

Funding What Works: Using Evaluation to Inform Federal Funding Decisions

Leslie Bloss, Makesia Sumpter,
Martha Walker, SC Department of Education
Anna Brink, Greenville County Schools, SC
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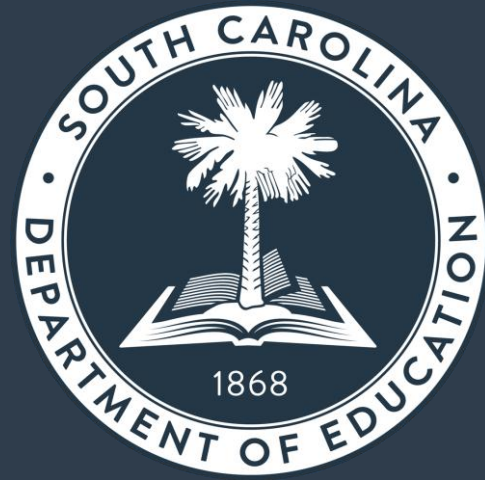


SOUTH CAROLINA
DEPARTMENT OF EDUCATION

Agenda

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





Evaluation Requirements

Title I, Part A & Part D



Evaluation Requirements – Title I, Part A

Required components for successful implementation

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



Evaluation Requirements – Title I, Part A

Evaluation Process

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

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

Continuous Improvement

- Regularly revise based on:
 - Student needs
 - Results of the evaluation



Title I, Part D Goals

To maintain and improve educational achievement and to graduate from high school in the number of years established by the State under either the four-year adjusted cohort or the extended-year adjusted cohort graduation rate.

To accrue school credits that meet State requirements for grade promotion and high school graduation

To make the transition to a regular program or other education program operated by an LEA or school operated by the Bureau of Indian Education

To complete high school (or high school equivalency requirements) and obtain employment after leaving the correctional facility or institution for neglected or delinquent children and youth

As appropriate, participate in postsecondary education and job training
(ESEA section 1431(a))



Subpart 3: Third-Year Evaluation

SA and LEA Evaluation Requirements – Subpart 3, Section 1431

- Ensure that sites are administering initial and follow-up assessments in ELA and Math
- Perform an annual, data-driven evaluation *for each program*
- Use annual evaluations to generate a federally required third-year evaluation
- The Third-year Evaluation Time Period – Three Consecutive Years Identified by the SEA (SCDE)

Each state agency (SA) or local educational agency (LEA)/school district that conducts a program for children and youth who are neglected, delinquent, or at risk shall evaluate the program, disaggregating data on participation by gender, race, ethnicity, and age, not less than once every 3 years, to determine the program's impact.

However, disaggregating data by category shall not be required in a case in which the number of students in a category is insufficient to yield statistically reliable information or the results would reveal personally identifiable information about an individual.



Consolidated State Performance Report (CSPR)

CSPR: A data collection instrument administered by the U.S. Department of Education's Office of Elementary and Secondary Education (OESE) on an annual basis. All States that received funding on the basis of the Consolidated State Application for the applicable school year must respond to the reporting requirements in the CSPR.

CSPR Data Focus Areas

- Student and Facility Count (Corrections and Detention Facilities Only)
- Demographics (race/ethnicity, age, gender)
- Academic and Vocational Outcomes
- Academic Performance in Reading and Mathematics



Pushing Past the Numbers – determining effectiveness (Subpart 2)

Evaluation and Continuous Improvement

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

These evaluations support your Clear Connection to Student Outcomes (ESEA section 1415(a)(1)(B) and Evidence-Based Justification of Need (ESEA section 1415(a)(2)(B)(ii))

- What are your expected impacts?
 - For example: improved credit accrual, increased reentry success, better attendance
- Applicants should use quantitative or qualitative data to demonstrate gaps, challenges or performance issues.
- Your data should directly connect to your proposed expenditures
 - For example: low reentry enrollment could result in the funding for transition supports



ROI in Federal Programs

What is ROI?



What is ROI in Federal Programs?

