

ESSER Funding Cliff Toolkit

Data-Driven Financial Decision Making for Post-ESSER Spending



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NC is a National Leader in Recovery

Superintendent Truitt created the Office of Learning Recovery and Acceleration in March 2021 to facilitate:

- **Prioritizing the research** needed to make evidence-based decisions at state and local levels to aid in recovery and accelerate learning for all students.
- **Partnering with PSUs** to bring needed solutions to long-standing challenges facing NC public education.
- **Serving as the central point of contact** for internal and external coordination of resources, collaboration, and communications.

[Main OLR Webpage](#) and [Research & Recovery Roundup Blog](#)

The Need

ESSER is an opportunity to take stock of investments to ensure that schools and districts continue to fund high-impact programs and interventions that are making a difference for students.

The Purpose

Help local leaders make decisions about what programs to continue or discontinue in the face of the upcoming expiration of federal funding to help schools with learning recovery post-pandemic.

The Audience

- 1.4M Children
- 2,500 Schools
- 100,000 educators
- \$11 Billion Budget



Development & Rollout



ESSER Funding Cliff Toolkit Overview

Step 1: Determine Budget Process & Timeline

Step 2: Collect Data and Evidence

Step 3: Determine Return on Investment

Step 4: Decision-Making

Step 5: Budgeting Process

Step 6: Communication



Office of Learning Recovery and Acceleration
ESSER Funding Cliff Toolkit
Data-Driven Financial Decision Making for Post-ESSER Spending

Step 1: Budget Process & Timeline



Community and Stakeholder Engagement: Collect input and engage around options for cutting or investing

Internal Budget Meetings: Work internally to gather data and conduct zero-based budgeting process

1st Board budget work session: Examine data and set priorities based upon what works

2nd Board budget session: Qualify and narrow options

Final Board Vote on 2024-25 Budget

County Commissioner Budget Proposal (if needed)

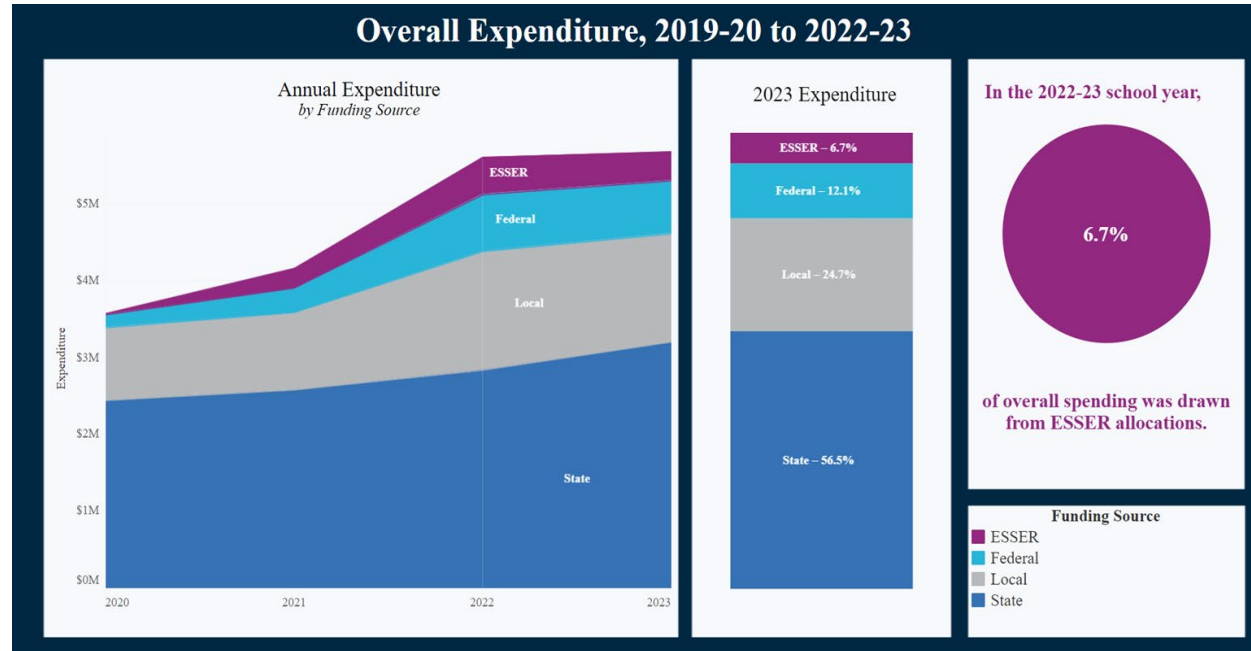
Budget Finalized

Notify Impacted Staff of any Changes (if needed)

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Step 2: Collect Data and Evidence

- Dashboard uses data from several sources to provide a visualization of ESSER spending for each PSU since 2020



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Step 2: Collect Data and Evidence

