



ESSA: Making Lemonade

MASA / MOSPRA Spring Conference

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March 28, 2019



Topics of Conversation

- ▶ ESSA Overview
- ▶ How is it different from NCLB?
- ▶ Primary goals for Curriculum
- ▶ Primary goals for HR
- ▶ Primary goals for Finance
- ▶ Lemonade

What is the Every Student Succeeds Act (ESSA)?

- ▶ MANDATE FOR FY2019

- ▶ Excerpt from the law:

Federal law passed in 2015 to replace No Child Left Behind - The Financial Transparency Component requires that beginning with the 2018-2019 School Year

“(C) MINIMUM REQUIREMENTS.—Each State report card required under this subsection shall include the following information:

...

(x) The per-pupil expenditures of Federal, State, and local funds, including actual personnel expenditures and actual non-personnel expenditures of Federal, State, and local funds, disaggregated by source of funds, for each local educational agency and each school in the State for the preceding fiscal year.”

- ▶ Source: S.1177 – 114th Congress.

New Mandate = New Opportunity



EDUCATION WEEK

States Confront New Mandate on School-Spending Transparency

By Daarel Burnette II

February 27, 2018

A tricky financial-transparency requirement in the **Every Student Succeeds Act** has cranked up tensions among state politicians, school district administrators, and civil rights activists over public understanding of how districts divvy up their money among schools.

ESSA requires districts to break out school-level spending by December 2019—a first-time federal requirement. It's a level of detail unknown even to most district superintendents.

Various interest groups are split over whether such items as transportation, technology, special education, and pre-K—some of the biggest drivers of the rise in school spending—should be categorized as regular school costs, or as extraordinary costs or overhead.

Civil rights activists, meanwhile, expect that the reporting of school-level-spending amounts will reveal to the public where districts' most-experienced and highest-paid teachers work, if those data are presented in a coherent and comparable way.

But state education departments are realizing that it's a daunting task to come up with school-by-school data using districts' sometimes-antiquated finance systems.

Why is ESSA important?

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NEW E-BOOK FROM EDUCATION WEEK PRESS

INSIDE THE EVERY STUDENT SUCCEEDS ACT
Education Week gets to the heart of a law set to reshape the education policy landscape for years to come.

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COMMENTARY

District Spending Is About to Get a Lot More Transparent. Are You Ready?



—Jonathan Bouw for Education Week

Why ESSA's new fiscal transparency requirement really matters

By David A. DeSchryver & Noelle Ellerson Ng

August 24, 2018

It's time for superintendents to tackle a challenging conversation about how they allocate their limited financial resources—and how those decisions align with the core values of public education. The Every Student Succeeds Act's fiscal transparency reporting requirement is a sleeper issue that will demand more of district leaders than just a change in how they communicate policy decisions with their communities. It will also prompt both school and district leaders to figure out how they manage productivity.

Reader, this is a big deal.”

No Child Left Behind (NCLB)	Every Student Succeeds Act (ESSA)
One size fits all plan developed by the US DOE for all states	Individualized plans developed by each state
Mandated labels for the lowest performing schools (priority and focus)	No labels for lowest performing schools
School performance primarily measured by math and ELA test scores	School performance measured by test scores, achievement, growth, ELL progress, graduation rate, school quality, and student success
State provided support directly to schools	States provides support to districts, which provide support to schools
Stakeholder engagement not required	Requires meaningful stakeholder engagement (Transparency)**
4-year graduation rate used to determine school success	4-year AND 5-year graduation rate used to determine school success
Focused on achieving proficiency	Focuses on achievement and growth for all students
No formal financial reporting requirements	FORMAL financial reporting requirements**

Primary Curriculum Goals of ESSA

K-8 Schools:

3rd grade students reading at/above grade level.

K-8 Schools:

5th grade students meet or exceed expectations in math

High School:

9th grade students are on track to graduate with cohort.

High School:

Students graduate from high school ready for college and career.

ESSA: Curriculum & Human Resources

▶ Equity Reports

- ▶ Similar to comprehensive school improvement plans (MSIP) plans

- ▶ <https://dese.mo.gov/sites/default/files/LEA-School-Improvement-Guide-2019.pdf>

▶ Staffing

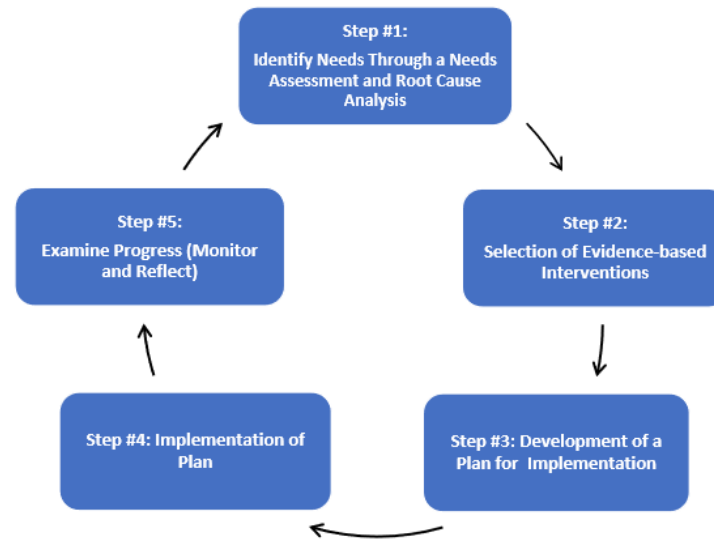
- ▶ Inexperienced
 - ▶ Out of Certification
 - ▶ Ineffective
 - ▶ Retention

- ▶ Does your plan best allocate your staffing to improve student outcomes?