ROI = Outcomes ÷ Investment

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

Example:

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

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



Why Use ROI in Federal Programs?



Maximize Impact of Limited Funds

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



Make Data-Informed Decisions

Shifts focus from just spending to what results spending produces.



Strengthen Strategic Planning

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



Support Compliance and Transparency

Aligns with federal requirements for evaluation and continuous improvement.



Promote Equity and Efficiency

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



ROI Framework and Data Sources for Evaluation

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



Sample ROI Evaluation Questions

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



Measuring Return on Investment (ROI) for Professional Development

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

1. Inputs — What Did We Invest?

Use these questions to understand resources committed before measuring impact.

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

These questions check whether the PD was delivered as intended.

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

3. Outputs — What Immediate Results Occurred?

Assess short-term, measurable results from PD.

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

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

Evaluate effectiveness through instructional and student outcomes.

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

5. ROI — Was It Worth the Investment?

Connect outcomes back to cost.

- Did PD outcomes justify the investment? Why or why not?
 - What is the cost per successful outcome (per teacher, per student, per proficiency gain)?
 - Were there higher-ROI alternatives that could have yielded similar or better results?
 - What modifications should be made to improve ROI in future PD cycles?
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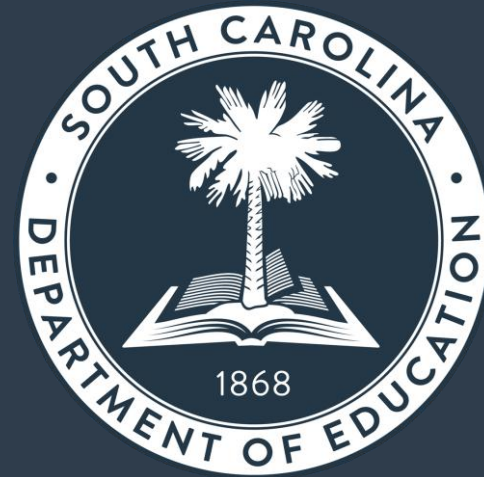
6. System-Level Considerations — How Does This PD Support Long-Term Goals?

Position the PD within broader school or district strategy.

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

Quick Tip for Leaders

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



ROI

Evaluation & Implications



Implications for ROI Evaluation

Informs Smarter Spending Decisions

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

Improves Compliance & Transparency

TIPD requires program evaluation. ROI data helps demonstrate that implementing a new supplemental reading curriculum increased the number of students who exhibited growth in reading scores by 25%, justifying continued investment.

Supports Continuous Improvement

Staff attended professional development (PD) for a behavior program that the LEA felt would enhance classroom performance. The PD showed minimal impact on academic outcomes. Using ROI findings, the LEA revises the PD request and will measure again next year.

Aligns Programs Goals

In their grant application, the State Agency identifies ensuring all students have access to CTE programs as a key goal. ROI ensures that TIPD funds are directed toward CTE programs that serve the greatest number of students.