North Carolina Department of Public Instruction NC Recovery Analysis Dashboard

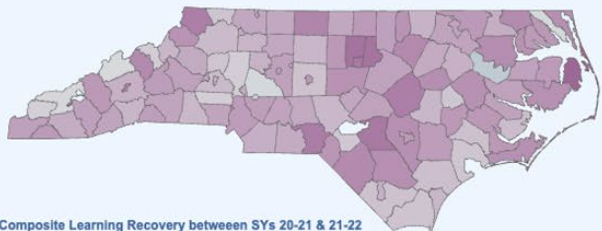
Average Effect Size by Assessment

Average Effect Size by Student Subgroups

District & Subgroup Comparison Chart

District & Subgroup Comparison Table

Choose a PSU from the map or list below:



Composite Learning Recovery between SYs 20-21 & 21-22

-0.04 0.31

Alamance-Burlington Schools

Alamance-Burlington Schools

Understanding Effect Sizes

NCDPI calculates student-level *academic progress* each year, a simple difference between a student's actual score and their predicted score (estimated by previous student-level test scores).

$$\text{Academic Progress} = \text{Actual Score (Spring 2022)} - \text{Predicted Score (Spring 2022)}$$

- If the difference is **negative**, the student **fell short of prepandemic expectations**.
- If the difference is approximately **zero**, the student **met prepandemic expectations**.
- If the difference is **positive**, the student **exceeded prepandemic expectations**.

To draw comparisons across school years and subject, the values of academic progress are aggregated, and converted into standardized values called **effect sizes**.

How to Interpret

Effect sizes are categorized according to absolute value:

Small: an effect size less than 0.05 in magnitude

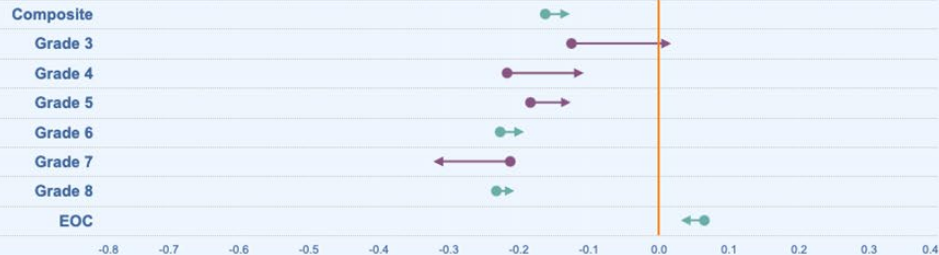
Medium: an effect size from 0.05 to 0.20 in magnitude

Large: an effect size greater than 0.20 in magnitude*

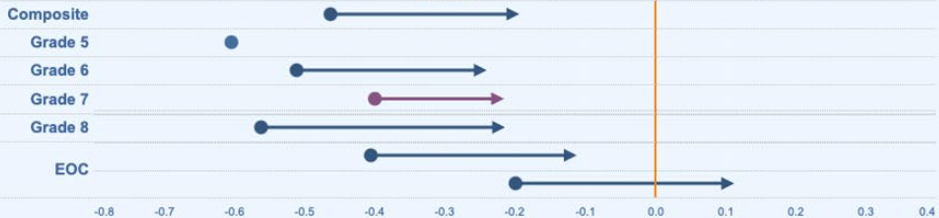
*Kraft MA. "Interpreting Effect Sizes of Education Interventions." *Educational Researcher*. 2020; 49 (4):241-253



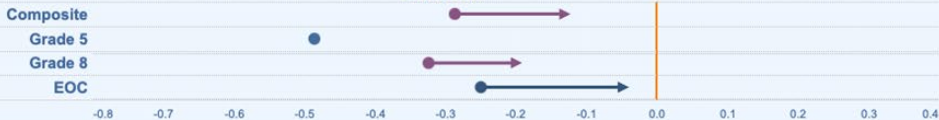
ELA



Math



Science



Step 2: Collect Data and Evidence

NC Ed-Relevant Dashboards

- Additional resource for PSU leaders to more comprehensively evaluate student outcomes

District/School/Charter Year over Year (YoY) Model

- Provides growth towards recovery for each district and charter school

NC Ed-Relevant Dashboards

- [NCDPI Accountability Dashboard *NEW*](#)
 - Tableau Dashboard that provides NC EOG and EOC Reading, Math, and Science Assessments results from 16-17 through 22-23. View results by state, region, district, and/or school.
- [NCDPI Cohort Graduation Rate](#)
 - Tableau Dashboard that provides percentages of 9th graders graduating in 4 or 5 years.
- [NCDPI Annual Public Report for Students with Disabilities](#)
 - Tableau Dashboard that provides visualization of required performance indicators related to the IDEA for the State Performance Plan and Annual Performance Report.
- [NCDPI EPP Performance Dashboard](#)
 - Tableau Dashboard that provides a comprehensive set of interactive data displays related to educator preparation in NC.
- [NCDPI FBS Allotment and Expenditure Data Visualization](#)
 - Tableau Dashboard that provides information about ESSER expenditures and allocations at the state and local levels.
- [NC School Report Cards](#)
 - Interactive website that allows users to view student performance and growth, school characteristics, student demographics, and more at the district and school levels.

