

School District Purchasing Priorities | 2023-24



February 2023

EdWeek
Market Brief®

The Year Ahead: Academic Recovery, Student Well-Being, And Budget Uncertainty

| About This Report

When a new school year kicks off each fall, it's not unusual for district and school leaders to develop an early intuition of what will be their biggest spending needs for the following academic year.

This information comes to them in different ways. Teachers leading new classes find that students need extra help in specific academic subjects or social supports, and they report it up the chain to school principals. District leaders begin laying out new strategic priorities. School boards and parents agitate for their own preferred changes. And administrators and educators begin to call out spending priorities they believe didn't receive enough attention in the last budget.

This special report, *School District Purchasing Priorities for 2023-24*, gives education companies in the K-12 market a window into what school systems are likely to be spending on in the next fiscal year—the one that begins in July. The report is based on a nationally representative survey conducted at the start of this academic year of district administrators and school principals, as well as on separate surveys taken throughout the year that asked about the biggest challenges school systems face, what they need from vendors, and how K-12 officials make buying decisions.

School districts' most pressing needs are in stark display in the results. Social-emotional learning, an overwhelming focus in many schools in recent years, is likely to continue to be the subject of heavy district investment. Spending on devices, which took off during COVID-19, is also projected to remain strong. Spending on secondary math and

English/language arts curriculum, and diversity, equity, and inclusion-focused resources will also remain robust.

The report also looks at the likely impact of macro forces on district budgets, and finds that concerns about the state of the economy, the evaporation of federal stimulus funds, and inflation (despite recent signs of it slowing) are major concerns.

Individual districts' spending priorities can shift quickly. The report offers intel for education companies that are trying to make predictions that will guide their investments and strategic decision-making. As always, please give us your feedback on what you're hearing from your district clients about their spending plans, and what surprises you.

Sincerely,

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Executive Summary

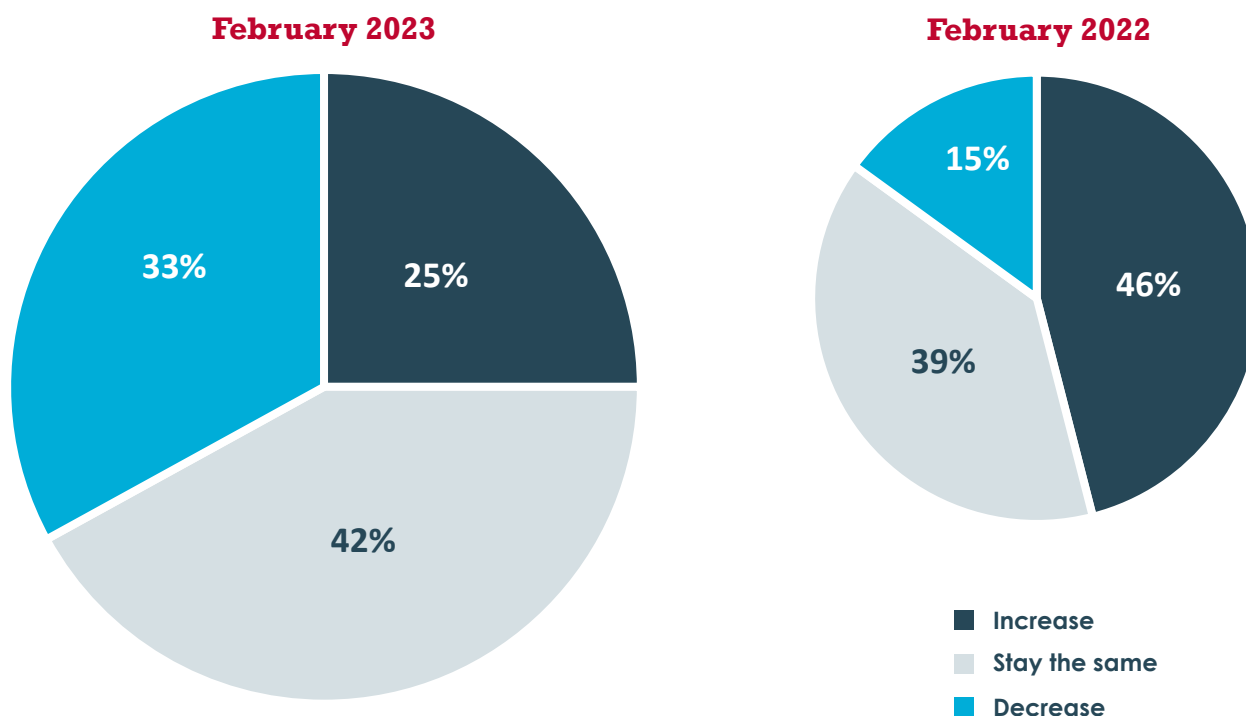
- School district officials have **significant worries about the “funding cliff”**—the coming drying up of federal stimulus dollars, and those concerns are particularly acute in certain regions, particularly the Western U.S. and the South. (Pages 10, 11)
- Nearly 4 in 10 district and school leaders say they expect **declines in student enrollment to have a negative impact on their future budgets**. Urban and diverse school systems are especially likely to reduce spending as a result of enrollment declines, the survey found. (Pages 10, 12)
- School districts’ **top priorities for using federal stimulus dollars are addressing learning loss in core academic subjects in early grades**. Addressing social-emotional learning and investing in summer programs are also major needs. Those priorities have remained relatively stable over the past two years. (Page 42)
- District and school officials predict spending on student information systems and learning management systems will rise next fiscal year, compared to the current year. But K-12 officials project **significant spending on devices**, with 42 percent saying they expect to allocate more next year on those tools. (Page 27, 39)
- Districts expect to **spend more at the secondary level for core and supplemental products** in math and English/language arts. For instance, the portion of K-12 officials who expect core math spending to rise at the secondary level next fiscal year rose to 39 percent from 31 percent this year. (Pages 32, 34)
- The demand in school districts for social-emotional learning programs shows no signs of easing. **Sixty-one percent of survey respondents say their spending on SEL will rise** next fiscal year, the highest of any product category and virtually unchanged from the current year. (Pages 23, 26)
- Asked about the most important factors that will guide their purchasing decisions over the next year, the largest portion of respondents, 54 percent, pointed to **concerns about student achievement**. District officials also cited worries about literacy, equity, and student engagement as top factors. (Page 19)
- Staffing woes and the exodus of educators from the profession are huge concerns. The need to **recruit and retain teachers** was cited as a top professional challenge by district leaders—much more so than a year earlier. So was Improving school climate. (Page 20)
- District officials expect a **faster buying process than they did a year ago**. Forty-six percent of those surveyed say they believe it will take three months from the time they identify a product to the time they buy it. That’s up from 33 percent the year before. (Page 18)

Key Context And Challenges

KEY CONTEXT AND CHALLENGES

Percentage of Districts Who Say Spending Will Rise Declines Over Past Year

If I had a crystal ball, I would predict that in the next year spending in our school district will:



INSIGHT:

District and school officials are much less optimistic about their future ability to spend than they were a year ago. Their new doubts could be driven by fears of a recession and its impact on their budgets, or by the coming end of federal stimulus funding, money that has propped up their spending levels since the pandemic.

Survey Question:

If I had a crystal ball, I would predict that in the next year spending in our school district will:

Link to relevant story:

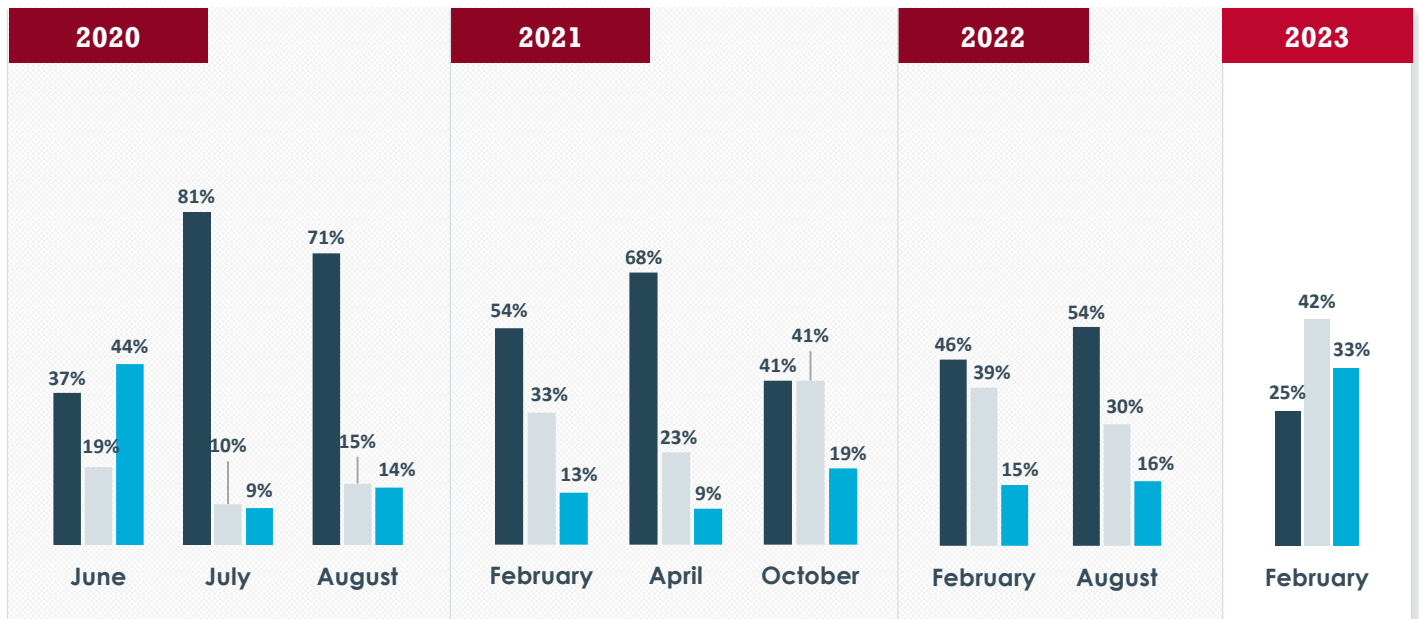
- <https://marketbrief.edweek.org/analysts-view/k-12-budgets-great-shape-inflation-taking-toll/>

SOURCE: EdWeek Research Center nationally representative surveys of district administrators, February 2022 and February 2023.

KEY CONTEXT AND CHALLENGES

A Look at District Optimism/Pessimism About Spending Over Time

■ Increase ■ Stay the same ■ Decrease



Totals may not add up to 100% due to rounding.

INSIGHT:

EdWeek Market Brief has been tracking districts' optimism/pessimism about future spending conditions since the start of the pandemic. Improbably, optimism soared during the summer of 2020—when COVID had shuttered much of schools and society—perhaps in response to the passage of the first federal stimulus measure and initial discussion of vaccines. It fell in late 2021, and picked up 2022, when schools had returned to in-person learning.

Survey Question:

If I had a crystal ball, I would predict that in the next year spending in our school district will:

Link to relevant story:

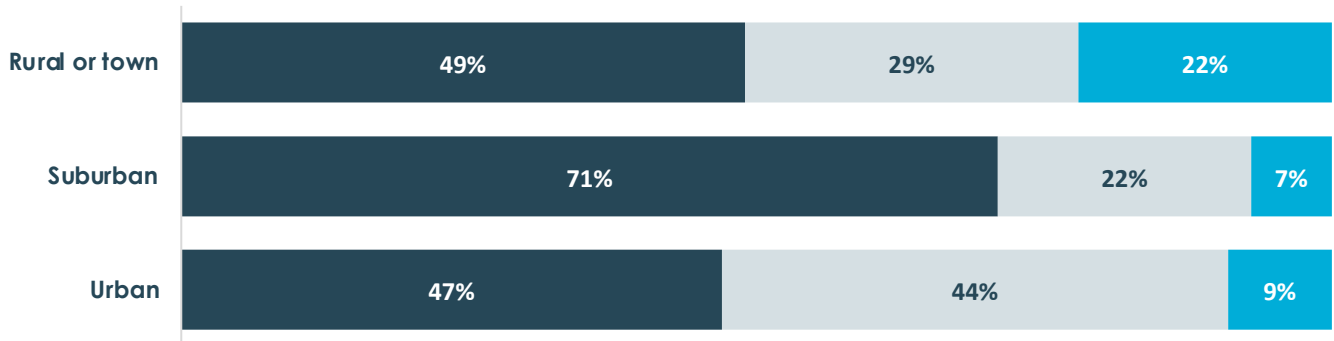
- <https://marketbrief.edweek.org/marketplace-k-12/states-ramped-k-12-spending-2022-growth-likely-slow/>

SOURCE: EdWeek Research Center nationally representative surveys taken of district administrators, 2020-2023

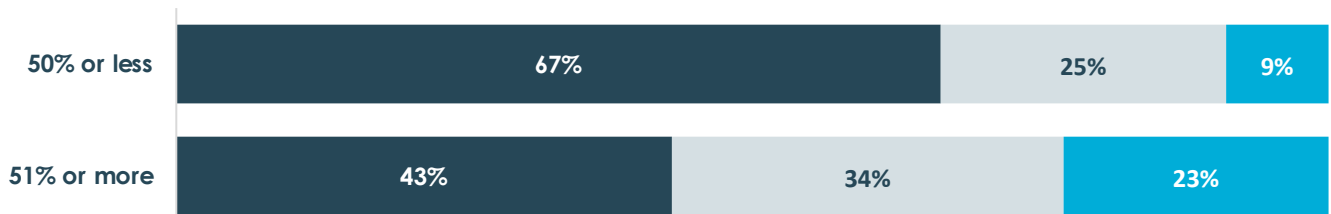
KEY CONTEXT AND CHALLENGES

Suburban, Wealthier Districts More Optimistic on Spending

Type of district



Percentage of students who qualify for free or reduced-price meals



Totals may not add up to 100% due to rounding.

