



EVERY STUDENT SUCCEEDS ACT (ESSA)

Report Card Design Challenge

Design Brief

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Design Challenge Overview

We look forward to hosting you at the Cleveland Park Public Library in Washington, DC on November 8-9, 2018 for two days of sketching, prototyping and building solutions to help states design family-friendly approaches to report cards that make school data more transparent and accessible!

During the Design Challenge:

- You will work as part of a team to address one of two [challenge points](#).
- You will design a detailed mockup or working prototype that addresses the [Design Challenge Requirements](#) and will receive feedback from [judges](#).
- You will use the provided [dataset](#) to develop your designs. In addition to the [background resources included in this design brief](#), all resources, including a recording of the pre-challenge webinar are available in the Design Challenge folder.
- You will be several opportunities during the Design Challenge to receive feedback on your design from subject matter experts.

High-Level Agenda

Please note that times and the order of events are subject to change.

THURSDAY, NOVEMBER 8

| Time | Activity |
|------------------|---|
| 9:30 – 10:00 AM | Arrival, Check-in and Welcome |
| 10:00 – 10:30 AM | Subject Matter Expert Panel + Q&A |
| 10:30 – 11:00 AM | “Who’s in the room” Activity |
| 11:00 – 12:00 PM | Work Time 1 |
| 12:00 – 1:00 PM | Working Lunch |
| 1:00 – 4:00 PM | Work Time 2 + Office hours with State/Parent/Subject Matter Experts |
| 4:00 – 4:45 PM | Review and feedback on initial mockups |
| 4:45 – 5:00 PM | End of day wrap up + Day 2 logistics |
| 5:30 – 7:00 PM | Networking Social |

FRIDAY, NOVEMBER 9

| Time | Activity |
|------------------|--|
| 9:30 – 10:45 AM | Arrival + Coffee + Work Time |
| 10:45 – 12:00 PM | Work Time 3 + First round of Panel Presentations |
| 12:00 PM | Finalists announced + Product due |
| 12:00 – 1:00 PM | Lunch Break |
| 1:00 – 2:30 PM | Finalist Presentations + Judging |
| 2:30 – 3:00 PM | Awards + Closing Remarks |

Background | ESEA Report Card Requirements

The Elementary and Secondary Education Act of 1965 (ESEA), as reauthorized and amended by the ESSA in 2015, requires State educational agencies (SEAs) and local educational agencies (LEAs or school districts) that receive funds under Title I, Part A of the ESEA to annually prepare and disseminate report cards that include more than 2,000 data points about their public school systems available to families. State and LEA report cards provide transparency regarding academic challenges and deficits and highlight areas in which States, LEAs, and schools have made gains. This information is a key resource to helping parents and communities understand how their school is performing, evaluate what is working and what needs to change, and drive changes that help kids succeed.

The ESEA requires that report cards be concise and presented in an understandable and uniform format that is accessible to the public. Further, SEAs must make the State report card, all LEA report cards, and the state's annual report to the U.S. Secretary of Education available on a single webpage on the SEA website.¹

