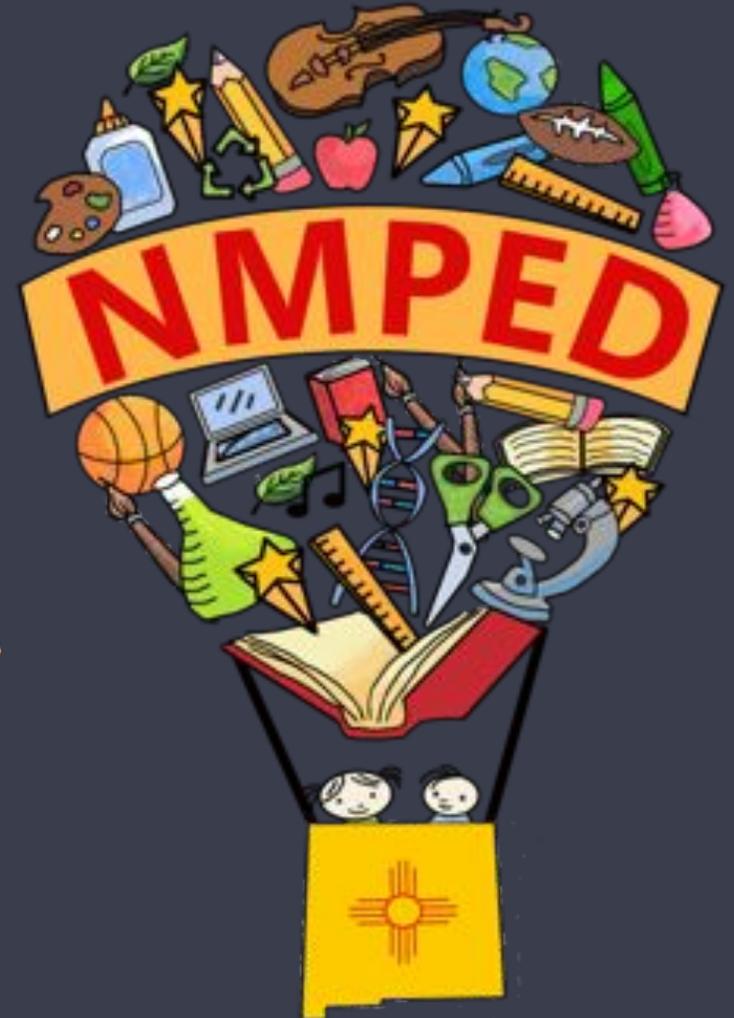


# Welcome

## Planning for the Equitable, Sustainable Allocation of Resources: Managing the Forthcoming Fiscal Cliff

*February 9, 2022*

*Investing for tomorrow, delivering today.*



# LEA Workshop Series: Strategic Planning & Use of ESSER Funds

*NM PED sponsored series in partnership with Region 13 Comprehensive Center at WestEd*

**February 2022 Session**

**Building a Sustained Educator Workforce Pipeline (February 23rd)**

# LEA Workshop Series: Strategic Planning & Use of ESSER Funds

*NM PED sponsored series in partnership with Region 13 Comprehensive Center at WestEd*

## *Today's Session*

***Objective:** Build the knowledge and mindset of LEA leaders to achieve program sustainability, ongoing impact, the equitable allocation of resources, and related technical reporting*

### ***Agenda:***

- > Presentations by Finance and Operations, NM PED, and WestEd*
- > Small group breakout session to discuss and share ideas*
- > Closing for whole group share out and final comments*

# Warm-up

## What does it mean to you when something is of value?

- monetary worth of something (market price)
- fair return or equivalent in goods, services or money for something exchanged
- relative worth, utility or importance
- something (such as a principle or quality) intrinsically valuable or desirable



# AGENDA

- Sustainability in the public education context
- Balancing (1) short-term investments to accelerate learning and address student well-being and (2) long-term structural changes to the education system
- Three Strategies
  - > Segmenting or organizing investments
  - > Prioritize investments with long-term returns on student outcomes and future cost savings
  - > Modeling investments for the next few years
- Techniques of blending and braiding
- Applying our knowledge
- Breakout discussion / Q&A

# Sustainability in a public education context



“Budgeting is the manifestation of an organization’s strategy: whether they are the result of thoughtful planning; the inertia of long years of doing approximately the same thing; or competing political forces that result in organized borrowing with others.”

