MAKING THE MOST OF YOUR ESSER FUNDS:

HALF-TIME REFLECTIONS & REVISIONS

Join us to hear from two district financial leaders about how they (and others across the country) are engaging senior leadership in ESSER Halftime Reviews with an immediate focus on identifying key moves throughout the SY23-24 budget cycle that optimize this ESSER opportunity.

Our Presenters:
- Emily Parfit, Education Resource Strategies, Director (facilitator)
- Katie Sunseri, Charlotte-Mecklenburg Schools, Executive Director of State and Federal Programs
- Scott Thompson, Assistant Superintendent, Business & Support Services, Mesa Public Schools

TUESDAY, NOVEMBER 29 AT 3 P.M. ET
Essential Question

How can districts use ESSER funds to meet immediate needs and redesign toward a more student-centered, equity-focused, and future-driven approach?
AASA Learning Recovery & Redesign GUIDING PRINCIPLES

- Plant Seeds
- Center Equity
- Use & Build Knowledge
- Sustain Strategically
Today's Panelists

Dr. Katie Sunseri
Executive Director Federal Programs

Scott Thompson
Assistant Superintendent Business & Support Services

District Overview
- Received $494M in ESSER funds (~30% of annual budget)
- Total Enrollment: ~150k students
- Classroom FTE: ~10k

District Overview
- Received $246M in ESSER funds (~40% of annual budget)
- Total Enrollment: ~65k students
- Classroom FTE: ~3.5k
Education Resource Strategies (ERS) is a national non-profit that partners with district, school and state leaders to transform how they use resources (people, time, and money) to create strategic school systems that enable every school to prepare every child for tomorrow, no matter their race or income.
Learning Objectives for Today

- Top 3 things district leaders should be paying attention to and communicating in this moment:
  - Progress on implementation
  - Adjustments based on what’s working so far and changing context
  - Approach to strategically sustaining after ESSER
- How two systems began these conversations with their teams and where their work is at now
- The key moves system leaders can make in the SY23-24 budget cycle to optimize the ESSER opportunity
ESSER Timeline

Revenue by Source School Years ‘18-’26 ($M)
ILLUSTRATIVE*

- Local
- State
- Federal
- ESSER I (CARES)
- ESSER II (CRRSA)
- ESSER III (ARP)

Hard stop: all ESSER funds must be encumbered by Sept 2024

Distributed across the three years, ESSER is about 2x typical federal funding.

- Depends on federal policy
- Depends on state funding policy (largely driven by student enrollment)
- Depends on tax base

*Revenue amounts are illustrative.
National discussion on ESSER spending: Scrutiny over pace and strategy

**States Grill Districts on How They’ll Spend Their ESSER Money for Learning Recovery**

By Mark Lieberman. Published 05/26/22

**Expectations for ESSER: Pressure to show return on investments?**

By Kara Arundel. 06/14/22

**US School Districts Are Spending More as Stimulus Deadline Looms**

By Nic Querolo. Published 08/15/22

Source: Bloomberg, K-12 Dive, EdWeek
Did we make research-based decisions about how we would allocate our funds?

Did we implement our plans?

Did we do so in ways aligned to research-backed best practices?

Did we obtain the results we expected?

“Maslow’s Hierarchy” of communication for ESSER impact
How might we use this to develop a narrative arc for communicating ESSER progress?

We developed plans grounded in research with input from our community, that are designed to be effective, equitable, & sustainable.

We are moving quickly to implement our plans with fidelity and are setting up structures to evaluate our progress.

We are adjusting our plans based on changing needs & leading indicators of what's working.

We are on track to fully spend down our ESSER funds without creating a substantial cliff.

We are achieving improved outcomes for students.

At this point in the ESSER timeline, system leaders should be focused on communicating these messages to their stakeholders to demonstrate effective stewardship of ESSER funds.
ESSER Halftime Review

System and school leaders conducting an ESSER Halftime Review seek to understand what is working about their ESSER spending strategy and where efforts can be re-focused for sustainable impact on student learning and finances.

- Identify Student Needs
- Review Spend to Date
- Track Initiative Status

- Assess Efficacy
- Reflect on Equity
- Plan for Sustainability

- Determine Reprogramming
- Set up Continuous Improvement Systems
- Improve Collaboration

Source: ERS ESSER Halftime Review Guide
Emerging insights from “Halftime Reviews” in ~7 large, higher poverty districts

1. District spending is faster than publicly reported AND slower than anticipated, largely due to industry challenges such as labor shortages and supply change issues. High poverty districts have spent approximately one-third of their ESSER funds so far.

2. On average, districts are not yet spending more per pupil at schools with greater learning needs.

3. There is still room for districts to make an impact with their ESSER funds by implementing a continuous improvement approach to adapt their plans over the next few years.

4. The shorter the remaining window to spend, the more limited the options for fully sustainable spend.
What are key moves district leaders should make in this budget cycle to sustain accelerated learning and advance equity in the long-term?

1. Never too late to:
   a. Work to target investments in support of schools with the greatest learning needs
   b. Explore further differentiation of staffing and funding formulas in support of schools with the greatest learning needs

2. Specific challenges for this budget cycle:
   a. In support of sustained student learning, manage spending across years and funding sources
   b. Estimate ESSER revenue for FY24 based on spending rate in FY23 and multi-year plan
   c. Bring a multi-year (at least FY24 and FY25) and an all-funds lens to identify efficiencies

3. Advocate for additional state and federal funding and flexibility
ERS ESSER Halftime Review Tools

- Our new downloadable resource, "How to Approach an ESSER Halftime Review: Deciding what investments to start, stop, and scale" provides the framing for productive, meaningful leadership conversations.

  DOWNLOAD “HOW TO APPROACH AN ESSER HALFTIME REVIEW”

- This Excel document is available for use as inspiration or as a customizable starting point for district leaders seeking to step back and reflect on their ESSER investment strategy and identify adaptations to maximize its impact moving forward.

  VIEW OUR EXAMPLE SELF-ASSESSMENT TRACKER
Help Us Meet Your Authentic Needs

What’s working?
What’s getting in the way?
What would help?

tinyurl.com/recovery-redesign-feedback
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