RECOVERY AND RENEWAL – How California School Districts Set Budget Priorities and Innovate to Lift Students

Field Report: 2022–23 School Year

Ja' Nya Banks, Bruce Fuller, Niu Gao, Emily Reich, and Abigail Slovick

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Acknowledgments

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Executive Summary

Public schools buckled under the shock that arrived with the global pandemic, most closing their doors in March 2020. Still fresh in our memories, teachers attempted online instruction, viewing their students each day as small squares on computer screens. We know all too well that learning curves of students flattened or fell. Many kids and teachers experienced death in their families, along with emotional angst that's still reported by local educators.

Yet as the COVID-19 virus receded, our research team began visiting a handful of California school districts in early 2021. We asked district leaders and school principals about how they were recovering from this unprecedented jolt, along with the challenges and joys of returning to in-person schooling.

These early conversations also revealed a variety of organizational and pedagogical innovations—from digitally enlivened lessons to intense work with small groups of pupils. Teachers and staff, still dealing with health challenges in their own families, were turning to the social and emotional well-being of their students.

Recovery and Renewal?

We renewed our visits with local educators during the 2022–23 school year in six diverse districts (expanding to nine in 2023–24). This report details our findings from interviews and school visits, guided by two core questions:

- How did district leaders and school principals adjust budget priorities in the wake of the pandemic? Did federal stimulus and new state spending affect these priorities? Who contributed to budget decisions and program initiatives inside districts and schools?
- What organizational and pedagogical innovations surfaced in schools during the pandemic? Which have been sustained as districts address learning recovery and the wider social-emotional vitality of students? Has the institution of schooling improved?

This report speaks to educators, local school boards, advocates, and policy makers—stakeholders who seek to improve public schools. We find that efforts to push learning curves upward or address less visible mental health challenges must take into consideration the post-COVID-19 contexts in which they work, situated in California's widely diverse communities.

Overall, leaders of these six districts remained focused on budgetary stability, utilizing federal stimulus and uncertain state dollars in ways that did not risk long-term, unaffordable costs. At the same time, district leaders and school principals aimed to backstop the broader well-being of their students, then secondarily address learning recovery.

These districts endeavored to recover from the pandemic, rebuilding teacher morale and returning to daily routines for students and families. Leading educators experimented with new ways of organizing schooling or classrooms, inspiring a feeling of "new possibilities," as one teacher told us.

Opportunities and Constraints—Evolving Local Conditions

Most districts, when setting budget and program priorities, build from core values, their sense of mission. Across the six districts, these basic commitments included the way digital tools placed students in active roles inside classrooms; a shift toward competency-rooted learning and adjusting the teacher's role; offering parents diverse school options; placing more adults in classrooms, dedicated to stronger relationships. During uncertain times, many district leaders focused budgets on such inventive practices and programs.

Yet keeping core values in mind, district leaders also responded to a variety of external pressures. We heard much about enrollment decline and spotty pupil attendance, labor shortages, and the inability to grow new programs. External demands also came from stiff expectations pressed by families and varying levels of civic support for local schools.

The return of categorical aid—new or expanded programs designed and regulated from the state capital—reflected an unexpected constraint as district leaders struggled to get past the pandemic. Districts, by 2022–23, were being pressed by the governor and lawmakers to expand pre-K options, provide free meals to all, extend the school day to 9½ hours, and broaden the curriculum in the fields of art and music. Yet finding a sufficient number of new teachers and support staff to implement those mandates has proven challenging.

Three Pathways Toward Recovery and Renewal

We discovered three common responses to external pressures, as district leaders built from core values and long-running cultures inside their institutions. At least one district focused almost exclusively on strengthening *fiscal health*. Coming off shaky times, this local superintendent faced COVID-19's aftermath. He opted to pay down outstanding debt and bolster cash reserves. The priority was to ensure the long-term solvency of the district.

All six districts utilized federal stimulus and new state dollars to add a variety of discrete programs on *the edge of core instruction*—tutoring outside the school, new counselors, free summer school, and enhanced after-school activities for students. These efforts provided more instructional time and extra help for students who needed it. Such peripheral programs were often staffed by instructional aides ("classified staff") or contracted out to local nonprofits. However, these initiatives minimally engaged classroom teachers or addressed day-to-day social ties inside schools.

A response observed in three of the six districts stuck to *core teaching practices* and sought to *enrich relationships* between students and adults inside schools. Two districts sharpened efforts to define the learning competencies fostered by teachers, moving away from curricula and didactic instruction detached from real-world issues. Another enlarged its digital-learning office, then deployed staff to coach teachers on ways to enliven their classrooms. Middle schools in one district revamped the advisory period to engage questions of ethnic identity and social tensions with peers or teachers.

A Thousand Flowers Blossom

District leaders and principals reported their return to familiar routines, resetting the certainty and work of teachers, and reassuring parents and families. At the same time, many local educators reflected on the pandemic as a chance to pursue new possibilities, when facets of schooling might be restructured. The risk of not mounting innovation was that schools would "rubber-band back to the old normal," as one superintendent told us.

In fact, all six of the districts mounted a colorful variety of innovations. Many were underway prior to the pandemic. Yet many were born from, or expanded by, sizable infusions of federal and state aid. Necessity proved to be the mother of some invention.

Two districts engaged in substantive structural reforms, both focusing on competency-based teaching and learning. Rather than organizing curriculum around textbooks and seat time, and instructing easily tested pieces of knowledge, this pair of districts has articulated a series of discrete proficiencies that students master, often at their own pace. One district offers core courses while most learning occurs in open workshops, coached by "learning facilitators." Stimulus dollars helped spur this shift in mindset, build inventive facilities, and lower class size in one or both of these inventive districts (Lindsay and Milpitas).

All six districts moved assertively to backstop the social and emotional well-being of students. A portion of those innovations shifted the way schooling was organized or aimed to enrich relationships between pupils and teachers. Two districts greatly expanded counseling staff, even designing new facilities to address mental health challenges of students and families.

Several districts have redoubled efforts to equip teachers with digital tools, from smartboards to online curricula, real-time tracking of student work, and learning stations where small groups of students work in cooperative fashion. District leaders now experiment with ways to lengthen instructional time: expanding transitional kindergarten (TK), contracting with tutoring firms, and offering extended-day programs, often delegating these to local nonprofits.

So, let's dig-in to learn about the colorful variety of contexts in which district leaders work, recovering from the pandemic, often with a renewed spirit of what's possible.

1. Aims, Audience, and Research Questions

California's educators resumed in-person schooling for a mostly uninterrupted year in 2022–23. Declining levels of achievement—what many term "learning loss"—had become vividly clear. The social and emotional health of students felt unusually fragile. The prospect of shrinking federal stimulus and state dollars began to preoccupy leaders of the six participating districts.

Against this uncertain backdrop, we renewed our visits to six California districts in fall 2022. We had completed a pilot study during the first half of 2021, assessing the ways in which schools were emerging from the pandemic. We also discovered a surprising mix of organizational and pedagogical innovations. Six superintendents and their staff colleagues opened their doors, their hearts and minds to share how budget and program priorities were evolving, along with organizational innovations that had sprouted inside their schools during the 2022-23 school year. We asked about what this period of recovery and renewal looked like inside their district office and schools.

This report speaks to educators, local school boards, advocates, and policy makers curious about the ways district leaders weathered the COVID-19 era, shifted budget priorities within a changing environment, and bolstered a variety of inventive programs to lift students. You will see how some districts battened down the hatches, returned to old routines, and sought fiscal stability. Others reported bolder action, sustained digital innovations in classrooms, shifted to a broader notion of student well-being, and maintained an innovative spirit.

This report describes the ways budget and program priorities evolved during 2022–23, district-level decisions were reached, and novel organizational or pedagogical reforms were supported. We also show how surrounding contexts *and* practices internal to the district help to explain the priorities that emerged in the wake of COVID-19.

We dug into the tandem topics encompassed by the tag, "recovery and renewal". That is, how were districts and educators *recovering* in 2022–23 from the nightmare of a pandemic and school closings? And how might a spirit of innovation and *renewal* mark efforts to lift students and revive their teaching force? We explore this pair of questions in cooperation with the six superintendents and their local colleagues.

- How are district leaders, school-level educators, and students *recovering from the pandemic*? Our field visits centered on the overall climate and cohesion inside the district office, the way it set budget and program priorities, and the organizational dynamics inside districts or schools that help to explain their pursuit of differing recovery strategies.

- What organizational or pedagogical *innovations* surfaced during the pandemic era that districts see as promising or effective? In short, has the unprecedented shock weathered by educators led to promising institutional change inside schools? (We also discovered several school-improvement efforts that began prior to the pandemic.)

Recovery and Renewal?

Our pilot study, conducted during the first 6 months of 2021, revealed a halting recovery as the virus morphed and repeatedly shut down California schools. More than a year later, in 2022–23, now visiting six diverse districts, we discovered greater stability, a general feeling that the nightmare was receding. We observed wide variability among district and school leaders in terms of uneven morale, intensity of external demands, and the capacity to put in place a coherent strategy for embracing and lifting students and teachers alike.

Arriving at budget priorities within district offices is proved key to recovering from the pandemic and (at times) innovating to improve district operations and reengage students. In turn, many of our interview questions, as we visited each of the six districts in the 2022–23 school year, focused on budget priorities, how stimulus dollars and new state funding were being allocated, and who contributed to setting budget priorities.

The renewal process after the pandemic was not always intentional or carefully planned. District leaders worked hard to ensure that students and staff remained healthy and motivated as they returned to school. Yet, demands from the district's context remained intense as we detail below. Differing recovery efforts bubbled-up from individual schools. At the same time, the nation's schools continued to experience a revolution in the use of digital technologies—from delivering classes and instantly assessing children's learning to converting textbooks and lessons to electronic form. We discovered that major portions of these digital innovations were persisting, even reshaping the ways in which classrooms were organized.

Some district leaders focused teachers on "essential" curricular standards, deployed digitally savvy coaches to work alongside teachers, mounted a variety of tutoring approaches (at times aided by private firms), or hired aides to enrich student-adult ties inside classrooms. California's governor and lawmakers pressed their own innovations, unevenly embraced by local educators. These new efforts include free lunches for all children, expanding TK (for 4-year-olds), extending the school day, and fresh funding for arts and music.

In fact, the pandemic and resulting school closings invite a longer-term question: Under what conditions might the institution of schooling—historically rather calcified, some argue—be moved to better engage and motivate students? Indeed, the "old normal" may have been soothing for some, but it often hosts didactic instruction, narrow ties with adults, and often

passive roles for students. Conventional schooling has been shaken at certain historical moments, altering the mindset of educators and the school's basic organization. The advent of grade levels aimed to calibrate pedagogy with the capacities of children offers one historical example. Or the advent of standardized seat time and Carnegie units arose to help more youth prepare for college. (Two of our participating districts now endeavor to undo seat time, moving instead to discrete competencies demonstrated by students.)

The jolt to schooling delivered by the global pandemic was unprecedented. Since the advent of common schooling, in the mid-19th century, the institution had halted operations only during the Spanish Flu—and then, not nationwide. So, the COVID-19 era offered a natural experiment, a chance to observe the extent to which a massive blow to the institution might yield adaptive and innovative behavior inside district offices and schools.

We will see that a portion of these districts did mostly "rubber-band back to the old normal". But others have not, at least not in 2022–23 during our site visits. So, this report informs this long-running institutional question: When can the organization of schooling change, intending to better engage and elevate students? What does that look like inside schools? And will promising innovations or shifts in educators' mindset persist over time? After all, rubber-banding back remains a comforting option.

Note that a year following our field work, in 2023–24, three additional districts joined the study. All nine districts appear below in our statistical profiles. The present report details what we discovered—the qualitative field data—from the six districts participating in 2022–23.

Organization of the Report

Section 2 specifies the core research questions, spotlighting the district *recovery* and *renewal* activities that motivated our inquiry. Section 3 describes our procedure for selecting six diverse districts across California, along with the qualitative research methods deployed. Section 4 puts forward a conceptual framework that emerged from our visits, interviews, and document reviews for each district. This conceptual model—centering on contextual forces that buffer district leaders, who variably move from core budget and program priorities—emerged from our field work.

We report key findings from the six districts in Section 4, split into these parts:

- The overall morale and perceptions of recovery, as told by district leaders, school principals, and teachers—that is, each district's overall gestalt.
- The ways in which superintendents aimed to set budget priorities and program innovations within their central office.

- The budget priorities that became salient in 2022–23, and the district leaders and principals that often shaped these priorities.
- The organizational and pedagogical innovations highlighted by district staff and principals and likely sustainability of these innovations as financing began to level-off and soon decline.

Section 5 summarizes major takeaways from this year of field work, then delineates implications for local educators, advocates, state and local policy leaders.

2. Field Work in Six California Districts

This section first describes the still-turbulent context faced by district leaders in 2022–23, including a dizzying hangover from the pandemic. We then explain our field-work methods, the way we went about learning from district leaders, principals, and several teachers. We also explain how we selected the six participating districts, along with their demographic features and fiscal patterns.

California Context—Roller-Coaster Funding, Diminished Learning

Each of the six districts closed schools in March 2020, reopening at varying points, only to be shut down again, through 2021–22. Soon after California schools were shuttered and shifted to online instruction, federal and state governments began providing large doses of economic aid. Infusions of federal and state dollars, at first paid for vital health and safety services, then shifted (by spring 2022) to district-led initiatives aiming to reverse declines in student learning, holistically buoy anxious students and weary teachers, backstop district finances, and bolster digital and pedagogical innovations sprouting during the pandemic.[1]

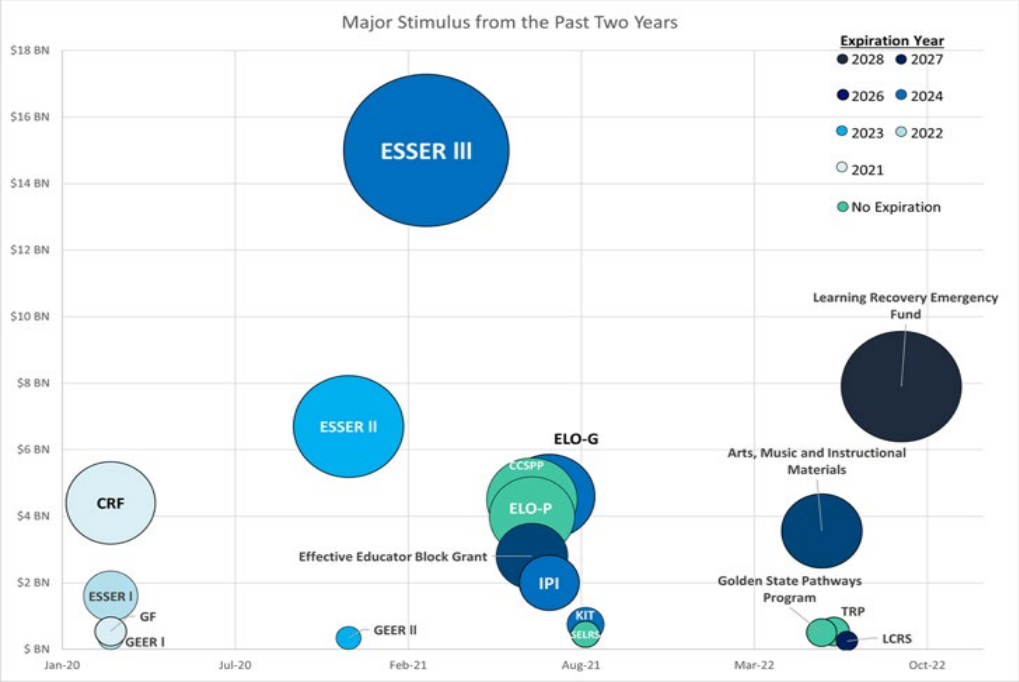
New state funding was arriving but accompanied by new mandates, unlike federal stimulus aid that remained fungible through September 2024. California's governor and legislative leaders—ironically blessed with strong revenues during the pandemic era—opted to craft new programs that required new teachers and support staff, just as district leaders were getting back on their feet. State-designed programs included extending free meals to all children, expanding TK for 4-year-olds, extending the school day for childcare and enrichment activities, and requiring new art and music offerings.

[1] The ways districts moved new dollars from health and safety measures to organizational and pedagogical changes is detailed in our team's earlier report (Lafortune et al., 2023).

Persisting uncertainties. District leaders spoke of many fiscal worries during the 2022–23 school year. Five of the six districts were experiencing high rates of pupil absences, secular declines in enrollment, or both. These factors then reduced baseline revenues from the state at the very moment that Sacramento was requiring additional planning, staff hiring, and monitoring reports for the new "categorical aid" programs. Superintendents and chief financial officers (CFOs) talked of careful spending plans, applying the new dollars to one-time costs or classified staff that could later be pared back (e.g., digital tools and curricular materials, ventilation and other infrastructure projects, paying down debt), with a fiscal cliff looming on the horizon. Federal dollars would disappear at the end of 2023-24).

Figure 2.1 displays when dollops of federal and state aid were allocated to local districts, along with the relative size of each federal or state revenue stream (indicated by the circle size). The third chunk of funding from Washington—Emergency Elementary and Secondary School Emergency Relief (ESSER III)—proved to be the largest single revenue source arriving to districts. Approved in early 2021, ESSER III distributed about $15 billion to California schools.

Figure 2.1. Diminishing Infusions of Federal Dollars as State Categorical Aid Persists



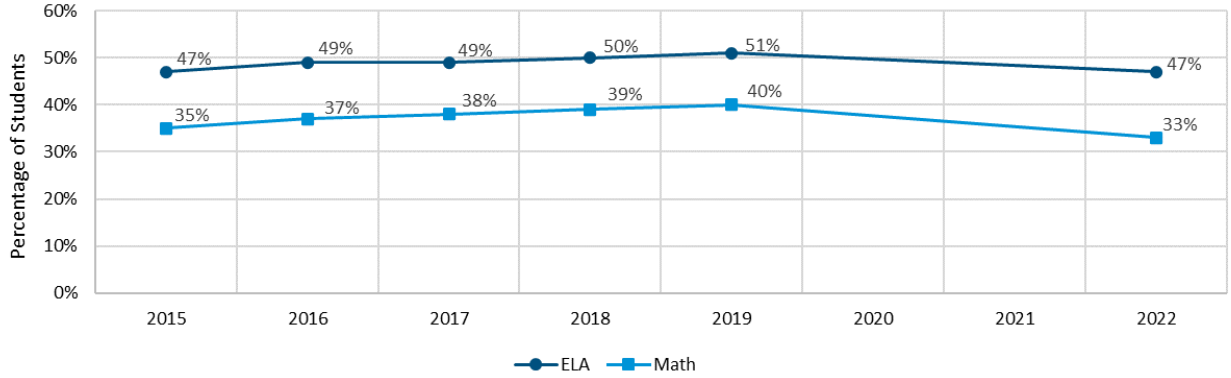
State efforts first guarded against teacher layoffs, disrupting the shift to remote instruction, or jeopardizing family-support activities mounted by districts. Next, state policy makers turned to factors that might guard against more severe learning loss: providing funds to feed all youngsters regardless of family income; lengthening the school day; expanding preschool options; and broadening the curriculum.

New state funding streams included the Expanded Learning Opportunity Grant (ELO-G) and Expanded Learning Opportunity Learning Program (ELO-P; $7 billion), the Learning Recovery Emergency Fund ($8 billion), Community Schools Incentive Initiative funding ($5 billion), and Arts and Music Education ($4 billion). Seeking fiscal flexibility as revenue streams grew more complex, some district leaders would blend sources, while conforming to a growing list of regulations and reporting mandates set in Sacramento.

Slower student learning under budget constraints. In the context of these budget uncertainties, district leaders and principals faced two major challenges. First, attendance rates remained three or four percentage points below the pre-COVID-19 normal, costing some districts more than $4 million in annual revenues. Second, declines in student proficiency levels became vividly clear in 2022–23. (We know that learning loss persists, especially in lower-income communities [Kane & Reardon, 2023].)