Builds Stakeholder Confidence

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



ROI Evaluation Cycle



ROI Evaluation Cycle Example



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



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

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



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



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

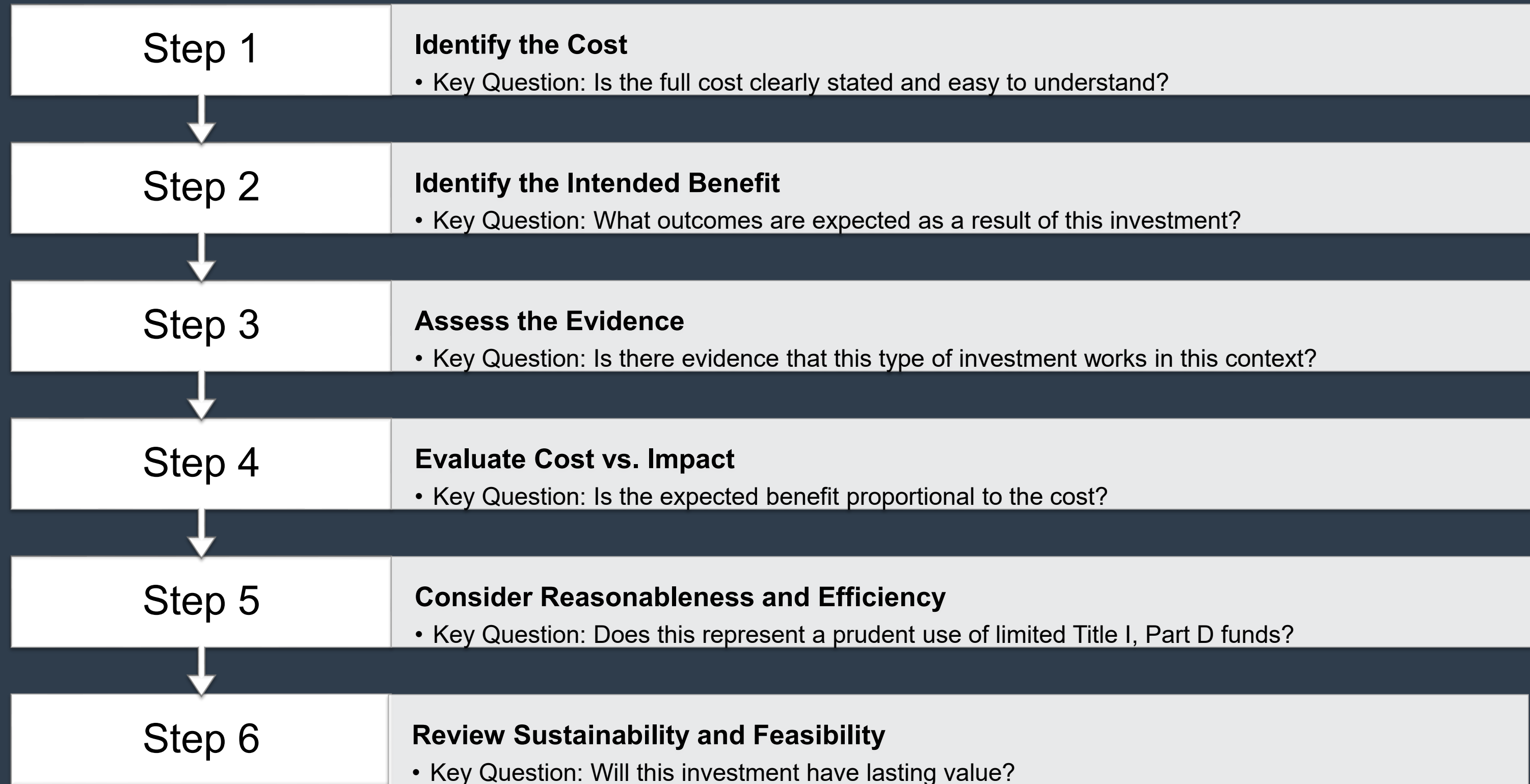


Evaluate ROI & Make Adjustments: To calculate ROI, the district totals program costs and divides by the number of students who improved reading proficiency, determining the cost per improved student. Finding strong returns, they expand the program and adjust staffing and materials for efficiency.



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

Cost-Benefit Considerations in Title I, Part D Applications



Cost–Benefit Consideration **Red** Flags

- ❖ High cost with limited student reach
- ❖ Vague or unsupported outcome claims
- ❖ Costs not clearly tied to identified needs
- ❖ One-time purchases without implementation plans
- ❖ Duplication of existing resources

Overall cost-benefit consideration question: *Given the cost, is this investment likely to meaningfully improve educational or transition outcomes for the students served?*



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

Step 1: Identify Priority Needs

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

Step 2: Select Evidence-Based Strategies

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

Step 3: Define Desired Outcomes & Metrics

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

Step 4: Plan Cost Tracking

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

Step 5: Plan for Data-Informed Decision-Making

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

Step 6: Continuous Improvement

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

ROI Worksheet for Title I, II, & IV





District Spotlight

Dr. Anna Brink, Director of Federal Programs



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

HERE'S WHAT.



