

Funding What Works: Using Evaluation to Inform Federal Funding Decisions

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Agenda

- Evaluation Requirements
- The ROI Mindset
- District Spotlight
- Discussion





Evaluation Requirements

Title I, II, & IV



Evaluation Requirements – Title I, Part A

Required components for successful implementation

- A comprehensive needs assessment
- A comprehensive schoolwide plan
- Annual review and revision of the schoolwide plan



Evaluation Requirements – Title I, Part A

Evaluation Process

- Annually evaluate the schoolwide plan using data from:
 - State assessments
 - Other student performance data
 - Perception data
- Purpose: Assess the effectiveness in addressing major problem areas and improving student achievement, particularly for the lowest-achieving students.

(ESEA section 1114(b)(3); 34 C.F.R. § 200.26(c))

Continuous Improvement

- Revise the plan annually based on:
 - Student needs
 - Results of the evaluation



Evaluation Requirements – Title II, Part A

- LEAs must also use data to continuously update and improve Title II, Part A activities.
- The statute does not specify exact data types but encourages the use of disaggregated data for various groups of students.

Section 2102(b)(2)(D)



Types of Data for Improvement

Title II

Student Data

- Assessment data reflecting well-being, student outcomes, or preparedness
- Data measuring the effectiveness of class size reduction (if applicable)

Recruitment & Retention Data

- Trends related to educator recruitment and retention

Survey Data

- From educators, students, and families on school climate
- From educators on available professional development opportunities

Evaluation Data:

- Educator evaluation data
- School leader evaluation data

Teacher Equity Data

- Distribution of effective teachers, ensuring that low-income and minority students are not disproportionately served by ineffective, out-of-field, or inexperienced teachers (per section 1111(g)(1)(B))



Evaluation Requirements – Title IV, Part A

Program Objectives and Intended Outcomes

- The LEA's application **must** include objectives and intended outcomes (Logic Models).
- The LEA or its partners **must** describe how they will evaluate the effectiveness of SSAE program activities.



(ESEA section 4106(e)(1))

Evaluation Requirements – Title IV, Part A

Evaluation and Continuous Improvement

LEAs must periodically evaluate activities based on the set objectives and outcomes.

The evaluation process helps inform decisions on:

- Mid-course corrections
- Steps for continuous improvement
- Next steps

Methods of Evaluation

Performance Monitoring

Rigorous Evaluations

*Use evaluation results to guide future investments and decisions.





ROI in Federal Programs

What is ROI?



What is ROI in Federal Programs?

ROI = Outcomes ÷ Investment

- **Outcomes** → Academic achievement, improved school climate, student engagement, teacher retention, etc.
- **Investment** → Federal funds, staff time, PD hours, technology, materials, etc.

Example:

If \$50,000 in Title II funds were spent on teacher coaching, ROI looks at whether:

- Teacher performance improved
- Student learning outcomes increased
- The district got sufficient value for its investment



Why Use ROI in Federal Programs?



Maximize Impact of Limited Funds

ROI helps ensure federal dollars are spent where they produce the greatest student benefit.



Make Data-Informed Decisions

Shifts focus from just spending to what results spending produces.



Strengthen Strategic Planning

Supports smarter budgeting and long-term planning across Title programs.



Support Compliance and Transparency

Aligns with federal requirements for evaluation and continuous improvement.



Promote Equity and Efficiency

Helps districts identify which programs effectively close achievement gaps — and which don't.



ROI Framework and Data Sources for Evaluation

Step	Key Questions	Data Sources
Inputs	What resources are invested (funds, time, people)?	Budget reports, staffing records
Activities	What activities are performed (PD, tutoring, tech use)?	Program logs, attendance records
Outputs	What immediate products (hours trained, students served)?	Training hours, number of participants
Outcomes	What short/long-term changes (achievement, behavior)?	Test scores, attendance, discipline data, surveys, interviews
ROI	Did outcomes justify the investment? Cost per outcome?	Cost analysis (total investment), cost per participant metrics



Sample ROI Evaluation Questions

- What outcomes did the program achieve?
(e.g., increased proficiency, improved attendance, reduced discipline)
- How many students or staff were served?
- What was the total cost of the program?
- What was the cost per participant?
- What was the cost per outcome achieved?
(e.g., cost per student who improved one level in reading)
- Did the program reach the intended students or schools?
- How does this program compare to similar efforts in terms of cost and impact?
- Should this program be continued, scaled, revised, or discontinued based on results?