Student performance on state tests in spring 2022, on average, fell back to 2016 levels. This, despite the fact that California students in the decade prior to the pandemic had been inching up on English language arts (ELA) and mathematics exams.[2] The share of students achieving at proficient levels in ELA fell six percentage points from 2019 to 2022; percentage proficient fell nine percentage points in math. Figure 2.2 displays declines in achievement, combining grade levels.

Figure 2.2. Percentage of California Students Proficient in English Language Arts and Math, 2015 to 2022



Note. The Smarter Balanced Assessment (SBAC) was not administered in 2020, and we exclude 2021 because the SBAC was optional. From: Smarter Balanced Assessments, California Department of Education, 2022.

[2] Progress had been slower pre-pandemic for California students on the federal National Assessment of Educational Progress (NAEP). For details, see Fuller& Lafortune (2023).

The damaging effects of the pandemic and remote instruction fell most heavily on Black and Latino students, along with those from low-income families. The decline in math proficiency rates was about three percentage points worse in schools with large concentrations of Latino students (comparing the fourth with the first quartile of schools in terms of Latino percentage of enrollment [Starr et al., 2022]).

This unequal impact on disadvantaged students fell on top of the slow progress in narrowing racial gaps over the past quarter century. White children in California have continued to achieve at three grade levels above Latino peers over the past 25 years, according to results from the National Assessment of Educational Progress (NAEP). Gaps were even larger for Black children. The picture, including lack of progress prior to COVID-19, is similar for math.[3]

Selecting Diverse School Districts

Set against these contextual dynamics, we contacted a variety of district superintendents, asking whether they would participate in our 3-year study. Several district leaders expressed interest in learning about the way other districts were recovering from the pandemic, making budget and program decisions, and perhaps sustaining organizational innovations. In selecting districts, we aimed for geographic and demographic variety.

Three districts—Glendale, Milpitas, and Lindsay unified—participated in our pilot study. Each opted to remain in the study, allowing us to track their evolving budget priorities and program adjustments. We then pursued three additional districts, seeking greater geographic representation and diversity in terms of families served. These three became Lammersville, Poway Unified, and Sweetwater Union High School District. This report focuses on the six districts participating in field work during 2022–23. Only the statistical tables include the final three districts—Compton, Del Norte, and Kings Canyon—which joined in 2023–24 (Figure 2.3). Note that several districts decided not to participate in the study, raising the question of possible bias, as discussed in Appendix A.

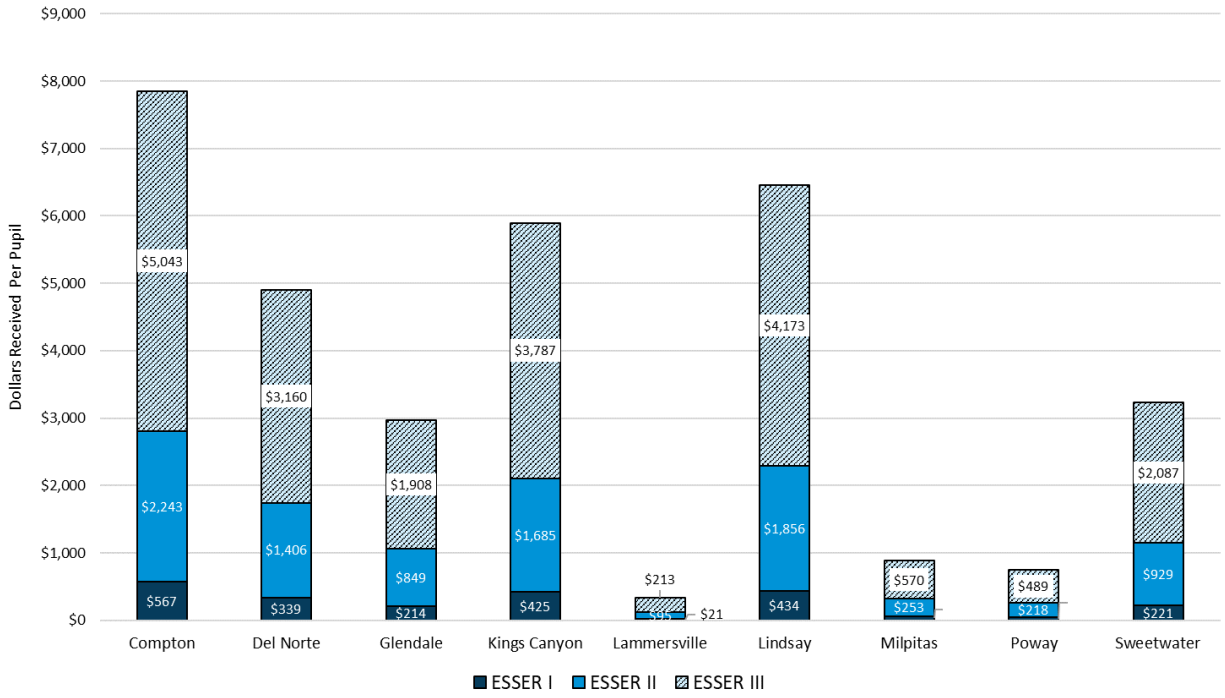
Figure 2.3. Nine Districts Participating in the Field Study Through 2023–24

[3] These patterns can be seen within NAEP data files, https://www.nationsreportcard.gov/.

By the Numbers—Participating Districts

Revenue streams. Let's first examine how funding streams varied among districts through the COVID-19 era. Figure 2.4 shows dollars received per pupil from the federal government via the three tranches of ESSER funding. Districts serving higher shares of children from working-class families benefited from greater ESSER allocations, an attempt to backstop pupils who attend school in the most challenged districts. We see that Lindsay Unified, for example, received $4,173 per pupil in ESSER III funds, compared with $489 per pupil in Poway Unified, a district serving an economically better-off community.

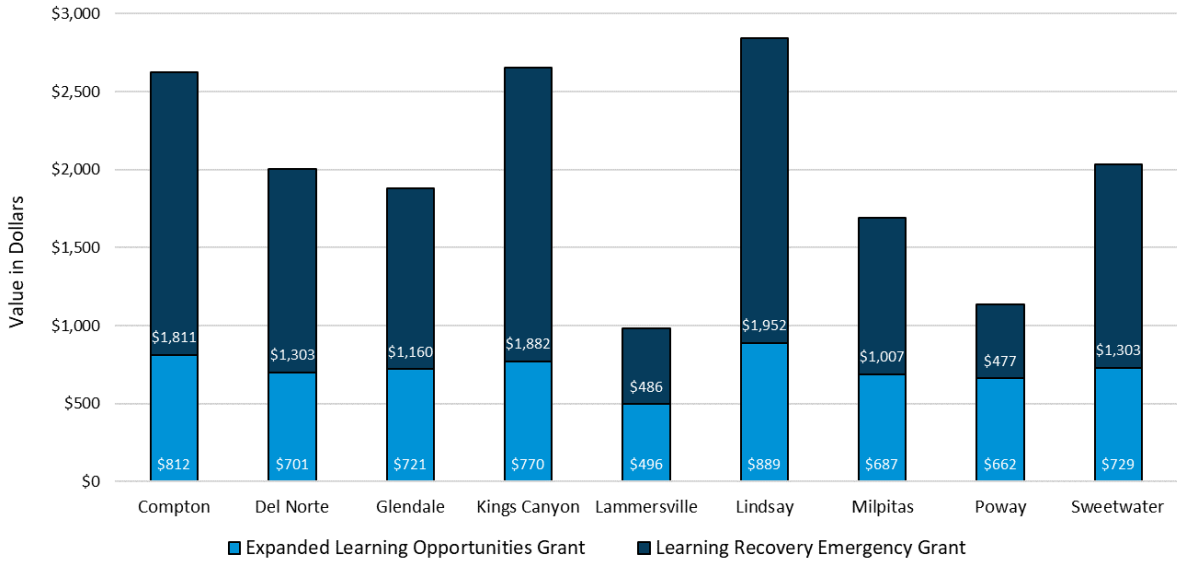
Figure 2.4. Variation in ESSER Funding per Pupil, 2021–2023



Note. ESSER means Elementary and Secondary School Emergency Relief.

California policy makers similarly distributed new state dollars in progressive fashion, consonant with the Local Control Funding Formula established in 2013. We see that Lindsay Unified, serving mostly low-income Latino families, received $1,952 per pupil in Learning Recovery Emergency Grants, compared with Lammersville, hosting middle and upper-middle class families, which received $486 per pupil (Figure 2.5). A similar pattern is seen for progressively allocated ELO-G funding.

Figure 2.5. Variation in New State Categorical Aid per Pupil, 2021–2023



Spending priorities evolved as the pandemic faded. To discover the way budget priorities shifted over time, we asked CFOs about yearly funding levels and what programs received greater attention. Four of the six financial officers provided the data shown in Table 2.1.

Table 2.1. Shifting Budget Priorities Emerging from the Pandemic, 2021–24

District	ESSER, 2021–22	ESSER, 2023–24	ELO-G, 2021–22	ELO-G, 2023–24
Lammersville	$2,018 Health and safety	$417 Learning recovery	$1,027 Summer school	$0
Lindsay	$4,519 Remote teaching, hiring teachers to decrease class size	$1,865 Classroom aides, extra duty for certified staff	$1,667 Classroom aides, additional teachers	$0[a]
Poway	$4,500 PPE, safety classroom support, substitutes	$10,000 Counselors, mental health, teaching technology, behavior intervention	$1,800 Tutors, technology, classroom supports	$600 Summer school, substitutes, professional development
Sweetwater	$34,332[b] Personal protection equipment, spacing of pupils, technology, restorative (social-emotional) practices	$78,349 Heating, ventilation, and air conditioning, roofing, technology, student engagement, enrichment	$27,359 Technology, ethnic studies, classroom and playground aides	$0[c]

Note. ELO-G is Expanded Learning Opportunity Grant; ESSER is Emergency Elementary and Secondary School Emergency Relief. Dollars are represented in thousands.

[a] No spending from ELO-G was reported, but Lindsay Unified spent $2.9 million from the Learning Recovery Emergency Block Grant.

[b] These ESSER revenues are for 2022–23. [c] This district received a $12.1 million state in-person instruction grant.

Two patterns arise from these numbers. First, new spending levels and program priorities varied among districts, according to student demographics and local needs. Relatively affluent Lammersville, for instance, benefited from just over $2 million in ESSER funding in 2021–22, falling to $417,000 in 2023–24. In contrast, the smaller Lindsay Unified received $4.5 and $1.8 million in the same two years, stemming from a larger concentration of students from low-income families.

Second, we see how funding priorities shifted as districts emerged from the pandemic and began to address evolving challenges. The bulk of new federal and state funding in 2021–22 went for masks, health and safety equipment, online teaching technologies, and public health efforts.

Two years later (2023–24), these four reporting districts were spending more on classroom aides, counselors, summer school, and tutors. Districts also created efforts to provide social and emotional support for students and staff, which could be partially supported through liberalized Medi-Cal reimbursements.

District enrollment. Next, we set these funding patterns in the context of each district's enrollment size and community context. The total of nine districts varies in size, as expressed by enrollment counts (Table 2.2). The largest, Sweetwater Union in San Diego County, enrolled 37,642 students in 2022–23. Del Norte Unified, situated along the Oregon border, served 3,777 pupils in the same year. Overall, our participating districts represent medium-sized and smaller districts in California.

Table 2.2. Basic Student Characteristics in Participating Districts, 2022–23

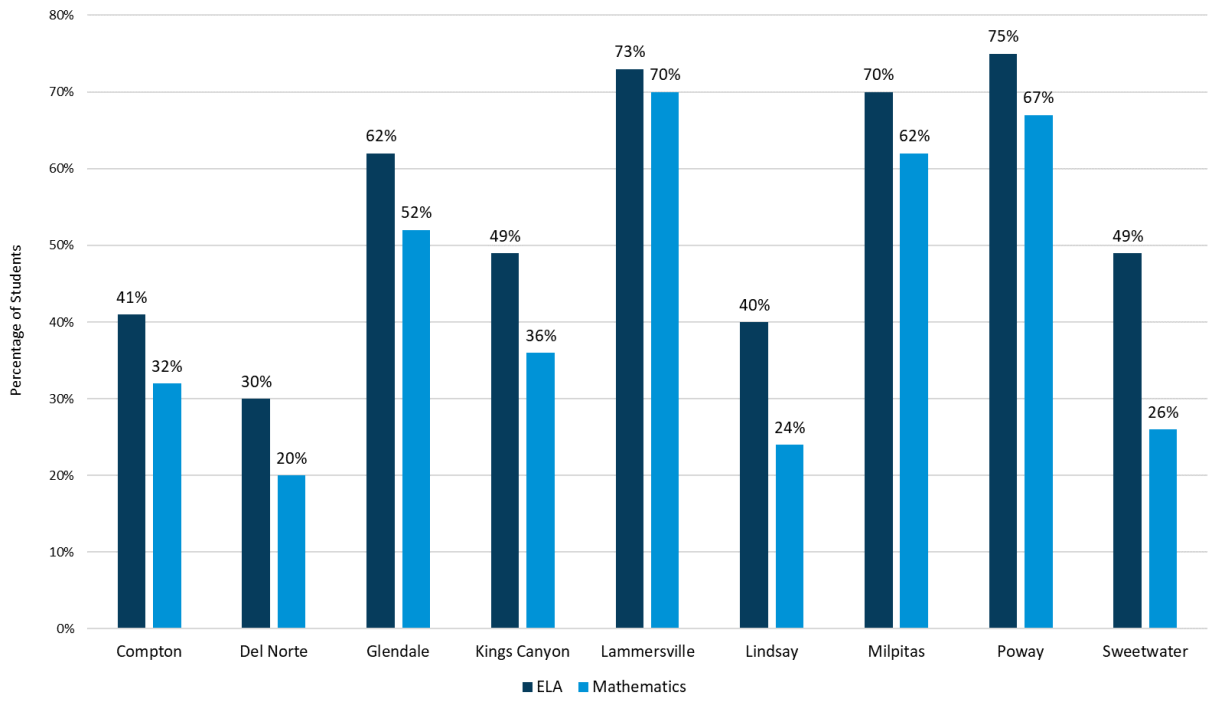
District	Enrollment	Percent eligible for free and reduced-price meals	Percent English learners	Percent proficient, ELA	Percent proficient, math
Glendale	24,456	46	21	62	52
Lammersville	7,520	12	12	73	70
Lindsay	3,976	83	34	49	24
Milpitas	9,967	27	22	70	62
Poway	34,900	15	8	75	67
Sweetwater	37,642	67	23	49	26

District	Enrollment	Percent eligible for free and reduced-price meals	Percent English learners	Percent proficient, ELA	Percent proficient, math
Compton	20,457	85	25	41	32
Del Norte	3,777	66	6	30	20
Kings Canyon	9,684	84	28	49	36

Diverse student backgrounds. Participating districts are situated within varying economic and demographic contexts. Table 2.2 also shows the share of students eligible for free or reduced-price meals (FRPM), along with the percentage designated as English learners (Els). We see that more than four fifths of pupils in Compton, Kings Canyon, and Lindsay were FRPM eligible in 2023. In contrast, about one in seven students attending schools in Lammersville and Poway came from disadvantaged families. There is less variation among districts in the share of students designated as ELs. Yet just 6% of students are deemed ELs in Del Norte, relative to 34% in Lindsay and 28% in Kings Canyon. (Differences in teacher characteristics among districts appear in Appendix C.)

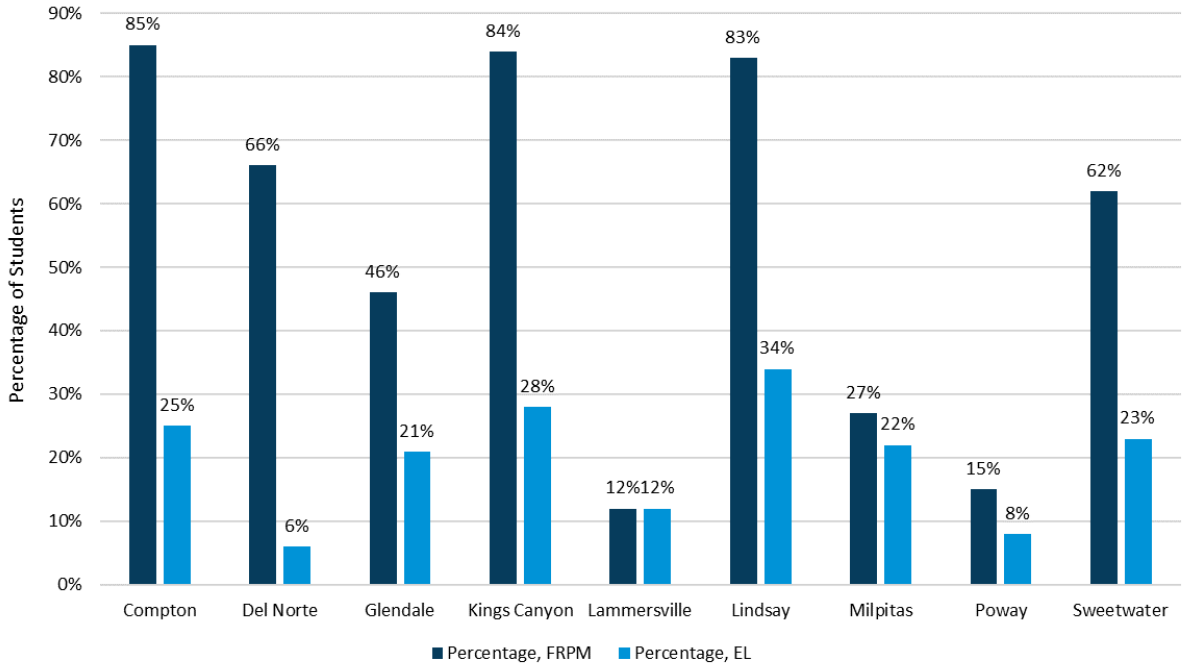
Learning loss and uneven bounce-back. Because of demographic differences and variation in school qualities, students perform at varying levels across the nine districts. Shares of students testing at proficient levels in ELA and math in 2022–23 appear in Figure 2.6. Three quarters of students attending Poway schools tested at proficient level or above in ELA, about two thirds in mathematics achievement. In contrast, 30% of students in Del Norte cleared the proficiency bar in ELA, just 20% in math.

Figure 2.6. Percentage of Students Proficient in English Language Arts and Mathematics, All Grade Levels, 2022–23



How did students fare during the pandemic? Can we detect a bounce-back in their learning curves by the 2022–23 school year? The light yellow bars in Figure 2.7 indicate the magnitude of learning loss between 2018–19 and 2021–22, expressed as the percentage of students proficient in math, again gauged by state testing. On the far left, we see that students in Lammersville actually improved by nearly two percentage points during COVID-19. However, on the far right, the share of students achieving at proficient levels dropped by nearly nine percentage points. The fraction of Compton students deemed proficient dropped by five points.