GREENVILLE COUNTY
SCHOOLS
Inspire | Support | Prepare

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

SO

WHAT?

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

WHAT?
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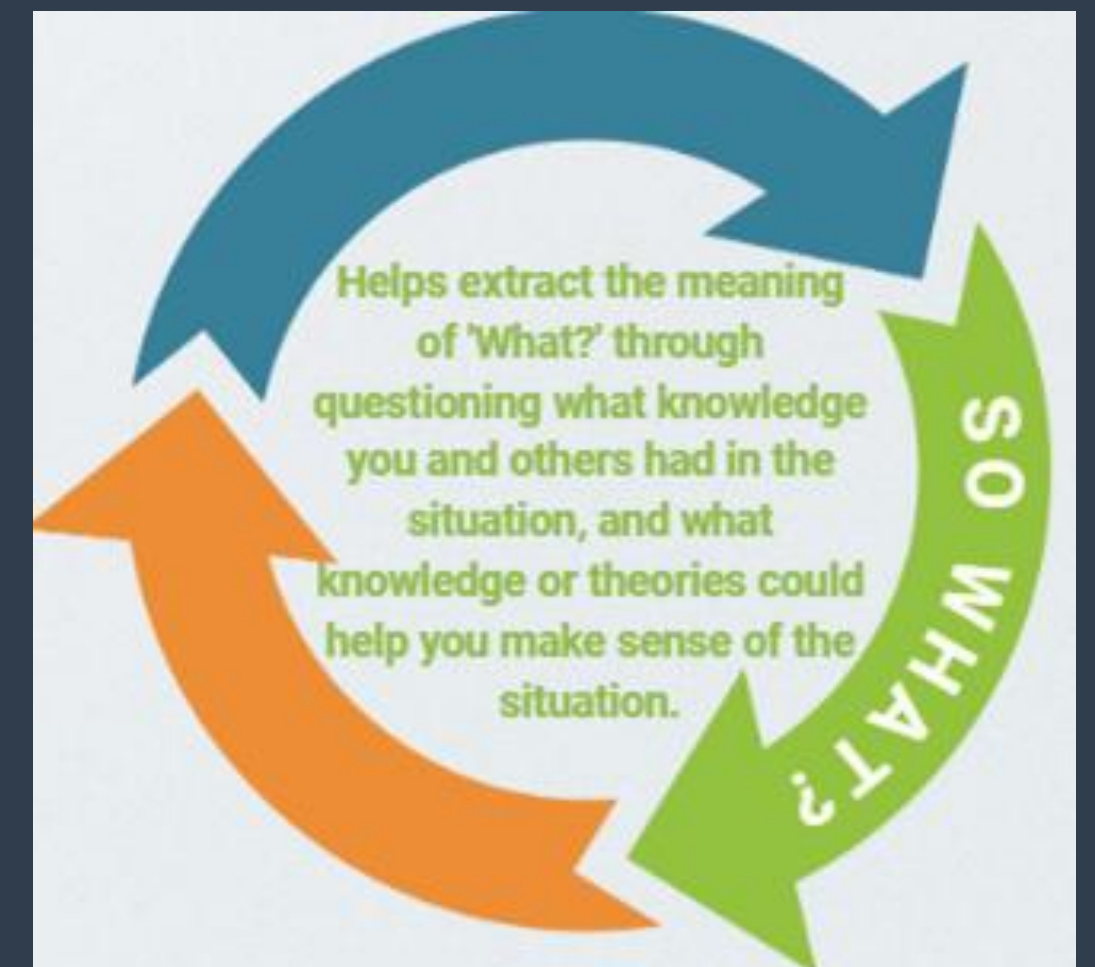
HERE'S WHAT.

- Compliance as the Ceiling: The focus was on the approved expenditure (the Input), not necessarily student growth (the Outcome).
- Need to Understand Impact: Introduced the question that drove the shift: If we spend \$X on the specific support, what academic return did we get?



SO WHAT?