■ Increase ■ Stay the same ■ Decrease

INSIGHT:

Disparities in wealth and income level are evident in how districts think about their future spending levels. As measured in the second half of last year, K-12 officials from suburban and relatively low-poverty school systems are much more likely than their peers from other types of districts to say their K-12 systems will be spending more money over the next year.

Survey Question:

If I had a crystal ball, I would predict that in the next year spending in our school district will:

Link to relevant story:

- <https://marketbrief.edweek.org/market-trends/inflation-squeezing-school-district-budgets-companies-ambitions/>

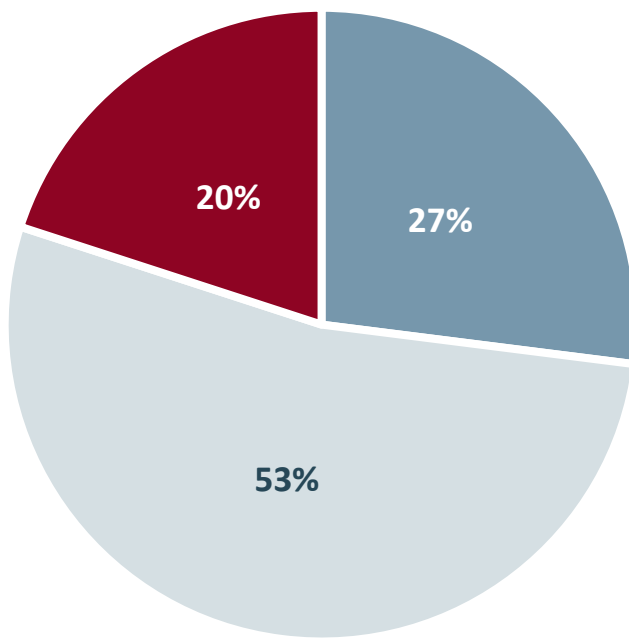
SOURCE: EdWeek Research Center nationally representative August 2022 survey of 231 district administrators.

KEY CONTEXT AND CHALLENGES

What Macro Factors Will Influence District Spending? Worries About State Support

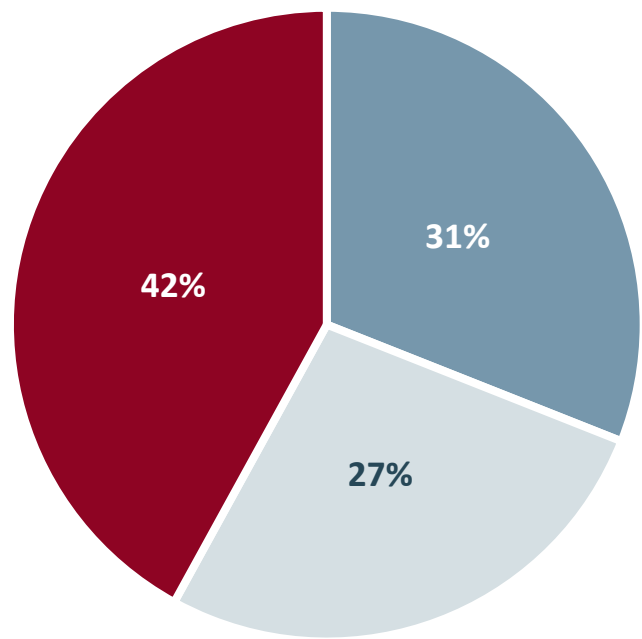
Local Elections Related to Funding

e.g., bond issue, property tax increase



■ I expect this to increase our spending ■ No impact ■ I expect this to reduce our spending

State K-12 Funding Levels



Note: K-12 officials are more concerned about their vulnerability to state budget cuts than to the consequences of local elections on their spending.

INSIGHT:

K-12 officials have more anxiety about the flow of state money to their districts than they do about how local elections will impact future spending levels. This could reflect general nervousness about economic conditions, the possibility of a recession, and the impact any downturn would have on state funding—which typically accounts for 40-50 percent of districts' funding.

Survey Question:

How—if at all—do you expect the following financial considerations to impact your district's spending plans over the next two years?

Link to relevant story:

- <https://marketbrief.edweek.org/marketplace-k-12/districts-spent-least-half-federal-covid-aid-means-k-12-companies/>

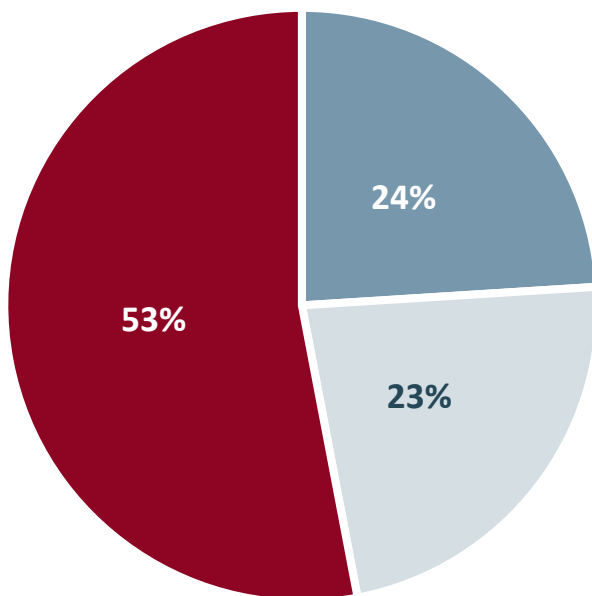
SOURCE: EdWeek Research Center August 2022 nationally representative survey of 231 district leaders and 295 school leaders

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KEY CONTEXT AND CHALLENGES

Anxiety About Loss of Federal Stimulus Money Is Greater Than Concern About Enrollment

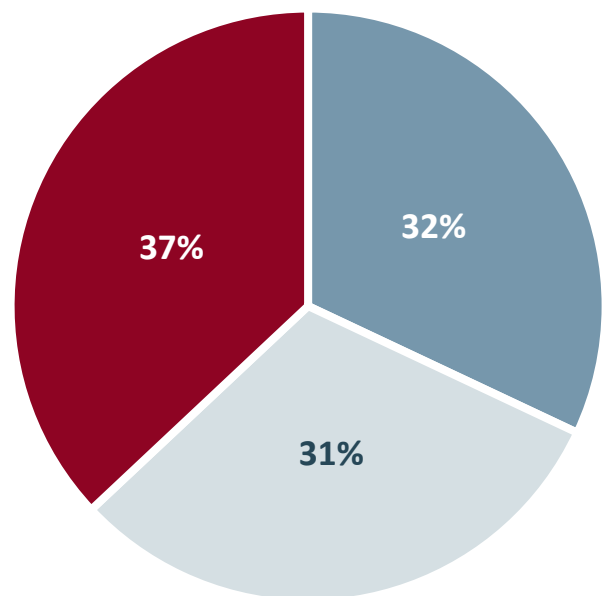
The Availability—or Lack Thereof—of Federal COVID Stimulus



■ I expect this to increase our spending

■ No impact

Changes in Our Enrollment—and the Per-Pupil Funding Associated With It



■ I expect this to reduce our spending

INSIGHT:

District and school officials are more worried about the drying up of federal emergency aid in 2024 than they are about enrollment declines. Finance experts who study district spending have told *EdWeek Market Brief* they expect both of these problems to weaken K-12 budgets at the same time. Many school systems will lose access to federal money that has propped up their budgets as they lose state funding based on lower student enrollment counts.

Survey Question:

How—if at all—do you expect the following financial considerations to impact your district's spending plans over the next two years?

Link to relevant story:

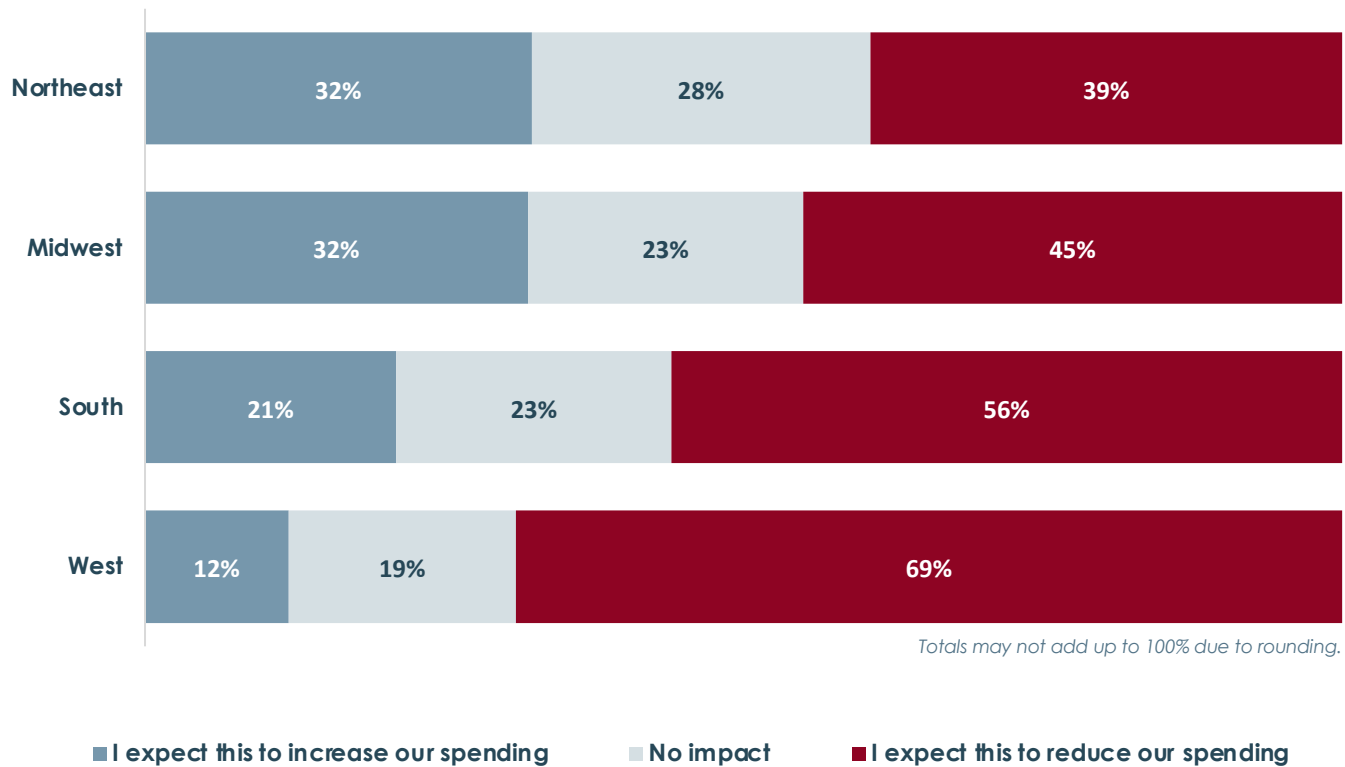
- <https://marketbrief.edweek.org/exclusive-data/student-enrollment-dropped-school-districts-bracing-pain/>

SOURCE: EdWeek Research Center August 2022 nationally representative survey of 231 district leader and 295 school leaders

KEY CONTEXT AND CHALLENGES

Worries About the Federal “Funding Cliff”: Big Regional Differences

Where do you live? (Region)



INSIGHT:
 District and school leaders in the West and South are much more likely than those from other regions to say the loss of federal funds will reduce their spending. One possible explanation is that districts in those regions relied heavily on emergency aid early in the pandemic to fund major projects, and now they see themselves as vulnerable to their loss.

