

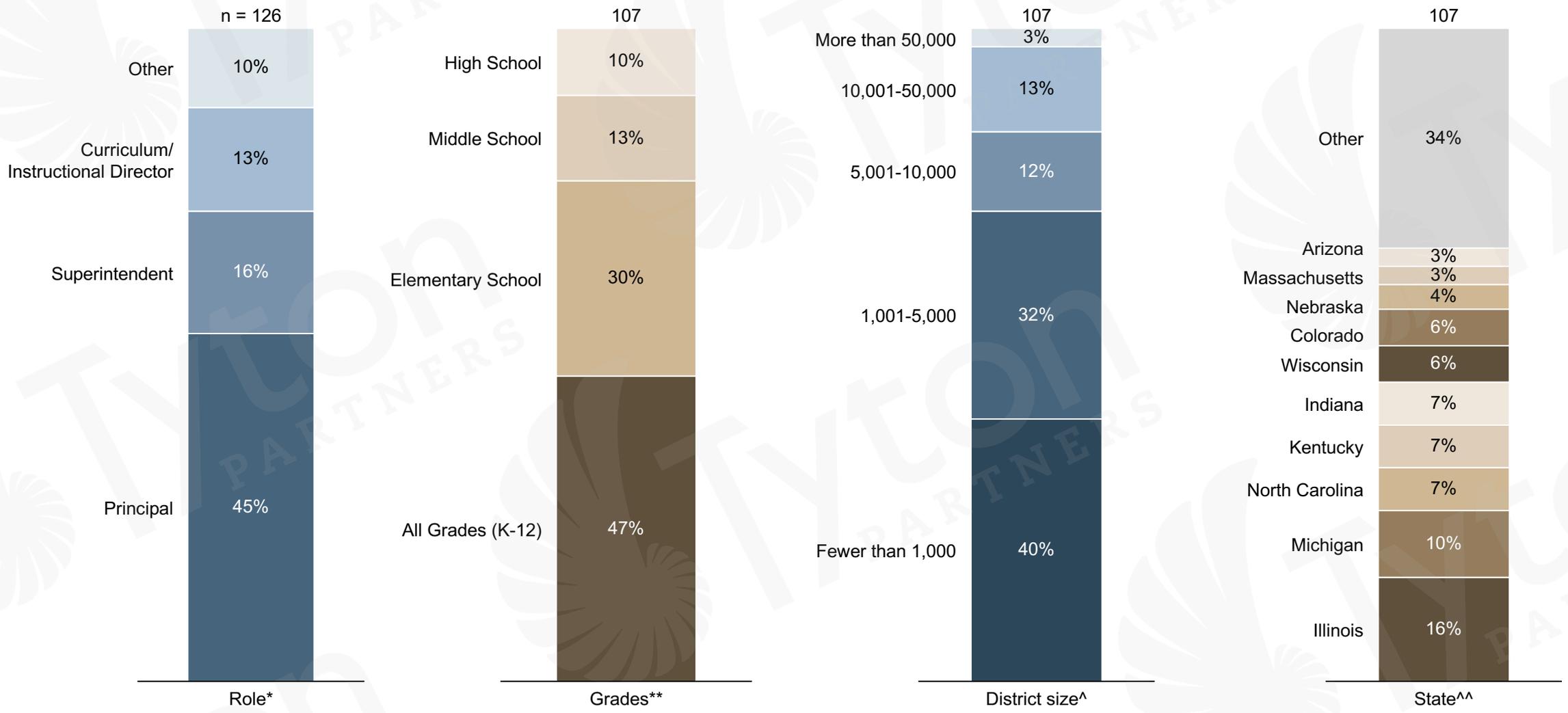
K-12 ARP ESSER Pulse Survey

February 2023



INVESTMENT BANKING + STRATEGY CONSULTING

Tyton Partners surveyed over 100 school and district administrators

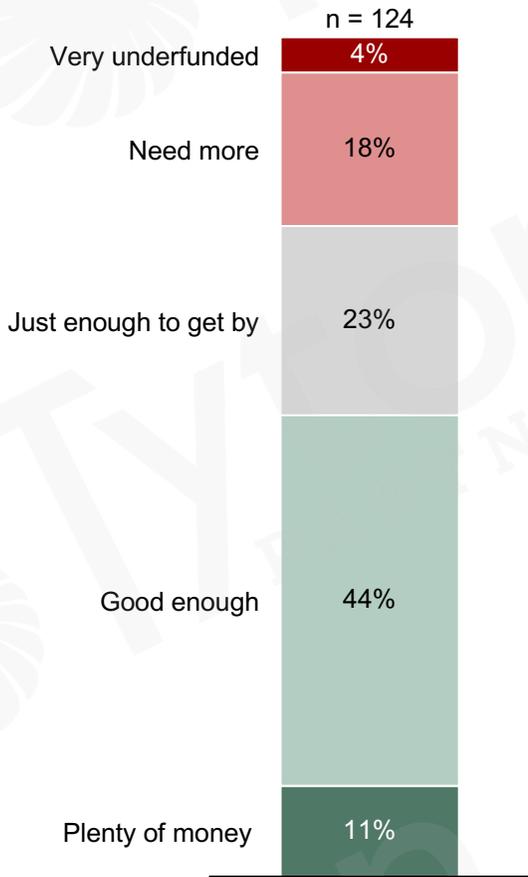


Notes: *Survey question: "Which of the following best describes your role?" n=126; other includes assistant/associate superintendent of curriculum or human resources, chief academic officer, and chief information officer **survey question: "Which grades do you primarily support?" n=107; ^survey question: "How many students are enrolled in your school district?" n=107; ^^survey question: "Please select the state where your school is located." n=107
 Source: K12 ARP ESSER Survey 2023