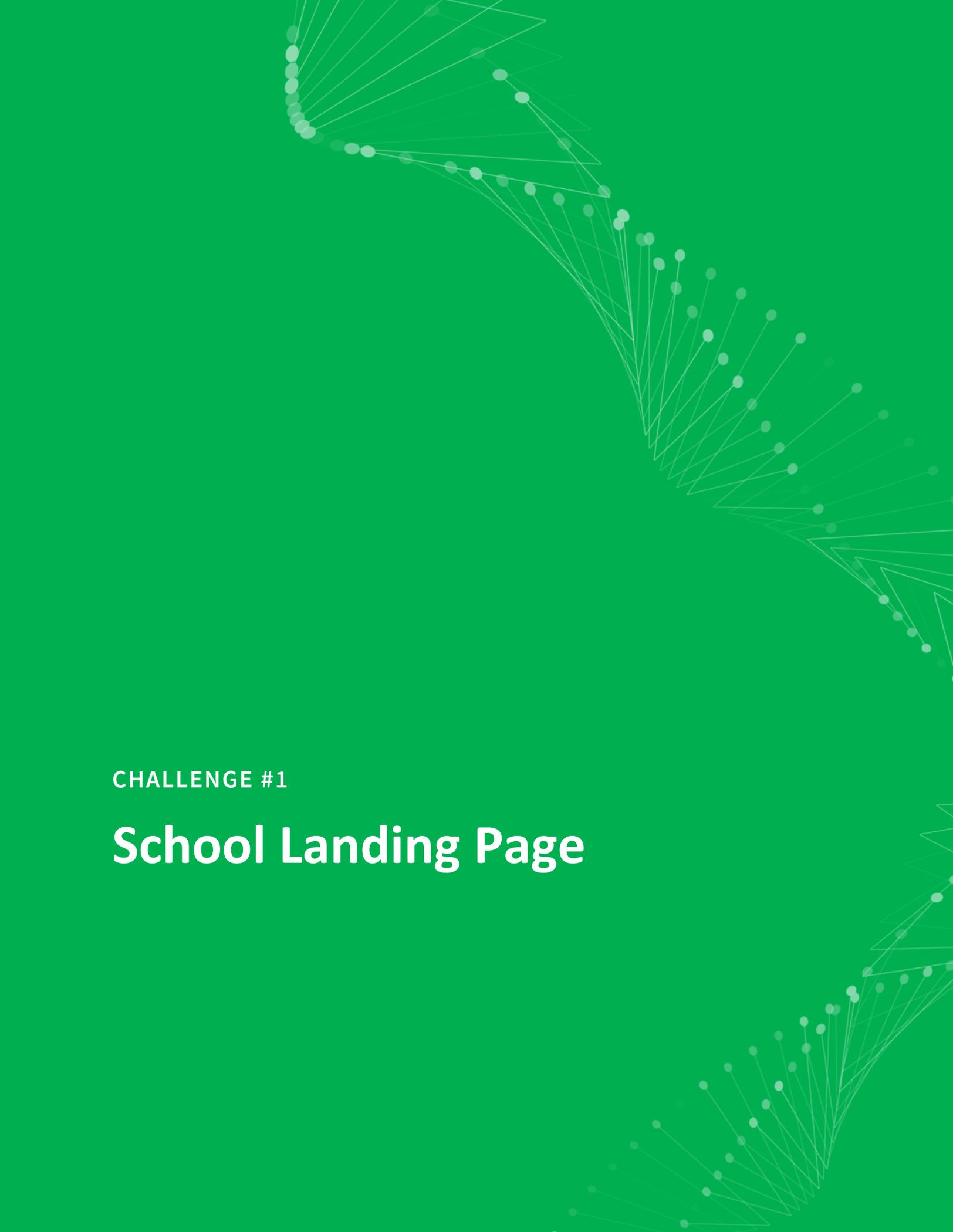
Required Report Card Data Elements

The ESEA outlines the information that must be included on State and LEA report cards. The chart in [Appendix A](#) lists all required report card data elements. [Appendix B](#) includes a chart that identifies which data elements require disaggregation by subgroups (e.g., major racial and ethnic subgroups, students with disabilities, English learners).

Challenge Points

During the ESSA Report Card Design Challenge, teams will be asked to focus on one of two challenge points. The challenge points are outlined below, along with additional resources that provide context on the challenge.

¹ ESEA section 1111(h)(1)(B), (h)(2)(B).



CHALLENGE #1

School Landing Page

Challenge #1 - School Landing Page

Although not required under the ESEA, given the number of data elements required for inclusion in the report cards, many States are considering the development of school profile pages that include an introductory section to highlight key metrics of interest on report cards and tell a story about their schools. The goal of this challenge point is to develop designs that are visually appealing, easy to interpret and navigate, and that encourage deeper exploration of the data. Details on the required components for this challenge are included in the [Design Challenge Requirements](#) section below.