– *Lee, Johnson, and Joyce, 2004*

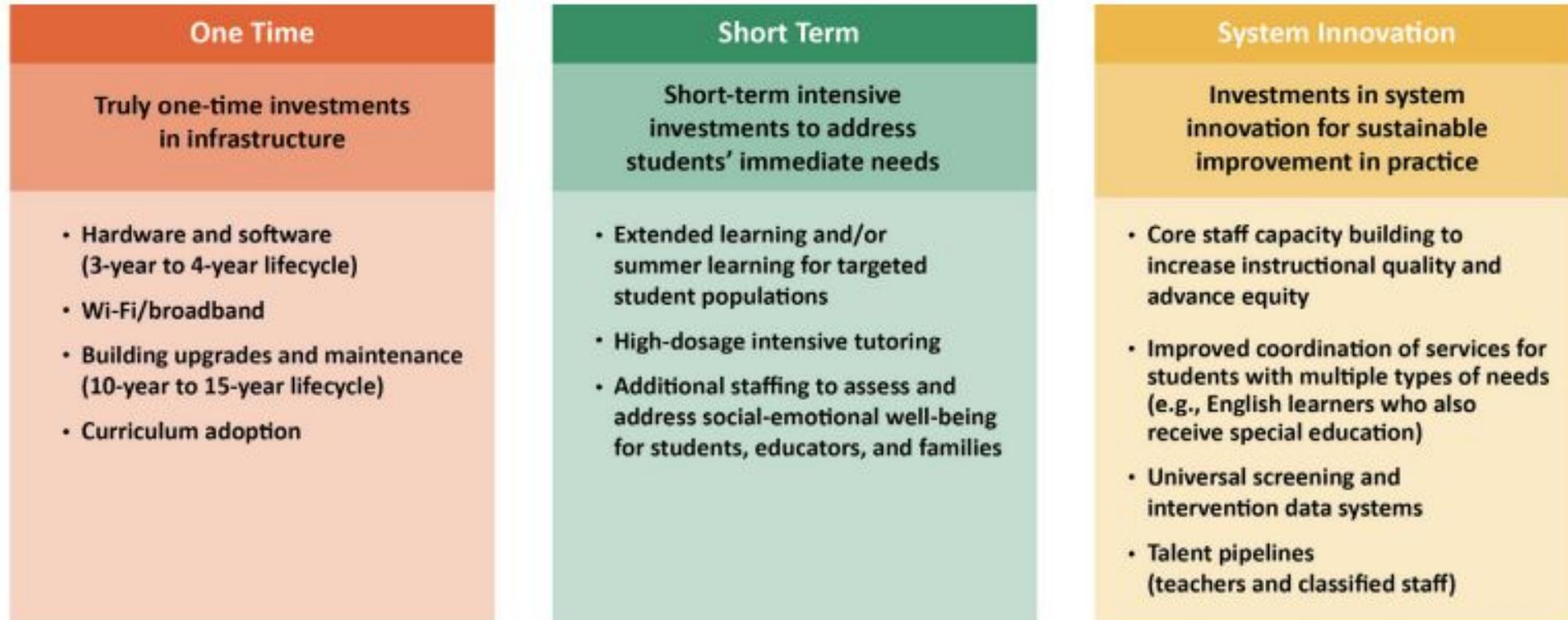


# Hurdles to Sustainability in Public Education's Context

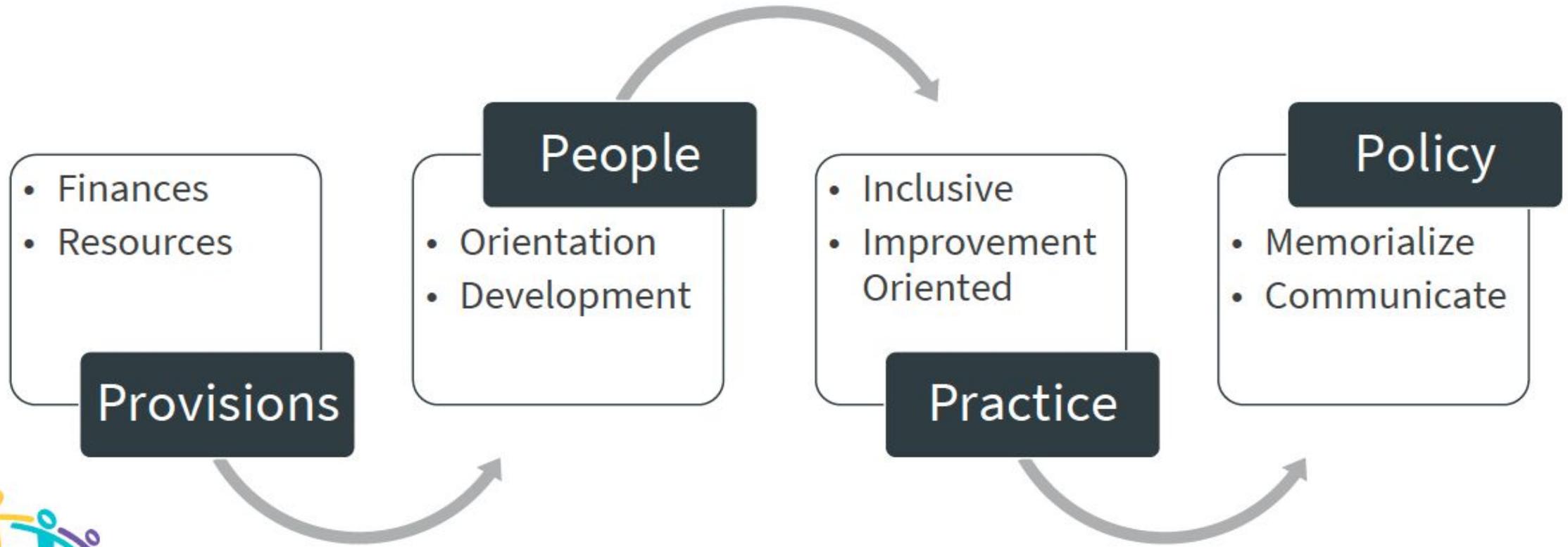
- ***The pie is fixed:*** There is some but often not enough
- ***History is a powerful guardrail:*** Some things are a given, others are not
- ***Siloes and fragmentation:*** Incrementalism leads to preservation
- ***Wrong pocket problem:*** One agency responsibility, another's cost