Survey Question:
 How—if at all—do you expect the following financial considerations to impact your district’s spending plans over the next two years? The availability—or lack thereof—of federal COVID stimulus funding

Link to relevant story:

- <https://marketbrief.edweek.org/market-trends/the-funding-cliff-looms-how-will-school-districts-respond/>

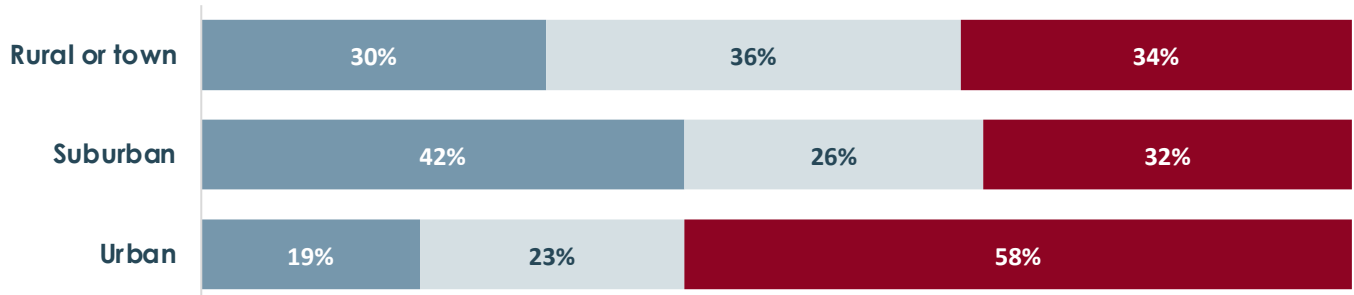
SOURCE: EdWeek Research Center August 2022 nationally representative survey of 231 district leader and 295 school leaders

KEY CONTEXT AND CHALLENGES

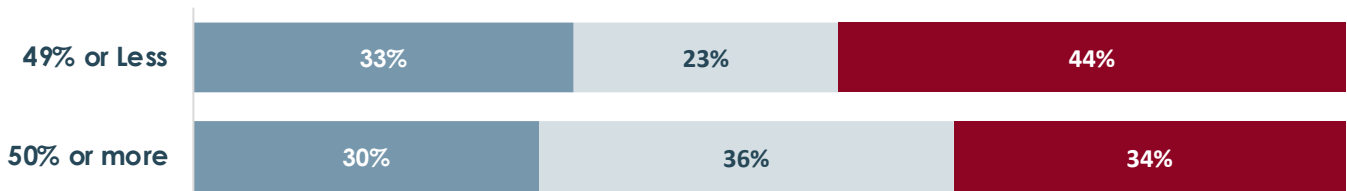
More Vulnerability to Enrollment Losses Seen in Urban, Diverse K-12 Systems

How will changes in enrollment affect district spending?

Type of district



Percentage of white students in district



■ I expect this to increase our spending ■ No impact ■ I expect this to reduce our spending

Totals may not add up to 100% due to rounding.

INSIGHT:

School systems in urban areas and those with diverse student populations have considerable anxiety about the financial impact of student enrollment declines. Previous EdWeek research has found that urban districts are significantly more likely than suburban and rural ones to have had their enrollment fall. And many K-12 officials say they have faced prolonged struggles to lure students back to school.

Survey Question:

How—if at all—do you expect the following financial considerations to impact your district’s spending plans over the next two years? **Changes in enrollment and per-pupil spending**

Link to relevant story:

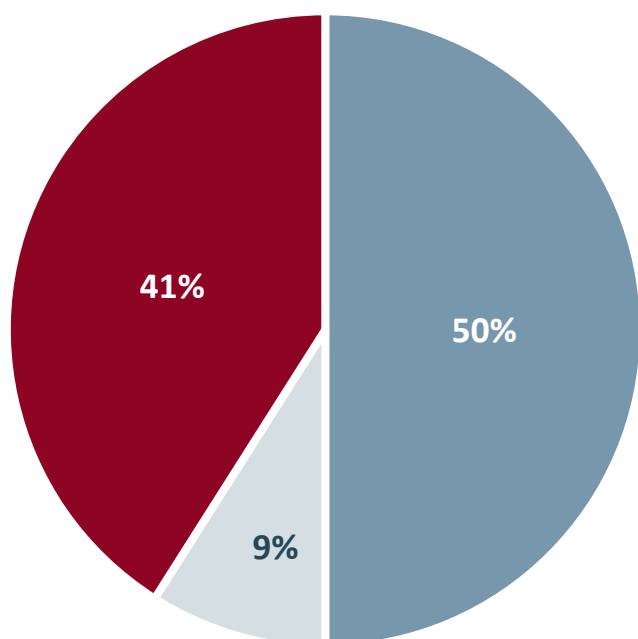
- <https://marketbrief.edweek.org/exclusive-data/student-enrollment-dropped-school-districts-bracing-pain/>

SOURCE: EdWeek Research Center August 2022 nationally representative survey of 231 district leader and 295 school leaders

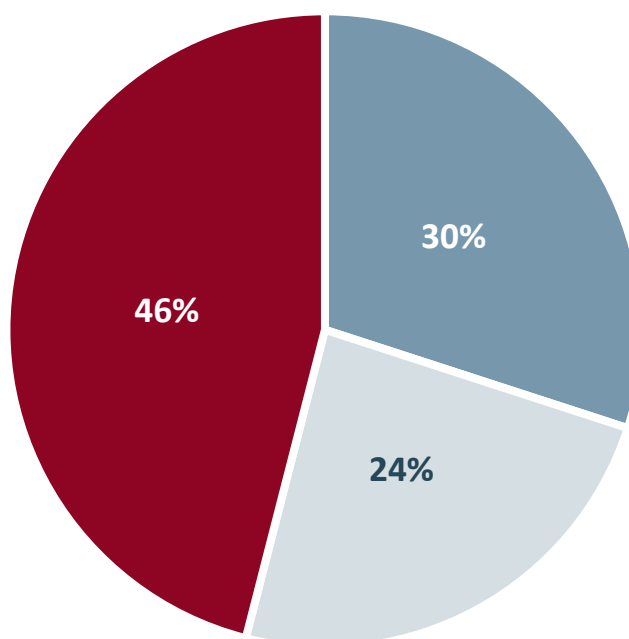
KEY CONTEXT AND CHALLENGES

4 in 10 K-12 Officials Say Inflation Will Drive District Spending

Inflation



General Health of the Economy



■ I expect this to increase our spending ■ No impact ■ I expect this to reduce our spending

INSIGHT:

The survey results underscore nervousness among district and school leaders about the overall state of the economy. And roughly half of those surveyed expect inflation—which has eased recently—to increase spending, probably as a consequence of it driving up costs.

Survey Question:

How—if at all—do you expect the following financial considerations to impact your district's spending plans over the next two years?

Link to relevant story:

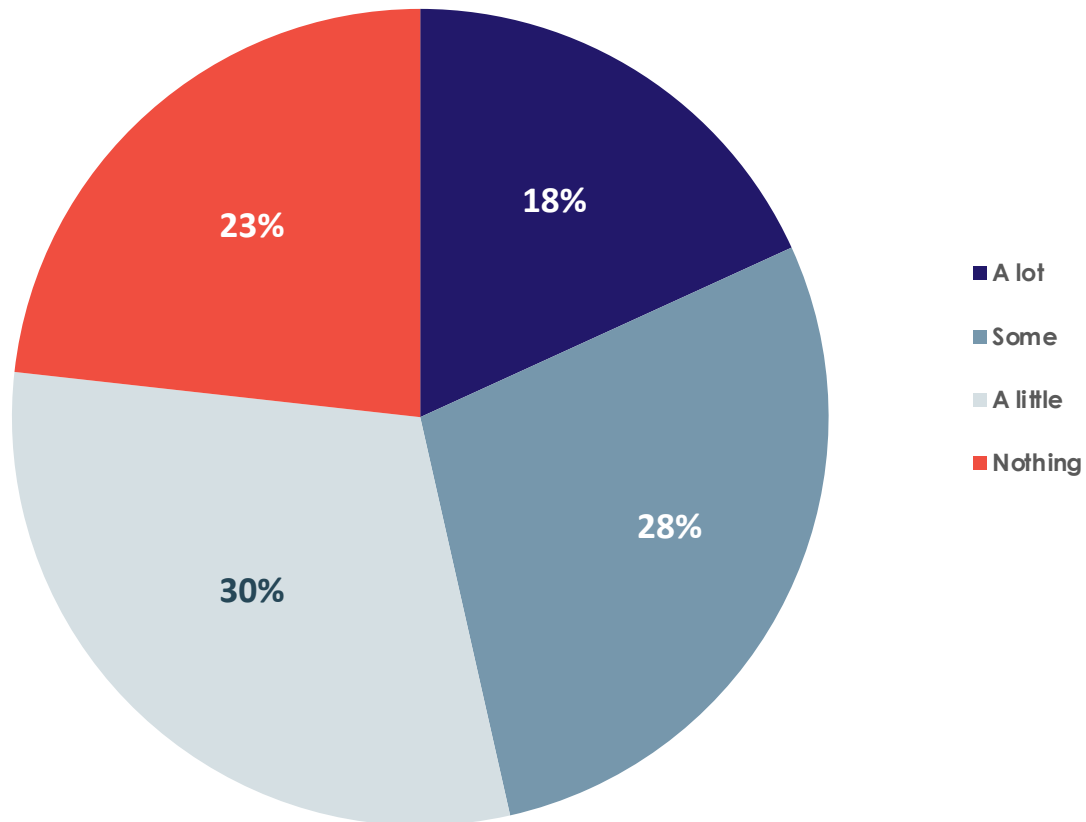
- <https://marketbrief.edweek.org/market-trends/survive-a-recession-education-market/>

SOURCE: EdWeek Research Center August 2022 nationally representative survey of 231 district leader and 295 school leaders

District Priorities And Pain Points

DISTRICT PRIORITIES AND PAIN POINTS

Key Context: Relatively Few K-12 Employees Are Clued In on Purchasing



Totals may not add up to 100% due to rounding.

INSIGHT:

A relatively small number of K-12 district employees—less than 1 in 5—indicate that they know A LOT about district purchasing, while more than 45 percent say they at least know something. For teachers and principals, their purchasing know-how may have come about because of experience on purchasing committees or other review bodies.

Survey Question:

How much do you know about the purchasing process in your district or school?

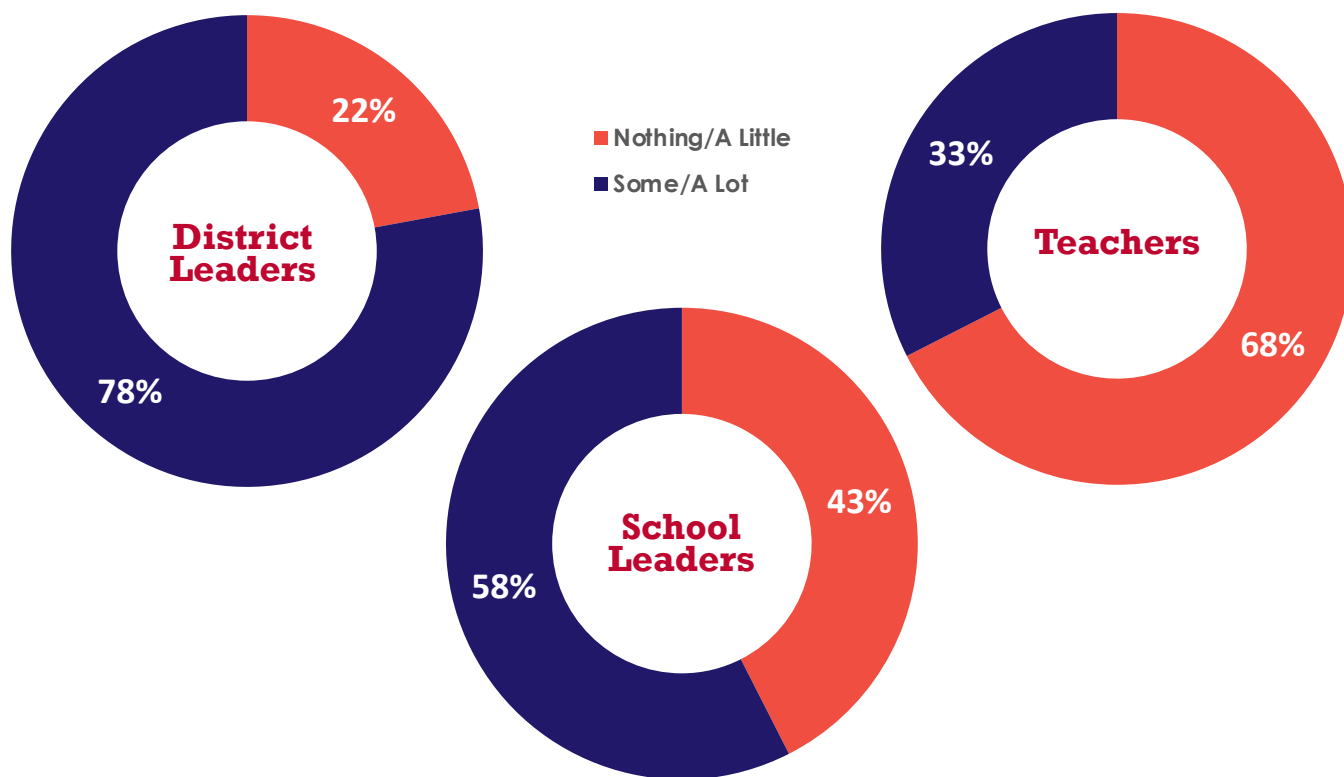
Link to relevant story:

- <https://marketbrief.edweek.org/exclusive-data/new-era-rfps-education-companies-need-know-virtual-bidding/>

SOURCE: EdWeek Research Center nationally representative September/October 2022 survey of 388 district leaders, 386 school leaders, and 887 teachers

DISTRICT PRIORITIES AND PAIN POINTS

Teachers 3X as Likely as District Leaders To Say They Know Little to Nothing About Purchasing



Totals may not add up to 100% due to rounding.