Measuring Return on Investment (ROI) for Professional Development

A quick-reference guide to help leaders evaluate the effectiveness, impact, and value of professional development (PD) investments.

1. Inputs — What Did We Invest?

Use these questions to understand resources committed before measuring impact.

- What resources (funding, staff time, materials) were invested in this PD?
- Was the investment aligned to an identified core need or theory of change?
- Were alternative PD options or delivery models considered before choosing this one?

2. Activities — What Actually Happened?

These questions check whether the PD was delivered as intended.

- Was the PD delivered as planned (content, duration, attendance)?
- Did the intended participants (teachers, coaches, leaders) attend and engage?
- What follow-up supports (coaching, modeling, materials) were provided to reinforce implementation?

3. Outputs — What Immediate Results Occurred?

Assess short-term, measurable results from PD.

- How many staff participated? How many hours of PD were completed?
- What instructional artifacts or products were created (lesson plans, assessments, strategies)?
- What evidence shows participants understood and could apply the new skills?

4. Outcomes — What Changed in Practice or Student Learning?

Evaluate effectiveness through instructional and student outcomes.

- Did instructional practices change as a result of the PD? What evidence supports this?
- Are student outcomes improving (achievement, engagement, behavior)?
- Are the outcomes meeting expected benchmarks or targets? If not, what barriers exist?
- What qualitative changes occurred (teacher confidence, student engagement, classroom climate)?

5. ROI — Was It Worth the Investment?

Connect outcomes back to cost.

- Did PD outcomes justify the investment? Why or why not?
- What is the cost per successful outcome (per teacher, per student, per proficiency gain)?
- Were there higher-ROI alternatives that could have yielded similar or better results?
- What modifications should be made to improve ROI in future PD cycles?

6. System-Level Considerations — How Does This PD Support Long-Term Goals?

Position the PD within broader school or district strategy.

- How does this PD contribute to strategic priorities (improvement plans, Title I/II goals, equity)?
- Is the PD scalable or replicable across schools or cohorts?
- What structures or supports are needed to sustain implementation and results?

Quick Tip for Leaders

For the most accurate ROI assessment, pair **quantitative data** (student achievement, attendance, discipline, proficiency gains) with **qualitative data** (teacher feedback, coaching notes, classroom observations).

PD Specific ROI Questions





ROI

Evaluation & Implications



Implications for ROI Evaluation

Informs Smarter Spending Decisions

If a summer reading program costs \$80,000 and raises reading scores for 15% of participants, but a tutoring program costs \$50,000 and raises scores for 40%, the district may shift funding to the tutoring model.

Improves Compliance & Transparency

Title IV requires program evaluation. ROI data helps demonstrate that a mental health initiative not only served students but also reduced behavioral incidents by 25%, justifying continued investment.

Supports Continuous Improvement

A Title II PD initiative showed minimal impact on classroom outcomes. Using ROI findings, the district revises the training content and delivery method, then measures again next year.

Aligns Programs with District Goals

If a district's strategic plan emphasizes early literacy, ROI helps ensure Title I funds are directed toward K–2 programs with measurable literacy gains, not just general supports.

Builds Stakeholder Confidence

When sharing ROI results with school boards or the community, leaders can show not just how money was spent, but how it directly improved student performance or well-being.



ROI Evaluation Cycle



ROI Evaluation Cycle Example



Identify Priorities & Set Goals: A district prioritizes improving 4th-grade reading proficiency, aiming for a 15% increase in one year.



Plan & Budget with ROI in Mind: They select an evidence-based after-school reading program and budget for staff, books, and materials, estimating cost per improved reader.

Total program cost ÷ estimated number of students who improve = estimated cost per improved reader.



Implement Programs & Track Costs: During implementation, spending and attendance are closely tracked.



Collect & Analyze Outcome Data: Reading assessments are conducted at the start, midpoint, and end of the year to measure progress.



Evaluate ROI & Make Adjustments: To calculate ROI, the district totals program costs and divides by the number of students who improved reading proficiency, determining the cost per improved student. Finding strong returns, they expand the program and adjust staffing and materials for efficiency.