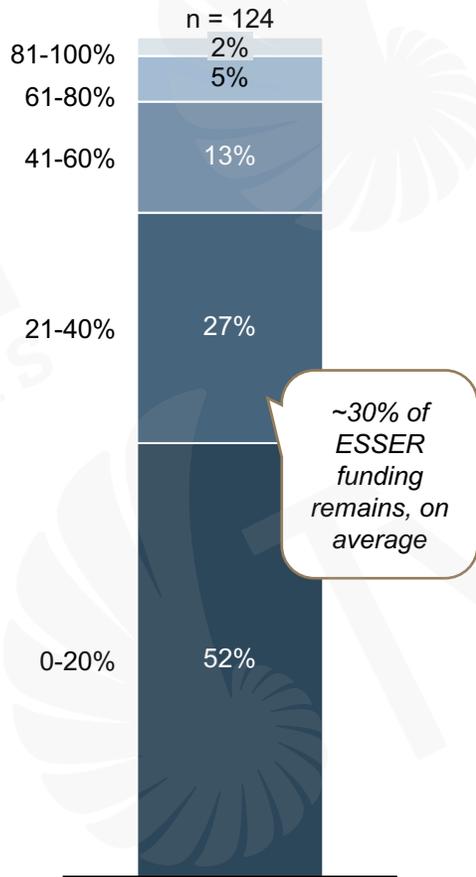
The majority of administrators report currently having enough funding, with ~30% of ESSER funding remaining; ESSER has been a very important source of funding