# Segmenting Fund Use: Three Types of Investments

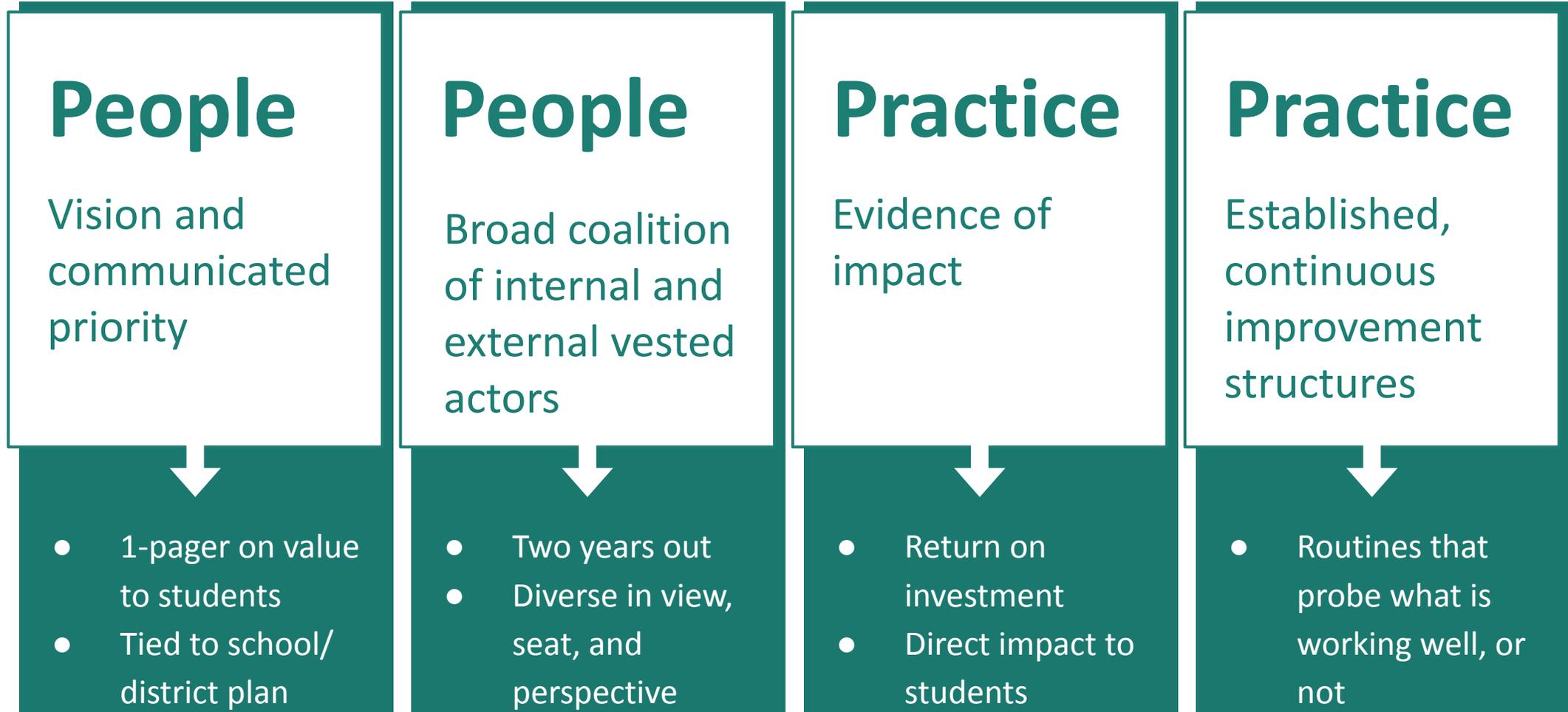
Figure 1: Segmenting Fund Use Into Three Types of Investments