Use Insights for Future Planning: These results guide Title I funding to prioritize high-impact reading programs going forward.



ROI Guide for Title I, II, & IV Federal Programs

Step 1: Identify Priority Needs

Question	Notes / Data Points
What are the key needs for each program? (Title I, II, IV)	(e.g., academic achievement gaps, teacher development needs, student health and safety)
Which student groups are most impacted?	(e.g., low-income, English learners, students with disabilities)
What data supports these needs?	(Test scores, attendance, surveys, etc.)

Step 2: Select Evidence-Based Strategies

Question	Notes / Considerations
What interventions or programs have been proven effective for these needs?	List evidence-based strategies.
What is known about the cost-effectiveness of these strategies?	Include any ROI or cost-benefit info if available.
Are these strategies scalable and sustainable in our district?	Yes / No + notes

Step 3: Define Desired Outcomes & Metrics

Question	Notes / Data Points
What specific student outcomes are we targeting?	(e.g., proficiency gains, attendance improvement)
How will we measure progress toward these outcomes?	(Assessments, surveys, attendance records)
What timeframe will be used for measuring outcomes?	(e.g., quarterly, annually)

Step 4: Plan Cost Tracking

Question	Notes / Details
What are the total costs for each strategy?	Include personnel, materials, training, etc.
How will we track costs by activity and participant?	(Spreadsheets, software, etc.)
Can we calculate cost per participant or cost per outcome?	Yes / No + plan to develop

Step 5: Plan for Data-Informed Decision-Making

Question	Notes / Action Items
How often will we review cost and outcome data?	(Monthly, quarterly, annually)
Who is responsible for data collection and analysis?	Names / roles
How will ROI data influence funding and program decisions?	(e.g., scaling, modifying, or discontinuing programs)

Step 6: Continuous Improvement

Question	Notes / Reflection
How will ROI findings be shared with stakeholders?	(Reports, meetings, dashboards)
What steps will be taken to improve ROI in future cycles?	(Adjust strategies, reallocate funds)
What support or training is needed to enhance ROI capacity?	(Data training, evaluation tools, etc.)





District Spotlight

Dr. Anna Brink, Director of Federal Programs



Helps describe the situation to learn from by identifying the facts and feelings of the situation.

HERE'S WHAT.

Helps extract the meaning of 'What?' through questioning what knowledge you and others had in the situation, and what knowledge or theories could help you make sense of the situation.

SO WHAT?

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Helps to create an action plan for the future based on the previous questions.

MON

WHAT?