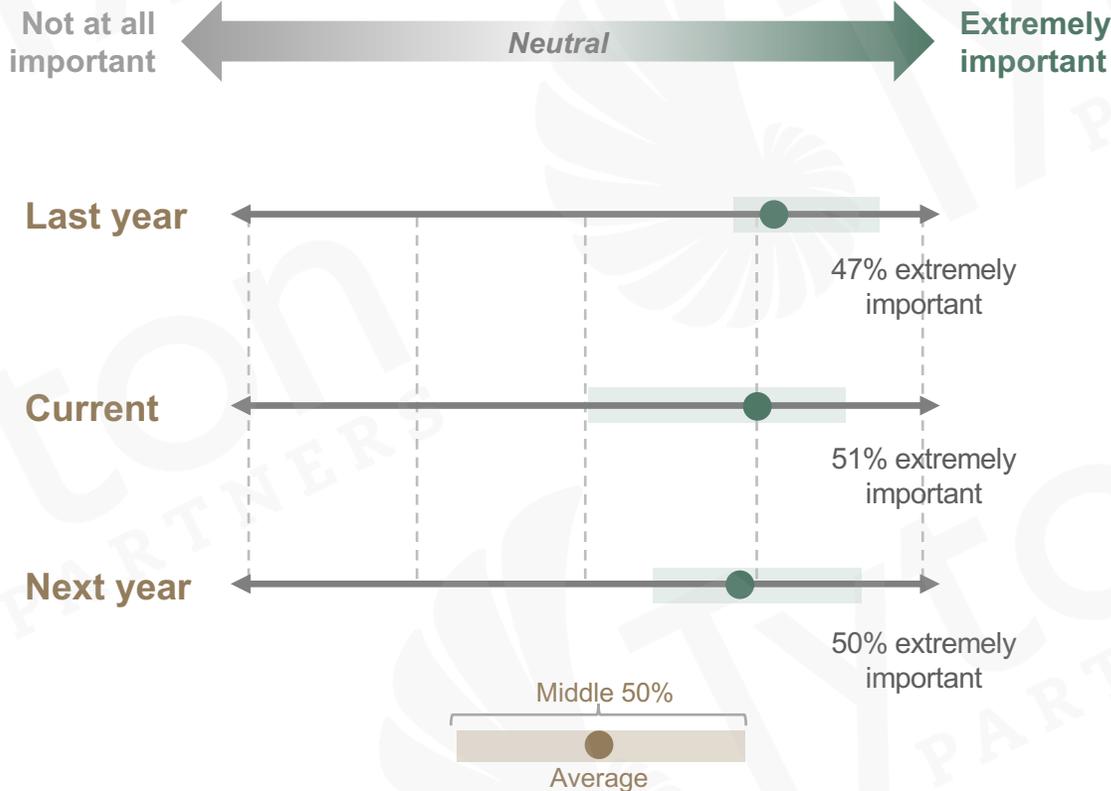
Current sentiment towards budget*



Percentage of funds unallocated**



Importance of ARP ESSER over time^

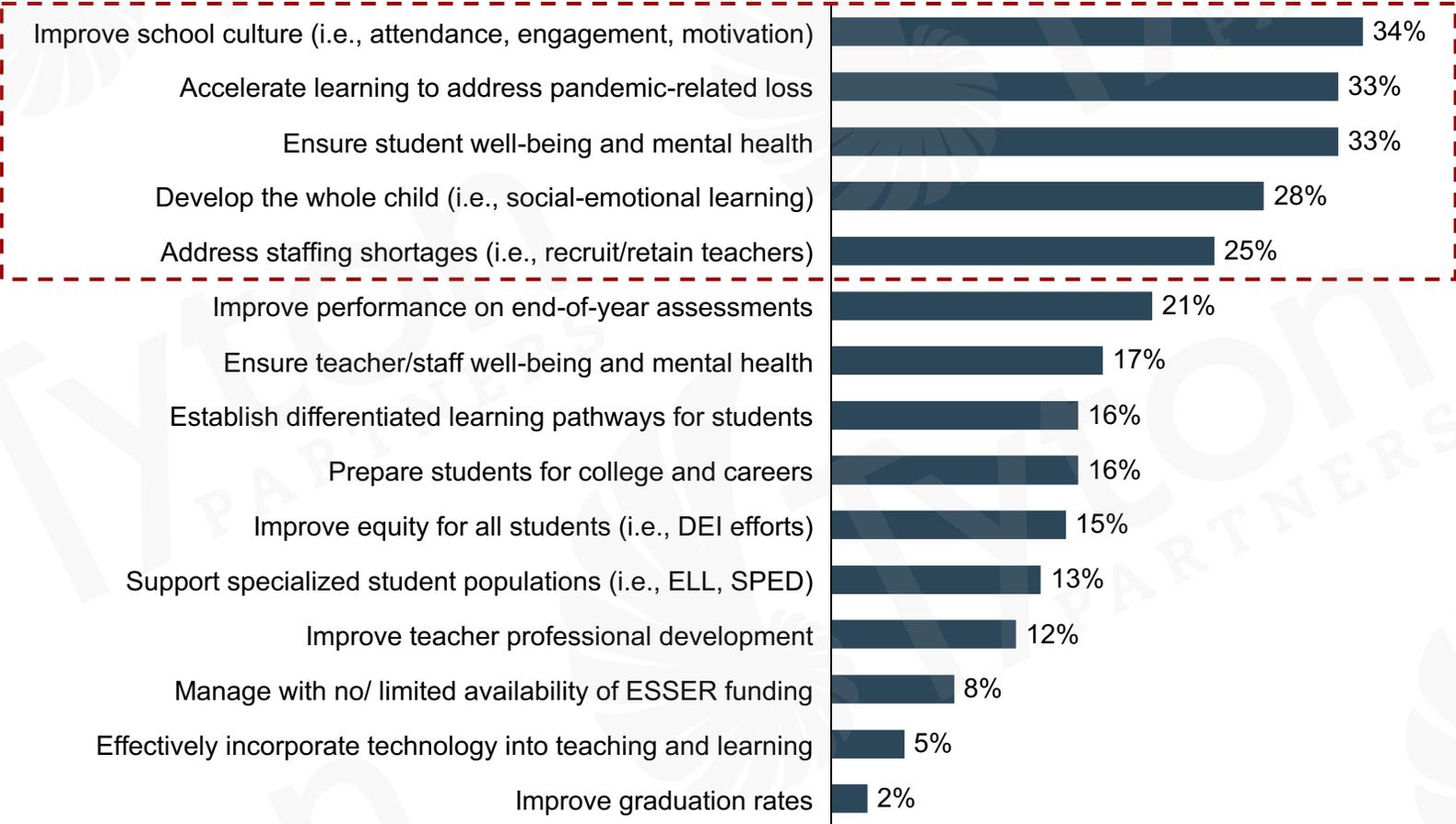


Notes: *Survey question: "Which of the following best describes your current sentiment towards your school/district's budget for the upcoming year (AY '23-'24)?"; **survey question: "Please estimate the percentage of ARP ESSER funding that has not been allocated yet by your school/district (i.e., still needs to be spent by the September 2024 deadline)."; ^survey question: "How important has ARP Elementary and Secondary School Emergency Relief Fund (ESSER) funding been to your budget this school year and next year?" n=124
Source: K12 ARP ESSER Survey 2023

Administrators remain focused on providing supportive environments for students and prioritizing students' mental health heading into the next year