# 4 P's toward Sustainability



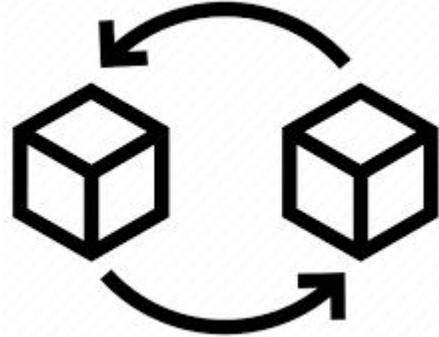
# Underlining Necessary Conditions



# Funding Pathways to Sustainability



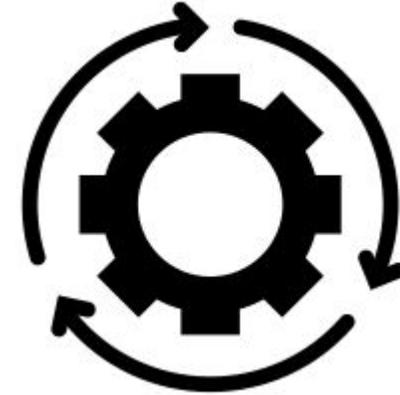
Increase ongoing revenue beyond prior year levels



Flat revenue, divest other strategies to invest in others



Identify and secure other, non-school resources



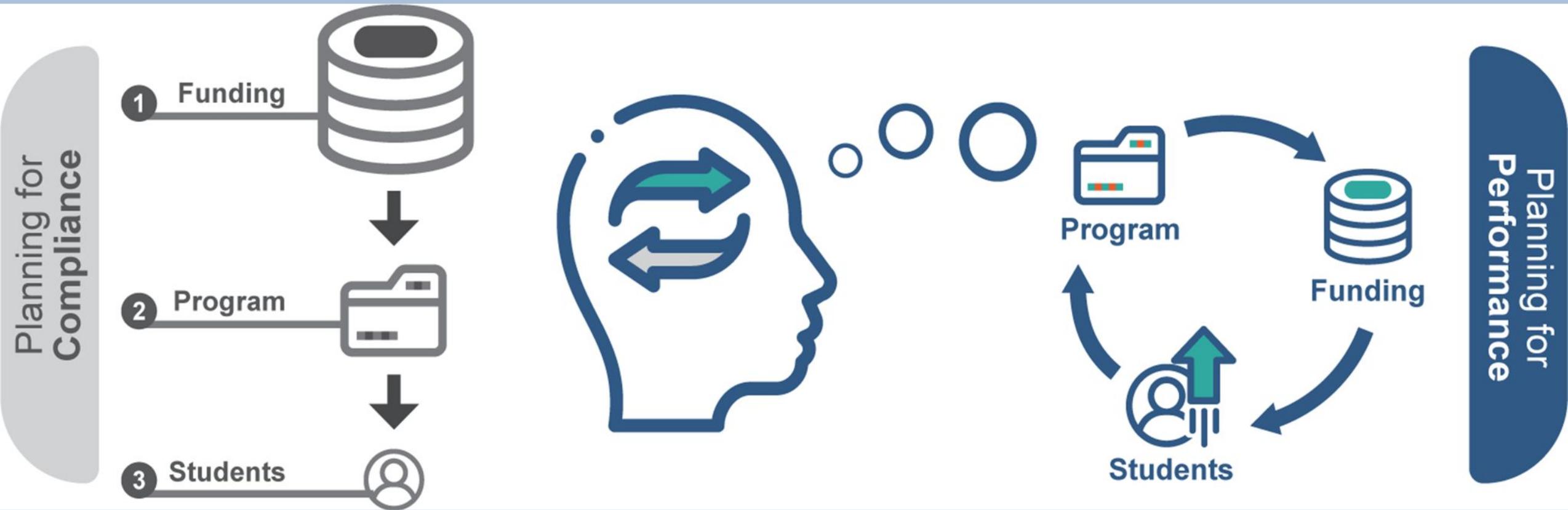
Build capacity among existing staff and resources