- ▶ MO-DESE will monitor and publicly report on the degree to which low-income and minority children enrolled in schools assisted under Title I, Part A are served at disproportionate rates by ineffective, out-of-field, or inexperienced teachers and the progress toward reducing those rates to negligible levels at the following URL address on the MO-DESE site:

- ▶ <https://apps.dese.mo.gov/MCDS/home.aspx?categoryid=14&view=2>

- ▶ Identified Title I schools submit strategies for addressing their disproportionate rates of inexperienced, out-of-field and ineffective teachers in order to reduce their percentage to that of non-Title I schools. Descriptions of strategies will include how funding, particularly Title IIA funds, will be used to reduce disproportionate rates. Descriptions of strategies are submitted to the SEA each year through the Consolidated Plan. Disproportionate rates will be calculated each year to monitor the progress of each identified school.



ESSA brings together strategic planning, staffing, and the budget process

In many districts...

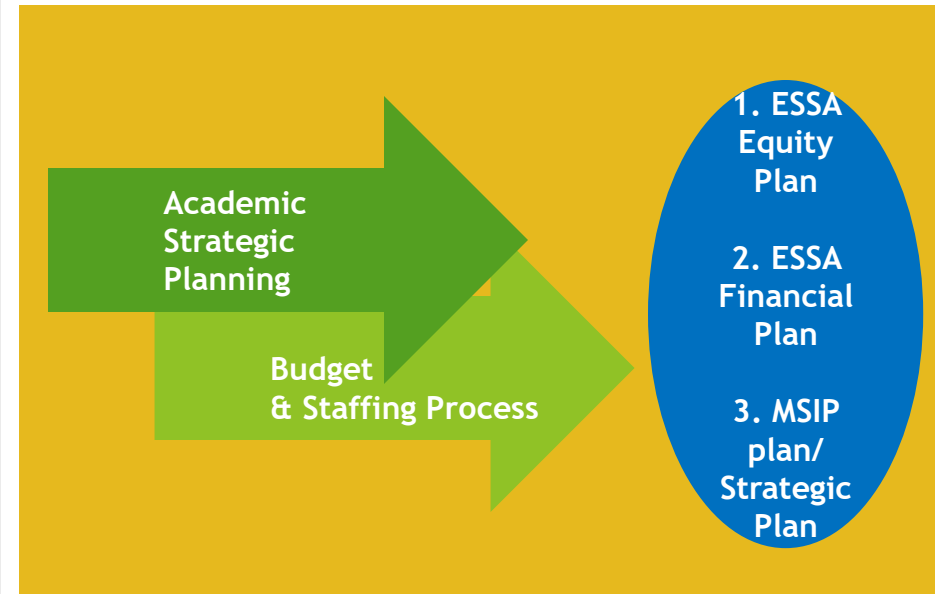
... strategic planning, staffing and budget processes happen in parallel tracks that don't intersect:



When these processes happen in isolation, a district is at risk for creating a strategic plan that cannot be funded and a budget that has no strategic basis

New ESSA Approach...

... curriculum planning, staffing and the budgeting process are merged to create a process for strategic use of resources in the district:



Merging these processes allows for greater alignment of district strategy and resources, and allows the district to balance financial decisions as tradeoffs for increasing strategic investments in students

ESSA's fiscal transparency requirement raises both technical and strategic questions:



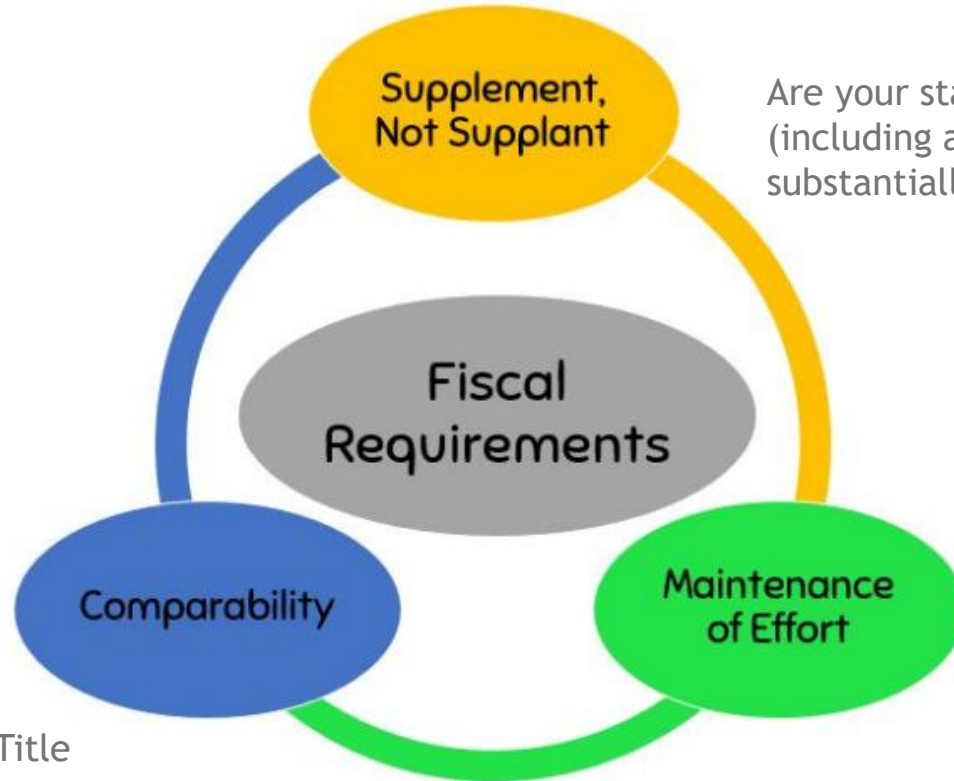
Technical Questions (mandate):

- ▶ What funds' expenditures should be excluded from your dollar per pupil calculation?
- ▶ How should you treat spending at schools that are reported on central budgets?

Strategic Questions (spirit):

- What drives funding variation across schools in your district?
- How are other types of resources distributed across schools and students?
- How do resources at schools shape the student experience?

New ESSA Emphasis on Fiscal Information



Are your state & local expenditures (including allocated central costs) substantially similar at all schools?