Figure 2.7. Percentage of Students Eligible for Free or Reduced-Price Meals and English Learners

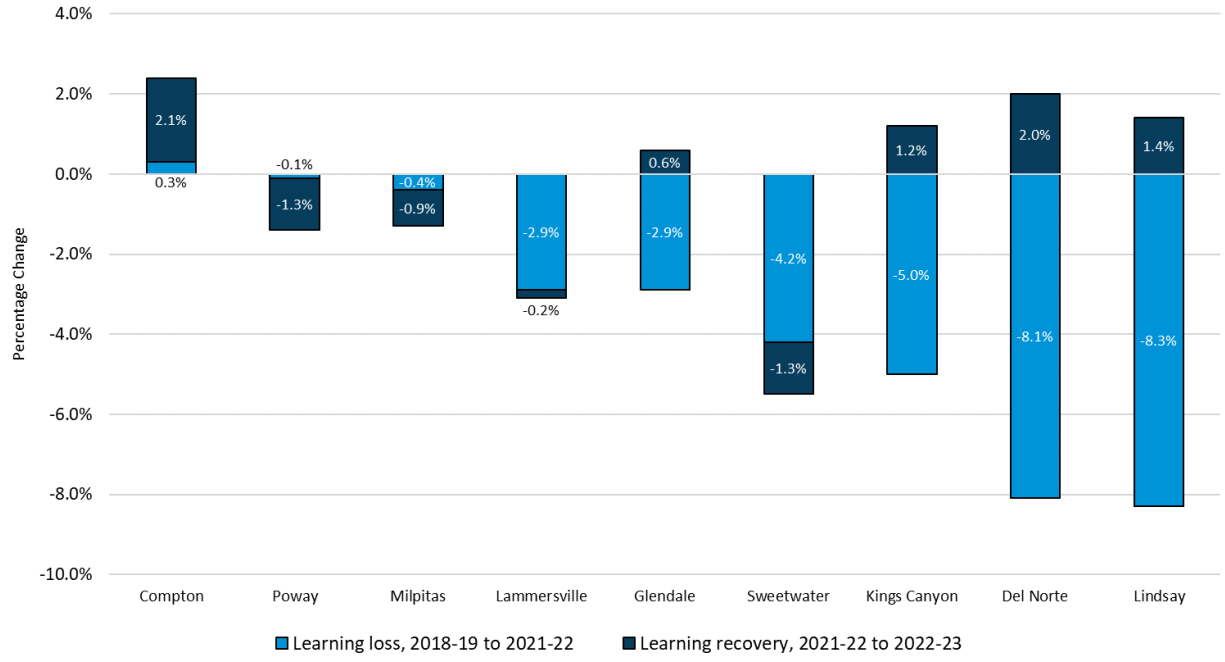


Note. FRPM indicates Free or reduced-price meals; EL stands for designated English learner.

The rust-colored bars then show the degree of bounce-back by students as the pandemic waned, tracking change between 2021–22 and 2022–23. Gains in Compton and Del Norte are most notable, with the percentage of students proficient in math rebounding six and four percentage points, respectively. Students in Lammersville continued to grow, and discernible recovery was observed for students in Kings Canyon and Lindsay.

The picture for student performance in ELA is less clear. Figure 2.8 first shows the magnitude of learning loss (light blue bars), including large declines in Del Norte and Lindsay, two districts that serve large shares of disadvantaged families. Dark blue bars indicate rebounding student proficiency levels in ELA, significant though modest in Compton, Kings Canyon, Del Norte, and Lindsay. These gains meant that 2% additional students tested proficient in 2022–23, compared with 2021–22. Declines in percentages of proficiency were smaller for ELA, compared with learning loss in math, as was the magnitude of the ELA rebound post-pandemic.

Figure 2.8. Change in Percentage of Students Proficient in English Language Arts Pre- and Post-COVID-19



Profiles of Six Districts

Beyond the statistical profiles, we can set each participating district in its local context. Then, we will turn to what we discovered in each, along with common patterns and local distinctions.

Glendale Unified School District is located in Los Angeles County and hosts 34 schools that serve nearly 25,000 students. Enrollment has remained relatively stable as numbers of refugee families entering the region are offsetting enrollment loss of native-born pupils. The district enrolls a diverse range of working-class and affluent families, long home to Armenian and, of late, Ukrainian and Russian émigrés. District leaders express pride in their dual-immersion programs, currently offering seven languages. Cost of living in the area is high, and according to district staff socioeconomic levels of families are split geographically: Wealthier families live in the "hills", whereas incoming refugee and migrant families settle in the "flat," or southern, part of the city. With nearly half the population earning low incomes, the district is working on expanding its community schools.

Similar to other districts, Glendale is facing chronic absenteeism, partially attributable to wealthier families taking extended trips. Glendale made adjustments to consolidate existing childcare and preschool programs to offer greater cohesion and flexibility for parents. These early-childhood options offer three differing pick-up times of young children—responding to parent preferences and work schedules. Curricular variety and the district's strong reputation

continue to attract families who reside outside the district or who might consider sending their children to competitive local private schools.

Lammersville Unified School District, situated between Livermore and Stockton, hosts eight TK-to-grade 8 schools and one high school. Mountain House, a recently built planned community, is home to many Silicon Valley commuters, many of South Asian heritage, making up 54% of the district's enrollment. Steady population growth in this pristine settlement means that Lammersville schools will continue to enjoy enrollment growth, in part served by a newly opened school in 2023–24. Many teachers and staff live outside the district, given the high cost of living in Mountain House.

District leaders accented high expectations for student achievement, shared among the district's well-educated parents. Many families aspire for their child to win admission to an elite university. Teacher "coordinators" based in the district often reported that learning goals are quite demanding and tracked by attentive parents. These coordinators coach teachers on pedagogical techniques, arrange staff development activities, and facilitate learning communities among teachers. The district boasts a robust assortment of after-school enrichment activities for high school students.

Lindsay Unified School District, located 60 miles north of Bakersfield, serves nearly 4,000 students across six elementary schools, one high school, and a continuation school. Lindsay is rooted in a small, largely working-class community—impoverished economically but rich in civic cohesion and caring for children and families. Nine in 10 Lindsay students come from Latino families, just over half entered school speaking Spanish or a language other than English. One in seven students has no permanent home to which they return at night.

Over the past quarter century, Lindsay has become known for turning classroom instruction upside down. Students attend some didactic instructional sessions with "learning facilitators" and occasionally sit for standardized tests. Yet, most of their days are spent working independently or in small groups—progressing along a sequence of specific competencies that everyone comes to understand. The credentialed classroom facilitators, when not directly teaching subject matter, roam among workstations and tables populated by highly engaged students—who know where they stand in their own learning and what new competencies are coming over the horizon.

Milpitas Unified School District serves a diverse rainbow of families, situated just north of San Jose on the northeast edge of Silicon Valley. The district's 10 elementary, two middle, and two high schools enroll slightly more than 10,000 students from diverse backgrounds. One in four students qualifies for free or reduced-price meals (FRPM), and one fifth are designated as ELs. The district carries on a legacy of diversity and inclusion, boasting racially integrated housing,

BOX 2.1 LINDSAY UNIFIED—A BOLD FOCUS ON STUDENTS COMPETENCIES

Lindsay is a district without teachers or students.Instead, classrooms are filled with "learners" and "learning facilitators." These labels signal Lindsay's innovative approach to the way students learn and facilitators guide students' development.

Like students in many districts, each learner has a personal digital device to use during the school day. Unlike students in other districts, learners track their progress on crisply defined competencies tied to conventional curricular topics, along with social and emotional benchmarks of growth.

District leaders described this cutting-edge learning management system (LMS), in place over a decade prior to COVID-19, in which students are well versed. Facilitators allow learners to progress at whatever pace best fits them, leaving behind the pressure of tying all students to a particular day's direct instruction. Learners proceed toward standards that define "competence" in various subjects.

Entering classrooms at Lindsay, learners and learning facilitators were excited to demonstrate the way they tracked progress, clearly boosting a motivating sense of efficacy. Scrolling past columns of completed tasks on Chromebook screens, we quickly spotted the milestones that had been reached and the challenges that remained.

During a lesson in which learners engaged with one another's work and provided feedback, suggestions were typed instead of said aloud to a peer a few seats away. Their learning facilitator monitored her learners' feedback from her own screen; the click-clack of Chromebook keyboards replaced lively, eye-to-eye conversation.

harking back to one of the first Black mayors in the nation in the 1960s. When Ford Motor Company moved its assembly plant from Richmond to Milpitas in 1954, civic leaders worked with developers to avoid the racial segregation of incoming families. In recent decades, the dot-com industry has brought a variety of well-educated families, further advancing the tradition of inclusion and integration across Milpitas.

Post-pandemic, the curriculum at middle and secondary schools is being recast into "career pathways," encouraging students to think early about job options and gain hands-on experience in their preferred field. Aiming to serve a variety of students and match growing industries in the South Bay region, this structural reform comprises pathways from STEAM (science, technology, engineering, arts, and mathematics) to nursing and early childhood education jobs. A new high school campus, replete with large and flexibly designed classrooms, is replacing a decades-old facility. The district also reaches out to a local nonprofit pre-K firm to provide childcare and early learning for families.

Poway Unified School District serves about 35,000 students across 41 school sites. Once a largely White agricultural town, Poway has become a widely diverse suburb and rising tech

center in north San Diego County. Poway is the 21st largest district in California. Demographic diversity and fresh ideas have moved district politics away from this town's historical conservatism. Poway leaders worry about limited state dollars because of their low share of students from socioeconomically disadvantaged backgrounds (who draw additional funding under California's Local Control Funding).

The former Poway superintendent, at the helm for seven years, recruited new deputies, including a budget chief and director of student services. A new division inside the district office spurs inventive digital strategies, building deeper relationships with individual teachers. Experiencing competition with virtual charter schools, Poway's digital division offers fully virtual curricular options for students. The district greatly expanded social and emotional support for students following the pandemic, hiring new counselors and special education staff. The expansion of TK and high-quality special education services have attracted new families to Poway Unified.

Sweetwater Union High School Districts serves secondary pupils at the southern edge of San Diego County in Chula Vista, bordering Tijuana, where a significant share of students cross the border each day to attend school. Sweetwater is one of the largest high school districts in the state, hosting about 37,000 students. Despite Chula Vista's size and urban landscape, educators report a small-town feel, as families see each other at sports events and community celebrations. This translates into a strong organizational culture inside the district, along with support from civic organizations and private foundations. Many teachers and staff come from and still reside in the Chula Vista community.

District leaders felt that the community had not shaken off the pandemic's effects on social behavior in 2022-23, and persisting emotional challenges affect students and teachers alike. Suspension and expulsion rates remain comparatively high, relative to pre-pandemic levels. Enrollment has fallen by about 5,000 students over the past eight years, due largely to declining fertility rates and the high cost of living.

Steady enrollment decline slows Sweetwater's state revenue stream. As a result, district leaders are focused on fiscal health and following procedures to set budget priorities and carefully track spending. The district's prior superintendent and CFO exited following allegations of mismanagement, resulting in a nearly $30 million loss in revenue. This episode unfolded before the pandemic, but the pursuit of greater trust and certainty with the Chula Vista community may explain the keen focus on fiscal health that we observed.

Methods—District Visits, Interviews, Document Reviews

Our field work focused on learning from district leaders and principals about how budget priorities were set and new dollars allocated in 2022–23, shaped by evolving local contexts and program priorities. This included any shifts in the mindset of district leaders regarding the mission and priorities of their schools, along with novel ways of buoying the social-emotional vitality of students or renewing growth in academic achievement. We inquired about the ways budget decisions were reached and which staff contributed to budget priorities. We asked whether innovative practices predated the COVID-19 era and whether the pandemic affected the shape or urgency of such inventive programs.

Interviews with district leaders and principals. Our field work included discussions with superintendents and top district staff and principals (Table B1). These recorded conversations typically included the district CFO, human resources director, leads for teaching and learning, and the director of student services. Most districts employed an instructional technology lead, as well, who takes on essential tasks during and following remote instruction. Expanding mental health services in several districts were led by a specialist who worked with principals, lead teachers, and community agencies.

An interview protocol guided first-round interviews with district staff. These questions were organized into three sections (protocol available and see Appendix D):

- ***Adapting to external demands and challenges.*** We inquired about staff morale, any remaining "hangover" from the pandemic, the gestalt inside the district office and schools; demographic features of families served, enrollment and attendance trends; long-term fiscal health, labor agreements and budget implications.
- ***Setting budget priorities***. How were budget priorities shifting in 2022–23, in light of changing federal and state financing, along with novel challenges as the district emerged from the COVID-19 era. How might district leaders weigh the balance between learning loss and attending to pupils' social and emotional well-being? Who is at the table in setting budget and program priorities?
- ***Mounting organizational and pedagogical innovations***. We asked about innovative adaptations or programs that may have sprouted during the pandemic: new organizational arrangements or pedagogical changes tied to benefits for students or teachers. We followed-up on commonly described innovations, including lengthening instructional time; novel forms of classroom technology, learning stations and competency-rooted pedagogy; greater use of instructional aides or volunteers in classrooms; new efforts to backstop the mental health of students or teachers.

During the 2022–23 school year we returned to the original three districts—Glendale, Milpitas, and Lindsay Unified. This was the second or third time we had sat with district staff and school principals since spring, 2021. We visited and conducted individual and group interviews with district educators in Lammersville, Poway, and Sweetwater for the first time, following up with video interviews with individuals or with pairs of district staff members. Two or three members of our research team visited each district.

Capturing shared patterns and district-specific dynamics. Our research team debriefed after each field visit, walking through interview transcripts and identifying key patterns regarding budget and program decisions. When our knowledge remained hazy or incomplete, we scheduled follow-up (video) interviews. Teaching and learning directors, for instance, often held rich knowledge of classroom innovations, so we often posed follow-up questions to them.

We discovered a range of efforts to backstop the social and emotional vitality of students. Here too, follow-up conversations helped illuminate how these efforts improved daily relationships among students and adults. We did not endeavor to understand all that was unfolding but focused instead on the way pandemic and school shut-down may have shifted financing and spending plans, motivated novel programming or thinking about schooling differently.

Additional details on research methods—the ways in which we conducted field work and analyzed the resulting mounds of qualitative data—appear in Appendix B.

3. Which Road to Recovery?

Shifting Budgets and Program Priorities

A key question has become more salient post-pandemic, more bedeviling in light of sustained dips in student learning: *What budget strategies and innovations inside districts and schools work to best empower teachers and engage students?* This study backs up a step to first *describe* these program strategies, discern what's common across districts, and identify novel practices that may better engage students and buoy their well-being. Then, we attempt to *explain* how and why district strategies vary.

The task, of course, is made ever more urgent by persisting absenteeism and learning loss stubbornly persist in many schools. At the same time, district leaders have long matched resources with school-level efforts to motivate pupils and their teachers. We arrive at the perennial question: How can districts focus teachers and scarce resources on approaches to human development that yield discernable results inside schools?

Another way to enter this question starts with the guarded yet upbeat discovery that student learning is bouncing back in the California districts that have received larger amounts of pandemic-era aid per pupil. This encouraging finding comes from the quantitative side of our research team (Betts et al., 2024). Results from statewide testing in spring, 2024, also reveal significant bounce-back in student learning in many districts. So, how do these successful districts marshal their resources, motivate teachers, and try novel programs that may pay off? Our six study districts shed a bright light on this key question.

Conceptual Framework—Forces That Shape Budgets and Innovations

We found that all six districts were working to preserve *fiscal stability* in a turbulent financial environment, quite aware of the fiscal cliff approaching with the end of federal stimulus dollars (September 2024). Every district faced growing pressure from labor unions in 2022–23, most agreeing to significant wage gains for teachers. District leaders also reported a return to conventional routines and pedagogical practices, as remote instruction faded into the past and teachers caught their collective breath.

Some districts also centered budget adjustments on addressing learning loss and student well-being by adding *segmented programs on the edges of schools.* Several districts mounted initiatives aimed at buoying the social and emotional vitality of students, or on learning recovery more narrowly. Yet, these efforts—extra tutoring, after-school programming, an 800 number for counseling—tended to remain on the periphery of the school institution.

A smaller subset attacked the school's *technical core*—rebalancing academics and standardized testing with broader concern over pupils' social and emotional well-being; redesigning with digital tools what teaching looked like in classrooms; even recasting conventional curricula to focus students on learning discrete proficiencies (academic and social), which students demonstrate publicly. Coming off the COVID-19 era, educators in these inventive districts said improvement in the core learning enterprise were made possible by the pandemic, as educators were nudged to rethink basic foundations of schooling.

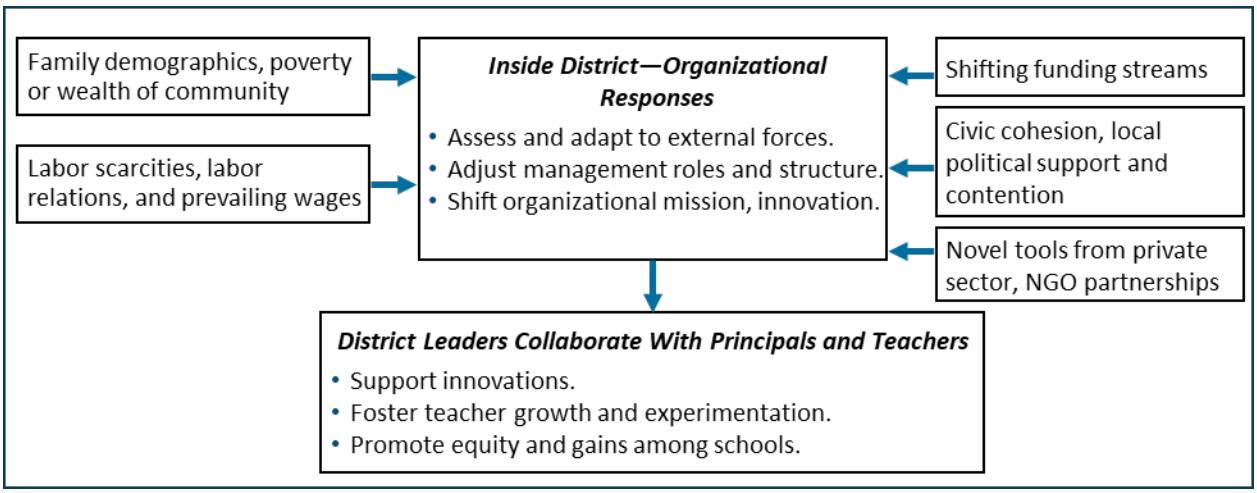
As we unraveled these three pathways toward recovery and renewal, a coherent framework could be drawn—a simple model that highlights the reported forces shaping budget and program strategies. Figure 3.1 illustrates the bevy of external forces that pressured district leaders as they took stock of revenue streams and adjusted budget priorities.

Then, actors and elements inside district offices made sense of these contextual pressures, weighing them against district values and cultural tenets, buffering negative pressures, and taking up opportunities afforded by the context. District leaders often engaged principals,

teachers, and labor partners together discussing novel efforts to engage students and lift their well-being and learning.

Balancing this barrage of external pressures with the internal values of district leaders, we observed three organizational responses. Superintendents, senior staff, and collaborating principals often (1) attended first to external demands, especially as public health worries persisted and state funding remained uncertain, (2) adjusted the district's organizational structure, redefining roles and responsibilities of key staff, or (3) begin rethinking the mission and core activities of schooling, including the mindset-shift toward the social and emotional vitality of students. District leaders at times engaged in all three organizational practices.

Figure 3.1. External Forces and Internal District Responses



Note. NGO indicates nongovernment organization.

Organizational Response A. Districts Assess and Adapt to External Forces

District leaders do not entirely control their own destiny; nor do they control their budget and program priorities. Several forces emanating from each district's surrounding context offer constraints and opportunities, as sketched in Figure 3.1. Revenue streams, for instance, shifted dramatically during the pandemic and in its wake. Federal stimulus dollars were largely unrestricted, allowing districts to buy health and safety equipment, upgrade ventilation systems, provide meals and subsistence supplies to millions of California families. New state funding was, and continues to be, tied to specific program designs and activities, limiting the discretion of district staff and local school boards.

District leaders reported that five external forces shaped resources made available or moved budget priorities coming off the pandemic in 2022–23:

- ***Family demographics***. The racial and social-class composition of families served by districts may condition parents' own history with public schools, stability and supports for students inside families, and the extent to which schooling is seen as yielding long-term benefits.
- ***Shifting revenue streams***. Stimulus dollars offered largely fungible relief for health-related costs and for stabilizing public schools. New state dollars quickly focused on specific programs, set in the state capital, requiring multiple planning efforts and monitoring reports—a new "plan-demic", as one superintendent told us.
- ***Labor markets and labor organization***. Districts faced tight labor markets and rising expectations from labor—even before state-mandated programs or expansion required finding new teachers and support staff. Efforts to raise wages, necessary to attract classified staff, became limited by teacher salary agreements, then leveling state funding.
- ***Civic cohesion and contention***. District leaders reported varying levels of civic support or divisive contention in their local communities. Some districts, including Del Norte and Lindsay, became major hubs of economic and social support during the pandemic, advancing their credibility among families. Other districts (such as Glendale and Sweetwater) instead struggled with contention over cultural issues or political tensions that at times threatened public support.
- ***Private sector tools and nongovernmental organizations (NGOs)***. District leaders and school principals drew on a variety of privately offered services and curricular materials—from online software for teaching to tutoring companies and nonprofits that continue to run extended-day programs. This array of private organizations evolved rapidly in COVID-19's wake, especially as the state pressed new programs that invited private contracting.