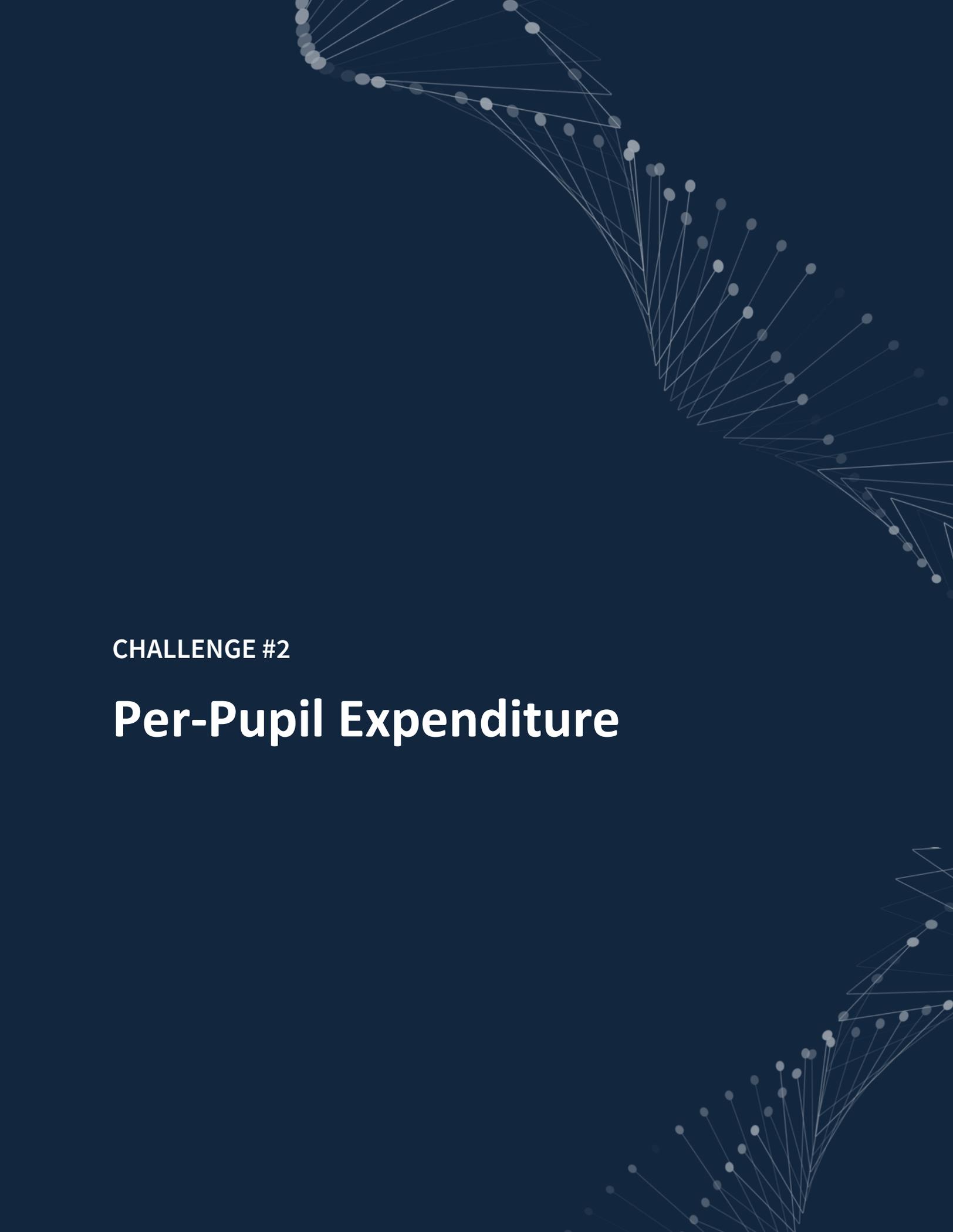
User Scenarios

Below are a few user scenarios you might consider as you design your “at-a-glance” page.

- **Scenario 1** – The Hernandez family is moving to a new home. They are looking for information on schools in districts where they are looking to move. They are interested in learning about course availability and extracurricular activities, but also want access to student achievement data such as test scores and graduation rates, along with chronic absenteeism and discipline data, so they have a full picture of what schools are like before they buy a house in a particular district.
- **Scenario 2** – Paul’s parents have received a letter telling them that his school was identified as low-performing. They are looking for information about why the school received that rating.
- **Scenario 3** – Kandice is selecting a high school to attend next year and wants to use school report cards to access information that compare how different subgroups within the schools she is considering perform on achievement and college readiness metrics.