Top administrator priorities for next year (AY '23 –'24)*, **



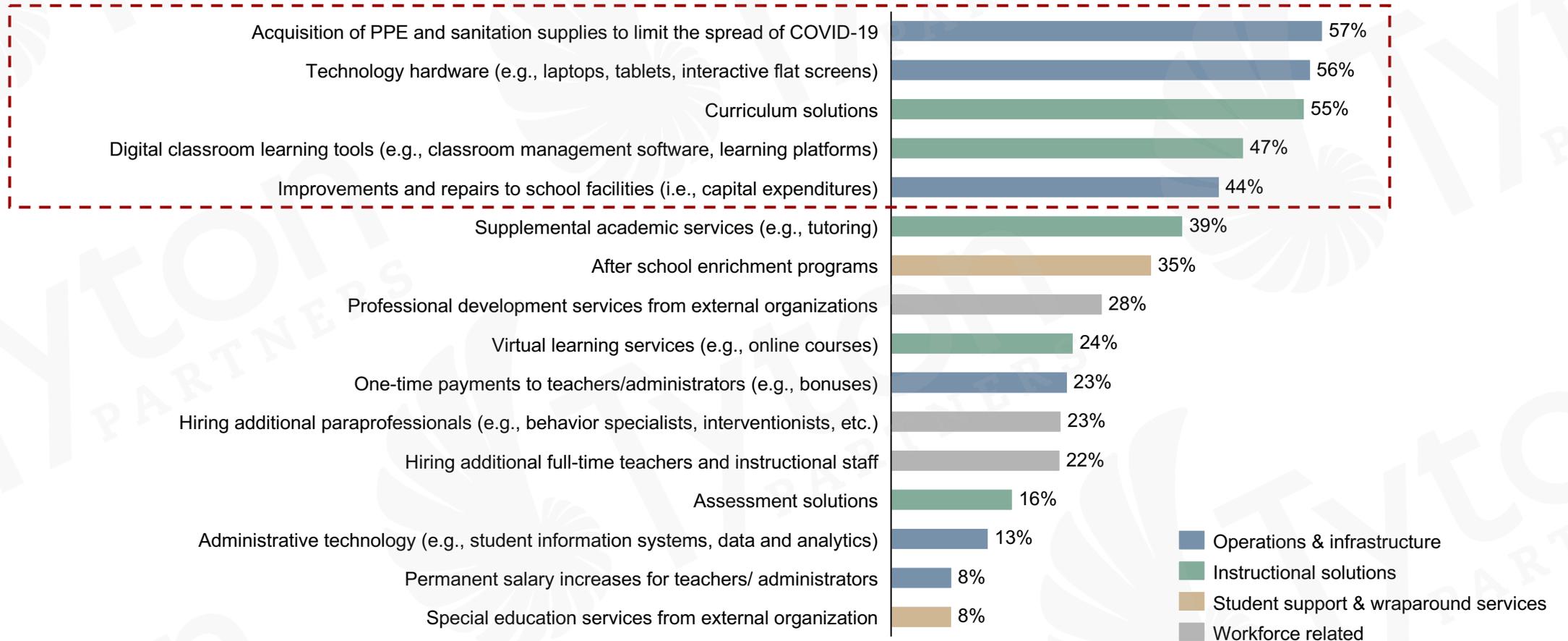
Districts continue to address longer-term COVID effects on learning and operational capacity constraints

Notes: *Survey question: "What are your school/district's top priorities as you head into next year (AY '23-'24)? Please select up to three."; **survey question: "Are there any other priorities not reflected above that your district is emphasizing? If so, please write them in the space provided below.", n = 126
Source: K12 ARP ESSER Survey 2023

ESSER has largely been spent on operational improvements and instructional solutions, in addition to resources to better support students and teachers



Areas where ESSER has been invested to date

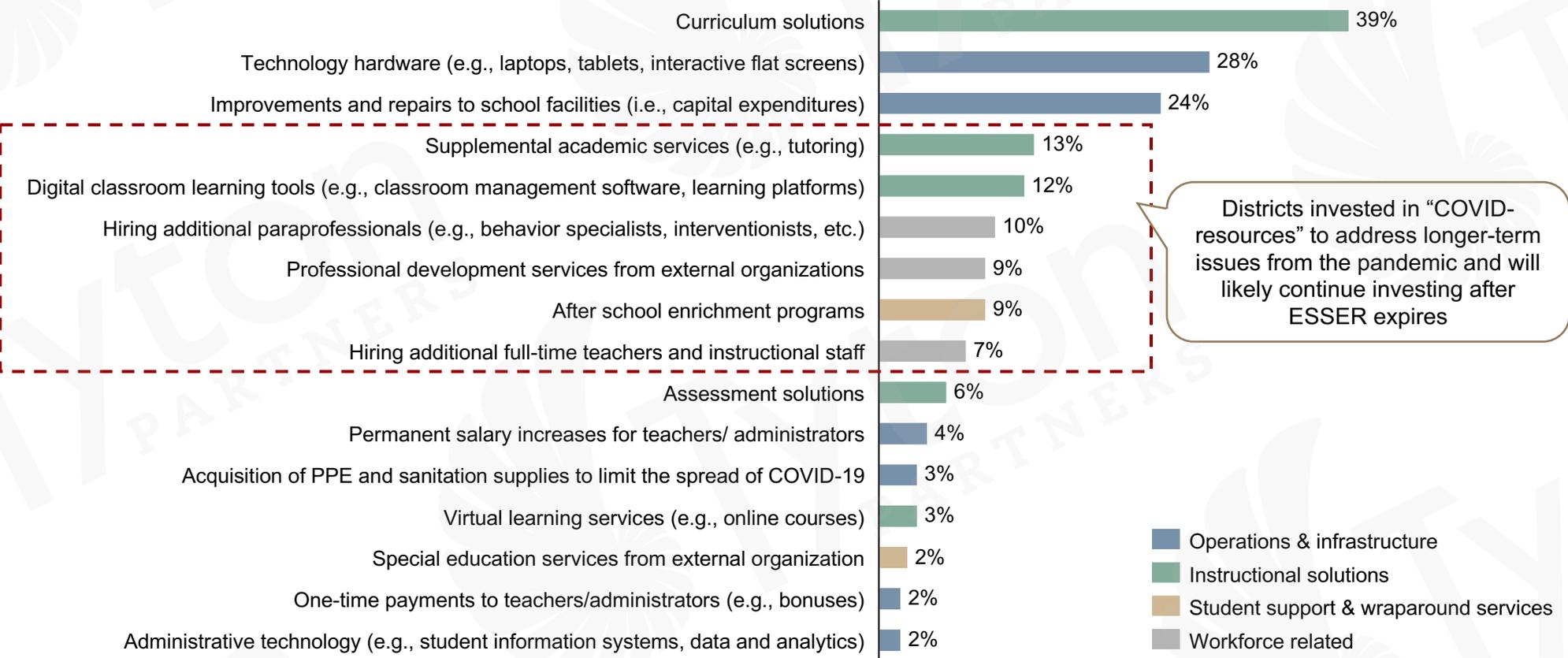


Notes: Survey question: "In which of the following areas have you ever invested ARP ESSER funding?", n=124, Please select all that apply.
Source: K12 ARP ESSER Survey 2023