# Pause and Reflect

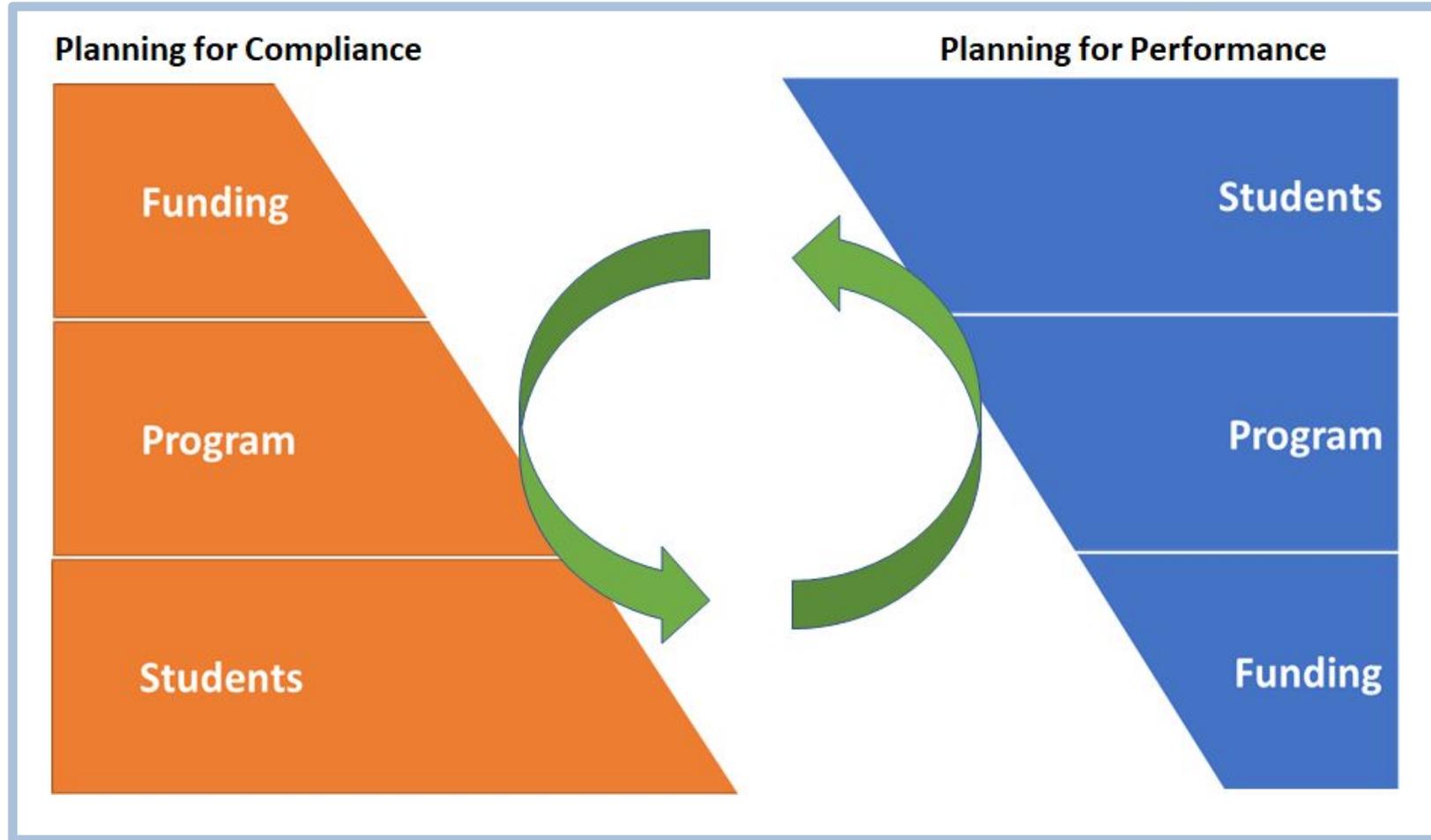
**Based on this information, what is one hurdle on your district's path to sustainability?**

# Technique of blending and braiding funds

# Re-orienting the planning mindset



# Re-orienting the planning mindset



# What do braiding and blending mean?

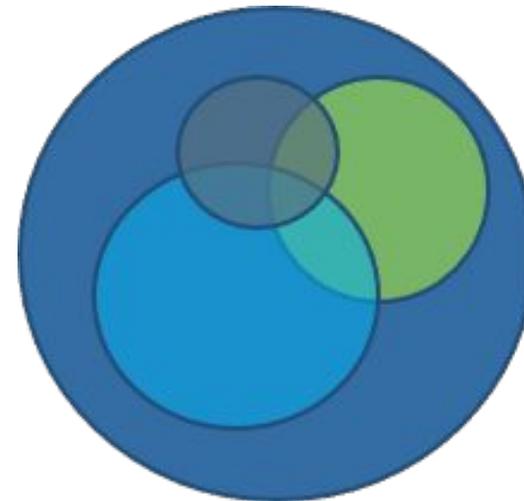
## Braiding Funds

- **Coordinated** to meet one purpose
- Individual funding stream maintains identity for eligibility and reporting



## Blending Funds

- **Consolidated** into one funding stream to meet one purpose
- Individual funding stream loses its identity



# Which funds may be braided and blended?

## Braiding Funding

- Unrestricted state and local funds
- Restricted state funds
- Federal funds
  - ESEA Titles I, II, III, and IV
  - IDEA including IDEA CEIS
  - CARES Act GEER and ESSER Funds

## Blending Funding

- Unrestricted state and local funds
- Some restricted state funds (depends on state rule)
- Federal funds
  - ESEA Titles I, II, III, and IV
  - IDEA including IDEA CEIS

# Braided Funding Streams



Braided together, funds support a planned strategy

## Universal Funds

Funds that pay for the **basic services** a program is already receiving to operate.