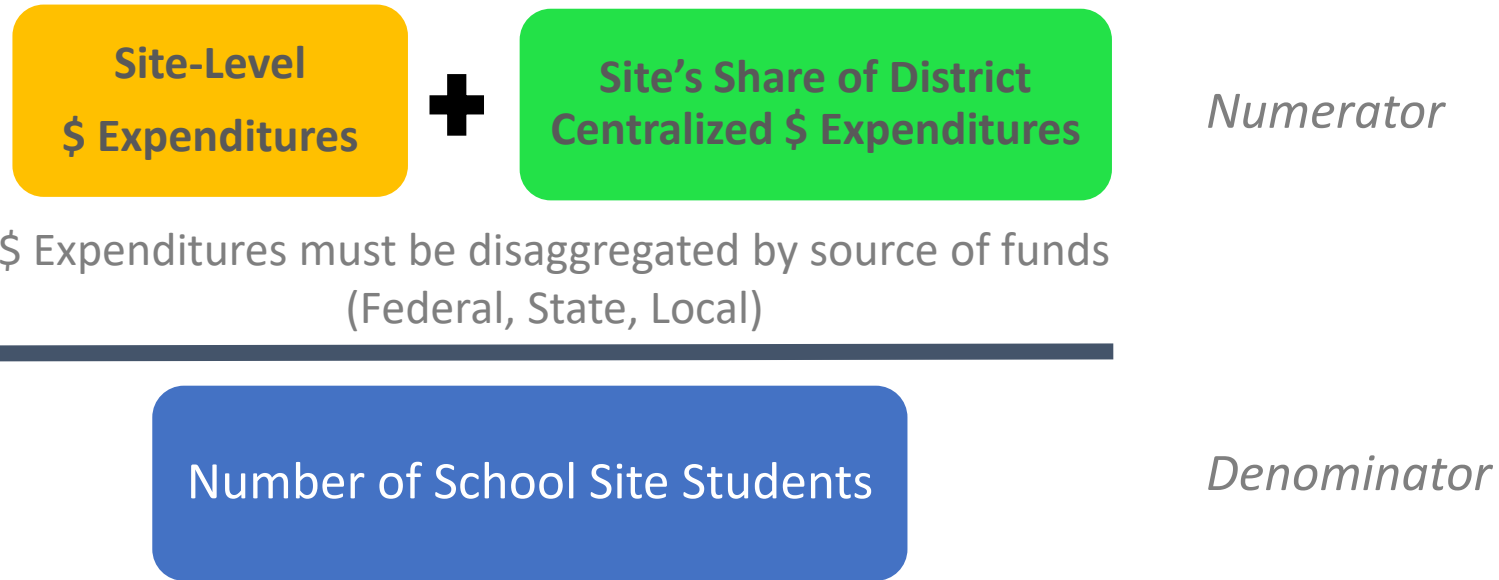
Are your teaching ratios similar at Title and Non-Title Schools?

Are you spending at least 90% of FY18?

<https://www.region10.org/programs/title-i-part-a/application-compliance/>

The Reporting Framework...

Per-Pupil Expenditures for each school:



District-level per-pupil metric

Dollars
Pupils

Numerator must include administration, instruction, instructional support, student support services, transportation, operations, fixed charges, preschool, expenditures to cover deficits for food service or activities, and exclude capital, debt service, and community services.

Denominator must be the district's pupil count on or about October 1.

Early Exploration of Results / Preview using FY18

		Site-Level Per-Pupil Expenditures			District Centralized Per-Pupil Expenditures			Total Per-Pupil Expenditures				
Sites	Enrollment	Federal	State and Local	Subtotal	Federal	State and Local	Subtotal	Federal	State and Local	Total	Exclusions	Total Expenditures
001 Wylie High School	2,626	\$ 103	\$ 5,787	\$ 5,889	\$ 214	\$ 3,417	\$ 3,632	\$ 317	\$ 9,204	\$ 9,521		
003 Wylie East High Sc	1,963	\$ 158	\$ 6,506	\$ 6,664	\$ 214	\$ 3,417	\$ 3,632	\$ 372	\$ 9,924	\$ 10,296		
004 Achieve Academy	138	\$ 245	\$ 14,208	\$ 14,454	\$ 214	\$ 3,417	\$ 3,632	\$ 459	\$ 17,626	\$ 18,085		
041 Burnett Jr High	808	\$ 131	\$ 6,129	\$ 6,260	\$ 214	\$ 3,417	\$ 3,632	\$ 345	\$ 9,546	\$ 9,891		
042 Harrison Intermed	771	\$ 134	\$ 5,578	\$ 5,711	\$ 214	\$ 3,417	\$ 3,632	\$ 348	\$ 8,995	\$ 9,343		
043 Mcmillan Jr High	887	\$ 146	\$ 5,810	\$ 5,956	\$ 214	\$ 3,417	\$ 3,632	\$ 360	\$ 9,227	\$ 9,588		
044 Davis Intermediate	829	\$ 119	\$ 5,695	\$ 5,814	\$ 214	\$ 3,417	\$ 3,632	\$ 333	\$ 9,112	\$ 9,445		
045 Cooper Jr High	924	\$ 126	\$ 5,460	\$ 5,586	\$ 214	\$ 3,417	\$ 3,632	\$ 340	\$ 8,877	\$ 9,217		
046 Draper Interemedi	976	\$ 121	\$ 6,171	\$ 6,292	\$ 214	\$ 3,417	\$ 3,632	\$ 335	\$ 9,588	\$ 9,923		
101 Hartman Elementa	520	\$ 146	\$ 7,420	\$ 7,566	\$ 214	\$ 3,417	\$ 3,632	\$ 360	\$ 10,838	\$ 11,198		
102 Birmingham Eleme	530	\$ 161	\$ 6,465	\$ 6,627	\$ 214	\$ 3,417	\$ 3,632	\$ 375	\$ 9,883	\$ 10,258		
103 Akin Elementary	465	\$ 179	\$ 7,023	\$ 7,203	\$ 214	\$ 3,417	\$ 3,632	\$ 393	\$ 10,441	\$ 10,834		
104 Dodd Elementary	566	\$ 139	\$ 6,283	\$ 6,422	\$ 214	\$ 3,417	\$ 3,632	\$ 353	\$ 9,701	\$ 10,054		
105 Groves Elementar	566	\$ 152	\$ 6,319	\$ 6,471	\$ 214	\$ 3,417	\$ 3,632	\$ 366	\$ 9,737	\$ 10,102		
106 Cox Elementary	666	\$ 121	\$ 5,896	\$ 6,017	\$ 214	\$ 3,417	\$ 3,632	\$ 335	\$ 9,314	\$ 9,649		
107 Tibbals Elementar	655	\$ 117	\$ 6,181	\$ 6,298	\$ 214	\$ 3,417	\$ 3,632	\$ 331	\$ 9,599	\$ 9,929		
108 Rita Smith Elemen	514	\$ 155	\$ 6,137	\$ 6,292	\$ 214	\$ 3,417	\$ 3,632	\$ 369	\$ 9,555	\$ 9,923		
109 Don Whitt Elemen	658	\$ 125	\$ 6,151	\$ 6,276	\$ 214	\$ 3,417	\$ 3,632	\$ 339	\$ 9,569	\$ 9,908		
110 Watkins Elementa	648	\$ 138	\$ 5,645	\$ 5,783	\$ 214	\$ 3,417	\$ 3,632	\$ 352	\$ 9,063	\$ 9,415		
111 George W Bush El	728	\$ 110	\$ 5,759	\$ 5,869	\$ 214	\$ 3,417	\$ 3,632	\$ 324	\$ 9,176	\$ 9,500		
699 Summer School	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
Totals:	16,438	\$ 133	\$ 6,134	\$ 6,267	\$ 214	\$ 3,417	\$ 3,632	\$ 347	\$ 9,552	\$ 9,899	\$ -	\$ 162,711,672