After ESSER expires, administrators will continue investing in curriculum solutions discovered during the pandemic, as well as technology and capital improvements

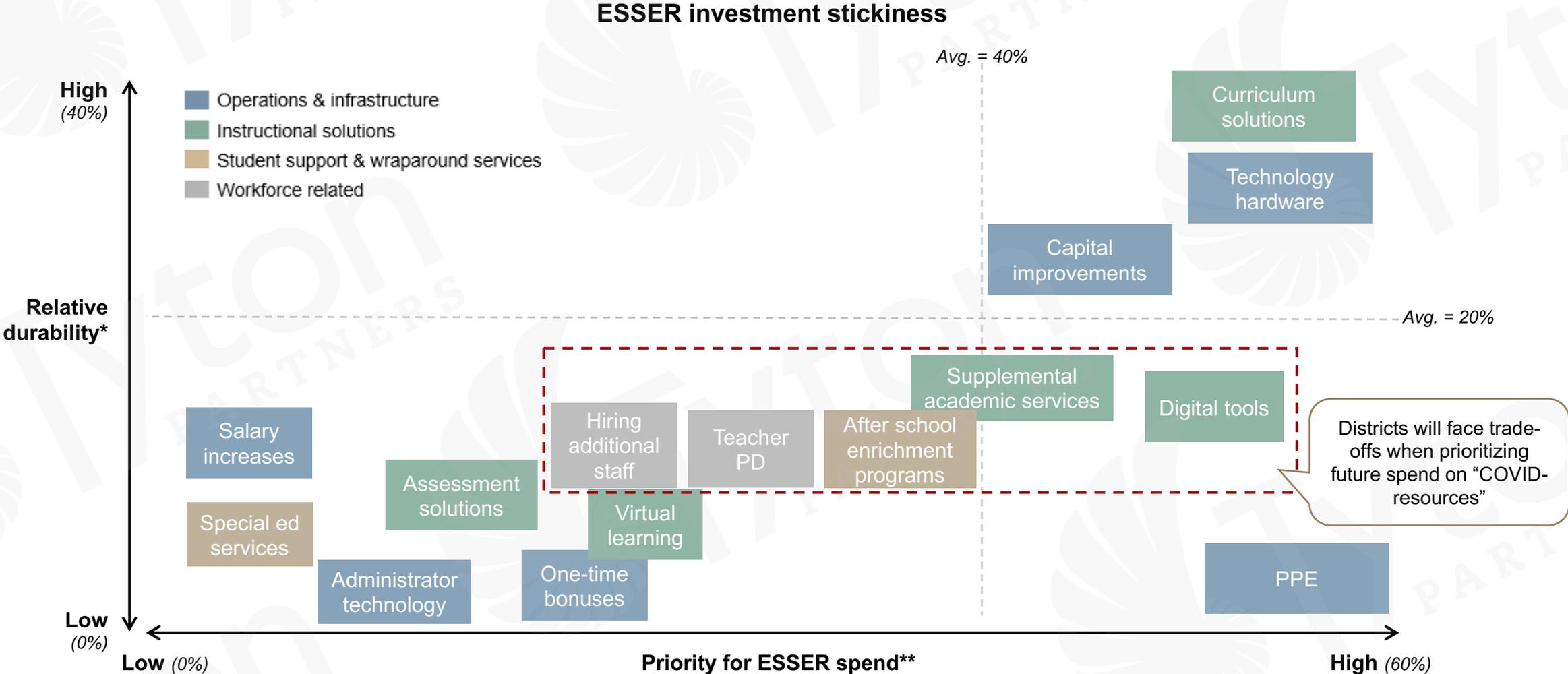


Areas of investment enabled by ESSER funding that districts will continue to spend on after loss of ESSER funds



Notes: Survey question: "Of the following areas in which ESSER funding was used, which areas will your school/district continue investing in after ESSER funding expires? Please select up to three areas." n = 123
 Source: K12 ARP ESSER Survey 2023

Curriculum, supplemental services, and digital tools are areas in which ESSER funding was used that have relatively high durability as continued investment areas



Notes: Survey questions: ******"In which of the following areas have you ever invested ARP ESSER funding?", n=124, Please select all that apply; *******"Of the following areas in which ESSER funding was used, which areas will your school/district continue investing in after ESSER funding expires? Please select up to three areas." n=123
Sources: K12 ARP ESSER Survey 2023