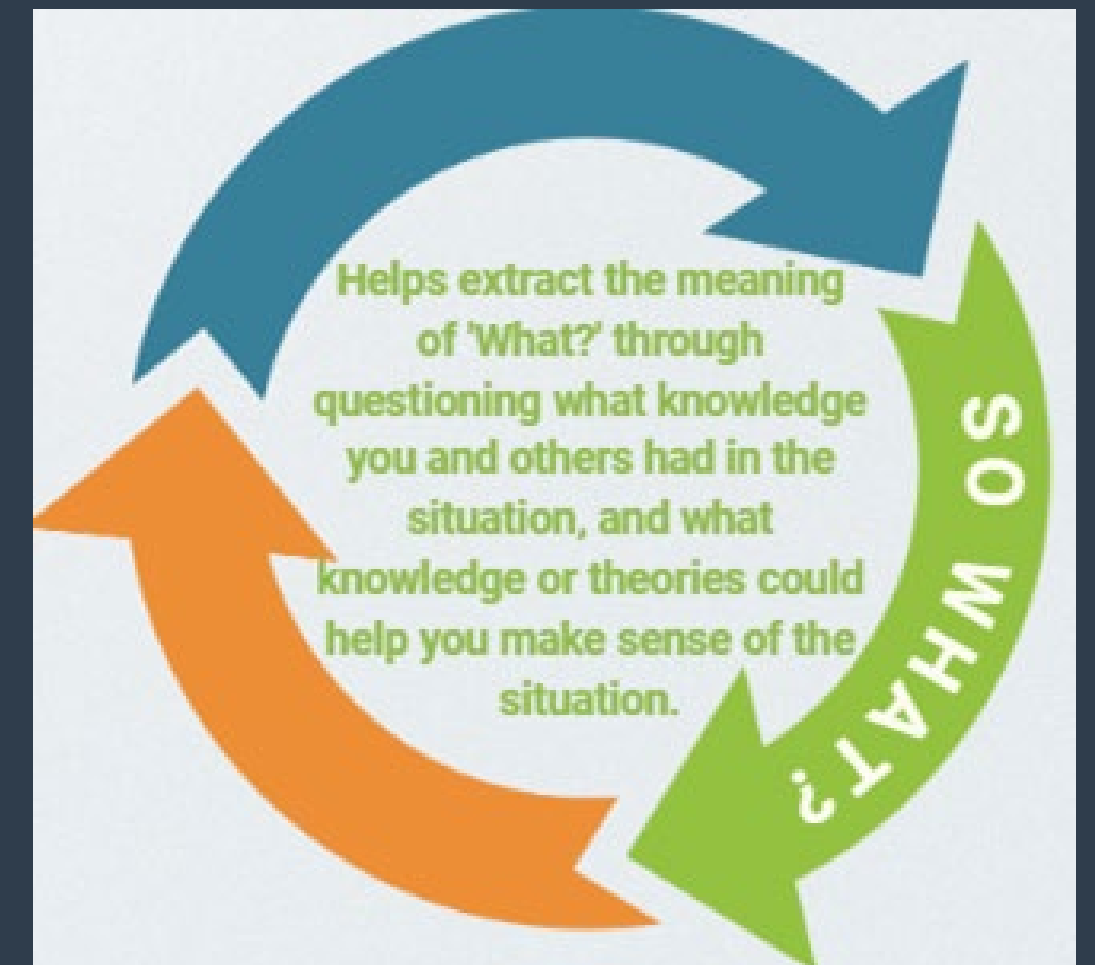
HERE'S WHAT.

- Compliance as the Ceiling: The focus was on the approved expenditure (the Input), not necessarily student growth (the Outcome).
- Informational Conduits: Title I Facilitators were predominantly siloed, primarily focused on paperwork, budgeting, and parental engagement documentation.
- Need to Understand Impact: Introduced the question that drove the shift: If we spend \$X on the specific support, what academic return did we get?



SO WHAT?

- **Protocol Shifts**: Use of the CNA to attach data to gaps, plan using evidence-based intervention, and specify the data source (Connect the dollar to the desk).
- **Instructional Strategists**: Shifting the Title I Facilitator role to be an integral member of the Instructional Leadership Team (ILT). Role shifts included: data interpretation, alignment of school and Title I goals, and managing compliance and budgets.
- **Shifting the Practice**: Continuous Improvement



NOW WHAT?

- **Connecting the Dots**: ROI = Outcomes divided by investment. Outcomes are measurable academic and climate results (e.g., proficiency rates, reduced discipline, teachers retention), not just services provided.
- **Academic ROI**: Integrated new protocol and practices into existing academic goal setting, instructional practices, and school-level evaluation. Requires a rigorous Comprehensive Needs Assessment (CNA) that documents the foundation for every spending decision. The CNA dictates the need; A-ROI measures the solution's effectiveness, and the overall continuous improvement process is the center is the center of school and leadership practice.



THE ROAD TO CONTINUOUS IMPROVEMENT

2020 - 2023

- School Planning Meetings in the Spring each school year to outline funding strategies. Presentation of general goals and data.
- Basic Comprehensive Needs Assessment.
- [Sample School Presentation](#)
- [Sample CNA](#)

2023 - 2024

- Shift from a presentation to a Spring strategy sessions with school and district leaders to discuss proposed strategies, implementation, and data.
- Required sections for CNA.
- [Sample School Planning Template](#)
- [Sample CNA 2.0](#)
- [Timeline for Continuous Improvement](#)

2024 - 2025

- Addition of comparative strategies for Title I planning with data points required.
- Refined CNA with direct ties from data to funding strategies.
- [Sample School Planning Template](#)
- [Crosswalk Document](#)
- [Sample CNA 3.0](#)
- [Integration with District Processes](#)