Early Exploration of Results...

For the First Time: Per Pupil Expenditures
According to School (First Draft)

	Enrollment	Expense per Pupil
Washington Elem	638	\$9,960
Jefferson Elem	705	\$6,754
Conant MS	941	\$8,185
Ginsburg High	1157	\$9,882
Hoffman Estates	173	\$12,526
North Campus*	42	\$18,645
Dodds Ed Center*	103	\$28,063

Go Ahead: Tell The Story From This Chart

Typical Drivers of School Spending Variation

Student Need	District Strategy	Unplanned
Special Education \$\$\$	School Level \$	Enrollment/ School Size \$\$\$
English Language Learners \$\$	School Type \$	Building Utilization \$
Economic Disadvantage \$\$	School opening/ closure – transition cost \$	Teacher Compensation \$
Other Student Needs \$		Enrollment Projections \$
		Ad-hoc exceptions \$

IF YOU DON'T TELL YOUR STORY



SOMEONE ELSE WILL!

Framework for Equity Plan / Financial Plan & Monitoring Progress: Collaboration of Administration

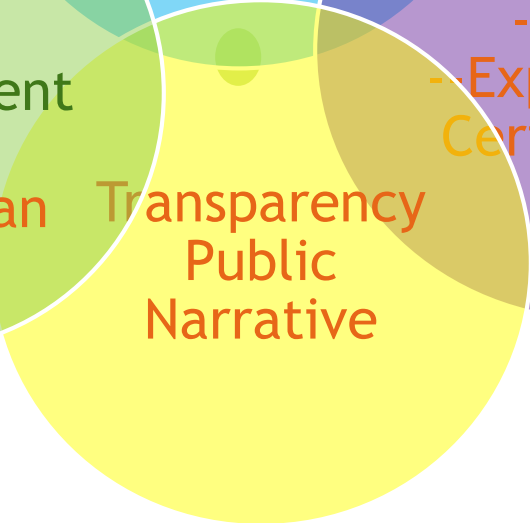
Business Office / Finance



Curriculum & Super



Human Resources

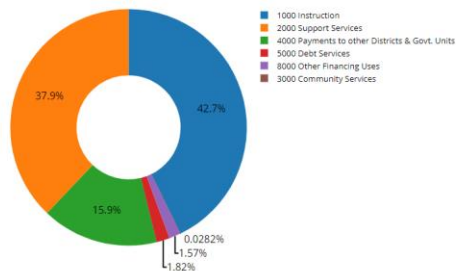


Community Relations

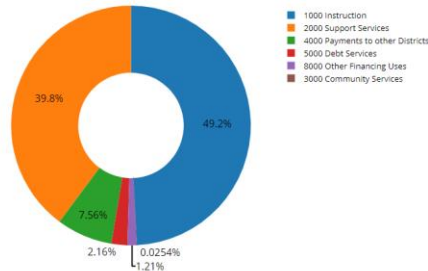
TELL YOUR STORY!

- Control the narrative
- Demonstrate command of your data
- Use visual analytics to illustrate why variances exist
- Articulate the Equity plan