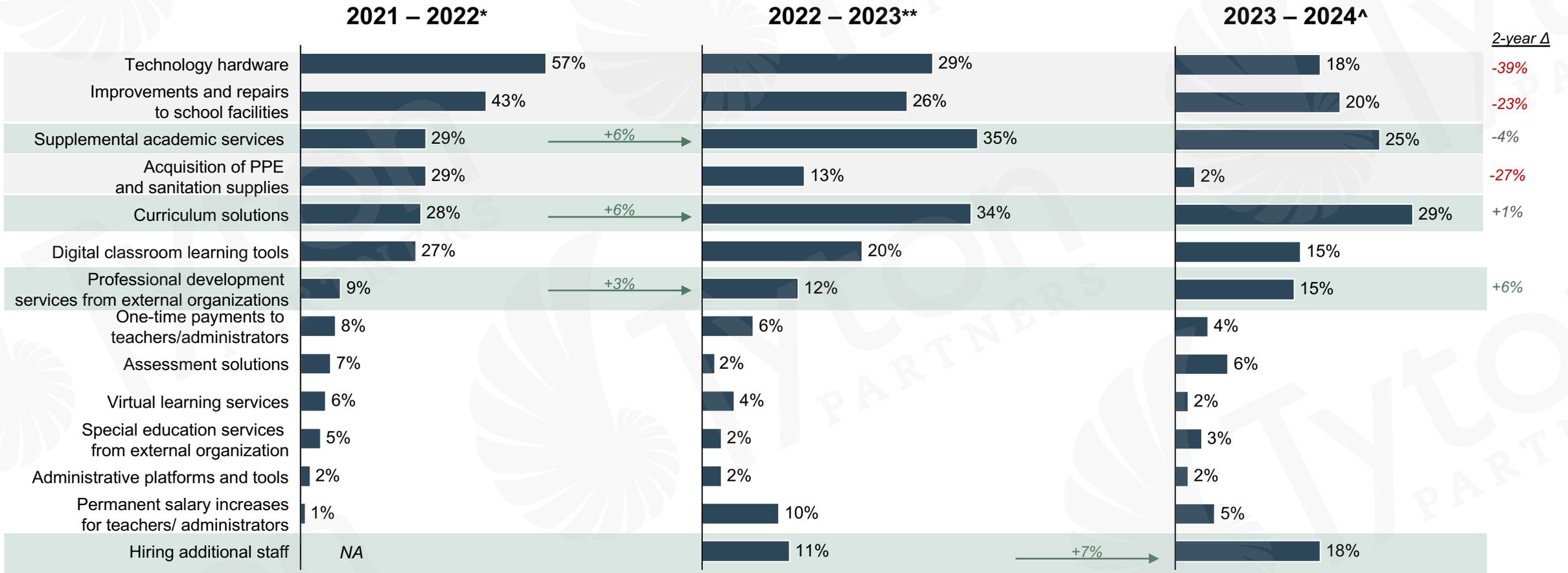
ESSER funding has shifted from infrastructure spend to instructional materials and professional development over the last few years



At the onset of ESSER, districts followed mandates to spend on PPE and capital improvements

As the pandemic drew on, investments to address learning loss and teacher capacity constraints were prioritized

Investments to accelerate learning and support staff will continue to be prioritized with remaining ESSER funding