Additional Resources

- [My School Information Design Challenge: Building a Better School Performance Report Card for Parents and Students](#)
- [Show Me the Data](#)
- [Communicating Performance: A Best Practices Resource for Developing State Report Cards](#)
- [What Makes a Good Report Card?](#)
- [GreatSchools: Why We’re Giving Parents More School Quality Info — and How States Can Step Up to Help](#)
- [State Exemplars of School Accountability "Report Cards"](#)
- [Creating Effective School Report Card Websites: Content, Design, and Process](#)
- [An Economist’s Guide to Visualizing Data](#)
- [Rating States, Grading Schools: What Parents and Experts Say States Should Consider to Make School Accountability Systems Meaningful](#)
- [Transparency for Families and Communities](#)
- [School Report Cards do not Matter if Parents Can’t Find Them](#)



CHALLENGE #2

Per-Pupil Expenditure

Challenge #2 – Per-Pupil Expenditure

Many States are exploring options for how to meet a new requirement to include per-pupil expenditure data on report cards in a way that is understandable and useful. The ESEA requires that each State and its LEAs annually report per-pupil expenditures of Federal, State, and local funds on State and LEA report cards, disaggregated by source of funds. Per-pupil expenditures must be reported for the LEA as a whole and for each school served by the LEA for the preceding fiscal year.

The U.S. Department of Education is giving States and LEAs until the 2018-2019 school year to report on annual report cards regarding per-pupil expenditures. Per-pupil expenditures must include actual personnel and non-personnel expenditures.² “Actual personnel expenditures and non-personnel expenditures” for public elementary-secondary education may equate to current expenditures³ on the National Public Education Financial Survey (NPEFS) and the School District Finance Survey (F-33). The information in [Appendix C](#) provides additional context on the factors that drive spending variation and resource equity that may be helpful in completing this challenge.

Under NCES data collection and publication procedures, the numerator for per-pupil expenditures consists of current expenditures (see ESEA section 8101(12)), which are comprised of expenditures for the day-to-day operation of schools and LEAs for public elementary and secondary education. The denominator may utilize the preferred statewide student count procedure (e.g., membership⁴ with a fall count date, averaged count of students in membership over the school year, membership count with multiple count dates, averaged count of students in attendance over the school year) to calculate per-pupil expenditures for State and LEA report cards.

The goal of this challenge point is to create solutions for visualizing school-level expenditure data in a way that is straightforward and easy to understand, while also incorporating important context and data limitations. Details on the required components for this challenge are included in the [Design Challenge Requirements](#) section below.

User Scenarios

Below are a few user scenarios you might consider as you design solutions for visualizing the per-pupil expenditure data.

² An example of “personnel expenditures” is teacher salaries. An example of “non-personnel expenditures” is transportation contracts. National Center for Education Statistics (NCES) reports provide detailed lists of personnel and non-personnel expenditures.

³ Current expenditures are comprised of expenditures for the day-to-day operation of schools and school districts for public elementary and secondary education, including expenditures for staff salaries and benefits, supplies, and purchased services. General administration expenditures and school administration expenditures are also included in current expenditures.

⁴ Commencing the 2017-18 school year, LEA membership includes students attending a school in the LEA; students “tuitioned-out” to private schools by the LEA; and students in PK programs administered by the LEA.

- **Scenario 1** – Julia saw an article in the newspaper that described how per-student spending in her child’s school is half as much as a school in the next neighborhood. She wants to better understand why that might be the case.
- **Scenario 2** – District leaders in District A are considering some changes in how they allocate funding between schools. They are interested in gathering information on how District B allocates its funds so they can understand similarities and differences between their spending decisions.
- **Scenario 3** – Dr. Hsu, a researcher from a local university, is making a presentation to the local school board on effective uses of Federal dollars and wants to share a visualization of expenditure data in relation to other school outcome data. Dr. Hsu wants to also make sure that appropriate context and caveats are included in the presentation.

Additional Resources

- [The Building State Capacity and Productivity Center \(BSCPC\)](#)
- [The State Support Network - District Strategic Planning and Resource Allocation Community of Practice](#)
- [Interstate Financial Reporting: Making the most of school-level per-student spending data](#)
- [School-Level Resource Allocation: Communicating for Transparency and Equity](#)
- [From Financial Transparency to Equity: Part 1](#)
- [Toolkit: Advancing Equitable School Funding under ESSA](#)
- [ESSA’s New Fiscal Reporting Requirement](#)
- [U.S. Census Bureau School System Finance Report and Data](#)
- [The Feasibility of Collecting School-Level Finance Data: An Evaluation of Data from the School-Level Finance Survey \(SLFS\) School Year 2013–14](#)
- [NCES District Fiscal Reports](#)
- [NCES State Fiscal Reports](#)

Design Challenge Requirements

A. Format

We plan to highlight the winners and their designs upon the completion of the challenge, including via a blog series. As such, the mockup design or working prototype must be an image or browser viewable file shared via hyperlink.