Step 3: Determine Return on Investment



**Traditional ROI Formula:
Profit/Investment*100 = ROI**

Step 3: Determine Return on Investment

- Defining ROI in Education Overview
- Using ROI as a tool for evidence-based financial decision making

Traditional ROI Formula: Profit/Investment = ROI

$$\frac{(\text{Outcomes} * \text{IF}) * (\text{Number of Students} * \text{Special Populations Multiplier})}{\text{Total Cost}} \times 100 = \text{ROI}$$



Decision-Making

- Determine which programs should be enhanced, sustained, or sunsetted
- SWOT Analysis framework to support decision making process

Budget Process

- Based on decision-making process, districts must determine how they will fund programs.
- Zero-based budgeting process
 - Requires justification for expenditures
 - Effective in reducing budgets by 4-6%

Step 6: Communication

It is important for PSUs to message the end of ESSER, budget decision-making, and any changes to staffing and programs.

- Communications templates provided to support conversations with various stakeholder groups including parents, the general public, teachers, and students.



Image from Pixabay

Costs

- Cost-effective
- No additional costs required outside of personnel time
- Fully customizable based on district and/or school needs and goals



Image from Unsplash

Effectiveness

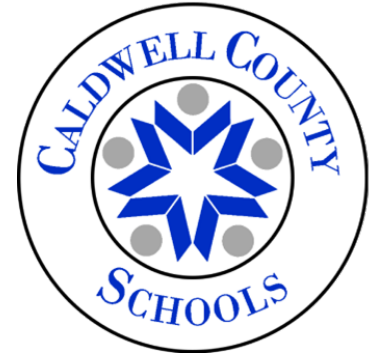
- Over 400 Educational Leaders Trained
- 88 Public School Units Trained
- **97%** of leaders trained indicated that the toolkit will help them make **better-informed, evidence-based decisions**.
- **98%** indicated that they planned to **use the toolkit** to prepare for the upcoming school year.

“I love the different tools that were shared. We plan to use these to make decisions on funding for different programs and resources”

Toolkit Usage

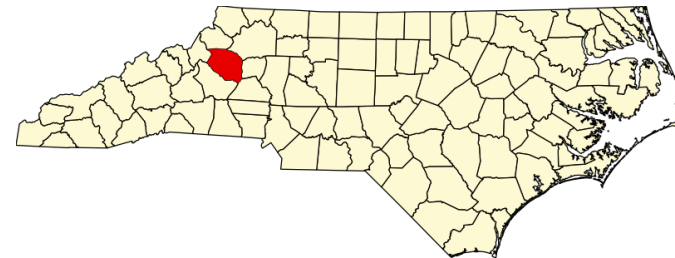
Caldwell County Schools

- All principals used the ROI tool to evaluate all federally funded programs in their schools
- ROI results were presented at school improvement team (SIT) meetings and budgetary decisions were made based on results



“Using this tool has been transformative. It has given our principals and our district the data we need to make changes and cut programs that we’ve had for a long time but that just weren’t making a difference for our students”

- *Jeni McNulty, Caldwell County Schools, Federal Programs Director*



Regional and National Audience

State-level Audience

- NC General Assembly- Special Committee on Educational Reform
- Office of State Budget and Management
- NC Association of County Commissioners
- NC School Board Association
- NC Research Practitioners Network

National Audience

- U.S. Department of Education
- National Comprehensive Center Network
- **SEA Support: Alabama + Ohio**
- ExcelinEd
- Council of Chief State School Officers (CCSSO)

Featured
In...

ABC, InFocus, EdNC, Institute of Education Sciences (IES)

Next Steps

- **ROI for Continuous Improvement Decisions - *New!***
 - ROI over time, cadence of review dependent on data availability.
 - You will apply this to the ROI framework rating yourselves on implementation and outcomes.
- Developing new toolkit targeted at continuous improvement and evidence-based financial decision making.
- Tailored Professional Learning
- Working with UNC Chapel Hill Faculty to design research study regarding implementation of toolkit



Governor Roy Cooper

*“Federal relief funds helped meet critical needs for students and schools recovering from the pandemic. With those funds coming to an end, **this toolkit helps education leaders make smart, strategic investment decisions to ensure learning recovery continues.**”*

NC State Superintendent Catherine Truitt

*“The **ROI tool is a game changer** because it allows our school and district leaders to approach their legislators with very specific asks that are backed by data and evidence. This ensures that our legislators are advocating for those initiatives in their districts that are truly working for the students and families they serve.”*



NC Senator Amy Galey

*“This NC-developed ROI tool is so important because it provides a **systematic way to examine connections between expenditures and student outcomes** to support a data-driven approach to investments and budgeting for local education leaders and elected officials.”*