INSIGHT:

The concentration of decision-making expertise and authority in purchasing is evident in this data point. Nearly four-fifths of district leaders say they're knowledgeable about purchasing, compared to just 33 percent of teachers. Almost 60 percent of school leaders say they have some knowledge of purchasing, expertise that probably arises from school-level decisions delegated by the district.

Survey Question:

How much do you know about the purchasing process in your district or school?

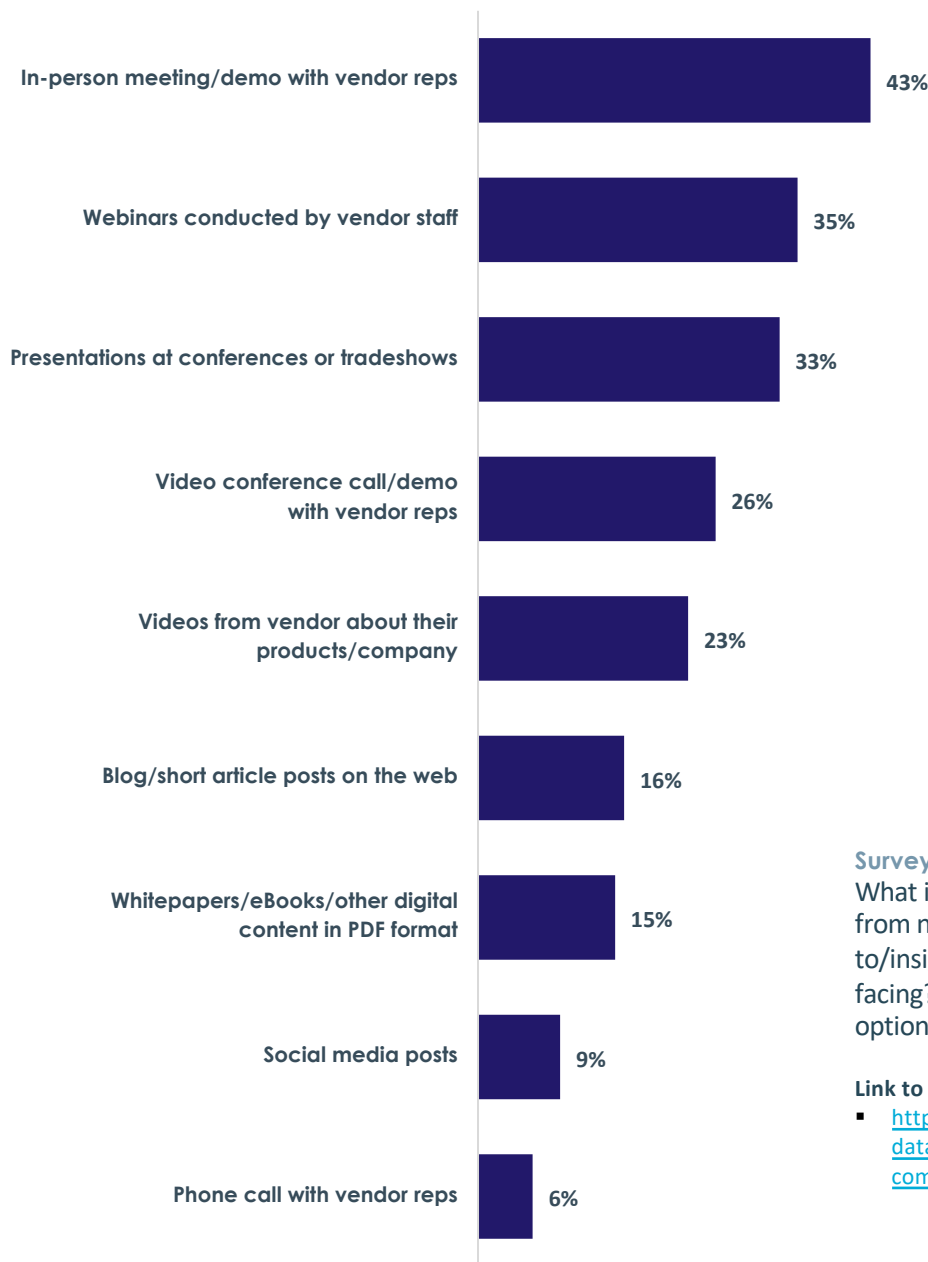
Link to relevant story:

- <https://marketbrief.edweek.org/k12-insider/districts-want-more-guidance-on-purchasing-ed-tech-heres-how-one-state-is-responding/>

SOURCE: EdWeek Research Center nationally representative September/October survey of 388 district leaders, 386 school leaders, and 887 teachers

DISTRICT PRIORITIES AND PAIN POINTS

Post-Pandemic Interactions: In-Person Meetings the Preferred Choice to Learn About Vendors



INSIGHT:
Many district administrators are evidently comfortable meeting vendors in person and have put pandemic-era social distancing regulations behind them to some extent. Video-based presentations rank lower as a way to learn about companies, as do written pieces.

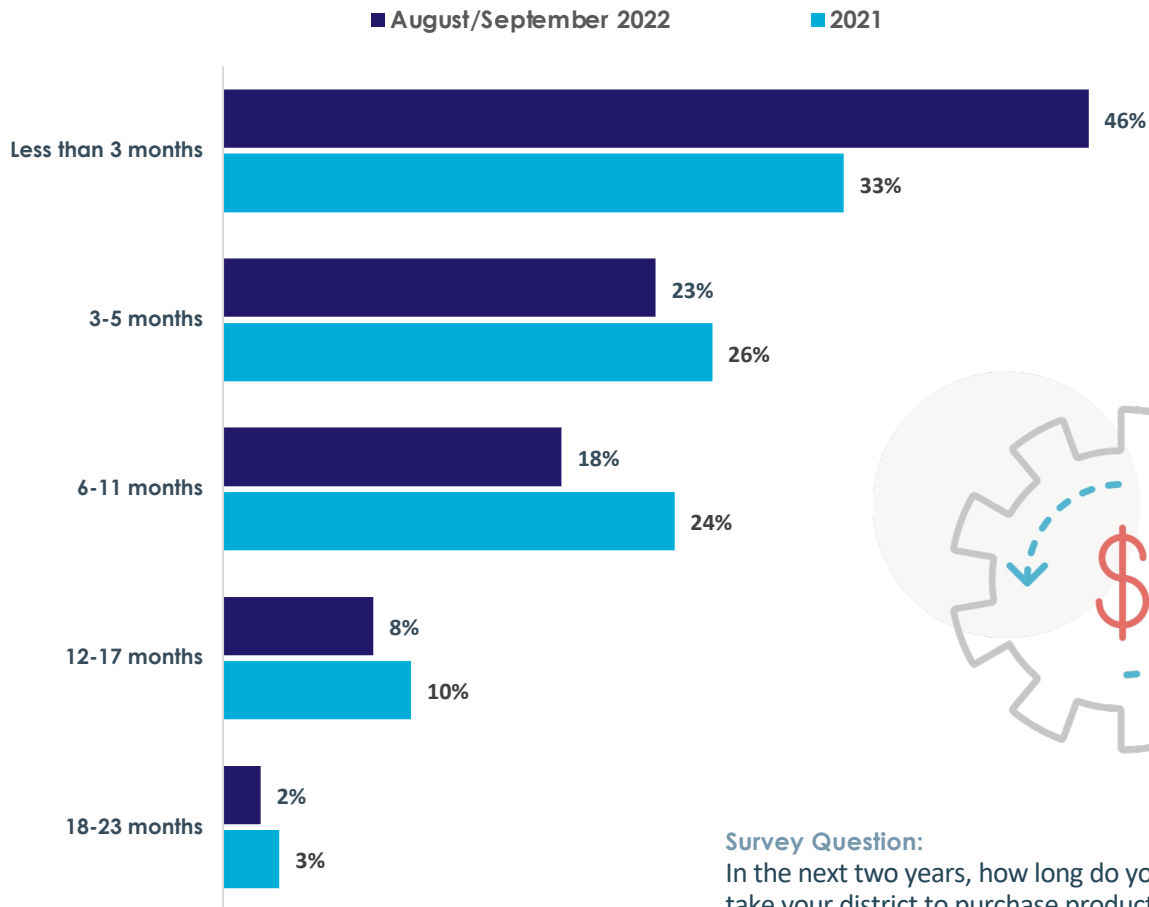
Survey Question:
What is your preferred way of learning from new vendors about their solutions to/insights on education issues you are facing? Please select up to three preferred options.

Link to relevant story:
▪ <https://marketbrief.edweek.org/exclusive-data/zoom-behavior-dooms-education-company-sales-pitches/>

SOURCE: EdWeek Research Center nationally representative September/October survey of 388 district level leaders and employees

DISTRICT PRIORITIES AND PAIN POINTS

District Officials Expect Faster Buying Process Over Coming Two Years



INSIGHT:
 The purchasing cycle has sped up in many districts, with 46 percent saying they anticipate being able to make purchasing decisions in less than three months, more than the 33 percent who said that last year. It's possible that the end of the pandemic led to a faster buying process in some districts, or that some districts' use of virtual processes in bidding has led to efficiency.

Survey Question:

In the next two years, how long do you expect it to take your district to purchase products/services/solutions from the time you identify a need to when you finally make a purchase?

Survey Question – 2021: Based on your recent experience, how long does it take your district to purchase products/services/solutions from the time you identify a need to when you finally make a purchase?

