| **Tool I—Learning Recovery & Redesign**  **Guiding Principles Self-Assessment** |  |
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**What do we mean by “Sustain Strategically”?**

ESSER funds are available through September 2024. On one hand, this is a substantial amount of time. On the other hand, it’s not forever. **Plan carefully for the end of these supplementary funds or risk going over a “fiscal cliff.”** If you’re planting new seeds, how will you [change underlying cost structure](https://www.erstrategies.org/tap/CARES_act_sustainable_education_spending)[s](https://www.erstrategies.org/tap/ESSER_School_District_Strategy_and_Funding_Calculator) so you can sustain what grows? How can you use ESSER funds to lay the groundwork for a more equitable funding formula? What are you learning along the way about what to *stop* and what to *sustain*? Which investments will continue to pay dividends and should be set up to continue over time?

**How much of a priority was this Guiding Principle for your initial planning?**

|  | Low Priority |  | Somewhat Priority |  | Moderate Priority |  | High Priority |
| --- | --- | --- | --- | --- | --- | --- | --- |
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| *Why?* | | | | | | | |

**Do you see look-fors like these in your current plan?**

Your plan can provide the foundation for lasting systemic change in your district. Below are some *illustrative* examples of how this Guiding Principle might show up in your current plan.

* **Your plan identifies other sources of funds that can supplement spending through post-ARP recovery years.** For example, if you use ESSER funds to increase the diversity of your workforce, you reexamine your traditional Title II budgets to shift funds from less effective spending (e.g., one-time professional development) to this evidence-based district priority.
* **Your plan builds long-term partnerships that add capacity**. For example, if you partnered with other social sector agencies or community-based organizations to navigate the pandemic, your plan strengthens and formalizes those partnerships to add long-term capacity to your recovery.
* **Your plan includes an explicit timeline for deciding what to sustain and how to sustain it.** For example, if you expand summer programming, you regularly track the return on investment to inform decisions about whether and how to sustain the costs of the larger program.
* **Your plan identifies up-front or one-time costs of long-term strategies and uses ESSER funds for these foundational investments.** For example, in your efforts to better understand and attend to the needs of the whole child, you invest non-recurring funds to improve data systems, curricula and instructional materials, assessments and surveys, and other assets that can advance a longer-term commitment to supporting the whole child.

**How much does this Guiding Principle actually show up in your plan?**

|  | Minimally |  | Somewhat |  | Moderately |  | Significantly |
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| *Describe specific ways in which this Guiding Principle* ***shows up*** *in your plan*. |
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| *Describe specific ways in which this Guiding Principle is* ***lacking*** *in your plan*. |
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**How can you integrate this Guiding Principle more?**

The following resources may be helpful as you seek more ways for your plans to Sustain Strategically:

**Sustainability Tools** (Education Resource Strategies) – ERS has produced three short resources full of concrete advice for how districts can take a sustainable approach to ESSER funds:   
a 90-second [**video explainer**](https://www.youtube.com/watch?v=rFBFtylurww), a brief outlining [**four sustainability strategies**](https://www.erstrategies.org/tap/CARES_act_sustainable_education_spending), and [**specific examples**](https://www.erstrategies.org/cms/files/4924-getting-real-about-sustainability.pdf) drawn from district CFOs.

[**ESSER Strategy Planner & Spending Calculator**](https://www.erstrategies.org/tap/ESSER_School_District_Strategy_and_Funding_Calculator)(Education Resource Strategies) – This interactive, open-source Google Sheet is organized around five key evidence-based strategies and helps districts prepare or revise multi-year ESSER spending plans to avoid a fiscal cliff.

[**Three Strategies for Investing One-Time Federal Relief Aid to Make a Lasting Difference**](https://www.wested.org/resources/three-strategies-for-investing-one-time-federal-relief-aid-to-make-a-lasting-difference/) (WestEd) – This brief explains three strategies for how to use one-time funds sustainably while also pursuing long-term improvement.

[**ARP Funding for Schools: Five Principles to Guide District Spending Decisions**](https://edunomicslab.org/wp-content/uploads/2021/05/Roza_SBA-Network_May-11.pdf) (Edunomics Lab) – This presentation provides a brief outline of how to best calculate multi-year spending.

**What will you do differently now?**

After reviewing your plans and your responses to this Self-Assessment, what changes will you make to better apply this Guiding Principle? Use the table below to identify your team’s next steps, responsible team member(s), deadlines, and resources needed to succeed.

| **Action Item** | **Owner** | **Deadline** | **Resources Needed** |
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