**Cannot be supplanted.**

## Supplemental Funds

Funds that pay for the **comprehensive services** necessary to strengthen the program and can benefit ALL children, regardless of eligibility.

## Specialized Funds

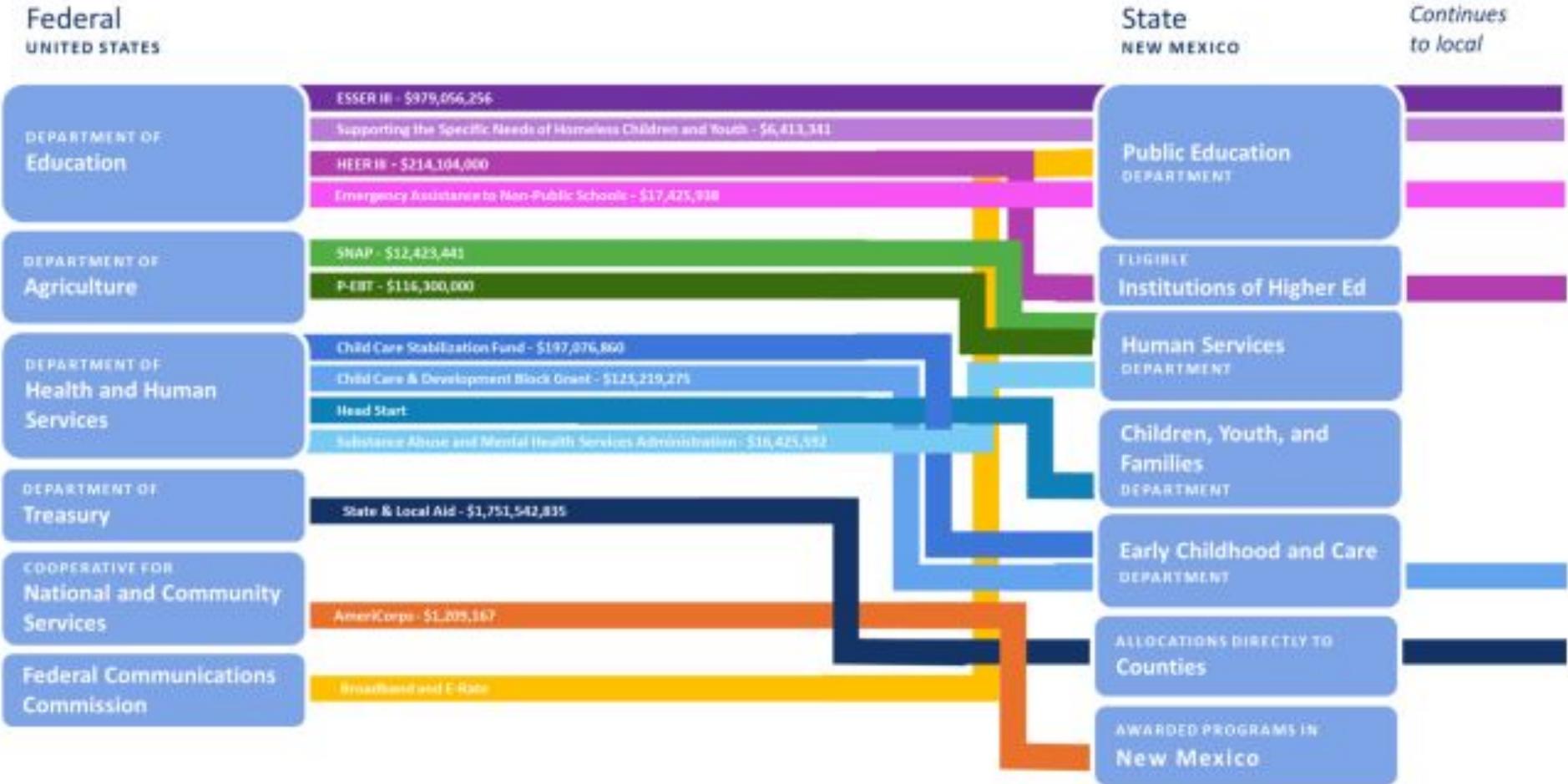
Funds that pay for **eligible services** that increase or expand access to programs and services.