We found that district leaders scanned and made sense of these external forces—to grasp available funding, engage families and the community, and set internal budget priorities. By focusing on this first organizational practice, we see why and how district leaders (and school principals) constantly turned to these contextual forces in 2022–23 to explain their shifting budget priorities.

The "Detailed Findings" section, below, offers details and identifies commonly shared patterns, for example, the shift toward student engagement and social and emotional well-being. At the same time, a portion of these external forces are particular to local communities—yielding more unique budget and program priorities in each district.[4]

[4] Field theory, in scholarly circles, offers a textured framework for seeing how managers inside organizations must attend to resource dependencies and political support outside the bounds of their own institution (Fligstein & McAdam, 2012; Kluttz & Fligstein, 2016).

Organizational Response B. Adjusting Roles and Structure Inside

District leaders endeavored to make sense of these external pressures in light of their internal values or longer running priorities. Lindsay, committed to guiding students through discrete competencies, deployed new revenues to hire additional "learning facilitators" and shrink class sizes, hoping to better engage students coming back from remote instruction. Compton centered resources on pushing additional adults, including college volunteers, into classrooms, to deepen relationships and put inventive pedagogical practices online (see Box 4.3 below).

District leaders had to interpret outside demands and opportunities, making sense of these pressures in the context of internal values and program logic. Sensemaking was an imperfect process because information from outside could be blurry, state funding continued to shift in uncertain ways, and leaders needed to attend to multiple fiscal or political demands all at once.

At the same time, we observed the way district leaders often reinforced certain values and differing organizational cultures inside district offices. This might emphasize strengthening relationships among district staff, getting budgets right, or focusing on curricular standards and student achievement. District leaders often invoked these historic commitments during our interviews, as they interpreted daily pressures from the outside or from site principals or labor partners. By blending their take on external demands with internal commitments, district leaders invoked causal accounts, identifying and addressing factors that advanced or impeded valued student outcomes.[5]

These various demands—especially the collateral barrage of pressures from the COVID-19 era—then led superintendents to adjust job roles and responsibilities inside their offices. That is, the structuring of work inside the district changed to varying degrees. Poway, for instance, came off the pandemic committed to advancing digital tools for teachers, along with providing one-on-one coaching to advance innovative ways of organizing students in classrooms. Thus, the Poway superintendent promoted a new chief of instructional technology and strengthened that unit. Sweetwater, having experienced fiscal uncertainty prior to COVID-19, dedicated management attention and staff positions to meeting planning and budgeting deadlines.

District leaders reported working closely with principals to implement changes in the school's organizational structure. Worried about reintegrating pupils into school routines, Glendale added a seventh period in middle and high schools to allow for elective courses popular with

[5] For discussion of sensemaking in organizations and "mental maps" that explain causal processes, see Maitlis & Christianson (2014) and Weick et al. (2005).

students, in part aimed at boosting attendance rates. This required new resources, allocated by the district to each school, along with adjusting the teacher labor contract.[6]

These shifts in the structuring of district organizations were commonly observed across more than one of our six participating districts. First, most districts redoubled efforts to track revenue streams and assigned more staff time to accommodate new activities. Staff roles became flexible and at times uncertain during the pandemic, as district leaders shifted to online tools, organized meals, COVID-19 testing stations, and health information for families.

Then as the pandemic waned by 2022–23, districts again had to adjust daily routines to track funding streams, hire staff for state-mandated programs, and attend to social and emotional challenges surfacing among students. These serial shifts in *job roles and responsibilities* inside district offices—all in the context of an ever-changing financial environment—posed a serious challenge to most of the six districts.

A second pattern of organizational change, observed in multiple districts, involved *adding new programs or expanding activities*, often attached to the periphery of the institutional core. Most district leaders saw the utility of offering free meals to all, expanding TK, tacking on art and music classes, and extending school to more than nine hours per day. But how to find staff for these expanding efforts, and did they have much to do with reengaging students and enlivening classroom teaching?

One adaptive behavior was to segment or contract out the new or growing activities. Most of the six districts, for example, contracted with nonprofits for extended-day activities. Tutoring efforts—commonly bought from the outside—were rarely integrated with core classroom instruction. Sweetwater (and Kings Canyon) offer useful exceptions, tightly integrating the work of tutors and after-school enrichment activities with the central proficiencies being addressed by classroom teachers. Given a bevy of new demands by the state and local constituencies and uncertain revenue flows, districts rationally attached these new efforts to the edge of the institution, where they would not impose on core work and could be staffed by nontenured aides, then possibly severed if an initiative became unaffordable.

A third shift in job roles and organization of novel activities inside district offices stemmed from efforts to enrich what some call the *technical core* of schooling—pedagogical practices in classrooms or rearranging student–adult relationships, aiming to lift social-emotional well-

[6] The structuring of job roles and priority tasks or activities has long characterized the way managers think about rationalizing organizations or making institutions more efficient and "better organized." We discovered that budget allocations and program innovations typically altered job roles, or the count of staff dedicated to that novel activity. Staff turnover in district offices during and after the COVID era also allowed for adjustments in the structuring of staff and high-priority activities. (For conceptual framing, see Haveman, 2023; Scott, 2002; Weber, 1958.)

being.[7] Principals in Glendale, for instance, redesigned the advisory period, intending to reengage students, surface emotional worries, and explore facets of ethnic and language identities. We report below the way Milpitas is revamping its curricular structure, nudging high school students to weigh career paths, then focusing on learning relevant competencies (drawing in part from the inventive logic of teaching and learning at Lindsay). These novel initiatives strike at the core of everyday teaching, learning, and social ties inside schools.

The revolution in teachers' use of digital tools also served to alter job roles inside district offices, cutting to the heart of classroom dynamics. Teaching and learning staff inside districts quickly retooled as remote instruction got underway. By 2022–23, these support groups were placing curriculum and pedagogical activities online, creating libraries of materials for teachers. Glendale and Poway shifted to one-on-one coaching in many schools. Some districts advanced novel ways of organizing classrooms, such as learning stations among which students rotate, aided by online materials engaged by single pupils or small groups. Our earlier study inside charter schools shows the way these approaches can free up teacher time, allowing for more intense work with lower achieving students (Fuller et al., 2021).

Organizational Response C. Evolving Mission, Priorities, Innovations

External demands and internal district commitments prompted a third response in several cases: Adjusting budget and program priorities to renew student engagement, lift social and emotional well-being, and address learning loss. This struck to the core work of schools, lengthening instructional time or improving classroom practices.

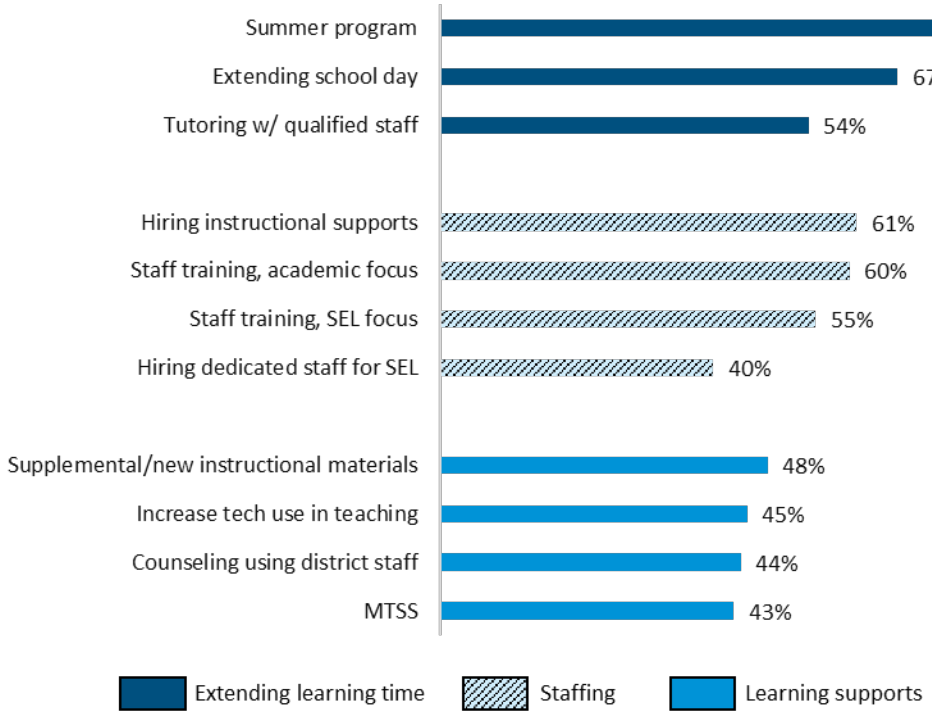
Some districts reported rethinking their core mission, seeking ways to help students regain their social competencies and emotional balance (often buoying teachers, as well). This required adjustment to the core mission of the institution and pursuing novel ways of balancing academics with broader well-being. This balancing of priorities was in play when we visited districts in 2022–23. This partial rethinking of schooling—now possible as COVID-19 became a more distant memory—was just getting underway in a portion of the six districts. Overall, this organization practice is more complex, involving tight teamwork among district staff, along with the commitment and time of site principals.

***A variety of program strategies*.** We are learning about the ways districts statewide designed a variety of program strategies to address learning loss, or social-emotional challenges felt by students. Our team members based at AIR have dug into ELO-G plans to inventory budget and

[7] Scholars of organizational behavior have long studied the way the technical core of schooling is often insulated from outside demands (for review, see Spillane et al., 2019). The addition of new or expanded programs on the institution's periphery is one case in point. But we also observed districts that emphasized the ways in which digital tools could improve the social organization of teaching and classrooms, or how new kinds of staff were required to provide counseling services and address the holistic growth of students.

program activities reported across 726 districts. We do not know from written plans, of course, the extent to which activities were implemented. Still, Figure 3.2 usefully displays the most frequently reported strategies in 2022–23, as reported by districts.

Figure 3.2. Common Budget and Program Strategies in 726 California Districts, 2022–23



Note. MTSS is multi-tiered system of supports; SEL is social-emotional learning.

About three fourths of the districts reported lengthening instructional time: offering free summer school, lengthening the school day (e.g., adding a period or small-group work), or creating tutoring programs for students who were falling behind. Three fifths of the districts reported hiring additional instructional aides, while fewer than half prioritized richer digital tools available to teachers and students, from moving curricular materials online to employing digital pedagogical and assessment tools. More than half of the districts (55%) reported spending new resources on staff development activities, equipping teachers or support staff to better connect with students over social issues.

Logics of organizational adjustments. District leaders talked much about their logic for advancing these kinds of organizational change. Their arguments stem from making sense of what the problem is, then matching budget priorities to perceived problems. Thus, for example, if flagging test scores in math and ELA were viewed as the problem, it was then logical to mount

credible remedies, such as tutoring, or extended-day activities focused on academic work. Other district leaders believed that ongoing loss and anxiety stemming from the pandemic was the dominant problem in 2022–23. This logically led to hiring additional counselors or adults to strengthen relationships with students, restructuring classroom practices to surface pupils' own worries and concerns.

Multiple logic circulates among educators and policy makers. Perhaps the dominant diagnosis is that learning loss demands better school attendance and longer instructional time.[8] Yet most district leaders we interviewed expressed greater concern over how to serve children and youth more holistically, how to identify underlying emotional concerns and social skills required to operate within institutions, like schools or workplaces. Milpitas, for instance, was moving toward discrete competencies that students could practice and demonstrate, tied to possible career paths in high school. Del Norte was tapping into Medi-Cal reimbursements to bolster its counseling staff and build a mental health clinic. That is, participating districts were advancing their thinking, their program logics for how to best address pupils' social-emotional growth. They were not ignoring learning loss and largely flat test scores. But these local educators appeared more concerned with ways to engage and motivate students as resourceful and complicated individuals.

Restructuring classroom activities—often enlivened by digital tools, workstations, and recasting small groups—offers another logic reported in two of the six districts. Glendale's teaching and learning unit, for instance, encouraged a shift toward project-based learning during remote instruction, a method that continues (though in less salient fashion), replete with asynchronous material that pupils view at home. This opened classroom time for cooperative work and presentations by students, making in-class time more interactive and motivating activities.

Lindsay had long been innovative, blending didactics with hands-on projects, on which students work with steady coaching from their "learning facilitator." Flush with the federal stimulus, Title I, and state aid, Lindsay invested in additional teaching staff, lowering average class size. Other districts were wary of this approach, concerned about long-term wage costs.

One external challenge was that state policy makers and other stakeholders pressed their own logics for what they believed would lift students. The expansion of TK builds from the logic of "early intervention." Lengthening the school day reflects a logic that more time in and around a school would elevate learning. We saw mixed evidence over actual ties to the core curriculum. Expanding electives—especially with new funding for art and music—operated from a logic that

[8] Scholars, journalists, and tutoring companies emphasize this crisp logic: Learning loss is best regained by intensifying didactic instruction. See, for example, Editorial Board (2023) for the startling evidence on learning loss.

claimed stronger student engagement. So, circulating logics of reform competed for a share of the budget, complicated by fiscal uncertainties and the steady barrage of external demands.

As organizing logics abounded within and among districts, we did not observe a careful culling or evaluation of these various innovations. That is, what has been working with the new funding to lift achievement and backstop broader well-being? We generally found that district leaders were attuned to which program strategies were proving popular at the school level and whether they were logically linked with desired student outcomes. But it has been difficult for districts—recovering from the pandemic, then faced with uncertain revenues—to mindfully evaluate promising innovations. This requires getting clear on the student outcomes that have been prioritized, then carefully assessing whether innovations have moved the dial on these facets of learning and pupil well-being.

4. Detailed Findings—Shifting Budget Priorities, Advancing Innovations

Given this backdrop—adapting to external demands and building from internal values—we turn to the ways in which districts had adjusted budget priorities and pursued innovative programs by 2022–23. Our team asked district and school leaders *what* budget priorities were emerging (or persisting) and *how* they were set, as well as *who* contributed to these deliberations. We arrived at the question of how federal stimulus and state dollars were allocated—perhaps sparking (or bolstering earlier) innovations, whether tied to the organization of schooling or inventive practices inside classrooms.

The three organizational responses by district leaders, as sketched in Section 3, described overall pathways toward recovery and renewal. District leaders had to track and make sense of *external forces,* then selectively adapt budgets to evolving contextual pressures. Second, districts variably altered their *internal structure* and job roles through the COVID-19 era, from upgrading instructional technology units to adding counselors or instructional aides. Third, district leaders acted from *credible logic* or program models that seemed likely to boost learning or the emotional vitality of students. District leaders often invested in extra tutoring, attendance clerks, and mental health support.

Along these pathways for setting budget priorities, a variety of innovations were undertaken, stemming from the logics of reform that circulated among educators, associations, and policy circles. The hangover of COVID-19 persisted into 2022–23, as tired teachers and weary students further recovered and settled-in back at school. Still, we heard a great deal about a shifting mindset toward broader well-being, along with a variety of innovative programs to better engage and motivate students, priorities that focused more on *renewal* than on *recovery* per se.

This section, detailing patterns of shifting budget priorities and program innovations, is divided into these parts:

- ***District gestalt*.** The overall mood and morale we observed inside districts, setting a context for local leaders' appetite for organizational change and school-level initiatives.
- ***Priorities in local context*.** The capacity of districts to adjust priorities and mount school improvements, constrained and enabled by shifts in the surrounding environment.
- ***Deliberating over priorities*.** Variation in the ways districts adjusted budget priorities or designed inventive programs, and which district and school-level leaders were at the table.
- ***Fiscal cliff*?** How district leaders anticipated the wind-down of federal dollars and uncertain flow of state revenues.
- ***A thousand flowers blossom*.** A variety of organizational and pedagogical innovations that sprouted (and took root) coming out of the pandemic, shared and unique among districts.

District Gestalt—Putting COVID-19 in the Rearview Mirror?

Leaders in the six districts reported that central staff, principals, and many teachers were moving on, pushing to get past COVID-19 in 2022–23. Still, signs of "hangover" persisted after the bedeviling crisis that left behind human loss and painful angst for many families and teachers. Sweetwater's superintendent, for example, worried about spiking levels of absenteeism, along with ongoing conflict in his Chula Vista community. Many teachers were reportedly just holding on, trying to regain their balance—or simply retiring.

The experience of death and dislocation, as suffered by many students and teachers, would not easily fade. Still, district and school staff expressed hopes for a return to "normal" routines, to take a deep breath and get past the pandemic. District staff members and principals described the many challenges still faced by pupils, along with the adults who cared for them, since schools had fully reopened in the prior year. As one Milpitas administrator explained, "Generally I think this year [2023] has been a challenge as we continue to navigate the outcomes of learning loss, social-emotional loss, behavior loss, from the pandemic."

Even districts with stable enrollment worried over chronically absent pupils. One elementary principal in Poway stated that "Just the amount of absenteeism and discipline and kids' leaving in droves to go to private schools. . .. It's a concern of mine." This principal specified three aspects of the engagement challenge: pupils who had returned but were absent at rates higher than pre-pandemic, student misbehavior, and those who had exited public schools entirely.

One district leader in Milpitas said that, in the prior year (2021–22), she felt as if she were "running a health care facility." The following year when we met, she said, "I feel like I'm running a

mental health care facility. . .. People like district and school administrators, [as well as] teachers are still very much feeling the impact." Another district leader called it "collective fatigue."

Getting past the pandemic and its emotional wake prompted new budget priorities and flexibility in job roles, as well as structural shifts across most districts. The teaching of academic content became secondary in some cases to talking with students about death and dying. Principals reported offering informal therapy to teachers or mobilizing psychological services with licensed therapists. Stimulus dollars allowed Sweetwater to move additional teachers into coaching posts, striving to improve pedagogical practices and student engagement. (By 2024, Sweetwater was moving most of these "teachers on special assignment" back into regular classrooms.) All six districts moved resources to hire more counselors or contract with therapists and firms offering online counseling to students or teachers.

We earlier reported the way in which federal revenues were first used for health and safety initiatives, COVID-19 testing, and infrastructure adjustments (e.g., ventilation systems, renovating classrooms), then shifted by 2022–23 to mental health and learning recovery efforts. New state dollars nudged districts to focus on learning and social-emotional health, as well, lengthening the school day, and attending to new course electives like arts and music. Leaders in half the six districts talked of retreating to a focus on "essential standards" with teachers.

At the same time, the pandemic hangover appeared to hurry these organizational changes—as district leaders worked to rekindle student engagement and maintain or increase student enrollment. District leaders by 2022–23 were recentering on a blend of pedagogical improvements or teacher training to address learning loss, while often adjusting staff to hire attendance clerks and boost emotional support for struggling pupils. This more holistic conception of schooling tended to move federal stimulus and new state dollars—widening beyond a "learning loss" definition of the problem.

Budget Priorities that Respond to External Demands

The disruption of nearly two years of school closings was unprecedented in the history of public education. Even during the deadly Spanish flu a century ago, public schools in urban centers like New York and Chicago remained open (Stern et. al, 2010). Would the pandemic prompt a major rethink of budget and program priorities? Or would the external forces and internal district routines encourage an inevitable return to the "old normal"?

Enrollment decline and student absence. These collateral factors began to threaten core maintenance of the school institution. Pupil enrollment was growing in just two of the six participating districts. Lammersville was constructing another TK–8 school in 2022–23, thanks

to ongoing expansion of the surrounding community. Enrollment was climbing in Glendale, after slipping, given a fresh wave of European immigrants and families petitioning to enroll from outside the district. The remaining four districts faced incremental yet steady declines in enrollment.

Weak school attendance added insult to the injury. Even a four or five-percentage-point decline in attendance could erode district revenues by millions of dollars. Falling enrollment stemmed from a variety of factors. First, there is ongoing decline in fertility rates.[9] Second, rising housing costs across California have hurried the dislocation of families, many moving into less expensive regions, like the Central Valley, or leaving the state altogether. Milpitas leaders told us about being at the mercy of housing developers, who had responded to employment and wage conditions in Silicon Valley. Lammersville, outside of Stockton, had to search far and wide for new teachers, as district staff could not afford to live in this pricey planned community.