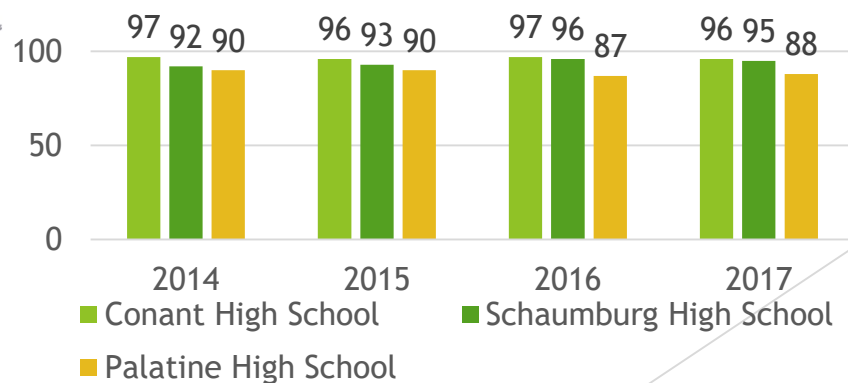
Actual Expenditures by Function - 2013



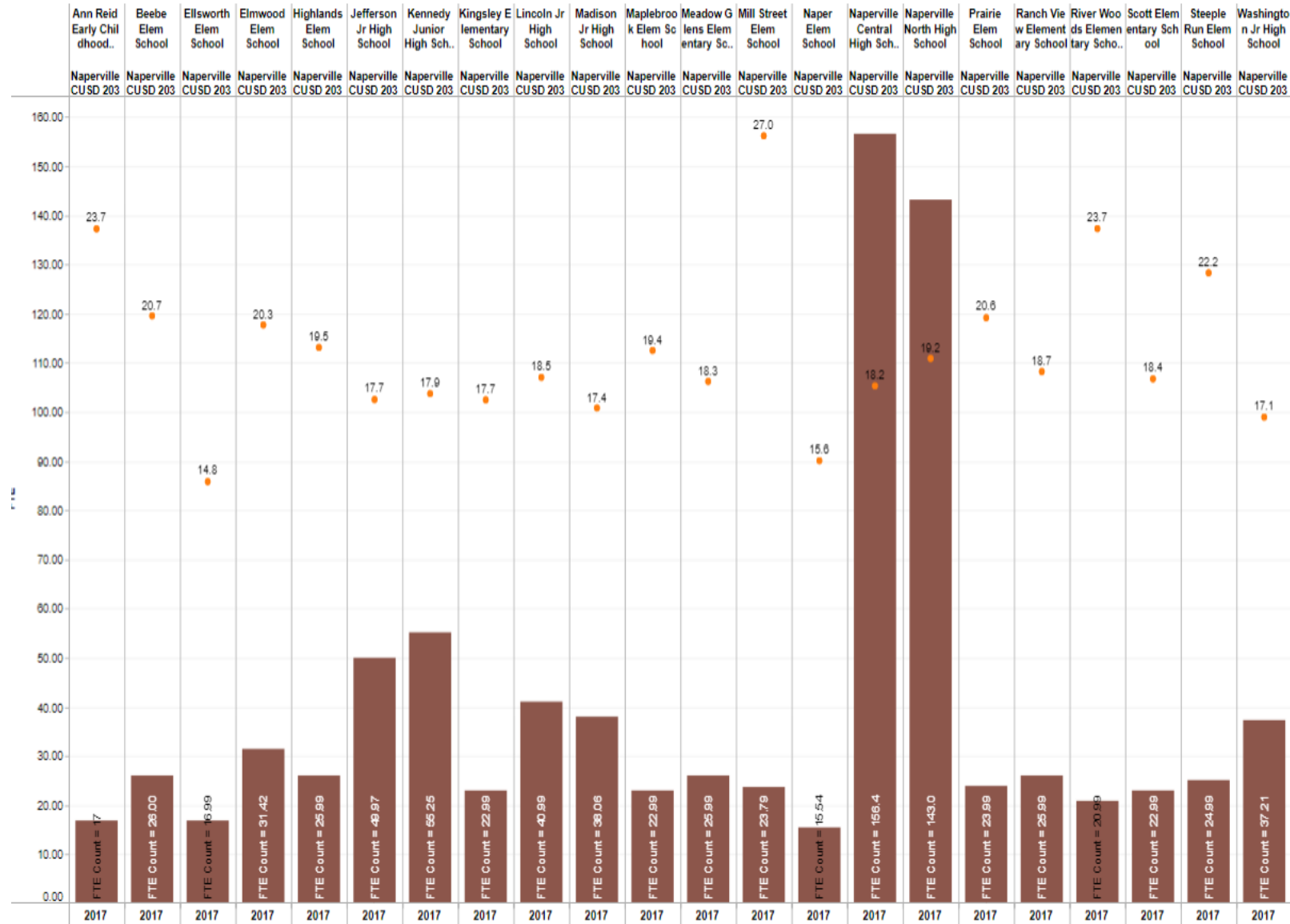
Projected Expenditures by Function - FY2023



