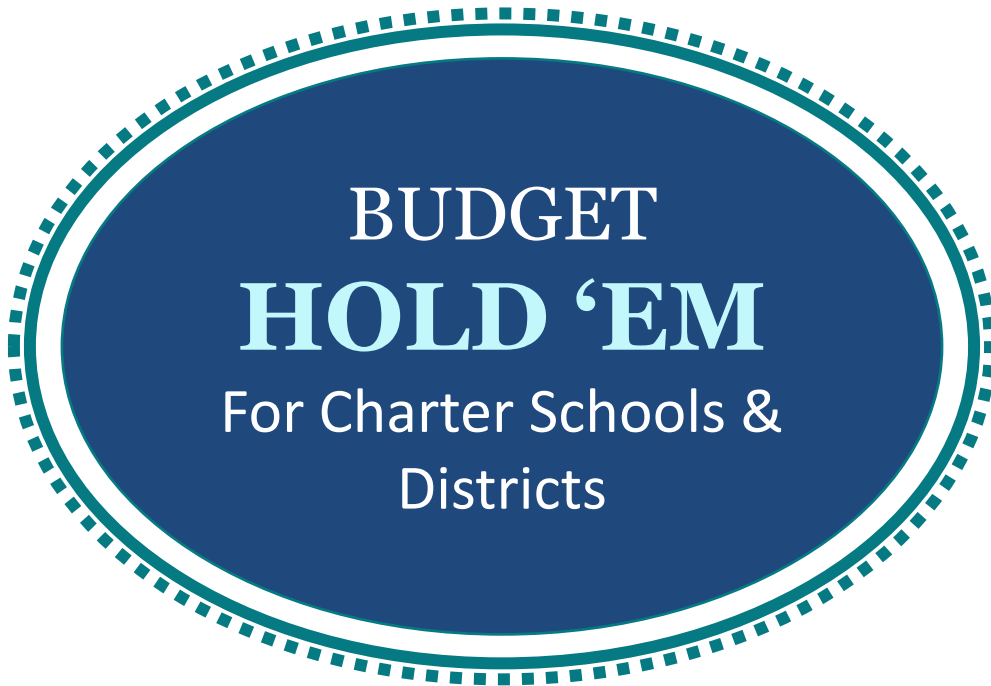


Resource Allocation Plan Map, Part II (Small Group)



- Add to your *Plan Map*:
1. Identify areas of long-term investment and savings:
 - Black= Investment
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 2. Designate year

Laying the Foundation: Decision-making



What is the “return on investment” in your school or school system budget?

- 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?

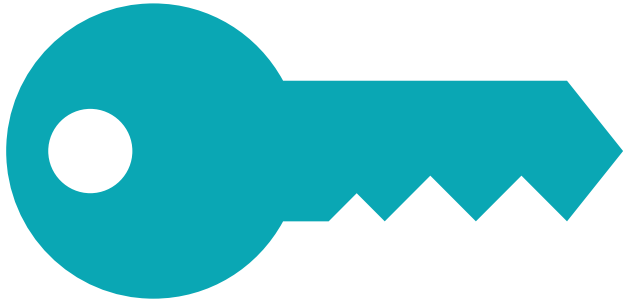


What are your next steps to identify specific strategies in your budget formulation, examine their impact, and plan for adjustments as needed to ensure equitable resource allocation?