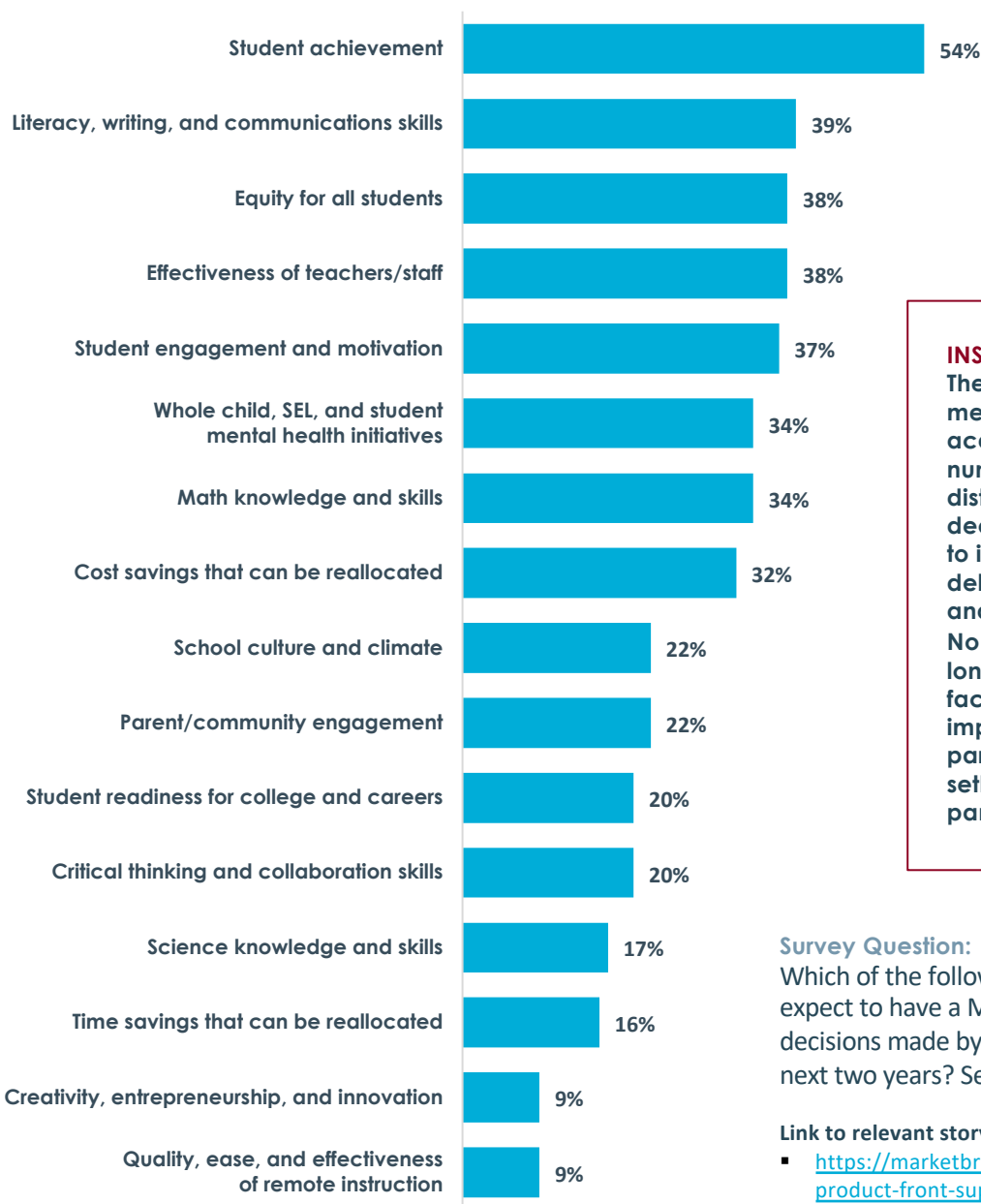
Link to relevant story:

- <https://marketbrief.edweek.org/market-trends/performance-based-contracts-national-pilot-shift-marketplace/>

SOURCE: EdWeek Research Center nationally representative August/September survey of 231 district administrators and 295 school leaders

DISTRICT PRIORITIES AND PAIN POINTS

What Factors Will Guide District Purchasing? Worries About Student Achievement, Literacy, Equity



INSIGHT:
 The desire to produce measurable, positive academic results is the number one motivator guiding districts in their purchasing decisions, followed by a desire to improve literacy skills and deliver equity. The testing-and-accountability era of the No Child Left Behind Act has long passed, but districts still face public pressure to improve student performance, particularly after academic setbacks brought on by the pandemic.

Survey Question:
 Which of the following factors, if any, do you expect to have a MAJOR influence on purchasing decisions made by your district/school over the next two years? Select all that apply.

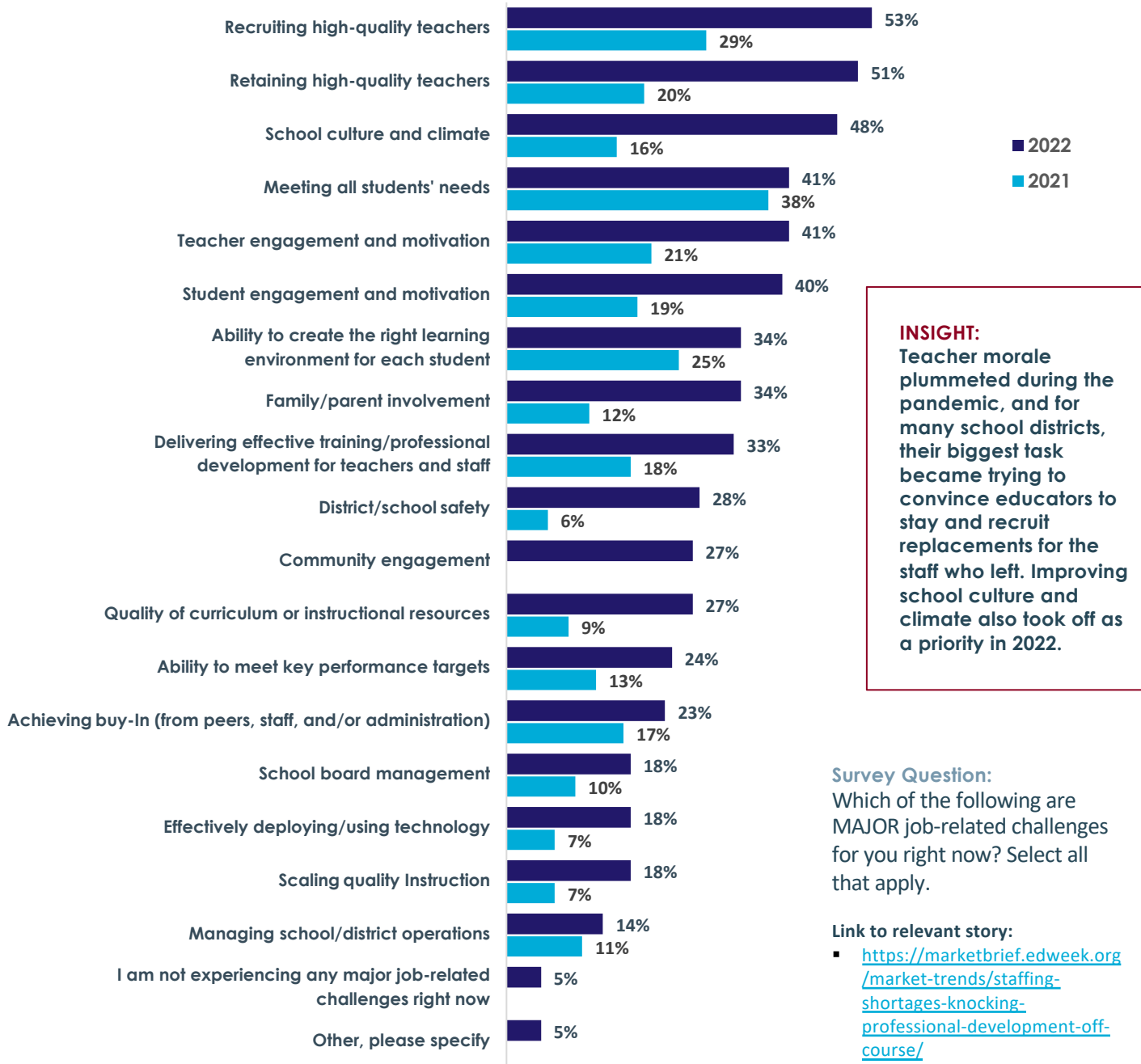
Link to relevant story:
 ▪ <https://marketbrief.edweek.org/k12-insider/getting-product-front-superintendent-winning-trust/>

SOURCE: EdWeek Research Center nationally representative September/ October 2022 survey of 388 district administrators and 386 school leaders.

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DISTRICT PRIORITIES AND PAIN POINTS

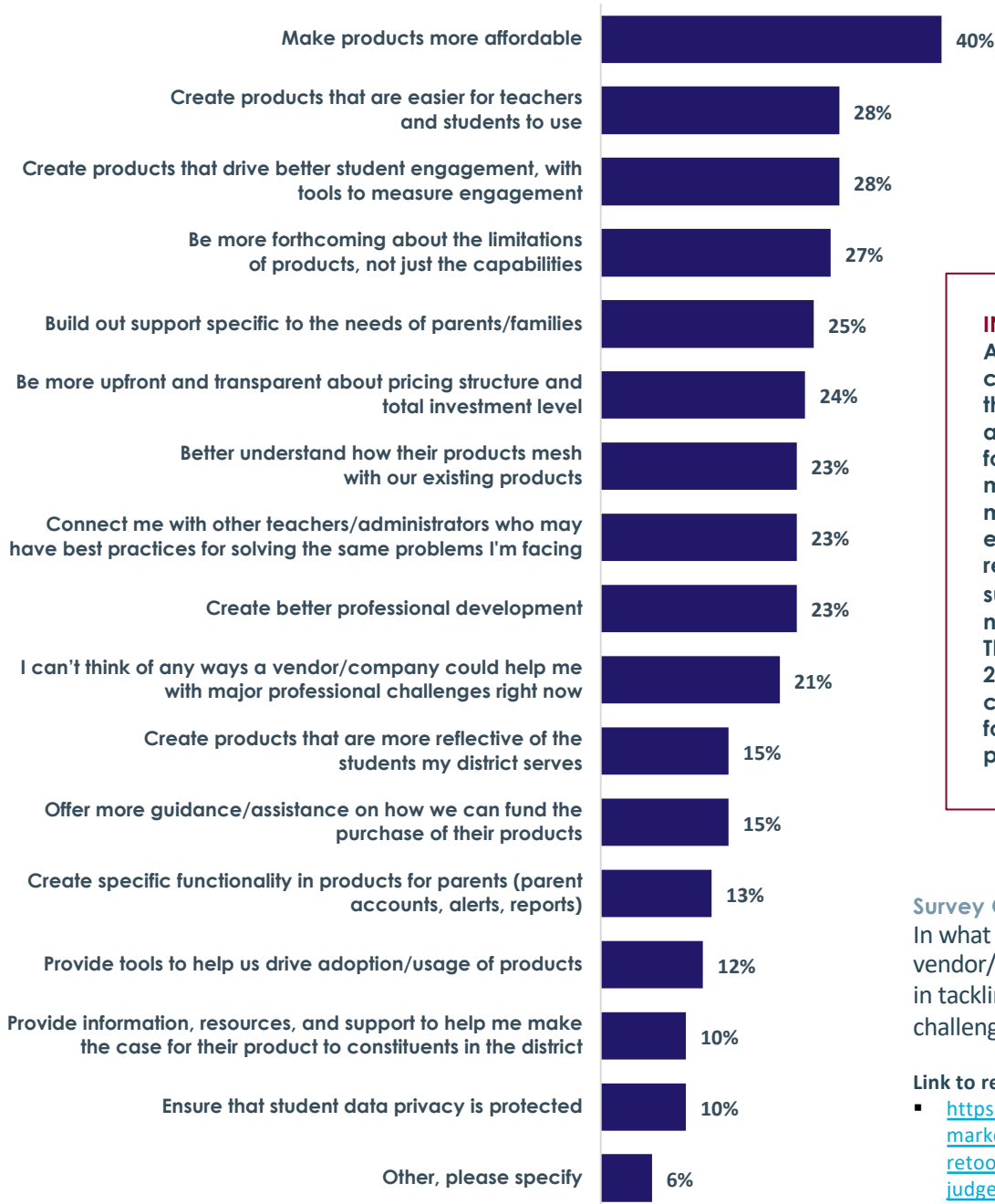
Teacher Recruitment, Improving School Climate Are Top Challenges for District Leaders



SOURCE: EdWeek Research Center September/October nationally representative survey of 388 district administrators

DISTRICT PRIORITIES AND PAIN POINTS

How Can Companies Support K-12 Leaders' Needs? Focus on Affordability, Ease of Use



INSIGHT:
 Asked about how companies can support them the most, district and school leaders focused on vendors making products that are more affordable and easier to use – perhaps a reflection of the need to support teachers who are new to the profession. They also want honesty: 27 percent want companies to be forthright about what their products CANNOT do.

Survey Question:
 In what ways could a vendor/company support you in tackling major professional challenges? Select all that apply.