Third, declining faith in public schools or perceived health conditions in public institutions appeared to be driving down attendance. A portion of our districts reported that attendance was rebounding, whereas others still suffered from low attendance rates, especially in TK and the early grades. Some districts—Lindsay, Milpitas, and Sweetwater—have put more dollars into attendance clerks and staff who call parents, even make house calls, when their children do not show up at school. These engagements with families help to inform district staff about the challenging contexts many students must shoulder, caring for other siblings or taking jobs to support their families.

To become more attractive to young parents, Glendale consolidated its childcare and pre-K programs in 2022–23. Three differing pick-up times were set for working parents. Competition for students certainly comes into play. “I think there’s a declining enrollment problem that they [district leaders] are trying to address,” one Glendale principal told us. “Private schools offer more electives. And so, they're trying to compete.”

Labor shortages amidst state-mandated programs. California’s governor and state lawmakers created several new programs during the COVID-19 era, moving well beyond temporary federal stimulus dollars, as sketched above. Each new mandate requires hiring additional classroom aides, food-service workers, or after-school tutors and counselors. This ambitious agenda, largely set in the state capital, arrived within already tight local labor markets, as private employers were raising hourly wages to attract semiskilled staff. The result: District leaders faced severe labor shortages in 2022–23 as they struggled to meet new state mandates.

[9] In 1990, for example, women gave birth to more than 204,000 newborns in Los Angeles County, but this number fell to just under 96,000 by 2021 (largely unaffected by the pandemic). This dramatic decline is driven mostly by young Latina women, as their school attainment levels have climbed. *Los Angeles Almanac* (2024).

The well-intentioned swerve by educators and policy makers to see students holistically—to listen and attend to their emotional challenges—hit the labor issue head on. Sweetwater's superintendent, for example, told us,

> "From a mental health, social-emotional perspective . . . I think we're still catching up. We had a very difficult time hiring enough mental health therapists and caseworkers. So, we still have quite a few vacancies for those positions. And we have active resources out there . . . a contract with our county government to provide behavioral and mental health therapy to students. But, again, staffing those positions [is difficult]. We've had a lot of therapists leave to go into private practice as they become licensed. [Hiring has] just been a tough, tough obstacle. . ."

Tight labor markets also pushed districts to contract out for new services. Glendale, Lindsay, and Milpitas contracted with community nonprofits to run after-school programs, now required for disadvantaged students. Some districts contracted out for recreational and physical education services during the school day to open up planning time for teachers. Milpitas contracts, in part, for its preschool program. When counselors and therapists couldn't be found, five of the districts contracted with county or private agencies (at times via 800 numbers) for mental health services.

Overall, each of our six superintendents praised legislative leaders for their virtuous intentions in creating new programs, while emphasizing that staffing challenges led to more frequent service contracts. This raises a variety of questions about educational quality, reliance on the nonprofit and for-profit sectors, and whether data will be sufficient to weigh effects from these differing program models.

Negotiations heated up with teacher unions in 2022-23, as labor pushed for a share of new federal and state monies flowing to districts. Superintendents reported steady communication with bargaining units, emphasizing how federal dollars were temporary and the lifespan of new state funding was unpredictable. The majority of participating districts settled for teacher salary hikes in the 4% to 6% range. Classified staff, redefined as *essential staff*, often won wage gains or additional hours to serve new state programs. A possible silver lining with the state's return to categorical aid was noted by one superintendent, "The good thing is that they keep new dollars off the bargaining table."

District leaders reported various ways of constraining long-term labor costs. Only Lindsay hired appreciable numbers of new teachers or credentialed staff. Overall, district leaders saw certified posts as difficult to discontinue once federal dollars began to wane. Sweetwater hired back retired teachers with the understanding that assignments would not likely last. Glendale contracted out recreational and physical education services with a local nonprofit, freeing up

professional development time during school hours while retaining the option of later paring back the contract.

Fresh revenue structures spur novel programs. Revenue streams shifted course during and after the pandemic. This created fresh opportunities in 2022–23 to move budget priorities in novel directions. The liberalization of the counseling and mental health services that qualify for Medi-Cal reimbursement exemplifies the state's shifting revenue structure. In 1993, California's health department began to deem certain school-based counseling functions and psychological services as eligible for state reimbursement. At first, few districts participated because of a lack of knowledge and shying away from yet another state bureaucracy. However, the legislature expanded reimbursements for student support during COVID-19, and this revenue stream became more consequential—especially in light of educators' widening conception of student development. This has allowed several districts to expand counseling and mental health support.

Most districts had earlier cobbled together funding for after-school programs. Yet, the rise of ELO-P and ELO-G funding lent credibility to this logic for action, aiming to raise learning tied to core classroom instruction. Other program logics—consolidating pre-K options, digital curricular innovations, and renewed attention to the arts—took root among educators and their associations in 2022–23. The fundamental notion that school should consider the student's holistic growth and vitality—heresy during the heyday of No Child Left Behind—further exemplifies how a program logic gains traction and attracts priority funding. Despite worries over centrally mandated programs and the corresponding "plan-demic", this wider set of funding streams began to fuel a variety of program innovations.

Civic cohesion or division. We discovered that consensus (or conflict) over district budget priorities was shaped in part by varying degrees of civic cohesion. For example, in Sweetwater, where a new superintendent arrived in the wake of fiscal scandal, he created a tightly disciplined budget-building process inside the district, while reaching out to various constituencies and parents in the close-knit town of Chula Vista. District leaders followed a stringent budget-planning process, framed by their Local Control Accountability Plan, structured by clear task assignments and hard deadlines. This reportedly built trust in the community and among labor partners.[10]

Lindsay is a community builder by all accounts, a pivotal institution in this agricultural enclave outside Bakersfield. During the pandemic, the district distributed free meals, checked in with parents and students to ensure that everyone was safe and taken care of. The district also built

[10] In conversation with labor unions, Sweetwater contracted out for tutors who would work in classrooms and in sync with the teachers' day-to-day curriculum. Both parties agreed that the tutors did not need to fall under the purview of bargaining units but could still work alongside classroom teachers. These "embedded tutors" helped to facilitate project-based learning for general and special education.

a local health clinic used by students and families alike. This spirit of civic engagement appeared to be infectious. Learning facilitators (teachers) reached out to students who did not show up for class. Many teachers came in on Saturdays for staff training. Classroom aides gained support to move up to credentialed teaching posts. "We like to grow our own," as one leader put it. These reciprocal supports between educators and the families appeared to enrich student engagement and trust in the school institution.

Lammersville serves a more affluent range of families, and these parents express high aspirations for their children's achievement. The superintendent reported striking a balance between competing parent expectations, often centered on academics, and a shift toward whole-child development. As COVID-19 waned, families pressed for an early return to demanding academics, while Lammersville educators emphasize concern over social behavior and the hangover of stress and angst exhibited by many students. As one Lammersville administrator told us,

> "So, what you're getting is first-generation immigrants, H1 visas, highly educated parents. They want their kids to go to Cal, Stanford, MIT, and it's our job to make that happen. Usually when we get pressed, we're not doing enough or it's not perfect enough. They're very supportive parents. We counter that by providing unbelievably beautiful schools . . . well maintained with highly trained teachers. We have lots and lots of programs [extracurricular activities]."

Disruption and a lack of civic cohesion can threaten budget priorities, even the stability of district leadership. Glendale was hit by cultural conservatives in spring 2023, when the board voted to acknowledge June as Pride Month. Protests turned violent outside the board's chambers, as former students and parents spoke in favor of the measure. Teachers and students in the queer community reported episodes of harassment on certain school campuses.[11] As one Glendale principal noted,

> "My senior teacher here. He started the lesson [on sex education], and then the next day, he had a student email him who said, 'One of the girls was recording you today.' And so, we called the girl over and this sweet, sweet girl, like she's never been in trouble before. Nothing. Like just a sweet girl. And she said, 'Well, my parents told me to record because they just want to know.' And it's like, the teacher's heart was broken. It's hard when teachers give their all."

[11] In Poway, cultural conservatives protested over curricular issues and gender-identity issues in 2022–23, occupying the school board's meeting quarters. This constituency, instigated in part by nationwide organizers, tapped into North San Diego County's historical conservatism. In contrast, board members supported a variety of pedagogical innovations (detailed below), greater support for disabled students, and added resources for schools that served low-income families. This cultural revolt from the political Right proved short lived. Yet, plans for a possible revenue bond were placed on ice.

How Districts Set Budget Priorities

Our conversations with district leaders and principals also revealed *the ways* in which priorities are set and adjusted—that is, *who* was involved at district and school levels. All six districts played a strong hand in setting fiscal priorities and deciding on innovative programs, while consulting with site leaders and clusters of innovative teachers.

Glendale stood out, directly allocating to principals shares of stimulus dollars based on the merits of school-level plans. One principal, awarded $50,000 in fungible funding from the district, stated, "They [the district] gave us freedom. . .. We were really fortunate where they gave us an allocation, and then they requested a plan from us. And I got to kind of decide how I wanted to spend my money. . .. This was kind of free money."

This principal went on to detail her purchase of musical instruments and hiring "intervention aides" to help teachers with struggling pupils. A second Glendale principal noted that she had used discretionary funding to provide learning platforms not offered at other sites. She explained, "I used [these funds] as an excuse to purchase things that the district wouldn't purchase. And then I was very creative with how I used the ESSER funds."

Leaders in Sweetwater passed a fraction of stimulus dollars to principals, equaling 16% of their ESSER II allocation in 2022–23. In addition, 5% of state ELO-G dollars went directly to principals. Lindsay offered a soft version of decentralized budgeting, as well. "We have been giving the sites additional allocations of the [federal] ESSER money," the CFO reported. "So even though they didn't necessarily control the funding, it was their input that drove that decision."

Still, school leaders across districts reported few discretionary funds. One principal in Poway told us, "If we did not have a foundation, I don't know how we would do any of the things. We would not have [them] paid for." Her site's foundation paid for all-school events and behavior intervention programs. At the same time, Poway's impressive spread of digitally enlivened pedagogies depends on the curiosity and cooperation of frontline teachers. At least two principals in Glendale, leading schools serving working-class families, worried about insufficient funding from district leaders, whereas schools in advantaged communities reportedly enjoyed strong support (we did not verify this claim).

Shifts in budget priorities often stem from priorities that bubble-up from site principals. Milpitas's teaching and learning coordinators began working with math teachers committed to defining discrete competencies, providing students with frequent feedback on their mastery (resembling Lindsay's overall structuring of competency-based teaching). In such cases, we observed the innovation sprouting amongst a cluster of teachers, and then district leaders responded with staff support.

Similarly, Lammersville's district leaders had restructured the teaching and learning unit, mobilizing coordinators who reach out to schools from the district office. Certain clusters of teachers, committed to rethinking professional learning communities (PLCs), collaborated with their district colleagues. Stimulus dollars supported this reconfiguration—deepening the ways in which this district nurtured engaging pedagogies. Buy-in by school leaders and teachers remained essential, district leaders reported. Similarly, Sweetwater's superintendent noted, "We get the input from the site level, we're trying to . . . take that into account [while] making sure we're also making decisions that are financially prudent."

A Fiscal Cliff? Gliding Down to Fiscal Stability

All six district superintendents and their CFOs worked to avoid a "fiscal cliff," as federal dollars were due to expire in September 2024. These leaders adjusted budgets to better engage students and backstop pedagogical innovations, while facing a tough labor market and ever-changing revenue streams.

Learning recovery efforts funded by the state threatened to incur long-run costs beyond the horizon of federal stimulus dollars (the state budget would go south in 2024–25, coping with a large deficit). Lindsay, for example, hired additional learning facilitators (i.e., credentialed teachers) to reduce the average class sizes to 15 students. Their belief was and continues to be that smaller classes enrich student time with learning facilitators and address "all the additional needs" students openly display, one district official said.

Recall that Glendale expanded to a seven-period day so that middle and high school students could gain an elective course that sparked their interest. Describing the program, a district official said, "We knew coming back from COVID that we've got to get our kids more engaged in school." The shift to seven periods also allowed the district to provide "more opportunities for interventions during the day." (By spring 2024, the seventh period was on the budget chopping block, since participating teachers receive extra pay to participate.)

Poway invested part of their one-time funds in social-emotional learning. They hired new staff, purchased new program materials, and reported the ways fiscal support could be stretched out over five years (if prudent in 2022–23 and 2023–24). In order to do this, the district was strategically using ESSER and state (Learning Recovery Emergency Block Grant) dollars over several years. Poway's CFO stated, "We strategically said we're spending ESSER I and ESSER II in the first two years, then ELO the next two years, and then the Learning Recovery Grant."

Lindsay described a similar budget strategy with "minor tweaks" to avoid a "huge cliff." As mentioned above, Lindsay invested stimulus funds in reducing class sizes. While the district had initially used federal stimulus dollars, it was planning to use "the Learning Recovery Emergency Block Grant, the state funds, to sustain a lot of that staffing over the next four years," according

to one district leader. The plan was to "slowly phase that [reduced class sizes] out as that money starts to decrease, and then we'll get back to normal staffing ratios."

All districts hired new classified staff in 2022–23, necessary for the new state programs. A portion of the six also allowed classroom aides and facilities staff to claim more hours in the post-COVID-19 period (another cost that would be pared back in 2023–24). New hires ranged from counselors and nurses to tutors and classroom teachers. A year later (in 2023–24) district leaders were counting on retirements and staff attrition to return their labor spending to pre-COVID-19 levels.

As districts foresaw the end of federal dollars, superintendents and CFOs spoke of their desire to minimize outright layoffs. One Lindsay administrator explained, "We're healthfully overstaffed right now, strategically overstaffed, but it's not sustainable forever." When asked about their plan to return to normal staffing levels, this district leader told us that the district would use "small little tweaks using attrition, not layoffs, over the next 4 years to get back to normal staffing levels."

Glendale added extra teaching positions when students returned to classrooms so that no elementary student attended a "combo" classroom (in which children in two grades were placed in one room under a single teacher). Seeing this organizational change as not likely sustainable, one district leader said, "We absorbed. We've not had layoffs." With retirements, the district has "absorb[ed] our teachers who are on temp contracts."

Milpitas used stimulus funds to increase weekly hours filed by classified staff. As the dollars expire, the district plans to bring "FTE [full-time equivalent] back to the pre-COVID" level, the superintendent told us. Milpitas district staff acknowledged that the district had yet to raise the prospect of layoffs, but this decision might have to be faced in the coming year. "They could suggest that we cut back, creating the potential for layoffs, possibly," one principal said.

Sweetwater departed from other districts by rehiring former teachers and support staff on short-term contracts. The superintendent noted, "We added additional teaching positions so that teachers that had retired or had been separated from the district were brought back." The district believed that these teachers could "support small group instruction" and keep class sizes small once students returned to in-person learning. However, district leaders were quick to clarify that these initiatives were temporary.

The values and organizational culture of district offices continued to shape budgeting strategies, even in the face of external demands. The "Lammersville Way" offers one example: the district-wide belief that, for each new program, district staff "study it, we vet it, we get feedback, and then we do it, and we do it until it is implemented or it proves unworthy for

implementation," the superintendent said. Lammersville leaders remained confident about their budget outlook. Despite the one-time nature of the stimulus dollars, the district's CFO said, "I think we're in, we're in good fiscal health."

Local budgeting under new state mandates. Many district leaders reported frustration with the way the state decided on favored program models, then mandated new or expanded initiatives. Each new program arrived by 2022–23 with particular regulations, hiring necessities, planning and reporting requirements. When asked about their ELO-P plan, one district leader described the big lift to create a new program from scratch. She felt the program was "designed [in Sacramento], as I can see it, to provide more money for the school districts who already had existing after-school programs in place." Without a local NGO network, the district could not contract out and had to hire within the district.

Already suffering from a tight labor market, other district leaders were concerned about finding staff for the summer "because right now we're still working on just trying to get teachers in the classroom, let alone over the summer have instructional aides and staff," one superintendent said. Part of the state's ELO-P legislation also required districts to either provide families with transportation or provide a program at each school site. Being a "small-ish district," Lammersville does not operate school buses "because everyone can walk to and from schools."

One district leader at Lindsay expressed worry about the "state moving back towards categorical funding and pigeonholing money into things which stifle innovation."[12] Because "California is one of the most diverse states in the country," they [local educators] don't understand why state leaders are creating "a one-size-fits-all kind of approach." This return to categorical aid ignores variation in local conditions and budget priorities, several district leaders told us, which better fit community priorities. Lindsay's CFO told us:

> "ELO-P, for example, . . . it's so restricted to the afterschool program. . .. We may have great stuff going on during the day that I have to reduce staffing in. Meanwhile, I have this great after-school program that serves maybe 60% to 70% percent of the kids. But my core program that serves 100% of the kids is taking cuts. If you . . . give us flexibility to use that money during the day, we can have this continuous, comprehensive program that goes from 7:00 in the morning until 6:00 at night."

[12] Enacted in 2013, California's Local Control Funding Formula (LCFF) consolidated many categorical aid programs and returned fiscal discretion to local school boards. Under LCFF, state leaders decide how much money is available to schools, tied to so-called Proposition 98 reserves and then distribute funding in a progressive fashion, awarding a bit more to districts challenged by high levels of family poverty. A district's share of ELs, low-income students, and foster children drives this additional funding. Once the dollars flow to local boards, district leaders decide how to use the funds with the input from their local communities, structured in part by each district's Local Control and Accountability Plan (LCAP).

California voters passed Proposition 28 in 2022, the Arts and Music in School Funding Guarantee and Accountability Act. This measure required the state to establish a program that advances arts instruction in schools beginning in 2023–24. Districts must contract with local artists as contributors to classroom programs.

Here, too, district leaders praised the philosophical goal of this effort while struggling to find new staff, devise yet another plan, and integrate arts and music into the core curriculum. Dollars must be allocated to all schools within the district, no matter how small or large. One district leader noted that money was to be spent as "determined by the community, not the district." She noted that each site would receive "about $80,000 and 80% of the money is supposed to go towards staff." These state rules made it hard to split an art or music teacher among schools, and district leaders feared they might be able to spend just "$20,000 on supplies [and] won't spend the rest of the money."

Districts braid new funding. Leaders at Sweetwater—taking seriously the Local Control and Accountability Plan (LCAP) process—explained that new stimulus and state categorical aid were integrated with ("shoehorned into") district and community priorities. These district managers noted that any new initiative had to align with the district's core goals, as delineated by the LCAP process: "Every plan that we submitted [was] placed under those four [LCAP] goals." So, as new funding arrived during the COVID-19 era, Sweetwater braided these funds with core LCFF funding and federal dollars to protect the cohesion of the instructional and pupil-support programs. The district superintendent explained, "We tried to see how we could utilize these funds with our existing resources in areas where we really needed additional support."

The growing count of plans required by the state—tied to the bevy of new categorical programs—proved frustrating for this and other superintendents. After moving toward a single, unified planning process in 2013 under the Local Control Accountability Plan, Sacramento policy makers were now fueling the spreading plan-demic. The state Department of Education seemed to collect more than one thousand district plans for each new program, then require separate spending reports for each. "Who is reading all these reports at CDE?" one district official asked.

A Thousand Flowers Blossom—in Differing Climates

The shift to remote instruction prompted a steep learning curve for many teachers, instantly required to experiment with a variety of digital tools. Teachers had mastered online curricular materials, newly organized with, for example, Google Classroom, along with real-time tracking of students' working in remote classes, plus a variety of animation and supplementary tools to enliven instruction. Many of these digital advances, along with newly purchased smart boards and one-to-one laptops for students, had persisted when we visited in 2022-23, even altering

the social organization of classrooms (e.g, workstations among which pupils rotated, engaged learning materials online).

A wider array of pedagogical and organizational innovations surfaced in most of the six districts. The flow of stimulus dollars and the immediate challenges faced by students—whether in the academic or social-emotional realm—moved district leaders to budget for differing types of innovations. We observed five types of major innovations across participating districts:

- Shifting resources to backstop the *social and emotional well-being* of students, even rethinking the mission of schooling in the context of "whole-child development".
- *Lengthening instructional time* via tutoring, extended day, and novel arrangements of small groups of students.
- Moving *additional adults into classrooms* to strengthen the lead teacher's core instructional program.
- Deepening the use of *digital tools* to create learning stations and cooperative forms of learning, freeing the teacher's time to focus on lower-achieving pupils.
- *Restructuring curricula* to center on discrete competencies learned by students, rather than didactic delivery and often passive roles set for kids.