Percent of 9th Graders on Track



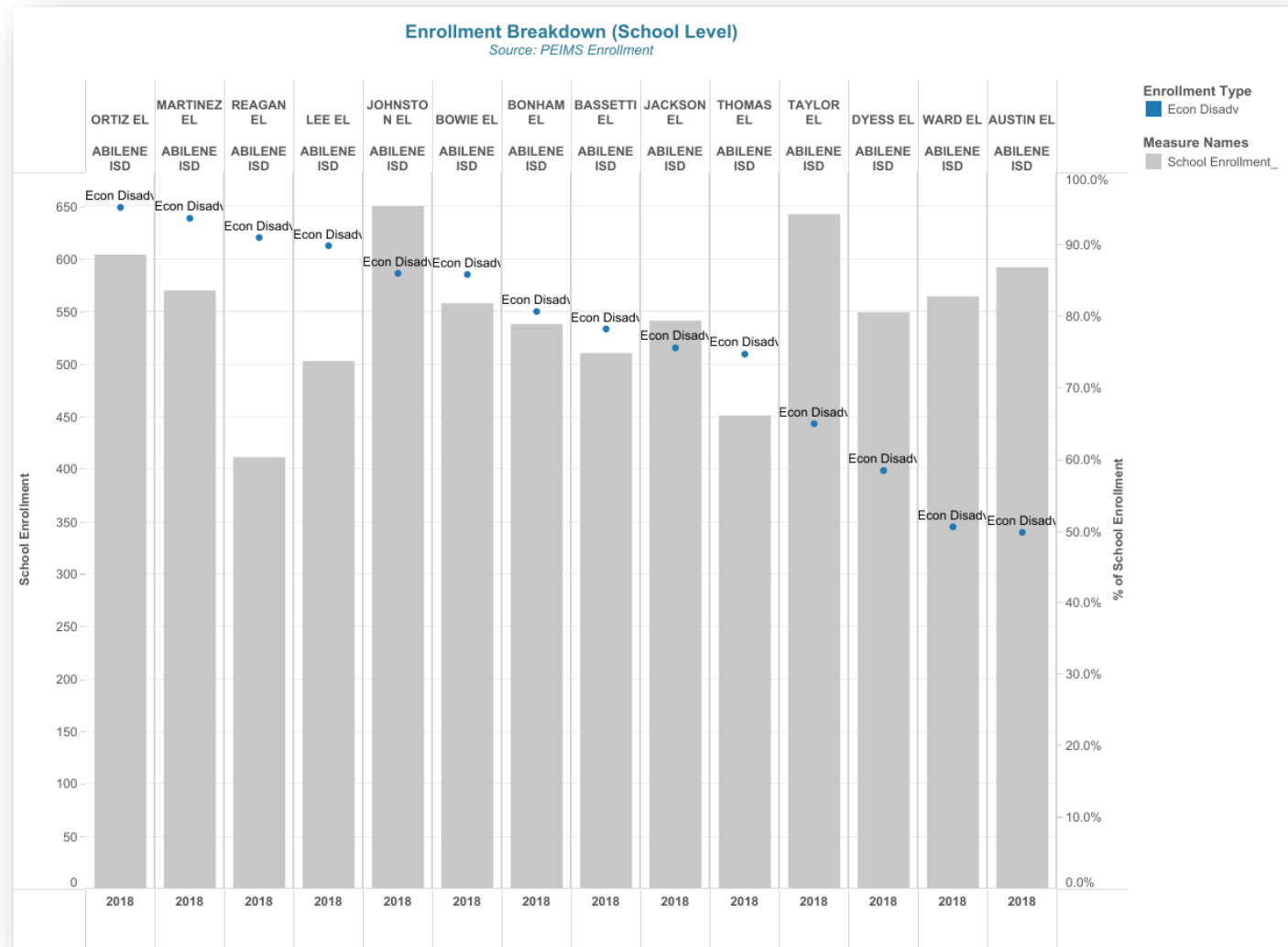
5SIGHT VISUAL ANALYTICS



Staffing Ratios may vary due to programs

5SIGHT VISUAL ANALYTICS

Buildings with high economically disadvantaged populations may require more resources