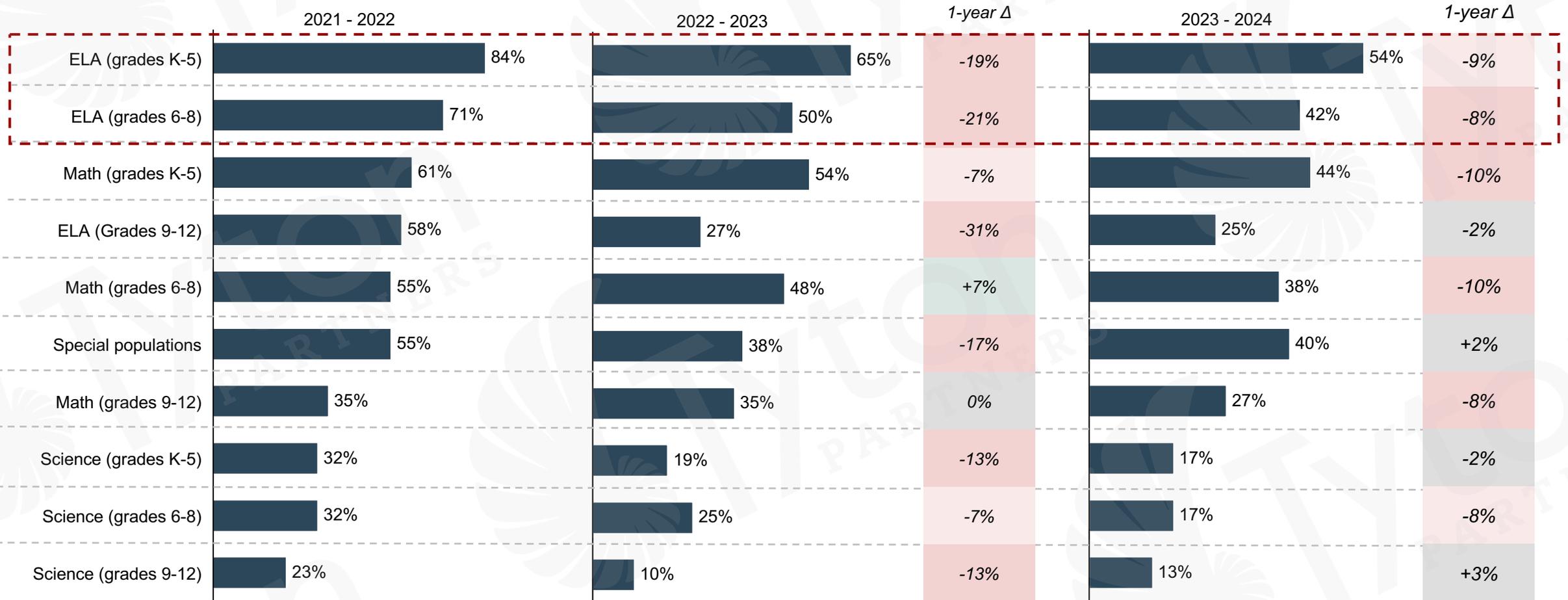


Notes: *Survey question: "In which of the following areas have you allocated the most ARP funding this past year (2021-22)? Please select up to three areas."; n = 86; **survey question: "Which of the following areas have you allocated most of the ARP funding to this school year (AY '22-'23)? Please select up to three areas." n = 124; ^survey question: "In which of the following areas do you plan to allocate most of any remaining ARP funding in the next year (AY '23-'24)? Please select up to three areas." n = 124
 Source: K12 ARP ESSER Survey 2023, K12 ARP ESSER Survey 2023

K-8 ELA and math have been key areas of investment over the last few years, while spend has been less prioritized within science and at the high-school level broadly



Curriculum areas where ARP ESSER was planned to be invested

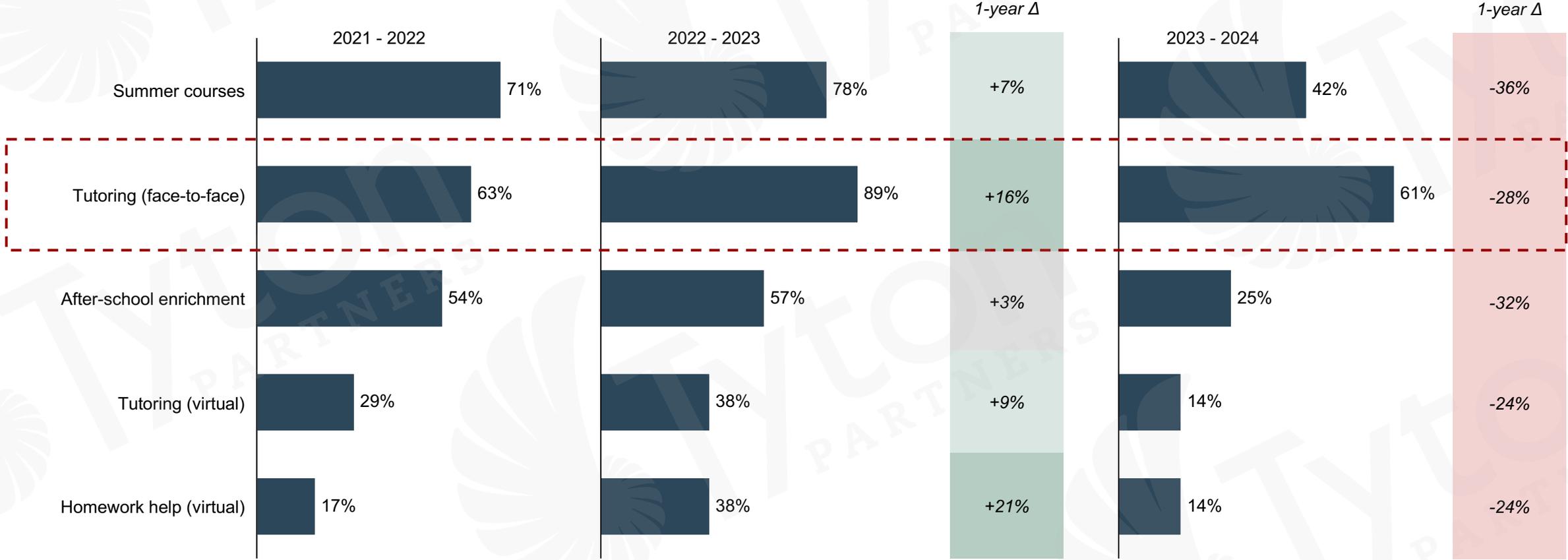


Notes: Survey question: "Curriculum - Have you used or do you plan to use ARP ESSER funding to invest in any of the following curriculum products/services? Please select all that apply."
 2021-2022 n=31, 2022-2023 n=48, 2023-2024 n=48
 Source: K12 ARP ESSER Survey 2023, K12 ARP ESSER Survey 2023

While summer courses were prioritized during the onset of the pandemic, face-to-face tutoring has emerged as the leading supplemental academic service