# Pause and Reflect

**Catalog in chat all the sources of funding that currently support students in your district.**

For example: Title I, SEG

# American Rescue Plan: New Mexico Funding Profile



# What does blending look like?

## Example: Community Schools Coordinator

- \* Coordinator serves an elementary school of 500 students with a high population of students from a low income background.
- \* School context
  - High degree of trauma from family and community
  - High proportion of students are chronically absent
  - Not a lot of experiences for learnings outside of the classroom setting
  - Desire to extend learning from regular school day
- \* School funded from state and federal dollars

### Funds available to support the community schools coordinator:

- Title I Part A
- Title IV Part A
- ESSER II, ESSER III\*\*\*
- SEG
- Community Schools Grant\*\*\*
- Partner funding sources
  - City, county
  - Non-profit organization

# Poll

## Are these examples of blending and braiding familiar to you?

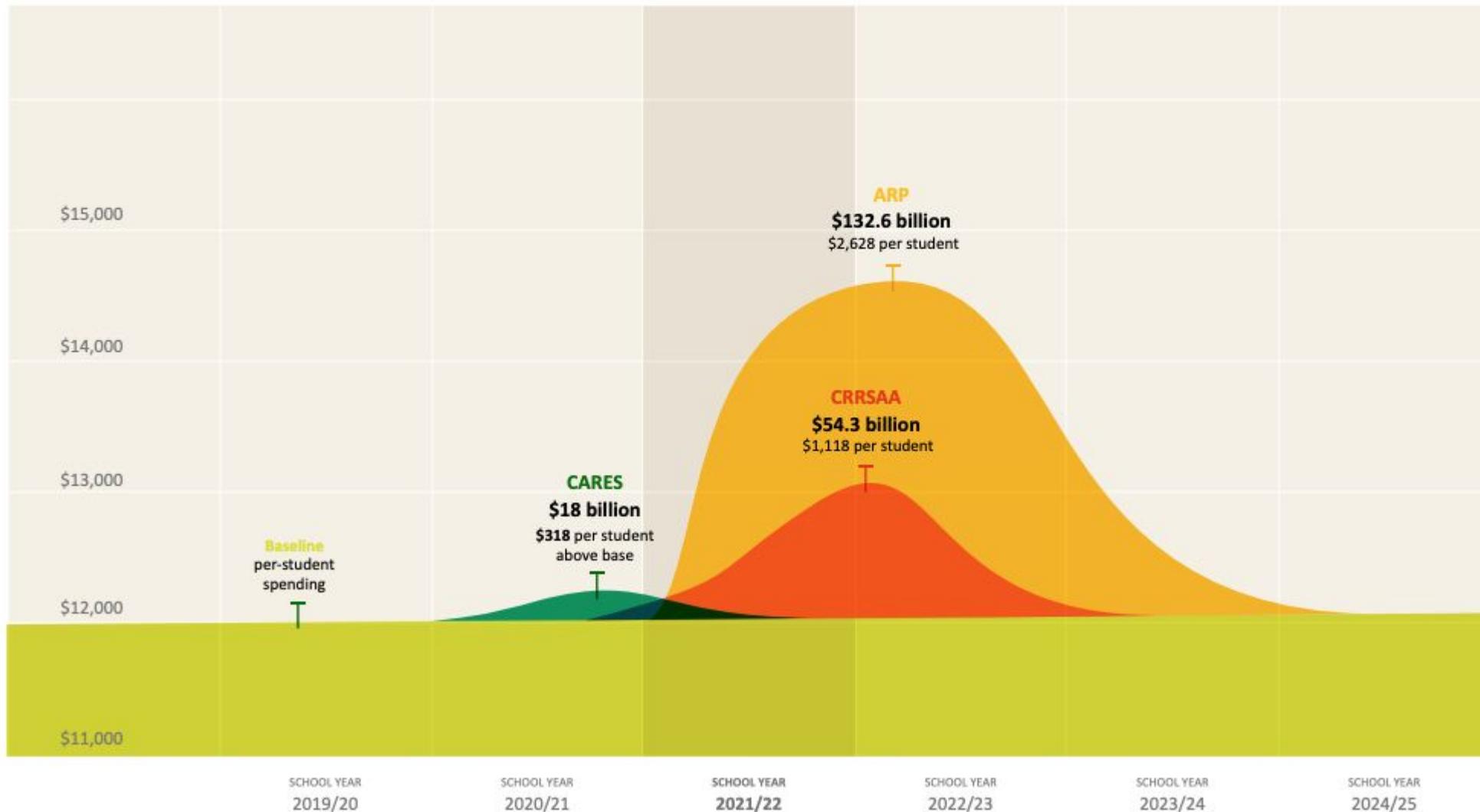
1. Yes, my school or district uses these strategies frequently.
2. Yes, my school or district uses these strategies, but not for federal relief aid funds.
3. My school or district sometimes uses these strategies, but are not confident in their implementation.
4. No, my school or district rarely braids or blends funds.