- **Acceptable image formats:** .PNG, .JPG, .GIF, .TIFF, .PSD, .AI, and .PDF.; acceptable browser viewable format is .HTML.
- **Feasibility of implementing online:** For the purposes of this Design Challenge, the submission can be delivered as an image. The design does not have to be coded in HTML/CSS (although working prototypes are welcome!). However, in your designs, we do encourage you to consider whether the design can be feasibly implemented in HTML, CSS and Javascript since States will ultimately be responsible for producing an interactive product.
- **Adaptability:** In order to best support States in tackling the ESEA data reporting requirements, we are encouraging participants to openly license their designs and prototypes (see the [Intellectual Property](#) section below). For those designs and prototypes that are openly licensed, we encourage participants to make them available in an editable format so they can be adapted by States.

B. Design Presentation

On the second morning of the Design Challenge, teams will present their detailed mockup design or working prototype to a panel of subject matter expert judges comprised of an education policy expert, a State leader, and a parent representative. Judges will provide feedback on the criteria outlined in the [Judging Criteria & Awards](#) section below.

Each panel will select a subset of designs to send forward to the Friday afternoon finalist round. The finalists will present their designs on stage in front of the full panel of judges. Judges will provide feedback on the criteria outlined in the [Judging Criteria & Awards](#) section below and select award winners.

Your presentation should:

- Be no more than three minutes in length.
- Explain how the design will empower various educational stakeholders – especially parents – with understandable, actionable information about schools.
- Describe how the design meets the [Required Design Challenge Components](#) and how your team made decisions about which data elements to prioritize.
- Summarize how the design will function as an interactive, online product.
- Include visuals (e.g. wireframes/screenshots) for the detailed mockup or working prototype.
- Be an image or browser viewable file shared via hyperlink.

Note: Designers looking for high-quality examples can consult the submissions made in the Health Design Challenge run by the U.S. Department of Health and Human Services: <http://healthdesign.challengepost.com/submissions> or the winning submissions from the ExcelinEd My School Information Challenge: <http://myschoolinfochallenge.com/#vote>.

C. Required Design Challenge Components

All teams must address the General Design Challenge Requirements outlined in (1) below as part of your design. In addition to addressing the information in (1):

- For teams addressing the Landing Page Challenge, the information in (2) below must be viewable as part of your design.
- For teams addressing the PPE Challenge, the information in (3) below must be viewable as part of your design.

(1) General Design Challenge Requirements

All designs must be:

1. Concise;
2. Presented in an understandable and uniform format, and to the extent practicable, in a language that parents can understand; and
3. Designed in a way that, if ultimately implemented by States, would be made available to the public on a single webpage.

(2) Required Components for the Landing Page Challenge

1. Meet the requirements for (1); and
2. Include at least 5 of the data elements featured in the dummy data set in your design. If you choose to include a data element that requires disaggregation by subgroup, please include data for all required subgroups in your design. See [Appendix B](#) for a summary of data elements that require subgroup reporting.

(3) Required Components for the PPE Challenge

1. Meet the requirements for (1);
2. Report per-pupil expenditures of Federal, State, and local funds, disaggregated by Federal and State/local source of funds;
3. Include actual personnel and non-personnel expenditures as part of per-pupil expenditures; and
4. Include at least one additional detail not required by the ESEA in the PPE visualization to provide further context on drivers of school variation (e.g., school size, percent of children with disabilities in the school, percent of English learners in the school, specialized programs).

Design Challenge Data Set

The dummy data set developed for the Design Challenge includes three years of data for ten fictional schools representing both high and low-performing elementary, middle, and high schools and a K-12 school. The data is reflective of characteristics of the profile (e.g., an elementary school does not have a graduation rate). Where applicable, the data includes a numerator, denominator, and the calculated percentage.

The dummy data set includes a subset of the required ESEA data elements prioritized by parents. This includes the components of current expenditures per pupil, including total expenditures (all current operation objects) for elementary-secondary education **instructional programs** and the elementary-secondary **non-instructional programs** (preK-12). The dummy data set also includes Membership⁵ and Expenditures per Pupil variables. All dummy data set elements are outlined below. The numbers in parentheses (#) correspond with the required report card data elements listed in [Appendix A](#) for your reference.

Please note, the dummy data set is provided for the purposes of providing resources for the Design Challenge event and does not signal elements that States must highlight or prioritize. States are free to prioritize elements that they believe are most important to highlight in the State. If developers want to incorporate information not included in the data set, they are free to mock up their own dummy variables.