- Protocol Shifts: Use of the CNA to attach data to gaps, plan using evidence-based intervention, and specify the data source (Connect the dollar to the desk).
- Shifting the Practice: Continuous Improvement



NOW WHAT?

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



THE ROAD TO CONTINUOUS IMPROVEMENT

2020 - 2023

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

2023 - 2024

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

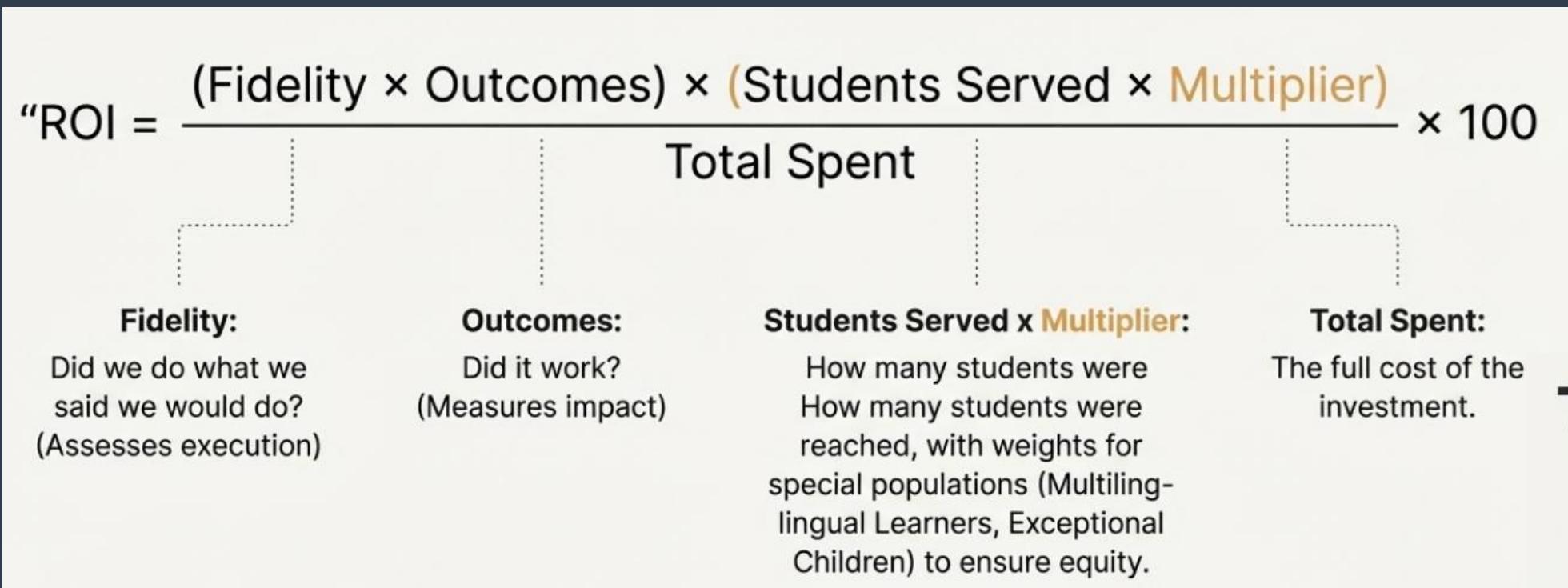
2024 - 2025

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



CORE CHALLENGE AND 2025 - 2026 NEXT STEPS

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



The A-ROI Planning Cycle: 4 Steps to Evidence



Before we calculate, we calibrate. This ensures one school's "High" isn't another's "Low."

CALIBRATING & DEFINING SUCCESS

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

Example 1: Re-Entry Transition Support

- **High**: Met credit recovery targets AND behavior incidents ↓ >10% AND positive transition experience.
- **Medium**: Academic progress but fall short of credit targets; behavior incidents ↓ 1–10%
- **Low**: Minimal academic progress; disciplinary incidents hold steady or increase

Example 2: Literacy Program

- **High**: Reading at or above grade level ↑ AND participation in literacy sessions ↑ >10% AND students report feeling more confident and engaged in learning.
- **Low**: Minimal or no reading growth; participation holds steady or declines; students report low motivation or disengagement from the program.