CORE CHALLENGE AND 2025 - 2026 NEXT STEPS

- **How do you objectively compare the value of fundamentally different investments?**
(i.e., A highly-trained interventionist vs. a widely-deployed software program)

“ROI = $\frac{(\text{Fidelity} \times \text{Outcomes}) \times (\text{Students Served} \times \text{Multiplier})}{\text{Total Spent}} \times 100$

Fidelity: Did we do what we said we would do? (Assesses execution)	Outcomes: Did it work? (Measures impact)	Students Served x Multiplier: How many students were reached, with weights for special populations (Multilingual Learners, Exceptional Children) to ensure equity.	Total Spent: The full cost of the investment.
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The A-ROI Planning Cycle: 4 Steps to Evidence



Before we calculate, we calibrate. This ensures one school’s “High” isn’t another’s “Low.”

CALIBRATING & DEFINING SUCCESS

Outcome Measures: Supports moving from generic goals to specific, triangulated thresholds (Academic + Behavior + Climate) but still gives schools flexibility.

Example 1: Reduced Class Size (Elementary)

- **High**: Met growth targets AND behavior incidents ↓ >10% AND high satisfaction surveys.
- **Medium**: Improved scores but missed targets; behavior ↓ 1-10%.
- **Low**: Scores stagnant; behavior increased.

Example 2: Behavior Interventionist

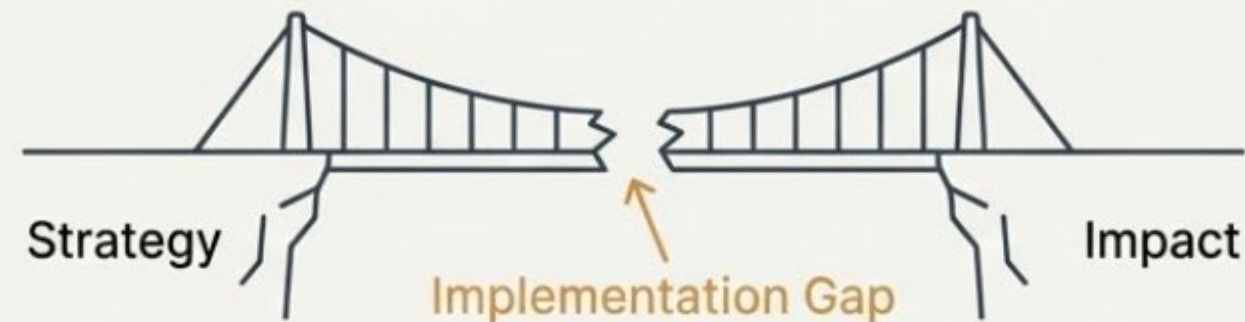
- **High**: Meets 3 goals (20% referral reduction, 15% suspension drop, 80% Smart Goals).
- **Low**: Meets 0-1 goals.

These matrices were co-created by educator work groups (Groups 1–3, Middle, and High School).

Most Frequent Strategies

CALIBRATING & DEFINING SUCCESS

Implementation Fidelity Measures: A low ROI often stems from low fidelity, not a bad strategy. We assess *execution* before we *assess* impact.



Example 1: Instructional Software



High Fidelity
Students meet recommended minutes weekly + Teachers use data for grouping.



Low Fidelity
Inconsistent usage + No data monitoring.

Example 2: Interventionists



High Fidelity
30 mins/day, 3-4x weekly + Bi-weekly progress monitoring.



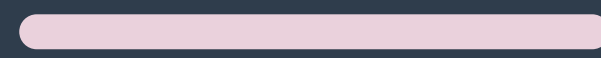
Low Fidelity
<20 mins/day + Monthly monitoring.

If ROI is low but Fidelity is also “Low,” we don’t cut the program—we fix the implementation.

Most Frequent Strategies

PATH FROM DATA TO DECISION

January



February



The Data Pass

Activity: Review 90th-day data & Expenditures. Calibrate Implementation Fidelity for all strategies.

Output: Identify and discuss any “Fidelity Gaps.” Produce clean data inputs for calculation.



The A-ROI Lab

Activity: Calculate the ROI Index for all Title I strategies. Rank investments from highest to lowest “Educational Profit.”

Output: Peer-reviewed A-ROI findings by school level (Elementary/Middle/High).