You can access the dummy data set in the Design Challenge Resources folder.

Descriptive

- School name
- LEA name
- Grade Span
- Summative rating
- Has the school been identified as a comprehensive or targeted support and improvement school (#14)

Assessment

- Percent of students at each level of achievement in math and English/language arts for grades 3-8, and once in high school (#2)
- Percent of students assessed and not assessed (#8)
- English learners achieving English language proficiency (#5)

⁵ Membership is the official unduplicated student enrollment, including students both present and absent, excluding duplicate counts of students within a specific school or local education agency or students whose membership is reported by another school or LEA.

Graduation rate

- Percent of students graduating in 4 years (all high schools) (#4)
- Percent of students graduating in 6 years (some high schools) (#4)

Chronic absenteeism

- Percent of students chronically absent (#6)

Discipline

- Percent of students receiving at least one in-school suspension (#9)
- Percent of students receiving at least one out-of-school suspension (#9)

College readiness

- Percent of students enrolled in AP courses (#9)
- Percent of students enrolled in the IB program (#9)
- Percent of students enrolled in dual enrollment programs (#9)

Teachers

- Percent inexperienced teachers (#10)

Per Pupil expenditures

- Per-pupil expenditures of Federal funds (#11)
- Per-pupil expenditures of state and local funds (#11)
- Total expenditures for elementary-secondary education **instructional programs** of:
 - Instruction (function 1000);
 - Support services, pupils (function 2100);
 - Support services, instructional staff (function 2200);
 - Support services, general administration (function 2300);
 - Support services, school administration (function 2400);
 - Support services, operation and maintenance of plant (function 2600);
 - Support services, student transportation (function 2700); and,
 - Business/central/other support services (functions 2500 and 2900).
- Total expenditures for elementary-secondary **non-instructional programs** of:
 - Food services;
 - Enterprise operations; and
 - Other; and
 - Districtwide current expenditures.

Intellectual Property

In order to best support States in tackling the ESEA data reporting requirements, we encourage participants to openly license any copyrightable designs and prototypes so that States may adapt or build upon these mockup designs or prototypes.

We encourage participants to grant to the public a worldwide, non-exclusive, royalty-free, perpetual, and irrevocable license to –

- Access, reproduce, publicly perform, publicly display, and distribute the copyrightable work;
- Prepare derivative works and reproduce, publicly perform, publicly display and distribute those derivative works; and
- Otherwise use the copyrightable work, provided that in all such instances attribution is given to the copyright holder.

In addition –

- Participants may select any open license, including a license that limits use to noncommercial purposes.
- All participants must guarantee that their designs do not violate or infringe upon the intellectual property rights, privacy rights, or publicity rights of any third party.
- All participants give the U.S. Department of Education and the Data Quality Campaign permission to publicly display their name(s) and submitted design(s) on their websites or in printed materials.

Judging Criteria & Awards

| Judging Criteria | Feedback |
|--|----------|
| 1. General School Information & Data Sets | |
| 1.1. Report card metrics are understandable. <i>The design clearly communicates the data, its meaning, and its context. Information is accurately presented, easy to digest, and is understandable. All elements, including charts and images are labeled and can be understood by multiple user groups.</i> | |
| 1.2 Definitions and drill down capabilities are available. <i>The design provides plain language definitions and explanations, with a feature representing translation capabilities into multiple languages for terms used to provide clarity for users. Design features drill down capability allowing users to dig deeper into underlying data and information.</i> | |
| 2. Visual Appeal & Design Presentation | |
| 2.1. Design is visually appealing. <i>There is appropriate and effective use of graphic design and consistent graphic standards are applied. Design is visually balanced, strategically uses white space and includes visual cues that support navigability.</i> | |
| 2.2. Design is well organized. <i>The design is organized in a manner that makes it easy to comprehend and understand school information.</i> | |
| 3. Usability & Engagement | |
| 3.1. Design serves multiple user groups. <i>The design addresses the needs of multiple stakeholders including parents, teachers, community leaders and policy makers.</i> | |
| 3.2 Designed for access via a single webpage. <i>Designed in a way that, if ultimately implemented by States, would be made available to the public on a single webpage.</i> | |
| 4. Required Design Challenge Components (Landing Page Challenge only) | |
| 4.1 Landing Page designs include at least 5 of the data elements featured in the dummy data set. | |
| 5. Required Design Challenge Components (PPE Challenge only) | |
| 5.1 Reports per-pupil expenditures of Federal, State, and local funds, disaggregated by Federal and State/local source of funds. | |
| 5.2 Include actual personnel and non-personnel expenditures as part of per-pupil expenditures. | |
| 5.3 Include at least one additional detail not required by the ESEA in the PPE visualization to provide further context on drivers of school variation | |

| | |
|--|--|
| (e.g., school size, percent of children with disabilities in the school, percent of English learners in the school, specialized programs). | |
|--|--|