Framework for Monitoring



Admin ▾ Resources ▾ Help ▾ Profile ▾

Guided Analysis ▾ Explore Dashboards Excel Reports ▾

Remove Add+ Dashboards: Equity Report

District Equity School Building Equity Grade Level Equity



2373
Students in the District

46.02%
Percent of Low Income Students

79.44%
Percent of Title 1 Students

14.29%
Percent of Special Education Students

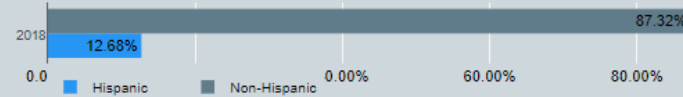
4.89%
Percent of LEP Students

14.29%
Percent of Students in Academic Intervention

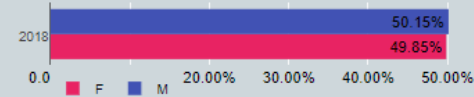
2.7%
2+ Discipline Events

31.23%
Percent of Students in Activities

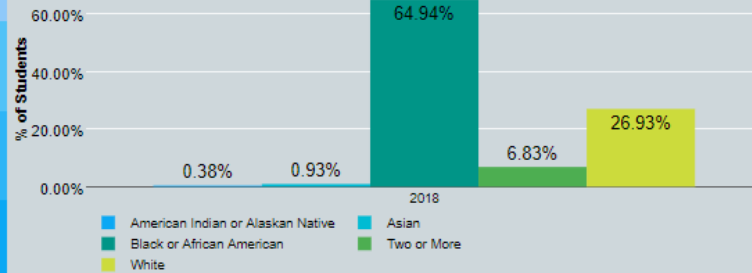
Ethnicity Makeup Across The District



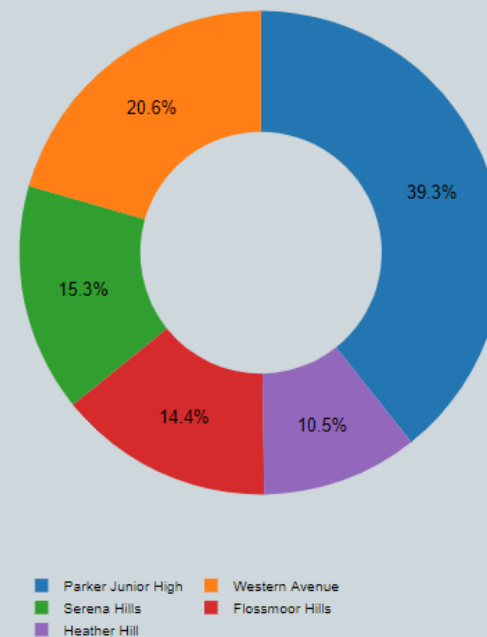
Gender Makeup Across The District



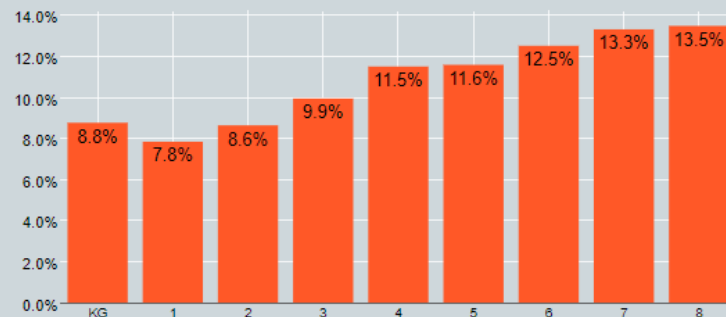
Racial Makeup Of The District



Percent Of Student Population By School



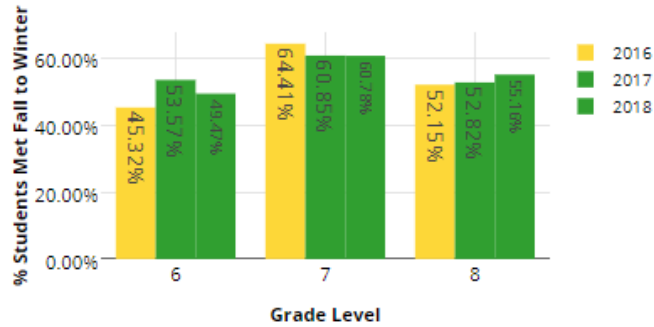
Students In District By Grade Level



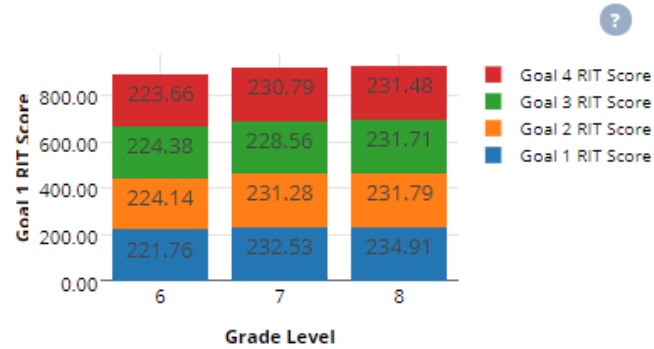
PJH School Wide SMART Goal 1

By the end of the school year, **49% of students** at Parker Junior High, will be **meeting their Math MAP Growth Target**, as compared to 46.3% of students meeting their Math MAP Growth target at the end of the 2016-2017 school year. **Actual: 55.27%**.

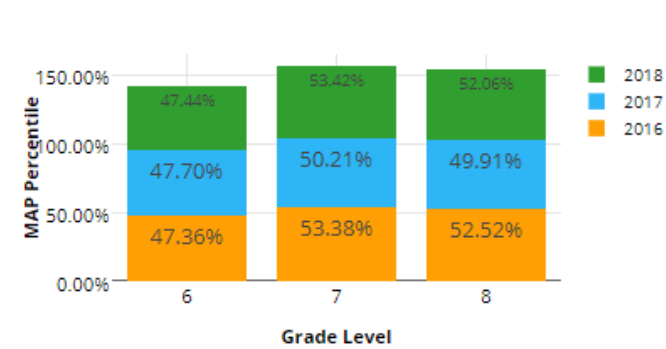
PJH NWEA MAP Met Growth Math



NWEA MAP RIT Math Sub Scores



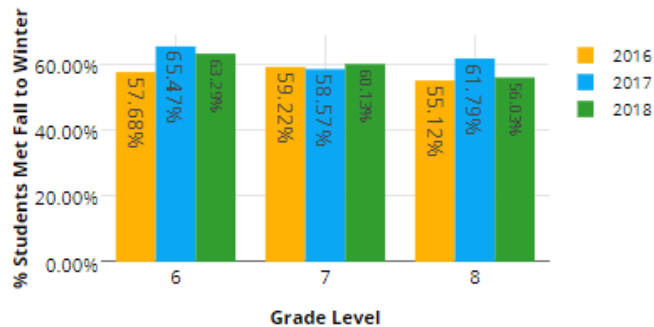
NWEA RIT Math Percentile by Grade Level by Year



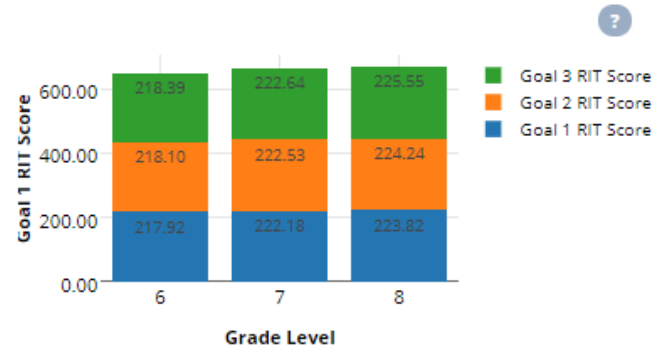
PJH School Wide SMART Goal 2

By the end of the 2017-2018 school year, **60% of students** at Parker Junior High, will be **meeting their Reading MAP growth target**, as compared to 54.6% of students meeting their Reading MAP Growth target at the end of the 2016-2017 school year. **Actual: 61.48%**.