# Applying our knowledge



# Ramp Up and Ramp Down

Figure 3. Model of How a District Might Ramp Up, Then Ramp Down Its Investments in Education Using Federal Relief Aid



# Planning and Funding a Community Schools Coordinator

**Assumptions:** Position costs \$150,000 per year; community schools grant will only cover position through FY23; district has some resources to cover the position in future years

Funding by Year	One-time	2022-23	2023-24	2024-25
<i>Community Schools Grant</i>	X	\$150,000	\$0	\$0
<i>Title 1, Part A</i>			\$50,000	\$80,000
<i>ESSER III</i>	X		\$50,000	\$0
<i>SEG</i>			\$10,000	\$10,000
<i>City/County budget allocation</i>			\$40,000	\$30,000
<i>Local non-profit organization</i>				\$30,000

# Breakout discussion

# Breakout Prompts

- What techniques introduced today can you apply in your FY23 budget planning process?
- What else would be helpful in the application of these strategies in your FY23 budget planning process?
- What action will you take based on the information presented today?

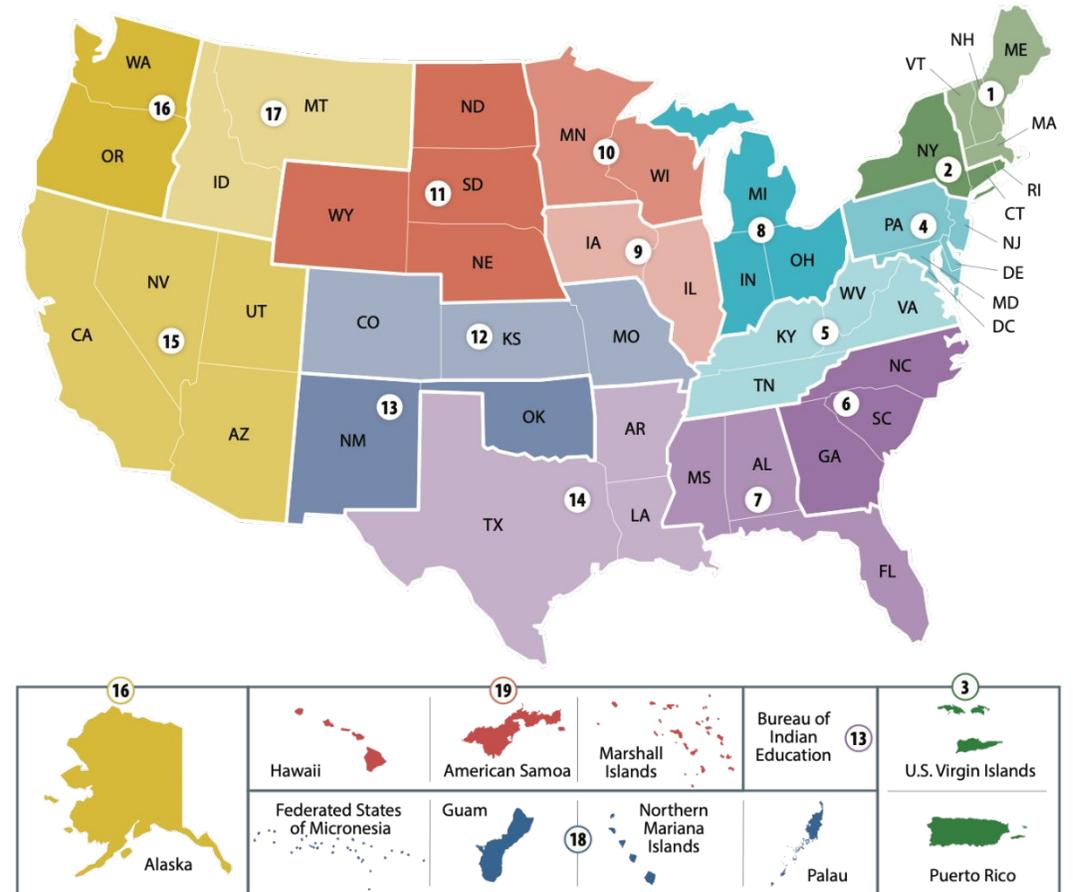
# Thank you!



# Comprehensive Centers Program (2019–2024)

➤ The Comprehensive Centers Program is a federally funded network of technical assistance centers comprised of 19 regional centers serving clusters of states and one **national** center providing universal and targeted multi-state support to address common high-leverage problems among states.

## CCNetwork Regional Centers



This presentation is in the public domain. While permission to reprint is not necessary, publication should be cited. The presentation is prepared by the Region 13 Comprehensive Center under Award # S283B190031 for the Office of Program and Grantee Support Services (PGSS) within the Office of Elementary and Secondary Education (OESE) of the U.S. Department of Education and is administered by WestEd. The content of the presentation does not necessarily reflect the views or policies of the PGSS or OESE or the U.S. Department of Education nor does mention of trade names, commercial products, or organizations imply endorsement by the U.S. Government. © 2020 WestEd.