Awards

- **Best Overall Design**

The design clearly communicates the data, its meaning, and its context. Information is accurately presented, easy to digest, and is understandable. All elements including charts and images are labeled and could be understood by multiple user groups.

- **Best Graphic Design**

Design is aesthetically pleasing and there is an effective use of graphic design and consistent graphic standards applied.

- **Best User Experience**

The design is easy to navigate and organized in a manner that makes it easy to comprehend and understand school information. Design highlights functionality across multiple platforms and devices (tablets, smart phones). The design addresses the needs of multiple stakeholders including parents, teachers, community leaders and policy makers.

- **Best Data Visualization**

Data visualization presents a clear story that is easily digestible. The design utilizes visuals that make the data easy to quickly understand and provide a high-level overview of the information presented.

- **Plainest Language**

The design provides plain language definitions and explanations, with a feature allowing for translation capabilities into multiple languages for terms used to provide clarity for users.

- **Excellence in Accessibility**

The design utilizes universal design principles to ensure the design works for all user types regardless of technical capabilities, physical abilities, location, culture, etc.

- **Creative Use of Context (PPE Challenge Only)**

Design creatively incorporates additional context on drivers of school variation to articulate differences in spending.

Appendix A. Required ESSA Data Elements

Below is a complete list of data elements that must be included on report cards.

| | ESEA Report Card Requirements |
|----|---|
| 1 | State accountability system description <i>ESEA section 1111(h)(1)(C)(i)</i> |
| 2 | Student achievement in mathematics, reading/language arts, and science* <i>ESEA section 1111(h)(1)(C)(ii)</i> |
| 3 | Other academic indicator for elementary and secondary schools that are not high schools <i>ESEA section 1111(h)(1)(C)(iii)(I)</i> |
| 4 | High school graduation rates* <i>ESEA section 1111(h)(1)(C)(iii)(II)</i> |
| 5 | English learners (ELs) achieving English language proficiency (ELP) <i>ESEA section 1111(h)(1)(C)(iv)</i> |
| 6 | Performance on school quality or student success indicator(s) used in State accountability system <i>ESEA section 1111(h)(1)(C)(v)</i> |
| 7 | Progress toward meeting State-defined long-term goals and measures of interim progress <i>ESEA section 1111(h)(1)(C)(vi)</i> |
| 8 | Percentage of students assessed and not assessed <i>ESEA section 1111(h)(1)(C)(vii)</i> |
| 9 | Civil Rights Data Collection (CRDC) data (e.g. measures of school quality, climate, and safety; enrollment in preschool programs; enrollment in accelerated coursework) <i>ESEA section 1111(h)(1)(C)(viii)</i> |
| 10 | Educator qualifications (including the number and percentage of inexperienced teachers, principals, and school leaders; teachers teaching with emergency or provisional credentials; and teachers teaching out-of-field) <i>ESEA section 1111(h)(1)(C)(ix)</i> |
| 11 | Per-pupil expenditures <i>ESEA section 1111(h)(1)(C)(x)</i> |
| 12 | Number and percentage of students with the most significant cognitive disabilities taking an alternate assessment aligned with alternate academic achievement standards <i>ESEA section 1111(h)(1)(C)(xi)</i> |
| 13 | Postsecondary enrollment <i>ESEA section 1111(h)(1)(C)(xiii)</i> |
| 14 | Number and names of public schools in the State identified for comprehensive support and improvement or implementing targeted support and improvement plans <i>ESEA section 1111(h)(1)(C)(i)(V)</i> |

| | |
|----|---|
| 15 | LEA student achievement compared to State (LEA report cards only) <i>ESEA section 1111(h)(2)(C)(i)</i> |
| 16 | School level student achievement compared to the LEA and State (LEA report cards only) <i>ESEA section 1111(h)(2)(C)(ii)</i> |
| 17 | National Assessment of Educational Progress (NAEP) data <i>ESEA section 1111(h)(1)(C)(xii)</i> |
| 18 | List of LEAs and schools receiving 1003 funds and types of strategies implemented in each school with 1003 funds (State report cards only) <i>ESEA section 1003(i)</i> |
| 19 | Other information as determined by the State or LEA <i>ESEA section 1111(h)(1)(C)(xiv), (h)(2)(C)(iii)</i> |