A listing of innovative programs—bold and ambitious to modest and incremental—appears in Table 4.1. These inventive programs are split between *pedagogical* and *organizational innovations*. Pedagogical innovations involved novel ways of arranging classroom instruction by reordering student groups, tasks, or the ways students got work done. We have mentioned the reorientation of advisory periods, creating quiet rooms, engaging learning stations affording options for students, and curricular efforts to address social and emotional issues.

Organizational innovations speak to wider structural changes made by some district leaders, for example, creating new units to focus on digital tools or bolstering counseling staff or special education services. As mentioned, Lindsay and Del Norte were drawing on liberalized Medi-Cal reimbursement to bolster counseling supports. Glendale shifted to block scheduling in 2022–23 and added a seventh period. Two districts (Lindsay and Milpitas) were moving from crediting "seat time" to delineating competencies that pupils pursued with coaching from learning coordinators. These are examples of shifting the core functions of schooling or recasting adult roles and relationships with students.

Table 4.1. Listing of Organizational and Pedagogical Innovations by District, 2022–23

District	Organizational innovations	Pedagogical innovations
Glendale	• Seven-period day • Block scheduling • Outdoor classrooms • Childcare expansion • Hiring of Equity Access and Parent Engagement Office staff	• Advisory period • Wellness centers • "Lunchtivities" • 1:1 device • Peer tutors
Lammersville	• Hiring of education services staff • SUCCESS! period • *New Hire Academy* • School psychologists • Parent Project (adult education)	• Advisory period • Wellness centers • Flipped classroom instruction. • Blended Learning Academies • Impact teams (type of professional learning community)
Lindsay	• Data summits • Hiring of social and emotional learning coordinator • Mental health counselor for afterschool program	• Instructional aides
Milpitas	• Professional learning communities • Restorative justice policies • Career and technical education campus and pathways	• Competency-focused formative assessments • Common rubrics
Poway	• Hired technology and innovation staff • Mental health–monitoring application • Keystroke-monitoring application • Mental health counselors • Learning management system training	• WIN ("What I Need") Time • District-wide learning management system • Extended independent study
Sweetwater	• Professional learning communities • Curriculum website repository	• Embedded tutors • Saturday Academy • Second adult online • Social and emotional learning curriculum • Google Classroom

Learning recovery and student well-being. We begin this section with Lindsay and the way this district addressed the social and emotional well-being of students and families. These efforts, by 2022–23, had become anchored in the Healthy Start Family Resource Center, operated by the district. Here center staff holistically served students and families in the Lindsay community. The district office added a social-emotional learning coordinator to assist schools, and each site received at least one counselor post. Counseling hours were expanded to ensure that mental health support was available full-time, even overlapping with extended-day activities.

Lindsay also purchased the Rhithm app, used to track student well-being through regular check-ins by individual students. Data collected through Rhithm are then analyzed by site administrators. Lindsay has invested in building soundproof spaces for individual and small-group counseling sessions at school sites. The district is looking to expand Medi-Cal billing as a way to provide more robust therapies for families, similar to Del Norte's assertive efforts.

Glendale's shift toward holistic development included rethinking the core curriculum. Going beyond counselors and quiet rooms, middle school leaders asked how core courses might lend space to examine social relationships, anxieties, and one's own evolving identity inside school. Several teachers and principals received a modest chunk of stimulus dollars to revamp the

BOX 4.1 MILPITAS NURTURES TIES WITH STUDENTS

The shift to buoy student well-being and motivation—seen across the study districts—unfolds on a human scale at Milpitas Unified, inventively rooted in free lunches. It's not surprising buns inside the noisy school cafeteria. The subtle idea: An adult mentor from the community takes one student to lunch every other month throughout the school year.

The lack of one caring adult forming a sustained bond has long beset American high schools. Thus, Milpitas counselor Jonathan Payne devised the take-a-student-to-lunch scheme, where a district staffer or business person simply engages one student informally to talk about how school is going, what interests the teenager might pursue.

"It's so comfortable, you talk about anything," one teen said about her lunchtime mentor. "She's more like an older aunt to me," another student told us. "It was hard coming back to work [from the pandemic]," this student reported. "We sort of opened up to each other."

The mentors talk about career options for Milpitas teens or just about social friction and good things happening at school. A respectful listener goes a long way with participating students. "I talk about stuff I couldn't talk about before [at school]," another teen said. "It's like speaking to an older friend, not like a teacher or authority figure."

The idea is simple, costing just a bit of counselor Payne's time. The payoff seems high in building respectful, informative relationships as these high schoolers find their way.

advisory period in the summer prior to 2022–23. Describing the restructured advisory period, one Glendale principal explained, "It's homeroom," offering students a warmer student–advisor relationship, offering pupils the opportunity to set goals, developing study strategies, and navigating social tensions.

Glendale reportedly took the advisory period a step further, sharing the focus on nurturing ties among diverse student groups. One principal reported that the advisory period was "all teacher

driven," with "five or six staff members" compensated to structure clearer lesson plans and activities. This group of teachers created "different activities to learn more about [various heritage groups]" represented among students.

These teachers focused on building lessons around kindness and pushing students to reflect, for instance, on "someone that was kind to you" at the school. Aligned with the school's positive behavior incentive system, the new advisory period prompted students to articulate what they liked in middle school, for example, asking them to "tell . . . what prizes you want in the student store." The principal explained that lessons varied across teachers but shared the goal of nurturing a tighter school community.

Similar to Glendale, Lammersville used the advisory period at its high school to capture the "current mood" of the student body. Each week, students completed a well-being survey using the online application Sown to Grow. The assistant principal described this as a "new online tool that we started using during COVID." She explained that, after students completed the survey, "counselors [were] monitoring the data." This offered an overall profile of how students were feeling, along with identifying students who might benefit from counseling.

In these ways, school leaders moved beyond hiring additional counselors and social workers—an effort that might yield results—while fostering rich ties beyond core teachers and students. District leaders remained concerned about learning recovery, doing better on state tests. But they also shifted budgets toward this variety of staff and strategies to buoy mental health and strengthen the enabling character of schools.

BOX 4.2 DEL NORTE TAPS MEDI-CAL TO LIFT STUDENT MENTAL HEALTH

Del Norte Unified is a small district in Del Norte County, on the coast of California, bordering nearby Oregon. Del Norte Unified is one of the few "single-single" districts in the state that serves all students within the county. District leaders discussed high unemployment rates, as the county had lost many logging and fishing jobs that once sustained economic development.

District leaders in Del Norte described a mismatch of student need for mental health support and access to services in the county. Because of this need, the district was building a mental health branch to meet student demand, including school psychologists, mental health counselors, and mental health technicians. New stimulus dollars from both the federal and state governments sparked this idea, but California's Children and Youth Behavioral Health Initiative will sustain the program after extra dollars expire. Through this initiative legislation, districts could directly bill Medi-Cal for mental health services provided by school counselors. Moreover, the district was building a residency program with nearby colleges so that individuals looking to become mental

health counselors would have the training and then, hopefully, would stay with the district after completing their program.

Alongside Medi-Cal billing, Del Norte added family liaison positions with stimulus dollars so that community groups had direct communication with district personnel. For example, the district serves a large share of Hmong students. The Hmong family liaison reached out to Hmong students who were absent from school to check in on families and understand the reasons for the absences. If a student missed the bus, the district would send transportation to combat absenteeism.

Like other districts across the state, Del Norte was investing in wellness rooms. When we visited the district, a mental health tech proudly showed us the wellness room they were overseeing at one of the district's middle schools. Students could visit the wellness room and confide in this mental health tech when they needed a break from the classroom. At a nearby elementary school, the wellness room sat directly next to the principal's office. There, too, when students needed a break from the classroom, they visited the wellness room, and the principal provided support to make sure the student could return to the classroom ready to learn.

Together these programs were the foundation of Del Norte's new wellness initiative. When district leaders saw a lack of access because of the district's rural nature, they innovated to meet students' needs.

Lengthening instructional time. All six districts acted to grow instructional time. This involved taking on new tutoring sessions, offering free summer school for at-risk pupils, and structuring an extended-day program variably synchronized with core instruction. The expansion of TK and required extended-day efforts reflected policy makers' desire to lengthen time in school—without necessarily addressing the quality of these add-ons. Faced with competing claims on uncertain revenue streams, many districts collaborated with local nonprofits (or national online companies) to provide tutoring or run extended-day programs, as mentioned above.

Rejecting online tutoring, Sweetwater contracted with HeyTutor to design an "embedded tutoring" approach. This required placing tutors at each school and marrying their work with topics covered by lead teachers. Tutors devised their own lesson plans and created materials alongside the lead teacher. Tutors could assist during the regular lesson and pull together small groups for targeted intervention in one classroom corner. The tutor's lesson plans had to synchronize with the core curriculum. District coordinators told us that tutors participated in teachers' meetings and reported on student progress. For many special education students, the embedded tutors designed project-based learning activities. (This model resembles Compton's resolve to put more adults into classrooms.)

Before the 2022–23 school year, Glendale offered every student the opportunity to attend their summer session, Camp Palooza. Glendale's (former) superintendent described Camp Palooza as a "wall-to-wall summer program for free." Whereas the new targeted ELO-P funding from the state only required districts to offer summer programming to historically disadvantaged (unduplicated) pupils, Glendale believed it was crucial to provide Camp Palooza for all students in order to draw families back and increase attendance during the school year. The summer program provided students with academic support, but the main focus was on enrichment and reminding their families that school was a safe place for students to be.[13]

Adding adults, enriching relationships. To provide greater adult support in virtual spaces, school leaders in Sweetwater added a second adult (in addition to the lead teacher) to online lessons. Leaders hoped this second adult would be able to take notes, ask questions, or help reteach struggling students. The superintendent told us –

> "One of the things that we did is, instead of having just one teacher . . . offering the tutoring online, we decided that we needed a second adult. And the purpose of the second adult was to field the questions or look at the faces if cameras were on because sometimes they weren't, or ask questions that we could anticipate, as this might be a question that a student has but they're not asking. The second adult would be the one kind of pretending to be a student . . . like, 'Mr. Park, what do you mean by the exponent'?"

Enriching staff ratios or lowering class size offered another strategy for strengthening relationships. In Lindsay, district administrators made two major changes in order to lower the ratio of students to adults. First, was to lower class size, shrinking classes to about 15 or 16 pupils per teacher. Still, by 2022–23 when we visited, district leaders could foresee that this strategy could not be sustained as stimulus dollars trailed off. Budget staff hoped that staff attrition, along with conserving cash reserves, would slow the likely return to larger classes.

Second, district leaders in Lindsay hired additional classroom aides. In Lindsay, they were trained by providers who offered professional development for lead teachers. Back in classrooms, the instructional time of aides was protected, rather than giving them clerical tasks. One assistant principal explained why the district would choose to hire multiple instructional aides instead of a single specialist: The district got a "bigger bang for the buck. And the data supports that that's a better outcome [for students]." Well-trained aides were seen as the most efficient way to provide excellent tier 1 instruction to students. See Box 4.3 for a similar adults-

[13] Because of the one-time nature of stimulus dollars, the district began to pare-back the subsidy for disadvantaged students in 2023. The superintendent explained, "We've had to now charge for those who do not qualify under the ASES [After School Education and Safety] or other programs." However, the district aimed to keep the price "as reasonable as possible" so that an economically diverse set of students could still attend Camp Palooza.

first strategy devised by Compton's leadership, which might help explain that district's notable bounce-back in student learning.

BOX 4.3 ENRICHING RELATIONSHIPS—COMPTON STUDENTS BOUNCE BACK

Remote instruction sank many students in Compton during the pandemic. More eye-opening: Their learning curves quickly reversed, turning sharply upward. What worked? What could Compton teach policy makers and educators in other districts?

First, the numbers: After schools closed and students went online, the percentage of Compton pupils achieving proficient levels in math dipped by nearly 6%. Yet by spring 2023, they had rebounded in robust fashion, bouncing back to pre-COVID-19 levels. In ELA, Compton students lost no discernible ground and then climbed in the percentage found to be proficient.

How did Compton's leaders and frontline teachers do it?

Federal stimulus and fresh state funding helped. Compton Unified—largely serving poor and working-class students—benefited from nearly $8,000 in new federal aid per child, along with progressively distributed state dollars.

Teachers taught from their own classrooms throughout the pandemic, sustaining mutual support. Compton Unified reopened for in-person instruction long before the Los Angeles Unified School District and other urban districts, one factor driving a bounce-back in learning statewide, our team has found.

Still, the not-so- "secret sauce" flows with two distinct strategies deployed by Supt. Darin Brawley, sticking with these reforms pre- and post-COVID-19.

Nearly every initiative reported by Compton's leaders centered on getting warm and skilled adults into classrooms. "It's a push-in model," said Jennifer Moon, director of elementary education. "We have tutors who are integrated with the lead teacher, aides and volunteer students from Cal State Dominguez Hills." Every child in the district had at least one adult available to support them.

Compton contracted out for tutoring services, but the nonprofit deployed had to ensure that the tutors were tightly synchronized with the classroom teachers. Tutors advanced the competencies on which teachers were focused week to week.

Teaching and learning aides offered steady support to each student at risk of falling behind. "Kids come to school if they know someone cares about them," Abimbola Ajala, director of pupil services, emphasized. College interns from Cal State University Dominguez Hill connected with individual students, calling their homes if they did not show up at school, fostering relationships that deepened and lasted over time. After graduation, interns had a pathway to employment in the district.

Compton's second strategy aimed to embolden lead teachers with a kaleidoscope of digital tools and novel ways of organizing classrooms. The district's innovation and technology team pulled in curricula grade by grade during the pandemic—then continued to build out classroom activities tied to pupil competencies.

We saw students rotating to workstations, at times engaging with digital material, and other students in small groups, puzzling through tasks with the lead teacher. Real-time assessments helped teachers adjust lessons while enriching student engagement.

The waning of federal dollars may jeopardize Compton's advances. Whether the district can sustain reading specialists in each of 17 elementary schools remains in doubt. Yet Compton's students, so far, are bouncing back.

Digital tools to engage students. It's no surprise that teachers ramped up their necessary use of digital tools during remote instruction. We also discovered that several districts redoubled these advances, seeking to better engage students in classrooms (and at home with asynchronous materials). District offices bolstered their technology staffing and coached teachers in the classroom applications of digital tools, including inventive additions to small-group work and self-directed learning stations.

Poway administrators heeded a call from families to simplify the online learning platform, streamlining logins required to access content. In response, Poway purchased an LMS and began a large-scale, tiered program of training for all teachers. By 2022–23 nearly all teachers in the district had completed at least basic training and begun posting student assignments and grades on the LMS. Poway invested in online curricula and refreshed or replaced devices to improve student and parent access. Poway's Technology and Innovation director explained that the district was interested not just in expanding technology use but in purposefully using technology in classrooms.

Lammersville similarly mounted a team of 10 coaches who provided professional development for teachers. Even before the pandemic, teachers could join the district's Blended Learning Academy. This year-long professional development course taught ways to apply online materials and interactive exercises with in-class practices. With "all the new things that have come out [of the pandemic]," one district leader reported shifting budget resources to expand this direct work with classroom teachers.

Glendale applied translation applications to reach multilingual pupils and families. With a recent influx of refugee students from Russia and Ukraine, middle school teachers led an effort to install Google Translate on each student's Chromebook. While "it's not a perfect solution,"

one teacher explained, “it’s better than what we had pre-pandemic.” A nearby elementary school added an iPad in the front office to help communicate with parents. This site also hired a parent liaison for each language so that, for example, an Armenian parent or guardian could connect with the Armenian Parent Club.

The deepening use of digital technology—to enliven classroom instruction or better connect with families—offered a ripe example of how the pandemic accelerated earlier, incremental moves by district leaders and teachers. Walking through one Glendale classroom, lively and engaged middle-schoolers were discussing a geometry task, eyes darting between their iPads and one another, discussing and debating the problem at hand. The teacher had ingeniously integrated digital tools with a cooperative learning exercise that fully engaged students, who showed little interest in the gaggle of visitors wandering through the classroom.

In this way, yes, necessity may have been the mother of all inventions during COVID-19. Yet, several districts have extended this momentum to enliven the social organization of classrooms, get additional adults into classrooms, and leverage the pedagogical strengths of digital technologies.

Rethinking what schooling entails. Perhaps most fundamentally, a share of district leaders were reflecting on the pandemic era as an opportunity to rethink the institution of schooling. We earlier mentioned Milpitas’ restructuring of the high school curriculum, realigning to discrete learning competencies and fostering hands-on opportunities with employers and service agencies. This magnitude of organizational change speaks to the question of whether schooling—as a conventional and resilient institution—can seriously improve and better motivate all students in the pandemic’s wake.

Milpitas had long served a diverse mix of working-class and middle-class families, and of late, well-educated parents working in Silicon Valley. The flow of stimulus dollars was, by 2022–23, accelerating the district’s construction of a career pathways campus, replacing an old high school in which central offices were earlier co-located. Small clusters of innovative classrooms and human-scale plazas offered a fresh feel for students and teachers alike—now embarking on distinct curricular pathways tied to on-the-job internships and various careers.

“We are thinking differently,” the Milpitas superintendent told us. “A mindset shift toward career pathways, restructuring the curriculum in middle and high schools for a more hands-on experience.” She had partnered with two community college districts to provide dual enrollment for high school pupils, along with building a “middle college,” where community college professors offer courses for these students. New pathways, fostered by local employers, included STEM, digital technology, computer science, early education, and social welfare. The physical structuring of classrooms and campuses was being reconfigured to fit this shift in

mindset about what schooling should entail, an innovative blend of classroom learning with in-the-community experiences that students enjoyed.

Glendale leaders were keenly aware of competition from local private and charter schools as students resumed in-person learning. Taking a risk as the pandemic receded, Glendale decided to shift to a block schedule and offer the seventh period mentioned above. Prior to the pandemic, middle and high school students were limited to just one elective course within the six-period day. ELs could not enroll in any electives because of their required language course. Stimulus dollars covered the wage bill for teachers working all seven periods.

Focused on student–adult relationships, Glendale pushed forward with their block schedule. One district official argued that longer, more thorough class periods "really helped teachers get to know kids better." It also allowed "teachers to go in deep, to do intervention within the period" and gave "the kids more time with each other and collaboration." District leaders said that students were "recoup[ing] credits if they need to" and avoiding credit recovery during the summer. Other students were following career and technical education pathways, made more attractive by longer class periods. The new flexibility allowed the district to pilot AP African American and women's studies courses, and new language classes aligned with student heritages. Overall, the district's A-to-G completion rates and dual enrollment numbers with community colleges are up after the schedule change.

Lindsay, in the decade before COVID-19, had shifted to a competency-based learning process, nurtured with groups of students by the (credentialed) "learning facilitators." Students work with facilitators to define their learning goals, pegged largely to state proficiency standards. Next, pupils attend traditional courses and sessions in which each student works online to advance a series of defined competencies in subject areas. Lindsay's own LMS had long tracked student progress, allowing students and teachers to see the way students are mastering proficiencies step by step. Teachers also build inventive exercises and teaching tasks, receiving a modest bonus when uploaded and adopted by fellow teachers.

As was the case in Milpitas, new stimulus and state dollars did not drive the original structural reform in Lindsay schools. But the fresh funding enriched Lindsay's competency-based structure for learning, adding new learning facilitators and counselors, lowering class size, and offering broader social-emotional supports for students and families. Lindsay's leader bolstered the district's cash reserves, as did district officials in Poway, allowing these districts to continue innovative approaches over time.

On a more modest scale, Lammersville added what was called a "Success Period," to the high school class schedule. The assistant principal described this time as a daily "30-minute intervention period," during which teachers could "reteach and retest" students pushing to

master a particular topic or assignment. Schools dedicated one of three lunch periods to this activity, and the student response was strong, Lammersville leaders say. Teachers declared "priority days" for different subject areas, allowing students to tackle prior assignments on those days. If students did not require additional exercise in a subject area, they won an extended lunch period.