Most Frequent Strategies

WORKING WITH N & D SITES: Needs Assessments

Identifying the Gaps: This should go beyond standard test scores to look at the "whole student" entering these facilities.

- **Initial Assessment Timelines**: Are sites administering ELA and Math assessments immediately upon entry?
- **Goal**: Use data to identify specific academic gaps immediately after a student's arrival.

Disaggregating by Subgroup

- **Goal**: Identify if specific populations that are underserved invocational or reentry support.

High-Intensity Needs

- What percentage of students at these sites are Special Education or Multilingual Learners?
- What additional support are needed?

WORKING WITH N & D SITES: Planning

The Title I, Part D plan must be a "living document" that focuses on the short-term nature of many placements.

Evidence-Based Justification

- Does every proposed expenditure have a clear connection to a student outcome (e.g., will buying this software actually increase credit accrual)?
- **Goal:** Avoid "one-time purchases" that lack a long-term implementation plan.

Transition as a Core Strategy

- Is there a dedicated "Transition Coordinator" or "Instructional Strategist" for these sites?
- How will they support the plan, progress monitoring, and alignment of funding strategies?

Red Flag Review

- Are we duplicating existing resources or proposing high-cost items with limited student reach?
- **Goal:** Maximize the impact of limited federal dollars by choosing high-ROI strategies.

WORKING WITH N & D SITES: Progress Monitoring

Progress Monitoring: Assessing "Fidelity" Before "Impact"

- Low results are often caused by poor implementation, not a bad strategy.

Implementation Fidelity

- Example: Purchased reading software; are students meeting the recommended minutes per week?
- Action: If ROI is low but fidelity is also "Low," do not cut the program, fix the implementation first.

Quarterly Review

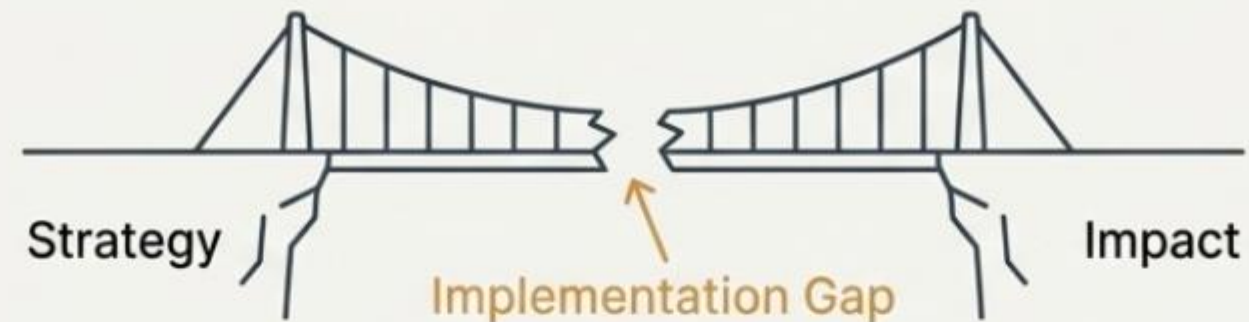
- Schedule 90-day data reviews to calibrate implementation for all 6 sites.
- Goal: Identify "Fidelity Gaps" early in the school year rather than waiting for the final evaluation.

Defining "High" Success

- What does "success" look like for a student? Are our strategies geared toward that goal?

CALIBRATING & DEFINING SUCCESS

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



Example 1: Instructional Software



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



Low Fidelity
Inconsistent usage + No data monitoring.

Example 2: Mentors



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



Low Fidelity
<20 mins/day + Monthly monitoring.

If ROI is low but Fidelity is also "Low," we don't cut the program—we fix the implementation.

Most Frequent Strategies

TURNING INSIGHTS INTO ACTION: A DECISION MATRIX

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

Sustain



Criteria

- High ROI strategies with good outcomes and reasonable cost.