Appendix B. ESSA Reporting Subgroups

| | All Students | Major Racial & ethnic groups | Students with Disabilities | English Learners | Economically Disadvantaged | Gender | Migrant | Homeless | Foster Care Status | Military-Connected |
|---|--------------|------------------------------|----------------------------|------------------|----------------------------|--------|---------|----------|--------------------|--------------------|
| Achievement on assessments in math, reading, and science | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Other academic indicator for elementary and secondary schools that are not high schools | ✓ | ✓ | ✓ | ✓ | ✓ | | | | | |
| Four-year adjusted cohort graduation rate and any extended year rates | ✓ | ✓ | ✓ | ✓ | ✓ | | | ✓ | ✓ | |
| ELs achieving ELP | | | | ✓ | | | | | | |
| Other indicator(s) of school quality or student success | ✓ | ✓ | ✓ | ✓ | ✓ | | | | | |
| Student Progress toward State-defined long-term goals | ✓ | ✓ | ✓ | ✓ | ✓ | | | | | |
| Percentage assessed and not assessed | ✓ | ✓ | ✓ | ✓ | ✓ | | | | | |
| CRDC Elements | ✓ | ✓ | ✓ | ✓ | | ✓ | | | | |
| Performance on NAEP | ✓ | | | | | | | | | |
| Postsecondary enrollment | ✓ | ✓ | ✓ | ✓ | ✓ | | | | | |

Appendix C. Per-Pupil Expenditure Context

PER-PUPIL EXPENDITURES - CONTEXT

Information on subsequent slides was created by technical assistance providers working with the U.S. Department of Education and is included to provide further context on the per-pupil expenditures requirement.

Disclaimer: These resources are provided for the reader's convenience and are examples of the many resources that users may find helpful and use at their discretion. The Department does not control or guarantee the accuracy, relevance, timeliness, or completeness of this outside information. Further, these links to items and examples do not reflect their importance, nor are they intended to represent or be an endorsement by the Department of any materials provided.

Beyond the requirement – value of per-pupil expenditure data

- Prompt district leaders to be more **equitable** when deploying funds across schools.
- Enable school leaders to **benchmark** how well they are able to leverage resources to maximize outcomes.
- Encourage leaders to **discover** spending and outcomes patterns across like-peers and **consider** strategies that have been successful elsewhere.
- Prompt healthy dialogue and engagement within communities about **tradeoffs**.



Drivers of School Spending Variation

According to research by Education Resource Strategies (ERS), the following factors drive spending variation among schools.

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

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Dimensions of Resource Equity

According to research by ERS in partnership with Chiefs for Change, the following other factors drive resource equity, beyond funding, and can help understand the gap between spending and student performance across the district.



Seven equity analyses:

According to research by Edumomics, the following factors impact resource equity.

1. **Which schools are outliers?** Array schools from lowest to highest on state/local PPE. On which school does the district spend the most per pupil (in state/local funds)? Least per pupil? Why? (i.e., what's driving the difference?) Does PPE at any school stand out as unexpected?
2. **How does school level matter?** Group schools by level. Does the district consistently spend more on elementary, middle, or high schools? Why?
3. **Do poor/minority students get their fair share?** Group schools by percent poverty and/or percent minority. Among elementary schools, does the district allocate the less/same/more of its state/local dollars to its schools with more students in poverty? More students of color? Why? How about across middle and high schools? Note that federal funds are intended to be layered on top of (i.e., supplement) an equitable allocation of state/local funds.

Seven equity analyses:

4. **Does the district spend fairly across regions or school types (e.g. magnet, International Baccalaureate, special education)?** Is spending fair across regions or school types?
5. **Are uneven teacher salaries a concerning factor?** Do teacher salary differences drive any of the patterns identified in #3?
6. **How much is managed centrally?** What percentage of an average school's resources is attributed to the site's share of central spending? Does that seem high?
7. **Does size matter?** Does the district spend more/less on smaller schools? If so, why?



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