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



**What's
next?**

- 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

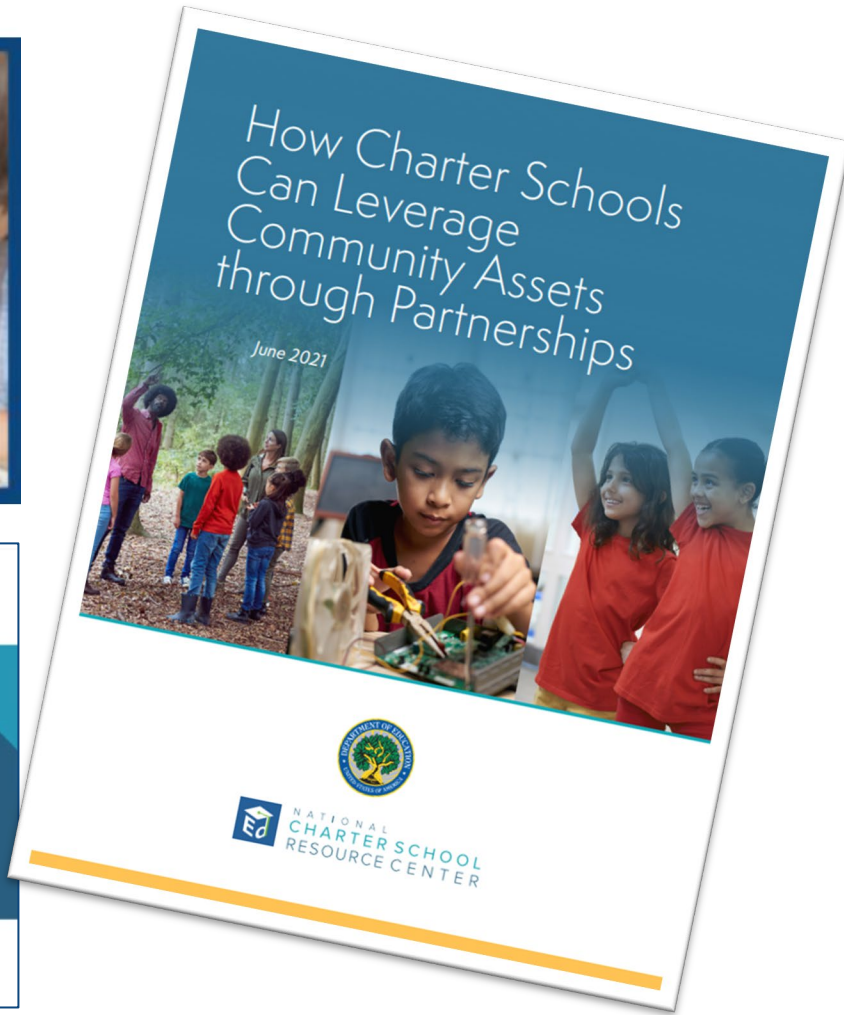
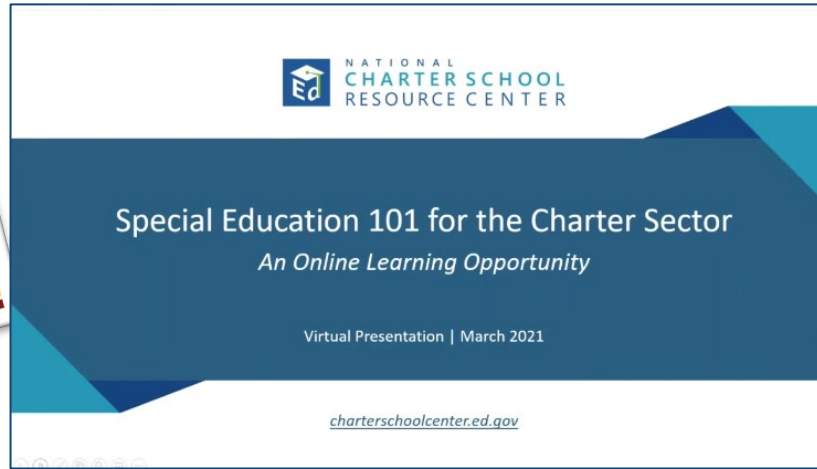
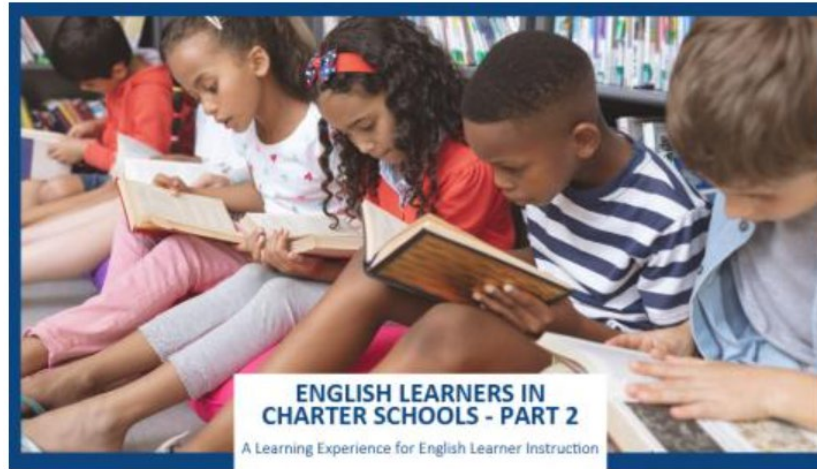
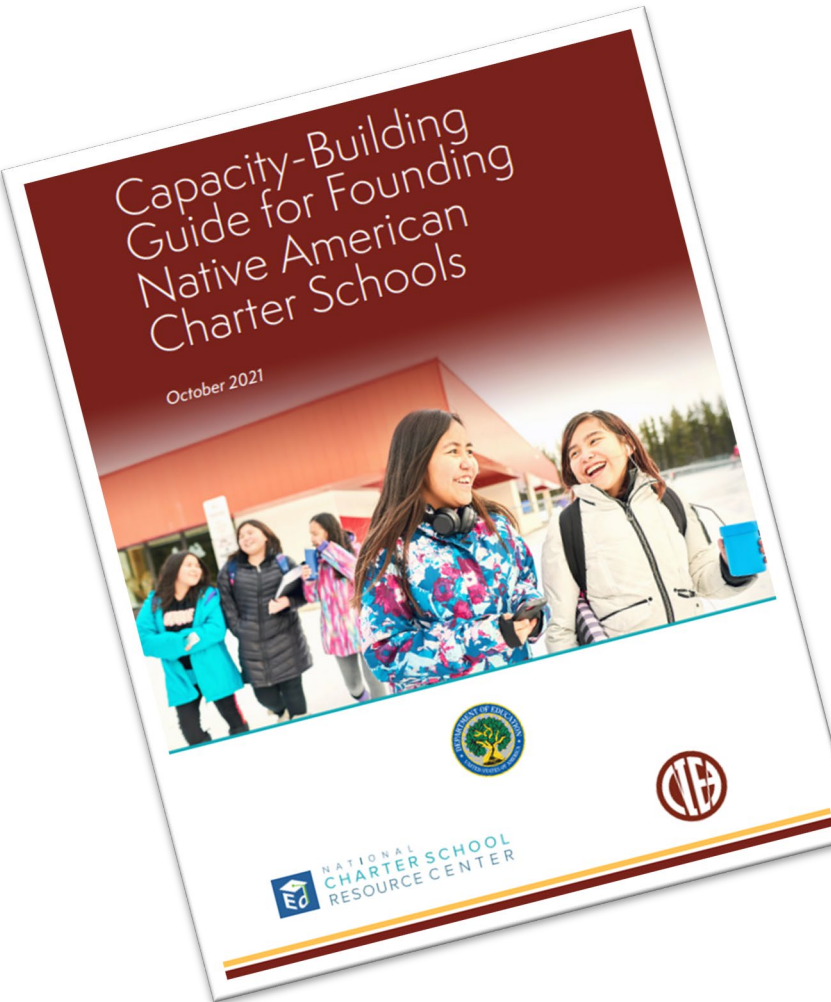