TURNING INSIGHTS INTO ACTION: A DECISION MATRIX

Based on the A-ROI calculation, schools will propose one of three actions for each strategy in the FY27 budget.

Sustain



Criteria

- High ROI strategies with good outcomes and reasonable cost.

Action

- Renew contracts and positions.

Increase



Criteria

- High impact strategies that need to be scaled.

Action

- Allocate additional funds to expand reach.

Phase Out



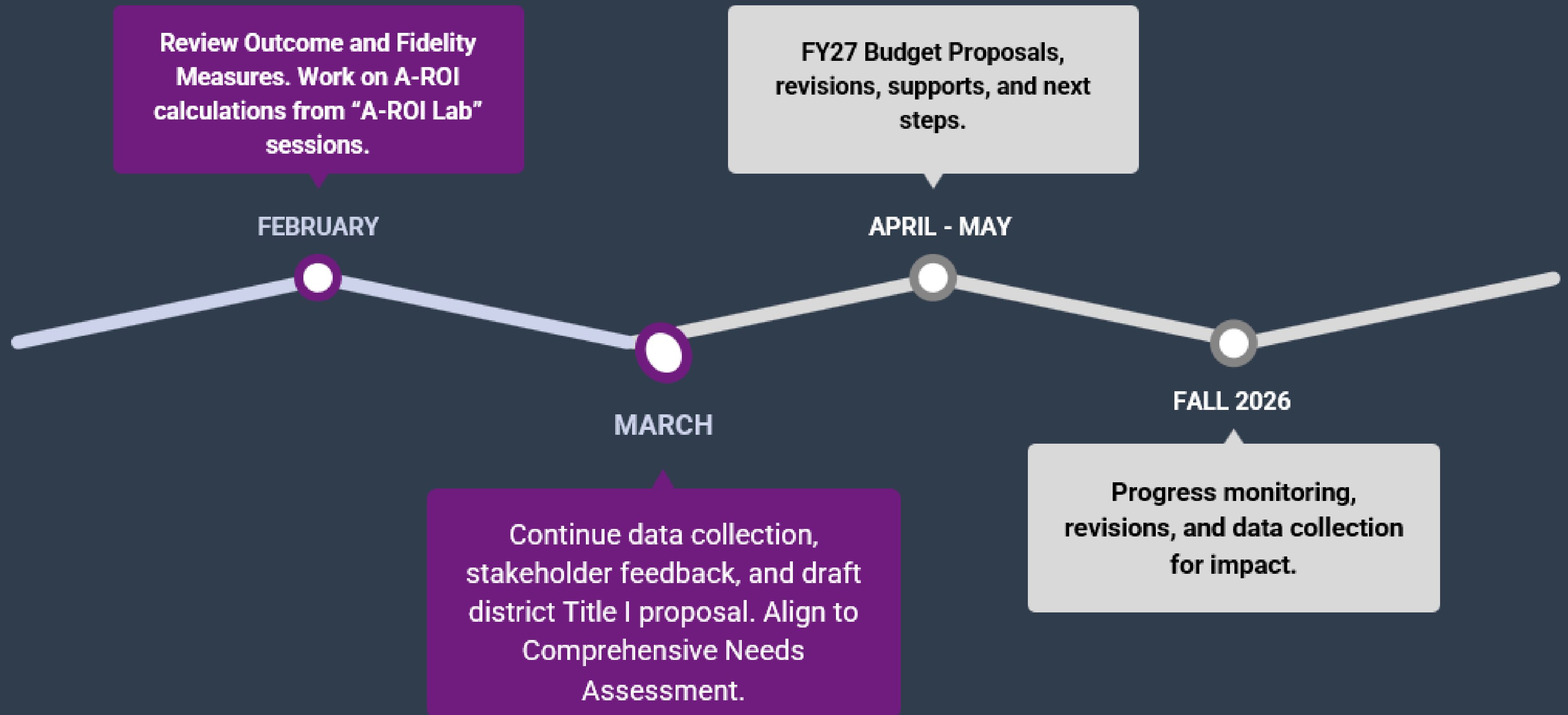
Criteria

- Low ROI due to ineffective outcomes or creating “wasted instructional time.”

Action

- Reallocate funds to higher-yield strategies.

FY27 AND BEYOND



Questions



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