Link to relevant story:

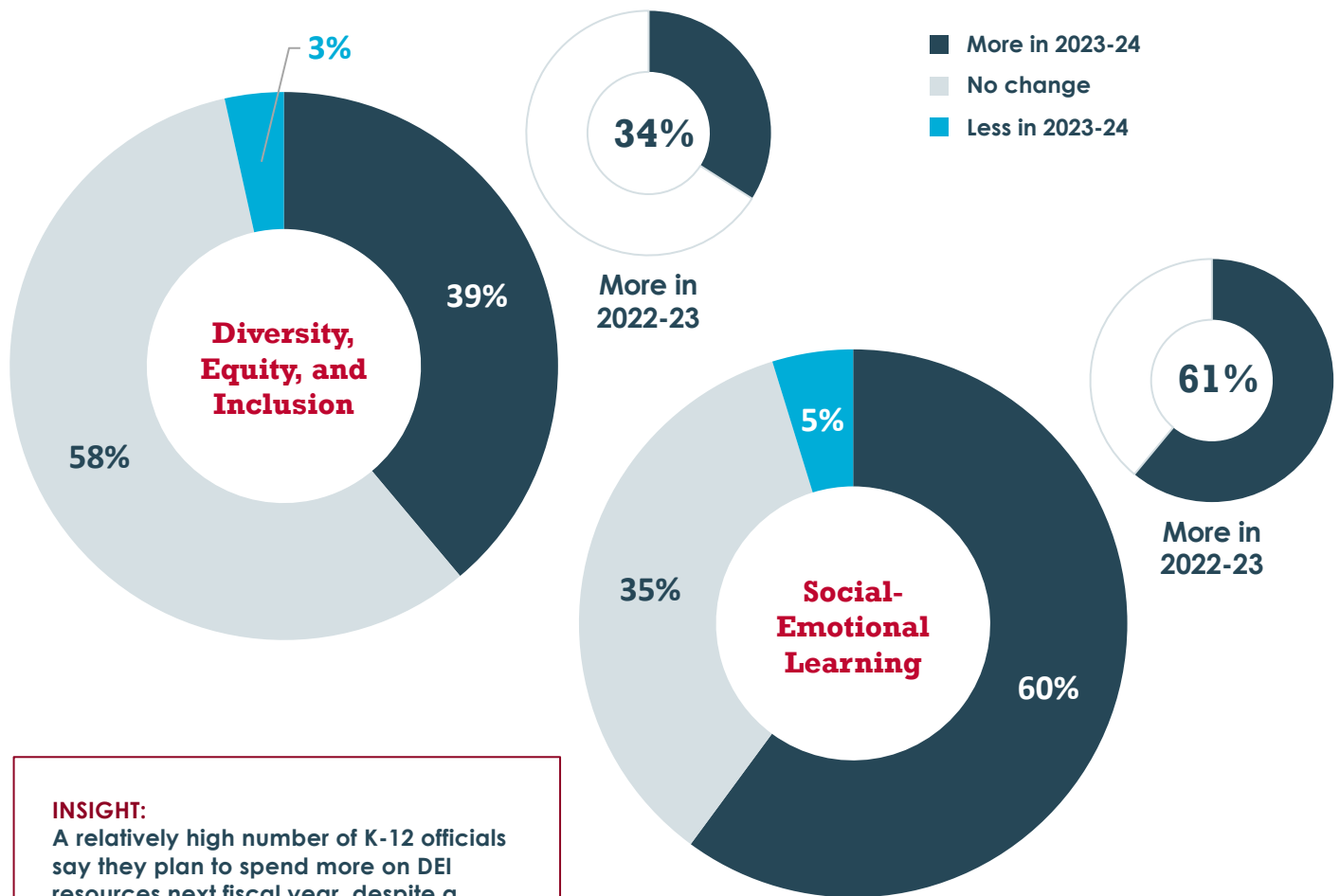
- <https://marketbrief.edweek.org/market-trends/teacher-colleges-retool-try-make-educators-better-judges-ed-tech/>

SOURCE: EdWeek Research Center nationally representative September-October survey of 115 district leaders and 110 school leaders

Spending By Product Category

SPENDING BY PRODUCT CATEGORY

Majority Say Stable Spending on DEI; Strong Projected Allocations for SEL



INSIGHT:
 A relatively high number of K-12 officials say they plan to spend more on DEI resources next fiscal year, despite a wave of state policies restricting lessons on race and resistance to culturally responsive materials among some local school boards. SEL, meanwhile, is poised to remain a major spending area for districts next year; a higher percentage of respondents predict increased spending in that area than in any other category.

Survey Question:
 When it comes to the following types of curricula, how do you anticipate your spending for NEXT YEAR'S budget (2023-24) will compare to the spending in the current (2022-23) budget?

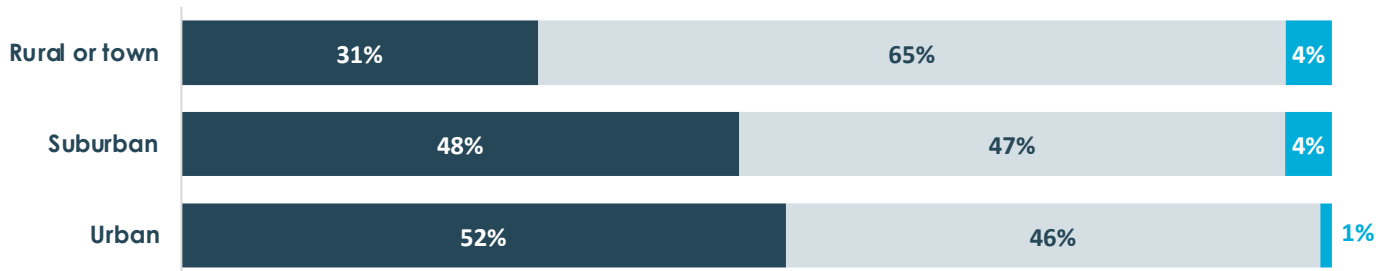
Link to relevant story:
 ▪ <https://marketbrief.edweek.org/marketplace-k-12/florida-officials-reject-long-list-math-resources-citing-references-critical-race-theory-sel/>

SOURCE: EdWeek Research Center August 2022 nationally representative survey of 231 district leaders and 295 school leaders

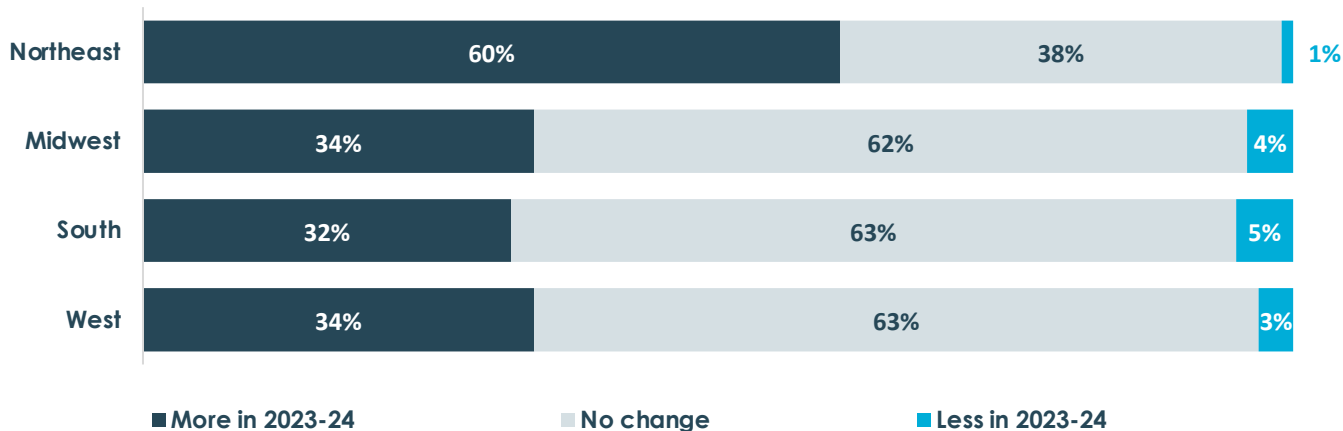
SPENDING BY PRODUCT CATEGORY

Regional Divides: Rural Districts MUCH Less Likely to Buy DEI Resources; Northeast Systems Will Take Them Up

Type of district



District by region



Totals may not add up to 100% due to rounding.

INSIGHT:
 When it comes to purchasing DEI-focused curriculum, the survey shows evidence of political/cultural divisions across the country. Rural K-12 officials are much less likely to say their districts will increase spending on DEI materials next fiscal year, and respondents from the Northeast are much more likely to do so than their peers from other regions.

Survey Question:

When it comes to the following types of curricula, how do you anticipate your spending for NEXT YEAR'S budget (2023-24) will compare to the spending in the current (2022-23) budget? **Diversity, equity, and inclusion**

Link to relevant story:

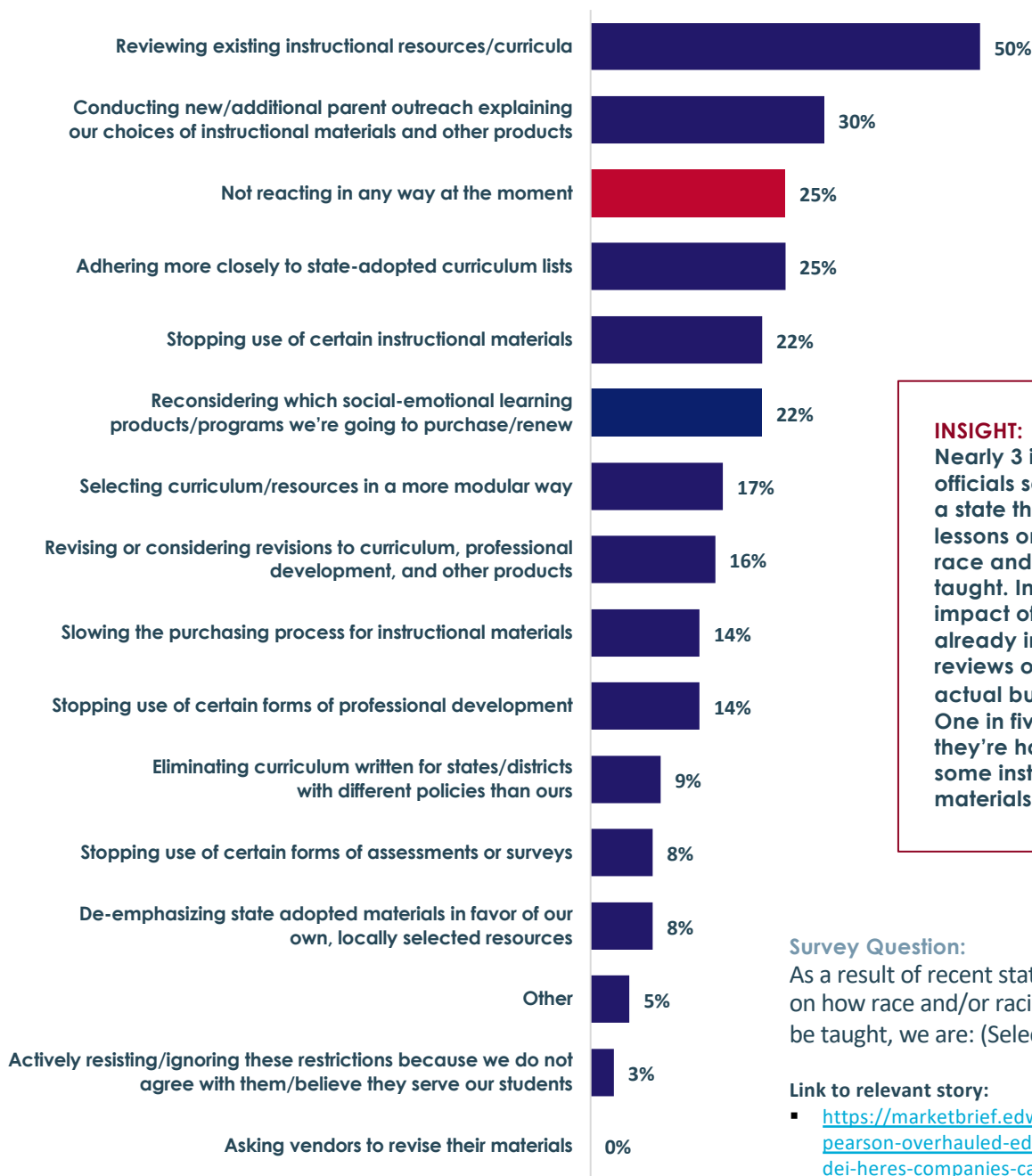
- <https://marketbrief.edweek.org/marketplace-k-12/curriculum-falls-short-supporting-diversity-equity-inclusion-heres-misses-mark/>

SOURCE: EdWeek Research Center August 2022 nationally representative survey of 231 district leader and 295 school leaders

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SPENDING BY PRODUCT CATEGORY

Restrictive Policies on Race Leading to Reviews—and Cancellations—of Materials



INSIGHT:
 Nearly 3 in 10 district officials said they work in a state that has restricted lessons on how topics of race and racism can be taught. In those states, the impact of the restrictions is already influencing district reviews of curriculum—and actual buying decisions. One in five respondents say they're halting the use of some instructional materials.