Supplemental areas where ARP ESSER was planned to be invested

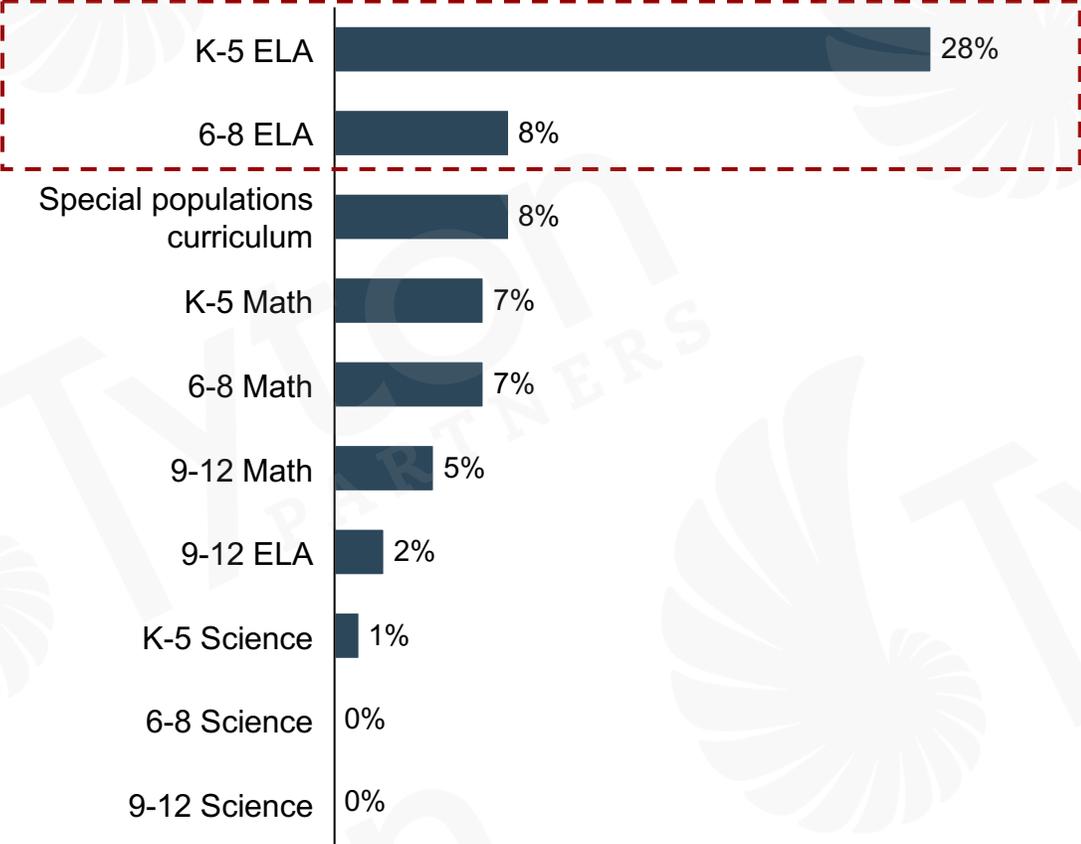


Notes: Survey question: "Supplemental - Have you used or do you plan to use ARP ESSER funding to invest in any of the following curriculum products/services? Please select all that apply."
 2021-2022 n=25, 2022-2023 n=37, 2023-2024 n=36
 Source: K12 ARP ESSER Survey 2023, K12 ARP ESSER Survey 2022

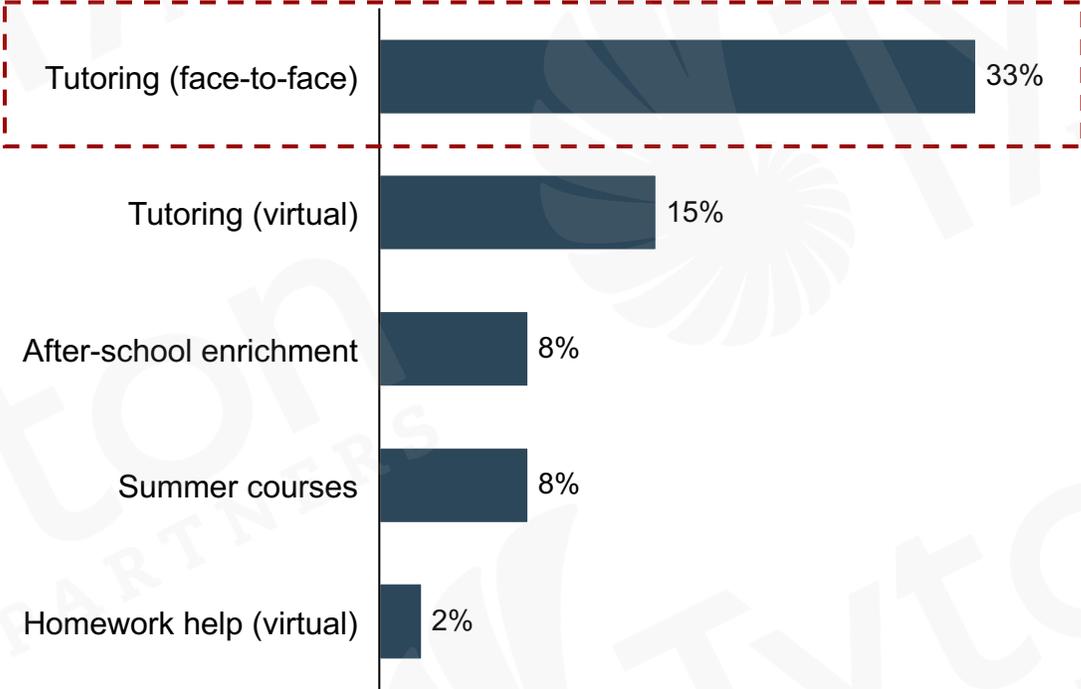
K-8 ELA and face-to-face tutoring will be key areas of continued investment to combat pandemic-related learning loss



Prioritized curriculum areas after ARP ESSER expires**



Prioritized supplemental areas after ARP ESSER expires*



Notes: *Survey question: Which of the following will your school/district prioritize investing in after ARP ESSER expires in September 2024? Please select up to 3. n=86; **survey question: "Which of the following will your school/district prioritize investing in after ARP ESSER expires in September 2024?", Please select up to 3. n=85
 Source: K12 ARP ESSER Survey 2023