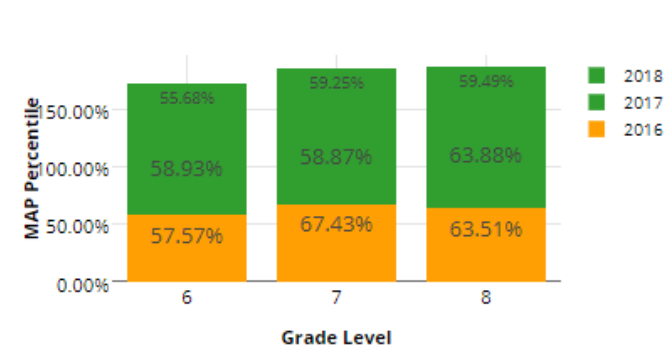
PJH NWEA MAP Met Growth Reading



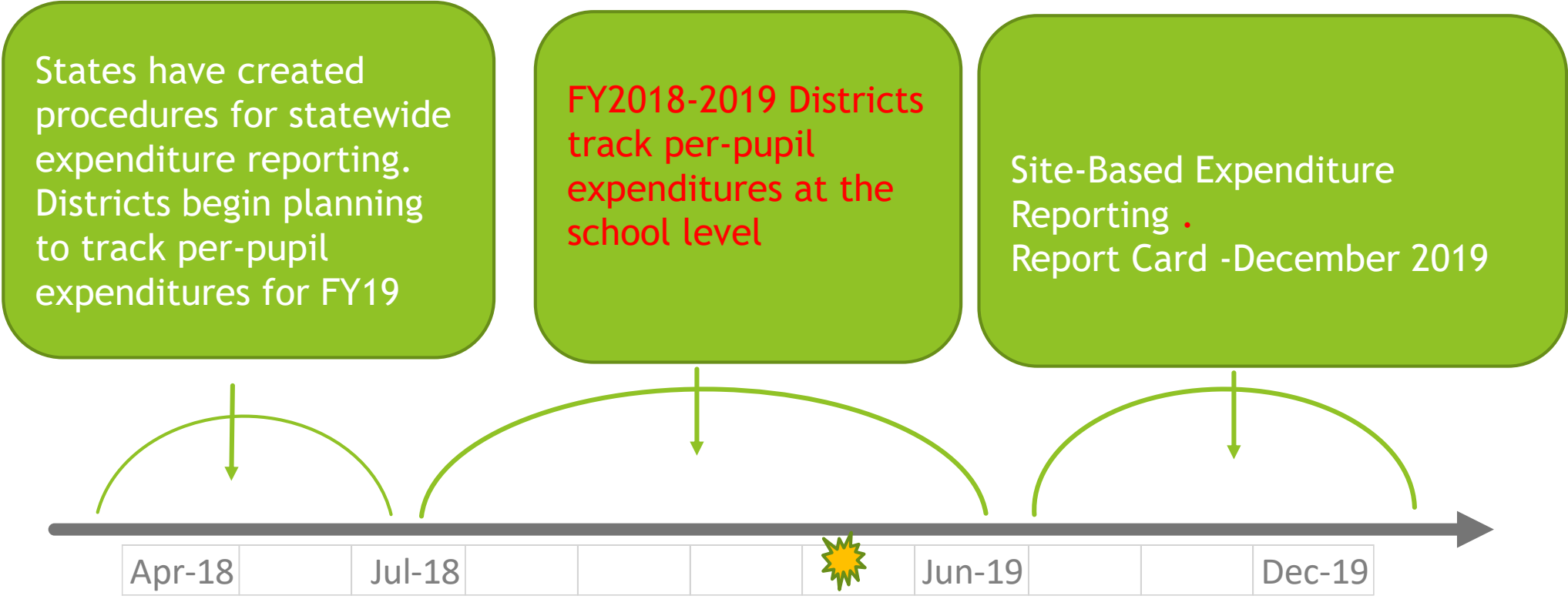
NWEA MAP RIT Reading Sub Scores



NWEA RIT Reading Percentile by Grade Level by ...



ESSA Timeline for States & Districts



FORECAST 5™ ANALYTICS CROSSWALK TO THE DESE MSIP GUIDE STEPS

DESE Steps



Engaging & Communicating with Stakeholders

Share data with internal & external stakeholders regarding the “State of the District” & develop peer district comparisons for point of reference.

Share data with internal & external stakeholders about the status quo.

Share data with internal and external stakeholders about the status quo.

Use Published and Dashboards to communicate key financial information & visuals related to the Equity analysis & to educate & inform them during the process.

Reviewing & Analyzing Data

Collect & identify data to assist in calculating equity gaps for student sub populations, teacher experience, student/teacher ratios, average salaries, & other key information.

Evaluate data to assist in calculating equity gaps for student sub populations, teacher experience and certification. Identify possible district mentors, benchmarks and success stories by school or staff member.

Investigate data from multiple sources to assist in calculating equity gaps for student sub populations, teacher experience, certification & effectiveness. Analyze correlations with attendance, college & career readiness, & other relevant factors, as well as district spending & survey results.

Review historical spending in Federal, State and Local funding to determine historical & current use of financial resources.

Review monthly cash flow & timing of resources needed for implementation.

Conducting a Root Cause Analysis

Capture questions of participants and investigate answers to uncover potential root causes and solutions.

Review district collected data (HR & SIS) and key visuals & analytics to determine resource use & optimization by location. Investigate root cause hypotheses & collect data to share with stakeholders.

Review district collected data (HR & SIS) and key visuals and analytics to determine resource use and pathways to align for success. Create differentiated dashboards for levels of users with multiple views from district wide to individual student.

Review historical spending at the account level to determine allocation by location & create comprehensive financial blueprints & scenarios. Cost out “local philosophy” and validate priorities.

Selecting Evidence-Based Interventions

Review resource use of peer districts & peer student performance to identify possible strategies.

Review visuals & reports to assist in selecting strategies.

Review dashboard visuals & reports to assist in selecting strategies & identifying successful in district solutions.

Review visuals and reports to assist in building possible scenarios for using financial resources in meeting plans and goals. Proactively identify future opportunities and shortfalls in funding plans.

TEA EQUITY STEP



Implementation of Plan

Create alternate scenarios of boundaries, evaluation of in and out of district students, and comparison of student assessment data and other factors by site.

Identify and incorporate key factors that need to be monitored and reviewed to insure success.

Build 5-year budget plan to create a financial blue print for phasing in new strategies, sustaining priorities, and insuring adequate monthly cash flow.

Examine Progress (Monitor & Reflect)

Proactively benchmark with peer districts to ascertain progress and look for opportunities to improve.

Monitor resources use by site and evaluate location of staff, schools, taxpayers, likely voters, student subpopulations, facilities statistics, assessed valuation, transportation, boundaries, and key data tied to geographic sites.

Review “scorecards” and dashboards with targeted views to monitor progress toward strategies and goals.

Utilize Site-Based Expenditure reports and review multiple allocation strategies to optimize spending.

Sharing Information & Results

Use turn key district story boards to share key information with board members and public, as well as other stakeholders of the district.

Create geographic visuals to share and inform.

Create “scorecards” and dashboards with targeted views of progress toward strategies and goals.

Utilize custom reports to share this information and ascertain that plans are on target. Proactively identify problems to allow time to resolve. Create dashboards and web pages to share information internally and externally.

Questions?

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