Adapting a Cardinal Rule of Finance: Five Strategies for Using One-Time Federal Funding on School Staffing

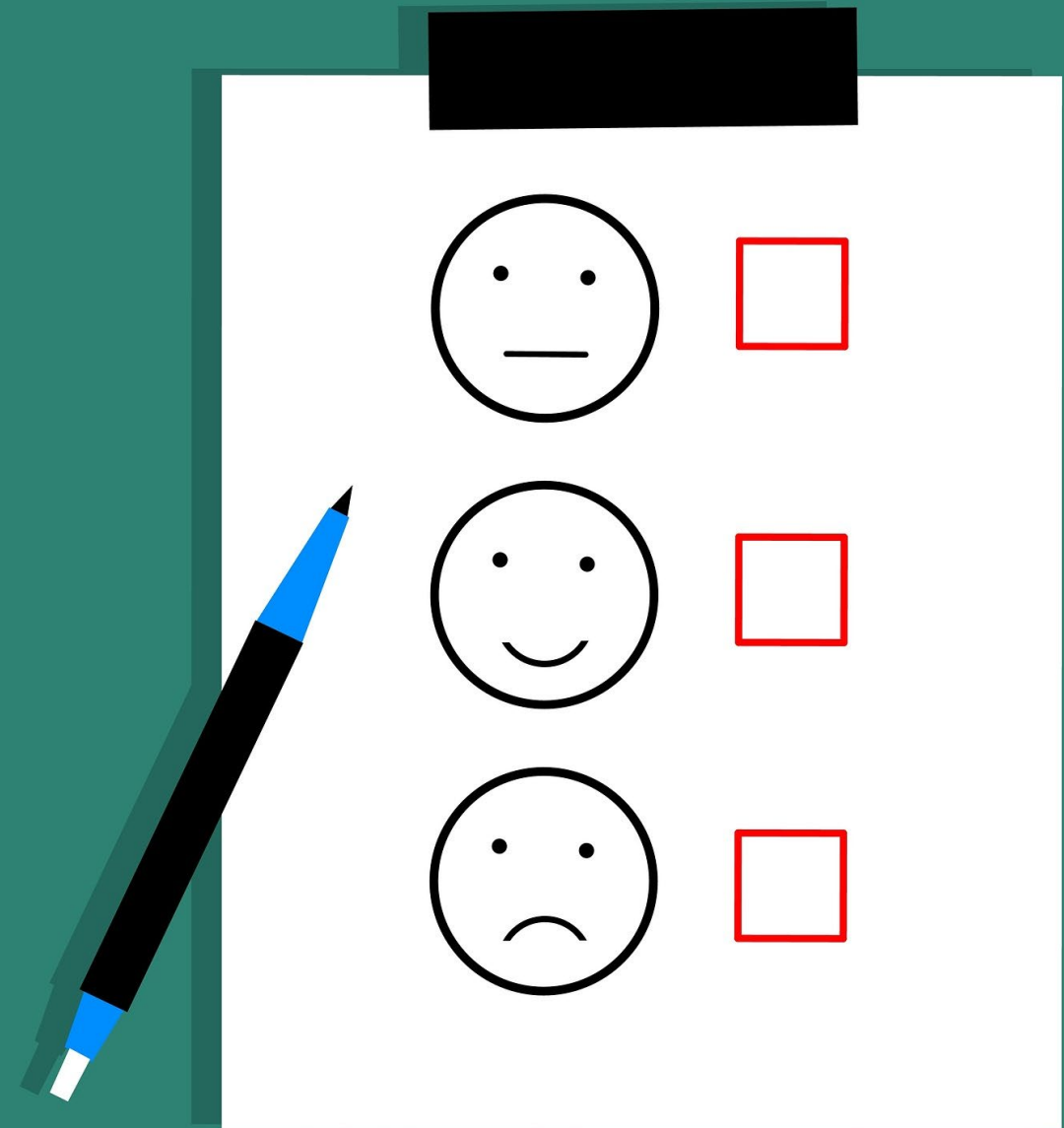


Managing Public Education Resources during the Coronavirus Crisis: Practical Tips and Considerations for School District Leaders. Crisis Response Resource

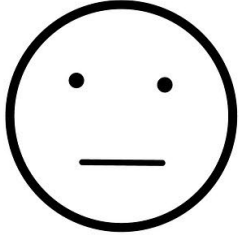


Recently Released NCSRC Virtual Events & Resources



Tell Us How We Did!



A feedback form on a white clipboard with a black clip at the top. The form contains three rows, each with a smiley face and a red checkbox. A black pen with a blue eraser and a blue tip is positioned diagonally to the left of the form. The background is a solid teal color.

	<input data-bbox="1989 329 2104 444" type="checkbox"/>
	<input data-bbox="1989 629 2104 743" type="checkbox"/>
	<input data-bbox="1989 923 2104 1038" type="checkbox"/>

How can you contact us?



charterschoolcenter.ed.gov



contact-us@charterschoolcenter.org



THANK YOU!