Poway's elementary schools in the pandemic's wake set aside time—dubbed "What I Need," or "WIN," time—to work with small groups of students, staffed by all teachers and classroom aides. Teachers focused on specific skill areas in which clusters of children were falling short. "We're basically all having a small group with very intentional, specific strategies that we're working on," one second-grade teacher told us. "The goal is [that the small groups] are really targeted and really trying to close those gaps." Small groups of students at similar learning levels met, for example, to practice phonics or language fluency. One principal reported her desire to expand WIN time across grade levels, increasing options for teachers to work with students in small groups.

Overall, these shifts in the social organization of learning did not manifest revolutionary change, based on our interviews and observations. The shift away from traditional curricula, didactic teaching, and seat time tied to easily tested knowledge—as seen in Lindsay and Milpitas—did reflect deep structural change. The student was seen as a more active learner, pursuing guided and self-directed mastery of competencies, aided by adults who built supportive relationships.

At the same time, modest organizational and pedagogical adjustments, as discovered in all six districts, offered incremental steps toward engaging students and enlivening their learning day to day. Educators in change-oriented districts reported that organizational gains were not necessarily sparked by the pandemic—but fresh funding and the desire to not "rubber-band back to the old normal" added momentum for promising reforms.

How Much Change? Prevalence of Budget and Organizational Reforms

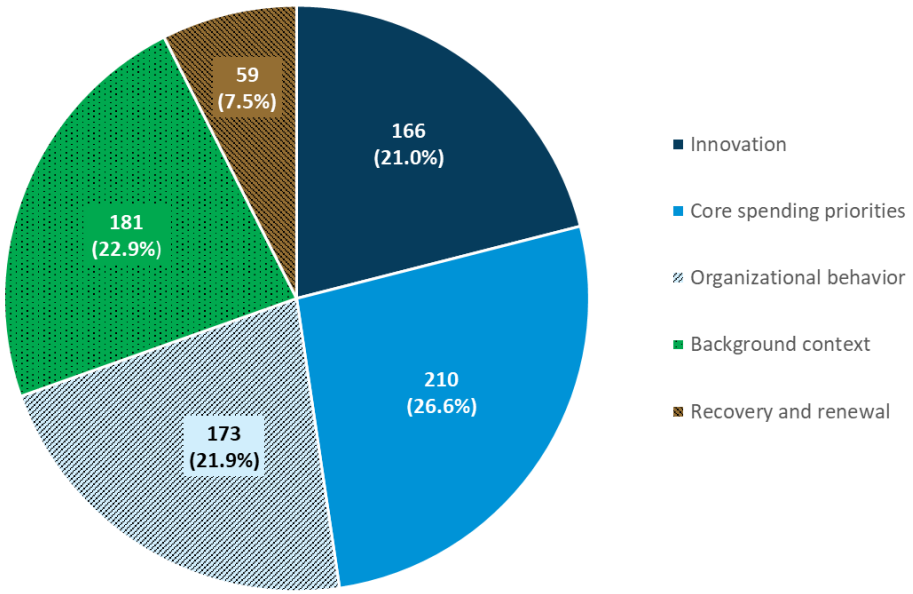
Looking across the six districts, what was the prevalence of budget adjustments and program innovations? We have detailed various changes budget priorities. We described a variety of organizational and pedagogical changes advanced by district leaders. But what was the relative incidence of such discernible shifts in district operations and school-level innovations? We want to be sure that what is vivid, emerging from our district visits, does not distort the prevalence or generalizability of these telling actions reported across districts.

To weigh relative propensities of budget priorities and innovations, we coded the transcripts derived from all interviews of district staff and principals, as described in the "Methods" section above. Our team coded a total of 1,432 segments across transcripts, drawing from interviews

with 45 district staff, and 854 segments with 23 principals or teachers. By "segments" we mean a series of four to five sentences appearing in an interview, in which the district or school-level educator reported an action, budget priority, or program initiative. Rather than coding for keywords, we marked the main topic being addressed by the respondent. Reported distributions of district actions or deliberations must be weighed relative to the incidence of topics covered in the interview protocol (Appendix D).

We coded 789 distinct segments in which district staff engaged in one of five core topics. The distribution of topics covered in our interviews generally matched the distribution of questions posed in our protocol—with two exceptions. First, very little discussion arose on the way district leaders thought about "recovery and renewal" writ large. That is, these leading educators seemed not to reflect on a discrete recovery strategy. Nor did they hark back often to returning to in-person instruction. More commonly, they spoke of the variety of contextual pressures they were feeling (23% of all segments) and the various program initiatives they were mounting inside schools, often tied to budget adjustments (Figure 4.1).

Figure 4.1. Distribution of Core Topics Discussed in Interview Transcripts

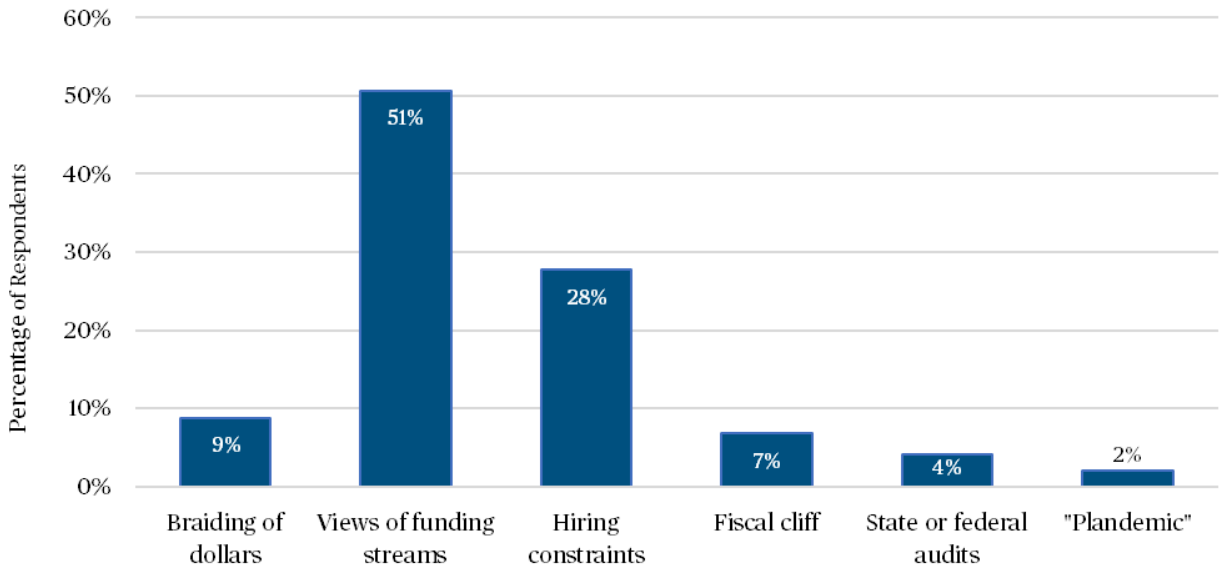


Second, district staff spoke more frequently about how they devised budget priorities and whom, compared with this topic's presence in our protocol. This set of organizational behaviors illuminated the way district leaders weighed competing demands and built annual budgets as stimulus dollars began to diminish and pandemic-era innovations came under greater scrutiny.

Setting budget priorities. About one eighth of the interview segments with district leaders dealt with their consideration of budget priorities, including who was at the table in deciding

fiscal adjustments. Half of those conversations were dominated by worries (and occasional plusses) tied to the state's return to categorical programs (Figure 4.2). Related concerns about finding enough qualified teachers and staff filled about 28% of budget-related segments.

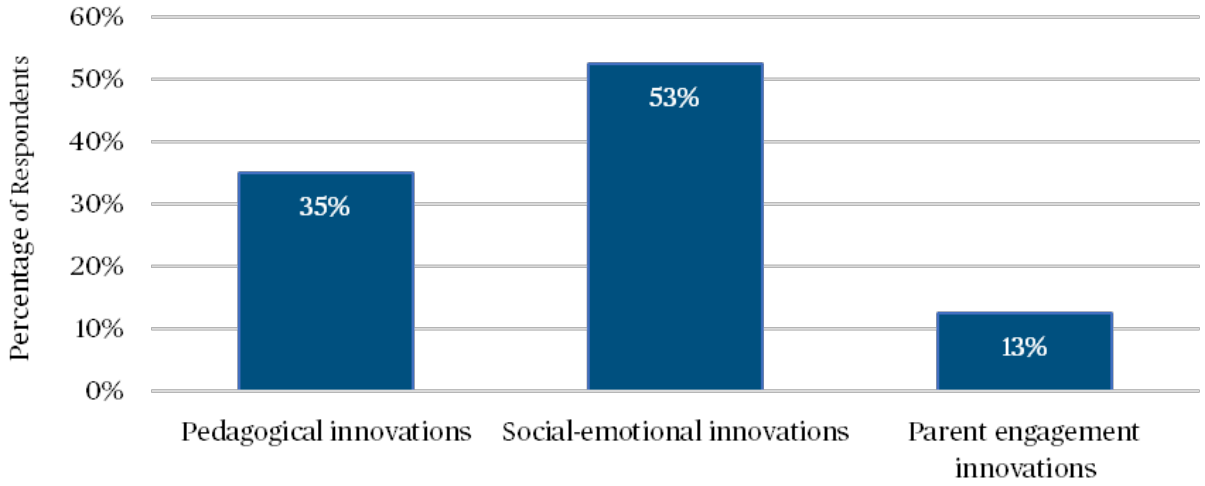
Figure 4.2. Distribution of Budget Topics Among Interview Segments



Notably, the fiscal cliff was raised in just 7% of interview segments. The plandemic was mentioned in 2%. By 2022–23, district staff were mostly thinking forward about new programs and ways to staff them. All six districts were anticipating the end of federal relief dollars. This wind-down could be worrisome and involve modest layoffs. Yet, district leaders had largely invested in one-time activities and classified staff, who could be let go with few regulatory constraints if this became necessary.

Types and intensity of innovations. District officials spoke of program innovations less frequently, relative to the proportional representation of this topic in our protocol. We did learn that several organizational changes cited by district leaders predated the pandemic. Others surfaced during the period of remote instruction. Just over half of segments in which inventive activities were discussed centered on social-emotional support for students, then on teachers to a lesser extent (Figure 4.3). Just over one third focused on pedagogical innovations inside classrooms or teacher training directly tied to pedagogical practices.

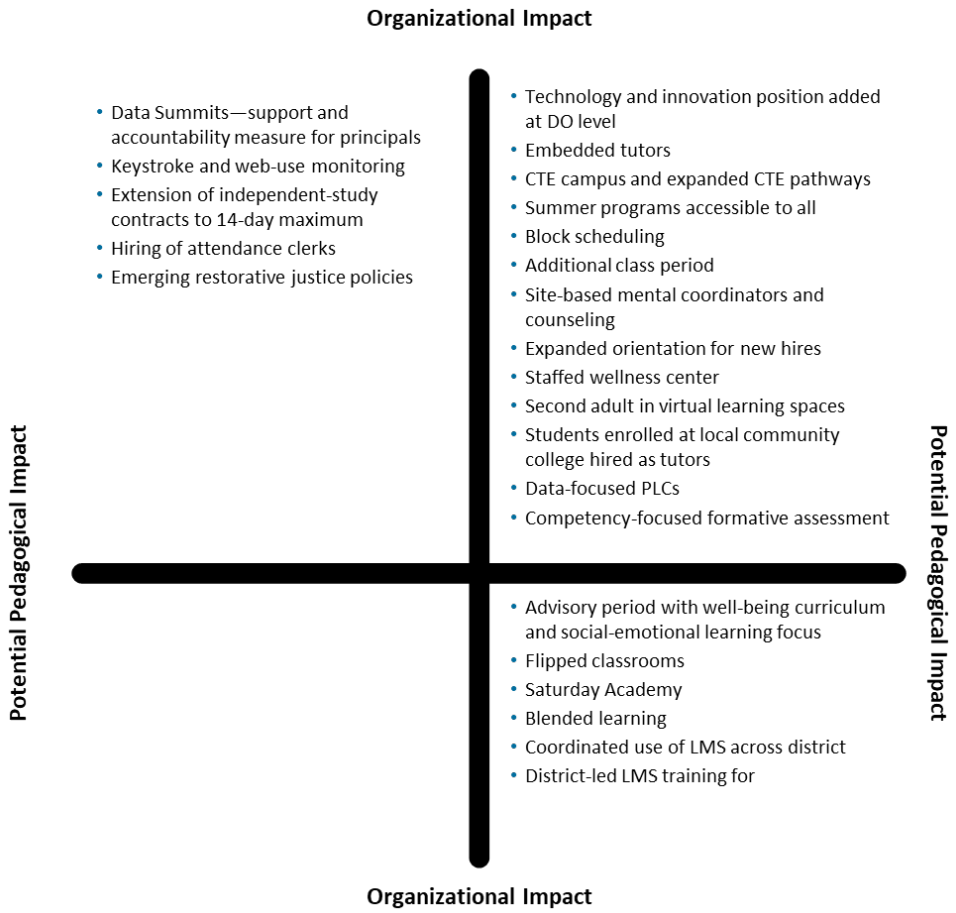
Figure 4.3. Distribution of Organizational and Pedagogical Innovations Reported by District Leaders



A portion of the innovations felt modest or incremental in discussions with district leaders. Other reforms manifest deeper structural change in the organization of teaching and learning, or assertive efforts to enrich pupil–adult relationships and buoy social-emotional well-being. To visualize the relative prevalence of incremental versus deeper organizational change, we listed all innovations reported, then sorted high- versus low-potential impact on pedagogy and classrooms or wider organizational change at the school level (Figure 4.4). We inferred *potential* impact on students or teachers, based on the interviews, since we could not evaluate the actualization of intended benefits.

Innovations listed in the upper right quadrant are those that required more complex organizational change tied to pedagogical practices. In contrast, innovations in the lower right quadrant seemed to exercise strong change in the social organization of schooling but were more distant from students' learning experience. This display offers one possible way to distinguish between reforms aiming to enrich pedagogy and pupil motivation from shifts in organizational arrangements and job roles (of the adults), while remaining distant from the daily work that occurs between student and teacher.

Figure 4.4. Gauging the Depth of Organizational or Pedagogical Impact



Note. CTE indicates career and technical education; DO means district organizational level; LMS, learning management system; PLC, professional learning community.

5. Conclusions—Budgeting and Innovating to Lift Students

Let's summarize the major takeaways from our year in the field, talking with and learning from district and school leaders. We focus on major lessons learned—putting COVID-19 in the past—regarding how budget priorities shifted and efforts to renew the work and spirit of schooling unfolded in 2022-23.

1. ***Local variation and external demands***. Districts vary in the families and children they serve, the local capacity to support public schools, and achievement of their students. These local contexts conditioned the ways in which district leaders advanced recovery efforts and organized renewal activities. Districts had to cope with enrollment trends, tight labor

markets, difficulties still felt by families, and demands from several stakeholders. Recovery and renewal activities must respond to these local pressures.

2. ***New demands and resources from the state.*** Policy makers in the state capital contribute to external pressures, while providing evolving flows of financing. Federal stimulus aid was largely fungible, aiding the evolving budget priorities of districts. In contrast, new state aid offered novel possibilities: universal meals, expanded pre-K, extended-day programs, arts and music education. But actual implementation has been constrained by labor shortages, scarce facilities funding, and the multiplicity of new regulations. Our six participating districts contracted with private firms to implement novel initiatives, from tutoring efforts to after-school programming.
3. ***Learning recovery in districts varied greatly.*** In 2022–23, changes in pupil achievement could again be tracked post-COVID-19. These six districts reflect what's become apparent statewide: Students are bouncing back academically at varying rates; their recovery cannot be solely explained by demographic features of pupils. Our research team is beginning to identify factors that contribute to learning recovery. The present report points to promising drivers: Enriching student–teacher relationships by moving more adults into classrooms, broadening the curriculum to better engage students, advancing tutoring linked with classroom topics, and lifting kids' social-emotional well-being in ways that buoy motivation and learning.
4. ***Renewal rarely stemmed from a coherent strategy.*** Leaders of these six districts rarely talked of devising a distinct or singular strategy for improving their schools. Morale remained uneven in 2022–23, as the loss and exhaustion of the pandemic hung in the air. External uncertainties persisted, as school finance remained in flux and the loss of federal stimulus loomed on the horizon. Two districts were proceeding with vivid structural change, moving to competency-based forms of teaching and learning and away from curriculum and seat time too often divorced from possible career paths. But overall, district leaders advanced innovations episodically, often building from efforts fostered by teachers or principals in particular schools or returning to pre-pandemic initiatives and spreading to additional schools.
5. ***Shifting budget priorities.*** Most districts reported four common practices as they deliberated over budget priorities. First, ensuring fiscal health was a common preoccupation; federal dollars were being spent down and state funding was growing more complex and ever uncertain. Second, most districts were focused on student attendance, hiring additional clerks and staff involved with outreach activities. Third, most districts revamped or bolstered their teaching and learning units to advance digital materials for teachers, aiming to enliven classroom instruction. Fourth, most districts spent additional dollars to expand counseling staff, create quiet rooms for

students, and bolster mental health services for students and families. Extended-day activities grew with new state funding, but often remained on the periphery of the core enterprise, accomplished by contracting out to local nonprofits.

6. ***Structural changes inside district offices.*** District leaders faced greater state regulation of new categorical aid, requiring more staff time to draft plans, track spending, and report back to Sacramento for each new program. These tasks occupied staff energy, reducing time spent on school improvement efforts. On substantive fronts, district leaders commonly bolstered central staff who advanced learning technologies and mental health initiatives.
7. ***Rich array of innovations persist.*** We discovered a colorful variety of organizational and pedagogical innovations across the six districts. Major efforts to buoy pupils' social and emotional growth were commonly implemented. Digital resources were being fused with new ways of organizing classrooms and engaging students in several districts. A subset of districts worked on nurturing strong relationships between students and core teachers, beyond assigning social-emotional development to counselors or staff on the edge of schooling. Two districts were rethinking the basic mission of schooling, as discussed above, delineating specific competencies tackled by students, offering constant feedback on what was being learned, and facilitating active roles in the community or with employers for high school students.

In short, we discovered a set of *commonly shared practices* – when focused on budget priorities and program innovations – along with *district-style reforms* inside local schools. This variability depended on local contexts and the values or mission articulated by the superintendent and senior staff. Each of the six districts blended their interpretations of external forces and internal commitments in unique ways. We found that stimulus funding, state initiatives, and the shock of COVID-19 combined to prompt novel fiscal and programmatic priorities. Which of these innovations and organizational reforms persist – as federal stimulus ends and state funding sputters – is a major question that we will explore as the research team returns to all nine participating districts.

Schools as Sticky Institutions—What Did Not Change?

Through the eyes of parents, even most teachers, schools may not appear to have changed. We often heard that returning to the old normal, for many, was experienced as a huge relief. This report has detailed the way several elements of schooling *do* look quite different. The COVID-19 pandemic moved the conventional institution of schooling in discernible ways, big and small, at least within six diverse districts in varying local contexts.

Yet, one final take-away must be emphasized: The admirable resilience of local educators, from district superintendents to classroom teachers. Educators labored for months to simply sustain the institution of schooling, even when classroom doors were closed and many students detached from the enterprise. This remarkably durable institution delivered meals to families, ran vaccination and health care stations, even broadcast high school football games to local communities (in the case of Del Norte). The stable structure of the school—along with essential funding from government—helped families through the public health crisis.

In this light, it is not surprising that districts attended to maintaining the institution and its basic fiscal health rather than designing bold changes in operations or classroom teaching. The state pressed for structural additions on the edges of the core institution, expanding TK options and requiring a longer "school day" (which, we found, has not necessarily added "instructional time").

Yet, district offices remained organized pretty much the same way as before the pandemic. Students roamed into classrooms to tackle learning standards that would be checked by standardized tests. Several principals reported a return to social rituals—from student dances to sports events—with joy in their eyes. In Poway, students stood in line to win a slice of fresh bread, part of this high school's coherent culture.