Survey Question:

As a result of recent state limits or restrictions on how race and/or racism-related topics can be taught, we are: (Select all that apply)

Link to relevant story:

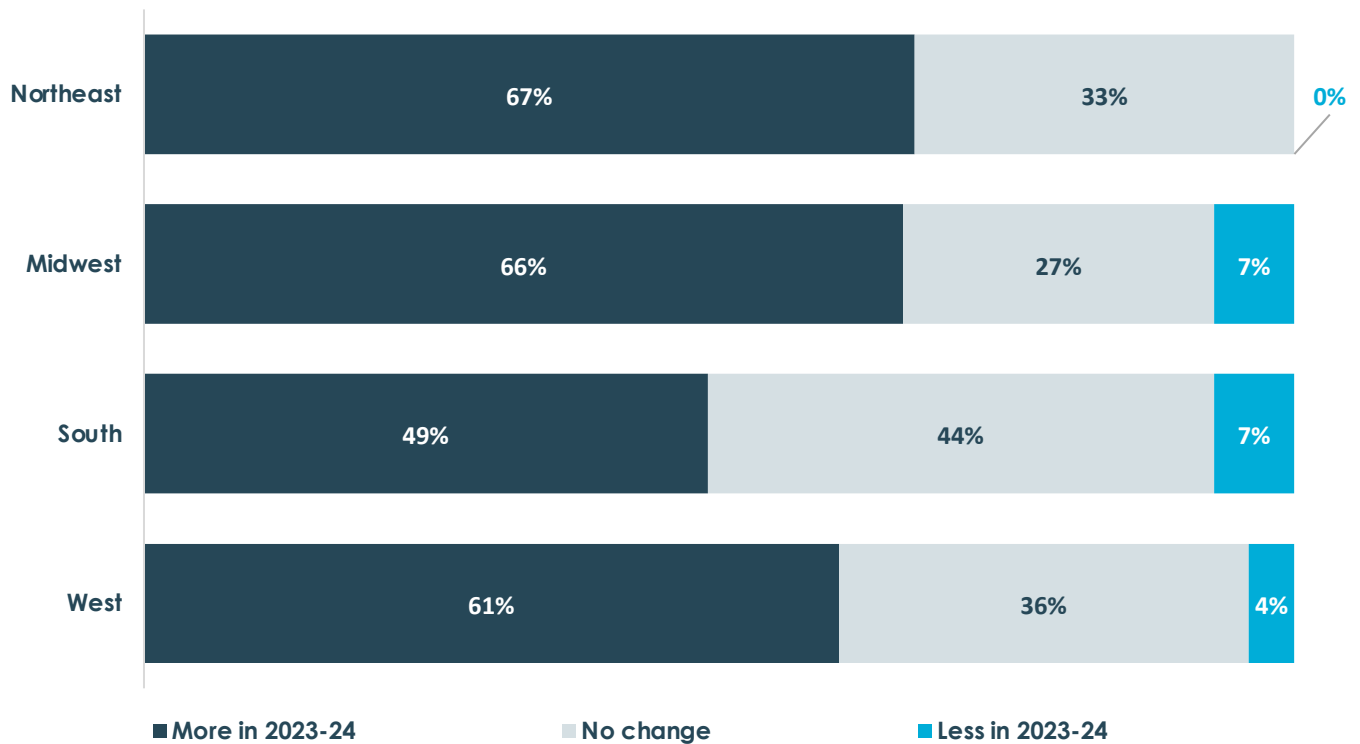
- <https://marketbrief.edweek.org/analysts-view/pearson-overhauled-editorial-policy-address-dei-heres-companies-can-learn/>

SOURCE: EdWeek Research Center nationally representative October/November 2022 survey of 181 district leaders and 193 principals

SPENDING BY PRODUCT CATEGORY

Regional Breakdown: Less Anticipated Spending on SEL in the Southern States

Social-emotional learning



Totals may not add up to 100% due to rounding.

INSIGHT:

District and school leaders from the South are less likely to say they'll spend more on social-emotional learning programs next fiscal year. This could be a reflection of differences in opinion on the value of SEL, overall, or that Southern K-12 officials feel the weight of state policies restricting lessons about racism and gender—which some elected officials have sought to link to SEL.

Survey Question:

When it comes to the following types of curricula, how do you anticipate your spending for NEXT YEAR'S budget (2023-24) will compare to the spending in the current (2022-23) budget?

Social-emotional learning

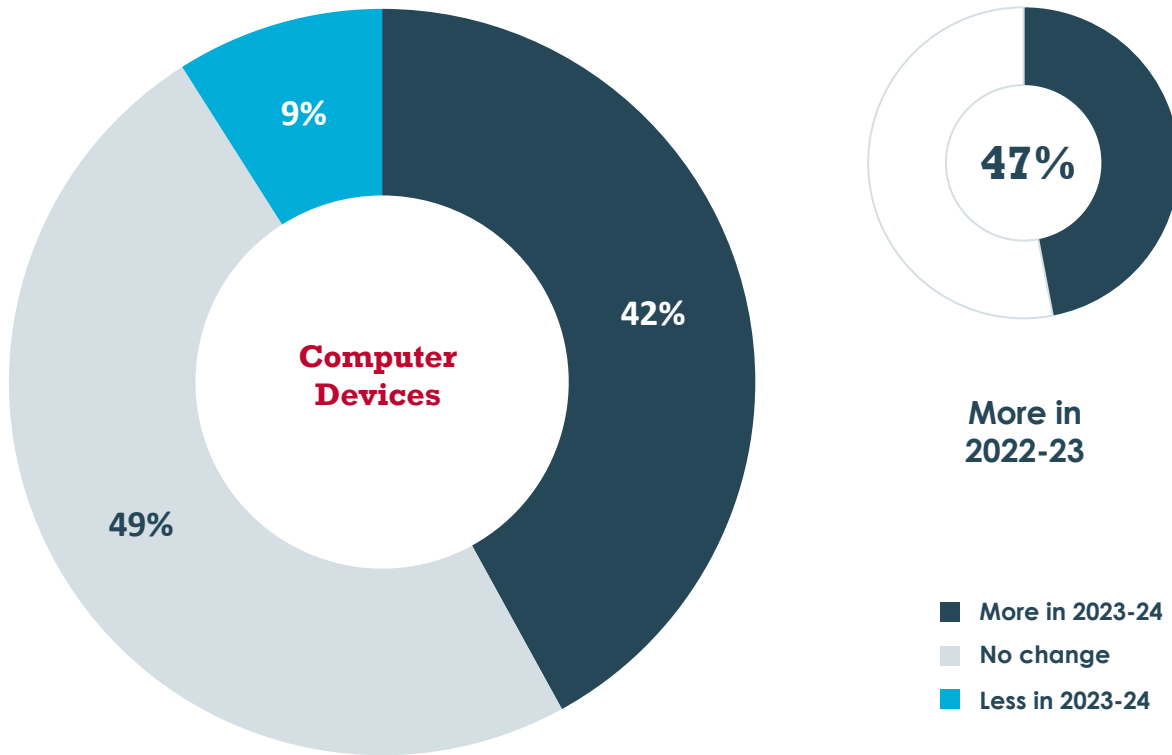
Link to relevant story:

- <https://marketbrief.edweek.org/analysts-view/will-behavior-based-complement-social-emotional-learning-take-hold/>

SOURCE: EdWeek Research Center August 2022 nationally representative survey of 231 district leader and 295 school leaders

SPENDING BY PRODUCT CATEGORY

Anticipated Device Spending Still Strong



INSIGHT:

Districts invested heavily in Chromebooks, iPads, and Windows devices during the pandemic, and a substantial portion plan to keep it up. The challenge for some will be finding a sustainable source of money after stimulus dollars expire. For other districts, the question will be how much of an emphasis they want to put on technology, overall, as parents and others call for a less tech-based approach to instruction as K-12 systems put the remote-learning era farther behind them.

Survey Question:

When it comes to the following technology-related expenses, how do you anticipate your spending for NEXT YEAR'S budget (2023-24) will compare to the spending in the current (2022-23) budget?

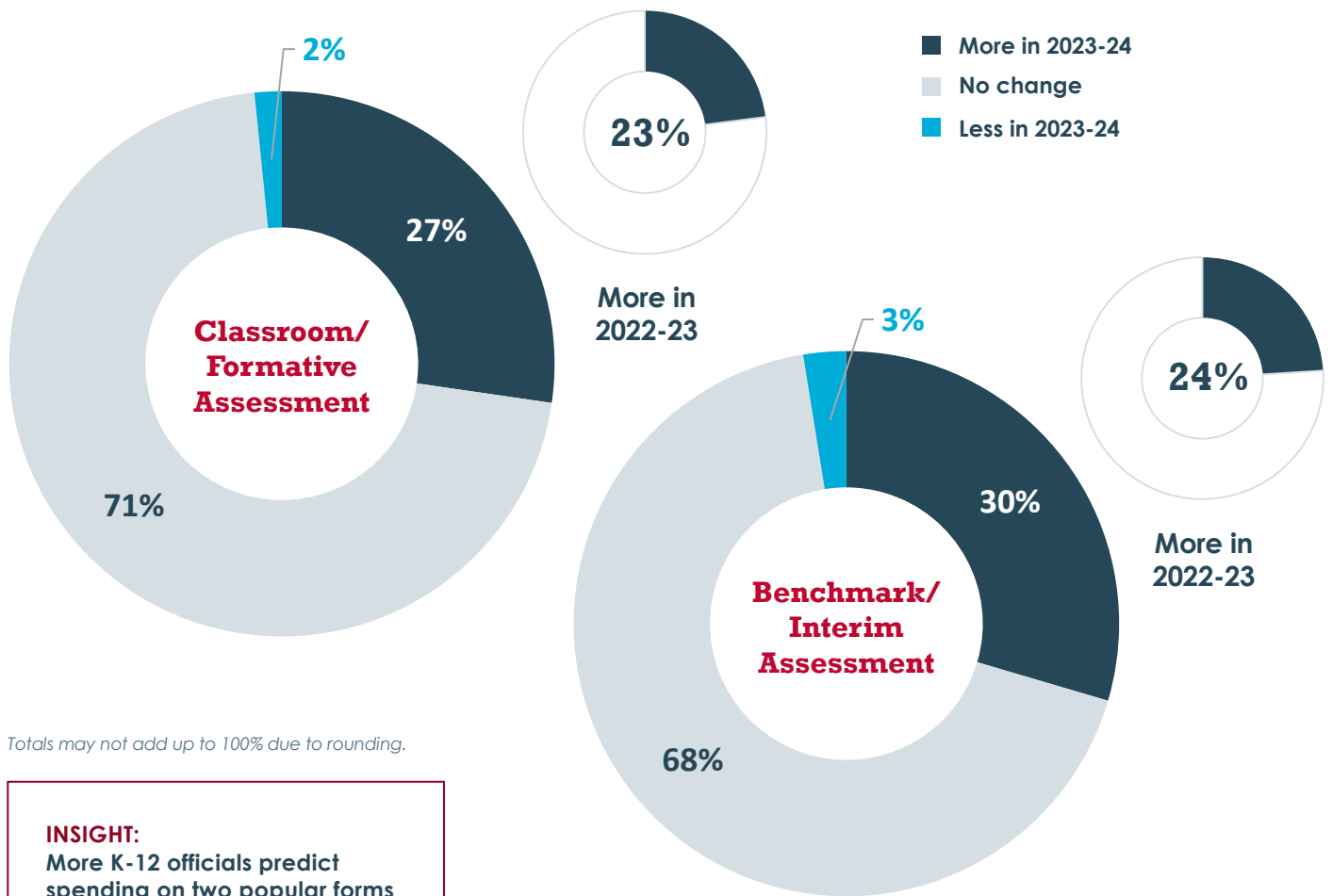
Link to relevant story:

- <https://marketbrief.edweek.org/k12-insider/districts-have-invested-heavily-in-devices-but-can-their-internet-connectivity-keep-up/>

SOURCE: EdWeek Research Center August 2022 nationally representative survey of 231 district leaders and 295 school leaders

SPENDING BY PRODUCT CATEGORY

Likely Spending on Classroom, Benchmark/ Interim Testing Is Relatively Strong



Totals may not add up to 100% due to rounding.

INSIGHT:
 More K-12 officials predict spending on two popular forms of assessment next fiscal year will rise than did so last year. This increase could be due in part to districts continuing to search for new ways to measure the depth of student learning across academic subjects, including through classroom observation.

Survey Question:

When it comes to assessment-related expenses, how do you anticipate your spending for NEXT YEAR'S budget (2023-24) will compare to the spending in the current (2022-23) budget?