Action

- Renew contracts and positions.

Increase



Criteria

- High impact strategies that need to be scaled.

Action

- Allocate additional funds to expand reach.

Phase Out



Criteria

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

Action

- Reallocate funds to higher-yield strategies.

SUMMARY DECISION MATRIX FOR PART D

Step 1: Identify Priority Facility Needs

- **Question:** What are the specific gaps in transition or reentry support?
- **Data Points:** Recidivism rates, credit accrual gaps, or low post-release school enrollment.
- **Target Groups:** Students with disabilities (IEPs) or those approaching the age of majority (17–21).

Step 2: Define Success Metrics (The "Outcomes")

- **Metric A (Transition):** Percentage of students enrolling in a local school district or GED program within 30 days of release.
- **Metric B (Academic):** Number of credits earned toward high school graduation per stay.
- **Metric C (Vocational):** Number of students obtaining industry-recognized certifications or employment after leaving the facility.

Step 3: Plan for Implementation Fidelity

- **High Fidelity:** Transition plans are updated weekly; students receive 30+ minutes of targeted ELA/Math intervention daily.
- **Low Fidelity:** Inconsistent data monitoring; transition coordinators only meeting with students once per month.
- **Note:** If ROI is low but fidelity is also "Low," the strategy is to fix the implementation rather than cut the funding.

Step 4: Calculate Investment vs. Impact (*only when a site is ready to engage in this work*)

- **Total Investment:** Include staff time for transition specialists, specialized software, and vocational materials.
- **The "Special Population Multiplier":** Apply a weight to the calculation for students with high-intensity needs (e.g., Multilingual Learners or Exceptional Children) to ensure equitable ROI analysis.
- **Cost per Outcome:** Calculate the total program cost divided by the number of students who successfully transitioned back to a regular education program.

Questions



Contact Information



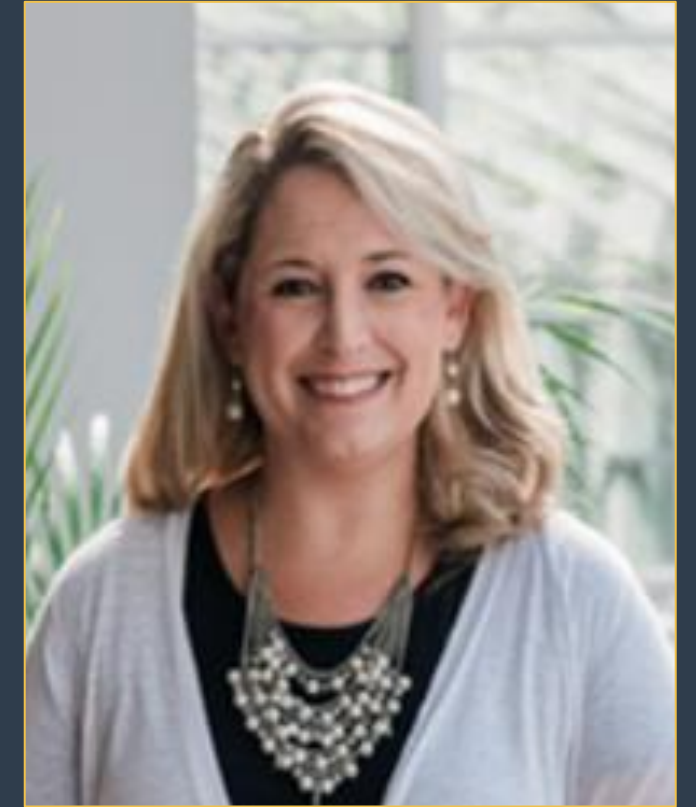
Leslie Bloss
SCDE
lbloss@ed.sc.gov



Makesia Sumpter
SCDE
msumpter@ed.sc.gov



Martha Walker
SCDE
mwalker@ed.sc.gov



Anna Brink
Greenville County Schools
abrink@greenville.k12.sc.us





ed.sc.gov