So, one question going forward is whether the organizational and pedagogical changes we observed will persist and take root, or simply wash away as age-old institutional habits and rituals return? Will the pandemic shake the way we conceive of schooling, inviting that era "of new possibilities," as the Glendale teacher claimed? Or will institutional recovery swamp renewal? The stubbornness of organizational familiarity may prove stronger than well-intentioned attempts to rethink and improve schooling—to search for richer ways of engaging students, lifting their heads and their hearts.

Implications for Local Educators and Policy Makers

Our learning from district leaders and principals in this first of this three-year study prompts a few suggestions for local educators and school boards, along with policy makers. We put forward these suggestions tentatively, since they are based on just one year of getting to know the six districts. (We returned in 2023-24, and head back into the field this fall, 2024.)

For district leaders and local educators

- District superintendents might consider their renewal activities—especially when setting budget priorities—*strategically*, with an eye toward *coherence*. Some superintendents have built from core commitments, such as widening school options and high quality for diverse parents (Glendale); competency-based learning (Lindsay); or digitally aided pedagogical

gains (Poway). Yet internal educational missions at times compete with external demands and novel initiatives from principals and teachers. This remains a delicate balancing act.

- Weighing budgetary attention to learning recovery against the wider aim of *advancing pupils' social and emotional vitality* remains a challenge. A portion of the six districts work to equip teachers or innovate with revamped courses, focused on enriching relationships between students and teachers. This offers a direct strategy that differs from simply awarding students a "pulse survey" each week or 800 number to call when anxiety strikes. How districts can effectively shape the holistic development of students remains a major question going forward.
- District staff may devise feasible ways of *discerning which innovations lift students and teachers* and which fall short. Participating districts experimented with differing organizational and pedagogical innovations all at once, especially when inventive teachers and principals advanced fresh ideas. A process of continuous improvement, however, requires experimenting with innovations and letting go of what is not working.

For state policy makers and administrative agencies

- The return to centrally regulated programs (categorical aid) by the governor and state lawmakers offers upbeat opportunities *and* costly constraints. All six superintendents expressed bewilderment at why state policy makers would require a separate plan and monitoring reports for each of the half-dozen new programs—on top of the Local Control Accountability planning process. Regulatory simplicity would free district staff to focus on school improvement.
- California's economy remains strong, yielding ongoing labor shortages for many districts. Tight labor markets create upward pressure on wages. These macroeconomic dynamics leave districts scrambling to find new teachers, classroom aides, and support staff to serve programs created in Sacramento. The current slowdown in education spending will ease labor shortages, but the state must realize that quality may suffer when aspirations outpace available teachers and staff. A punitive response by administrative agencies, such as penalizing districts that cannot fully staff TK classrooms, may not be helpful. This kind of response from Sacramento reflects a regulatory mentality, rather than empowering districts to pursue school improvements.
- The state department of education and county offices might disseminate information on promising innovations—from reshaping district offices to classrooms and school-wide efforts that buoy students. Digital innovations, for example, are reshaping the organization of classrooms and learning structured outside of classrooms. Other districts and schools could learn much from one another.

One can feel hope about the resilience of public schools after visiting and sitting with local educators—especially their spirit of renewal and innovation. Stay tuned for our second year of visits to and interviews with district and school leaders. We continue to learn how schooling remains the same and the ways in which districts quietly innovate and experiment to buoy students and teachers.

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Appendix A. Nonparticipating Districts and Charter Schools

Along the way, we contacted five additional superintendents, who declined to participate in the study. This was understandable, given that cooperating districts generously committed time for at least one site visit each year (sometimes twice for follow-up conversations) and interviews on Zoom when follow-ups were required. District leaders shared budget documents and program materials, along with imposing on their principals and teacher leaders as we visited schools. The openness and spirit of inquiry shared by participating districts may bias our results. Most district leaders expressed pride in their recovery and renewal activities. Many remained excited about a variety of organizational and pedagogical innovations. Almost every educator we interviewed or talked with informally was candid, clear, and curious about how to improve teaching and learning, how to more broadly support children and youth. Districts that were struggling or feeling beleaguered by outside demands were perhaps less likely to participate. We can only generalize our findings to districts that were confident in joining this study process.

Our team decided not to include charter schools because of our interest in budget decision making and the context surrounding local school boards and their administrative leaders. The Berkeley members of our research team examined for an earlier study the way charter teachers shifted to remote instruction and many schools pursued organizational innovation during the pandemic.

One final attribute marks the districts that opted to participate in the study: Superintendents displayed relatively longer tenure in their posts than did their peers in the nation's one hundred largest districts.[14] Superintendents serving in Lammersville and Lindsey unified have spent 11 and 12 years, respectively, in their posts. Closer to the nation's 6-year average tenure, the Poway superintendent entered her post in 2017 and was recently replaced with an interim chief. These more stable and transparent leaders may be more likely to open their doors to scholars and candidly share information, episodes, and ideas with our team. One superintendent did retire at the close of the 2022–23 school year. Overall, the possible bias in our sample must be noted.

In addition, women occupy the superintendent's chair in three of the six districts. This is higher than the one-fifth share of female chiefs nationwide. The Milpitas superintendent recently celebrated her 34th year in the district. Glendale and Sweetwater chiefs recently moved into the superintendency, having been promoted from within their districts.

[14] For data on the demographic attributes of U.S. school superintendents, see Broad Center (2018).

Appendix B. Methodological Details

Site visits allowed us to learn the ways federal stimulus and fresh state dollars might be altering the daily life of schools. Teacher morale was likely affected by wage negotiations; the shift to remote instruction might have spurred digital innovations inside classrooms; the hiring (and possible subsequent layoffs) of instructional aides might have changed the organization of classroom instruction for differing groups of students. That is, the infusion of new dollars, continuing through 2022–23, may have altered the organization of the school day, the expanse of instructional time, and the way teaching and learning unfolded inside classrooms.

We conducted interviews with principals and teacher leaders, and we observed classrooms and spoke with teachers who were attempting pedagogical innovations. We discovered that stimulus dollars had been used to revamp science classrooms, create computer-aided workstations in classrooms, deploy software that formatively assessed student progress in real time, and help teachers adjust their teaching for specific students. We also inquired about extended-day activities: what they entailed, whether they were academically rich, who was contracted to staff and operate these afterschool programs. How additional adults—classified staff, college interns, or contracted recess organizers—served to strengthen relationships and tutor students is a topic that invites additional research.

One methodological point is that we tracked stimulus or new state dollars from district central offices into schools, inquiring about the way funding was spent, the people who decided on school-level allocations, and whether district-wide initiatives eclipsed the innovations mounted by individual schools. Those healthy infusions of new funding might have spurred district leaders to rally around two or three major initiatives—focused on learning loss or social-emotional growth—or might instead have trickled into schools, where principals and teachers set their very local budget and program priorities. Our overall study endeavors to identify budget or program strategies that will help lift learning. However, a first analytic step is to understand varying renditions of "programs" and whether such initiatives display clarity and cohesion, or whether educators inside schools bubble up inventive efforts that remain local to a given school?

Coding and analyzing interview transcripts. District and school-level interviews generated between three and eight separate audio tapes for each of the six districts in 2022–23. We then transcribed audio files with voice recognition software. Each transcript was coded along core themes reflected in our interview questions, along with unanticipated dynamics that arose in these conversations. Subthemes also emerged, yielding subcodes that were applied to

transcripts—for example, deliberations from which budget priorities emerged, the origins of innovations, labor agreements, and classroom reforms shared among schools within a district.

The coded qualitative data allowed us to (a) assess the incidence levels of particular budgets or program innovations, that is, when we claim a pattern is unfolding, with what frequency is this actually observed? (b) analyze coded data to learn whether certain organizational or pedagogical reforms occurred within certain districts or appeared across multiple districts; and (c) easily look back to the coded transcripts to check the reasoning or the logics used by district leaders and principals as they adjusted budget and program priorities, and took stock of the variety of innovations that surfaced during the COVID-19 era.

Overall, six first-level codes emerged from the interview data. Those themes were district context, core spending priorities, district innovations, organizational behavior, district stakeholders, and district recovery and renewal. In addition, 34 second-level codes emerged, for a total of 40 codes. Our coding process relied on deductive strategies derived from organizational theory. After transcribing interviews, using Otter.ai, we moved files to MAXQDA for our coding process. Our research team was able to achieve an interrater reliability of 91.7% ($\kappa = .834$) when comparing six first-level codes among two researchers.[15]

Data and document reviews. We also reviewed a variety of budget and program documents authored by district leaders, often based on consultations with various constituencies. These included each district's LCAP and the ELO-P blueprint, authored by district staff. These plans specify budget allocations and program priorities, including how districts intended to distribute federal stimulus and dollops of new state aid (largely tied to ELO-P, Learning Recovery Emergency funds, universal meals, arts education, and TK funding). Finally, we asked district CFOs to complete a short form that specified amounts and uses of federal and state stimulus dollars expended in each of the past three years, as reported above.

Table B1. Roster of District Leaders, School Principals, and Teachers Interviewed

District	Positions of Interviewees
Glendale	Superintendent
	Assistant superintendent of Educational Services
	Middle school principal
	Middle school teachers (3)
	Elementary school principal
	Senior director, Teaching & Learning

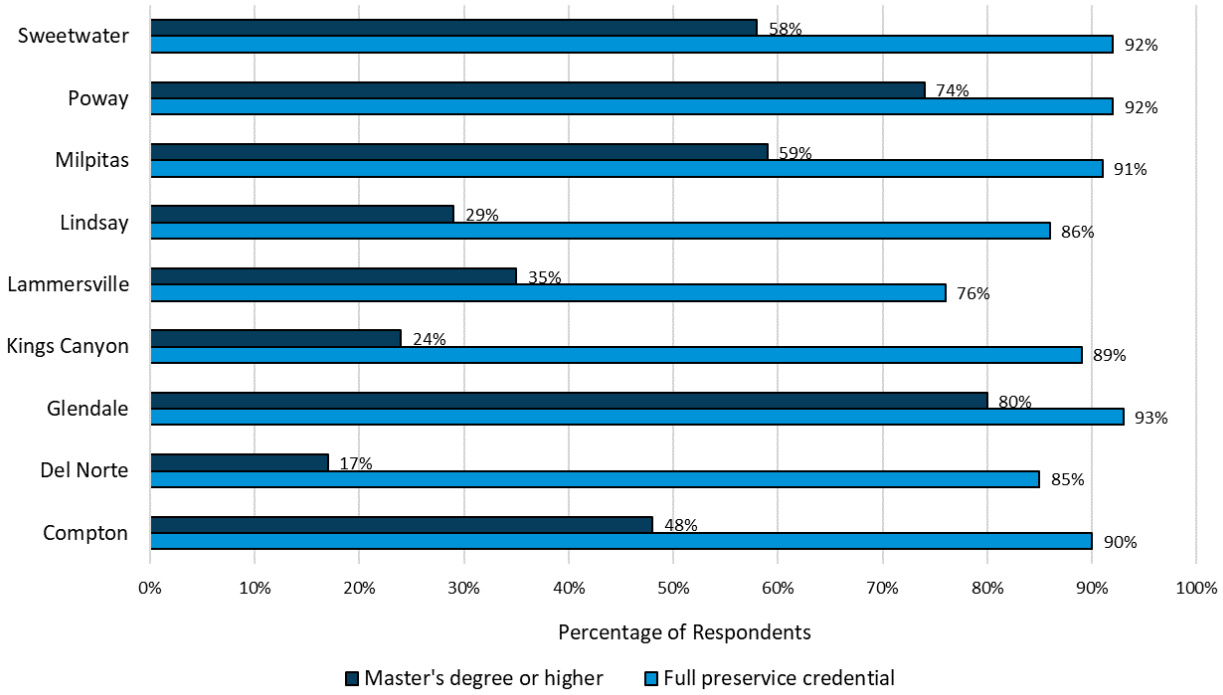
[15] This only includes interview transcripts from the 2022–23 school year.

District	Positions of Interviewees
Lammersville	Superintendent
	Associate superintendent of Administrative Services
	Assistant superintendent of Business Services (CFO)
	Director of student services
	Assistant superintendent of Curriculum & Instruction
	Vice principal of Alternative Education and Student Services
	Elementary school principals (2)
	Coordinators (3)
	Union representative
Lindsay	Superintendent
	Assistant superintendent of Administrative Services (CFO)
	Social-emotional learning coordinator
	Early childhood coordinator
Milpitas	Superintendent
	Executive director of Learning & Innovation
	Director of Inclusive Services
	Assistant superintendent of Human Relations
	Assistant superintendent of Business Services (CFO)
	Director of Secondary Education
	Director of Elementary Education
Poway	Superintendent
	Associate superintendent of technology & innovation
	Associate superintendent of business support services (CFO)
	Associate superintendent of learning support services
	Associate superintendent of personnel support services
	Associate superintendent of student support services
	Chief communications officer
	High school principals (2)
	High school teachers (3)
	Elementary school principals (2)
	Elementary school teachers (3)
Sweetwater	Superintendent
	Chief financial officer
	Assistant superintendent of educational equity and support services
	Assistant superintendent of teaching and learning
	Assistant superintendent of system improvement and innovation
	High school principal
	Executive director of curriculum and instruction

Appendix C. Teacher Characteristics in Sampled Districts

The nine districts varied in terms of teacher attributes. We see wide variation in the share of teachers who had attained a master's or advanced degree beyond their teaching credential (Figure C1). Four of five Glendale Unified teachers had attained an advanced degree by 2022, compared with just 17% in Del Norte Unified.

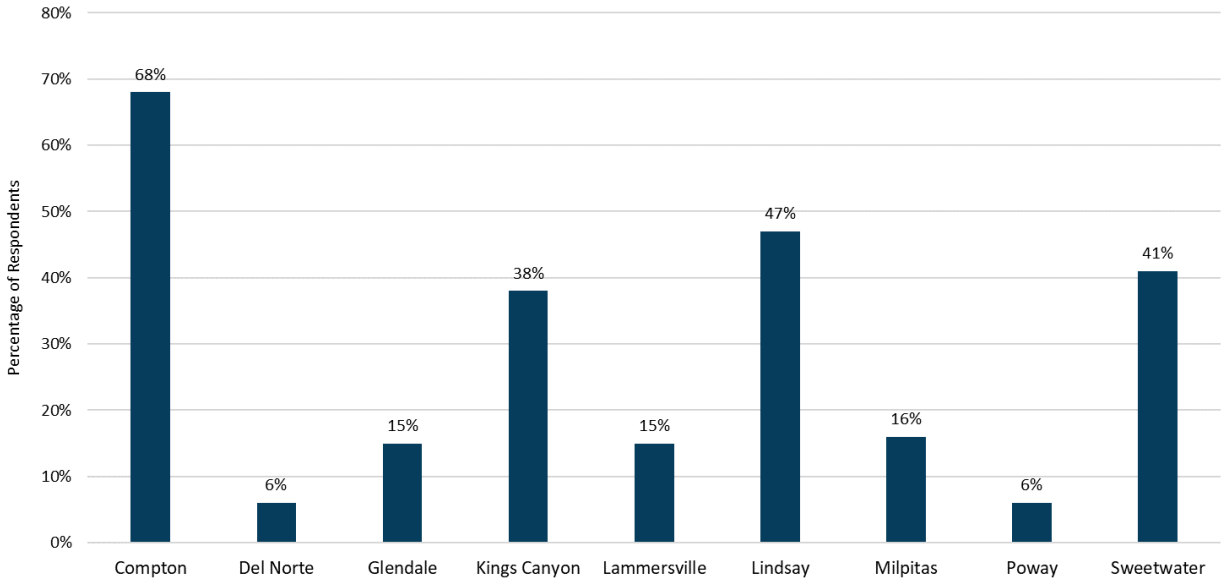
Figure C1. Percentage of Teachers Who Attained Full Preservice Credential or Master's Degree, 2022



Nearly one fourth of teachers in Lammersville had not completed all requirements to gain their credential. This may have stemmed from the steady growth in enrollment of this district, serving families in this young community east of Livermore. About 15% of teachers in Del Norte and Lindsay were not fully credentialed. Otherwise, teaching staff in the remaining districts had completed their full credentials.

Racial and ethnic attributes of teachers also varied among the nine districts (Figure C2). Two thirds of Compton's teaching force self-identified as Black or Latino; just under half of Lindsay's teachers belonged to one of these ethnic groups. In sharp contrast, just 6% of teachers in Del Norte and Poway are of Black or Latino heritage.

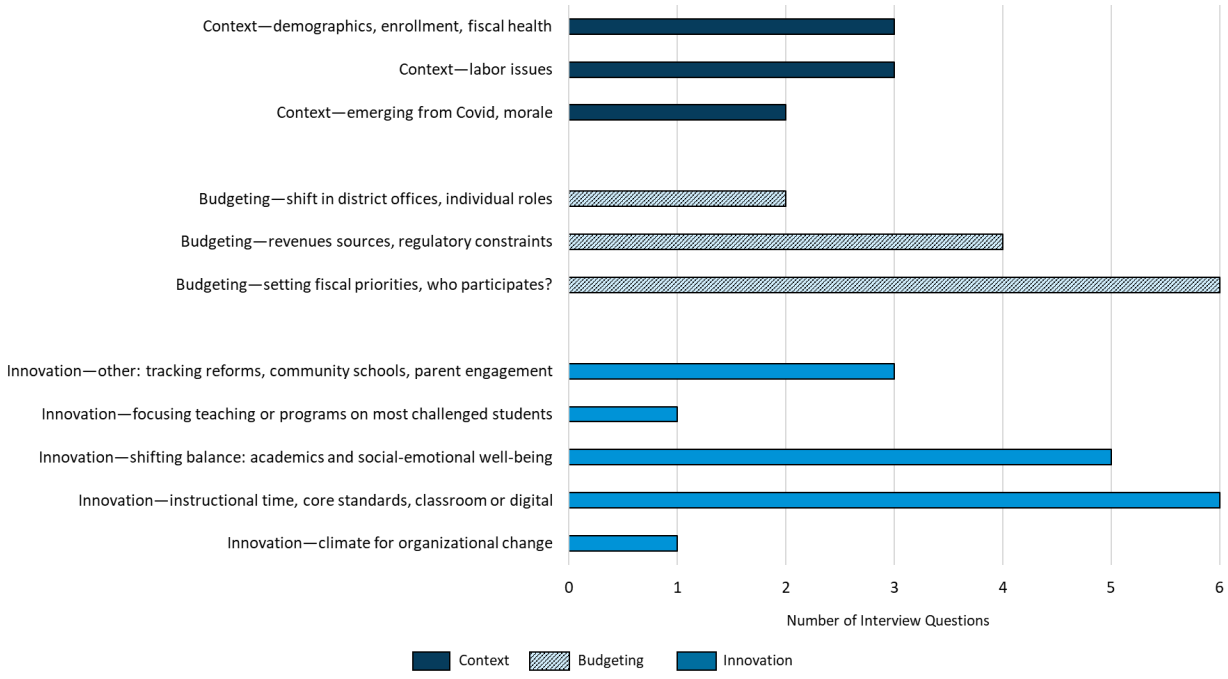
Figure C2. Percentage of Teachers Who Are Black or Latino, 2022



Appendix D. Incidence of Topics Covered in Interview Protocol

The incidence of reported fiscal actions or institutional change must be interpreted in the context of our interview protocol. Figure D1 shows the simple counts of questions we asked in our interview protocol. Note that questions were evenly spread on *contextual* issues: enrollment trends, labor issues, and the overall context, emerging from the pandemic. On budget issues, we asked three questions related to *fiscal priorities*: the context, origins, and who contributed to budget decisions (both inside and outside the district office). Two questions were posed on any shifts in *structuring* the district office, changing or enhancing the roles of district managers. We then spent significant time asking about possible *organizational or pedagogical innovations* stemming from the COVID-19 era. Next, we asked six questions about any efforts to increase instructional time, revisit core curricular standards, or enliven classrooms with digital technologies. Finally, five questions probed whether and in what ways district leaders might have moved resources and energy to address students' social and emotional well-being.

Figure D1. Interpreting the Range of Innovations—Distribution of Interview Questions



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