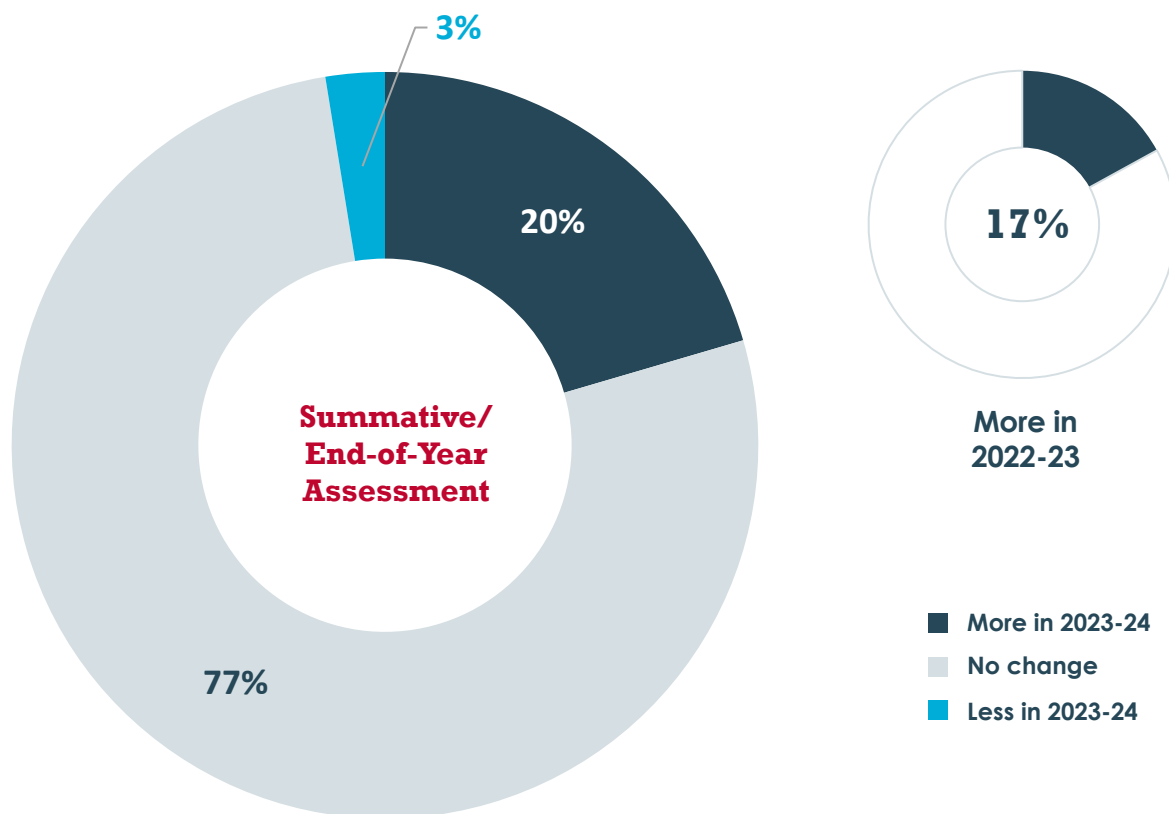
Link to relevant story:

- <https://marketbrief.edweek.org/exclusive-data/buying-classroom-formative-assessments-districts-listen-people-first/>

SOURCE: EdWeek Research Center August 2022 nationally representative survey of 231 district leaders and 295 school leaders

SPENDING BY PRODUCT CATEGORY

Projected Spending on Summative Assessment Not as High



Totals may not add up to 100% due to rounding.

INSIGHT:

Federal law still requires a state-based system of testing and accountability, though there are not the same hardline sanctions associated with those policies that there were in the No Child Left Behind era. U.S. Secretary of Education Miguel Cardona recently urged states and districts to use tests as a “flashlight” to gain insights on student learning—not a “hammer.”

Survey Question:

When it comes to assessment-related expenses, how do you anticipate your spending for NEXT YEAR’S budget (2023-24) will compare to the spending in the current (2022-23) budget?

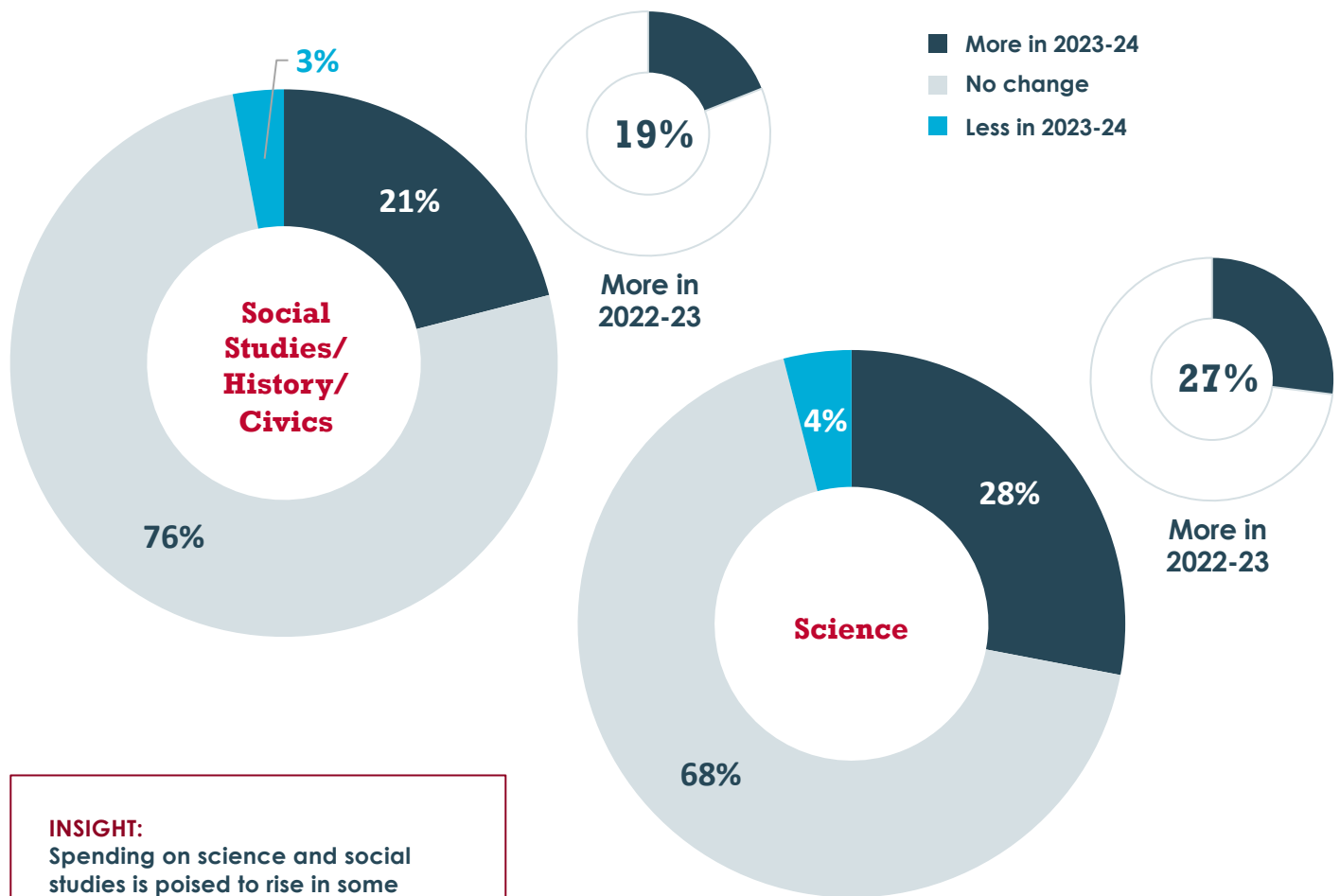
Link to relevant story:

- <https://marketbrief.edweek.org/market-trends/4-big-shifts-coronavirus-bringing-assessment-industry/>

SOURCE: EdWeek Research Center August 2022 nationally representative survey of 231 district leaders and 295 school leaders

SPENDING BY PRODUCT CATEGORY

Projected Spending on Social Studies, Science Roughly the Same as Last Year



INSIGHT:
 Spending on science and social studies is poised to rise in some districts next year, albeit modestly. Despite the heavy focus recently among districts on academic recovery in math and English/language arts, districts typically have a cycle for refreshing other core subjects, too, and may have set in motion plans over the past year to do so.

Survey Question:

When it comes to the following types of curricula, how do you anticipate your spending for NEXT YEAR’S budget (2023-24) will compare to the spending in the current (2022-23) budget?

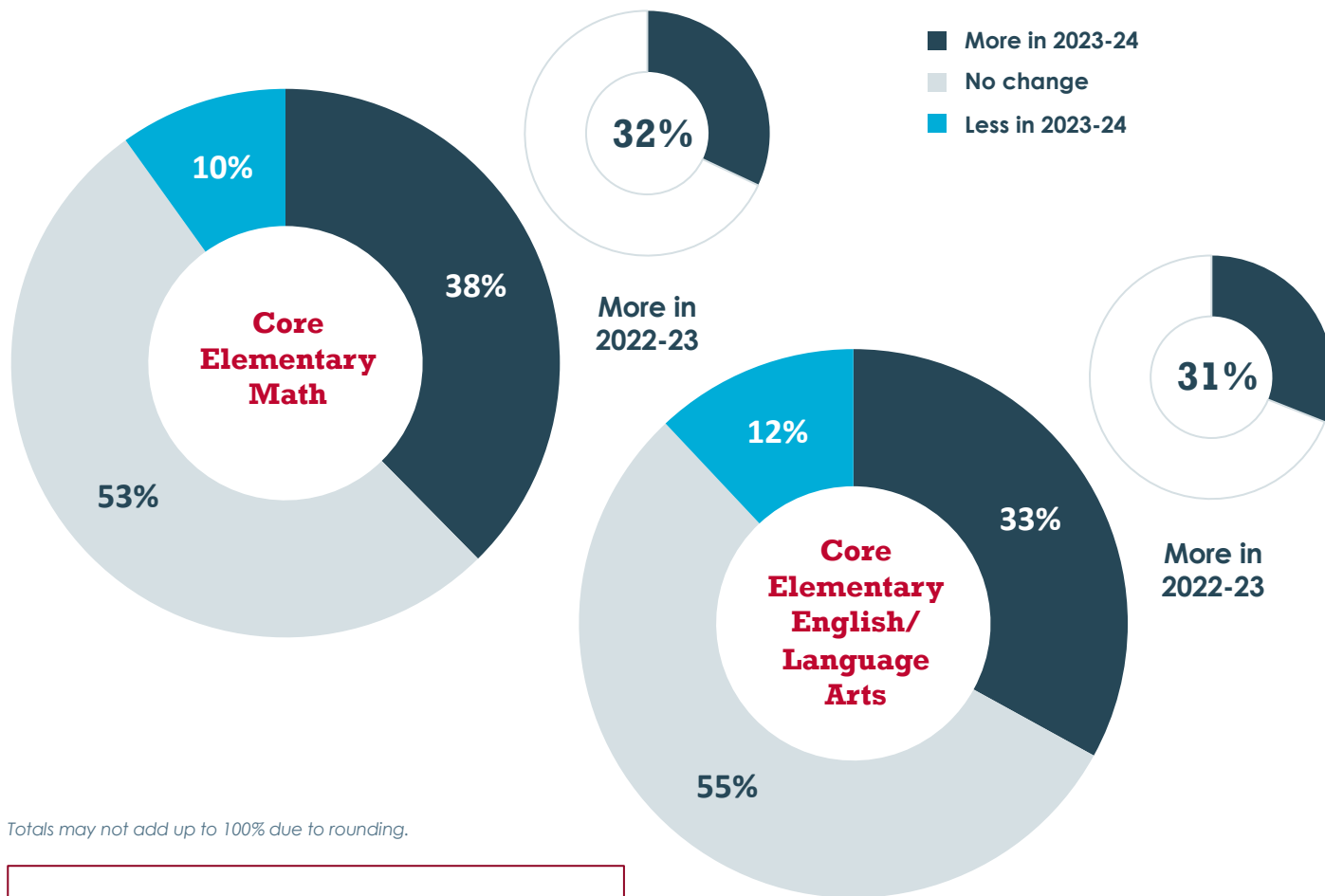
Link to relevant story:

- <https://marketbrief.edweek.org/analysts-view/science-products-districts-need-covid-beyond/>

SOURCE: EdWeek Research Center August 2022 nationally representative survey of 231 district leaders and 295 school leaders

SPENDING BY PRODUCT CATEGORY

Anticipated Rise in Spending on Core Elementary Math; Core ELA More Flat



Totals may not add up to 100% due to rounding.

INSIGHT:
 Districts' plans for spending on elementary core curriculum remain roughly the same as last year in ELA, and will rise a bit more in math. These decisions are often based in part on state-level curriculum adoption cycles, as well as on the reviews and purchasing cycles that districts establish on their own. Academic recovery in elementary grades has been a major area of focus during COVID.

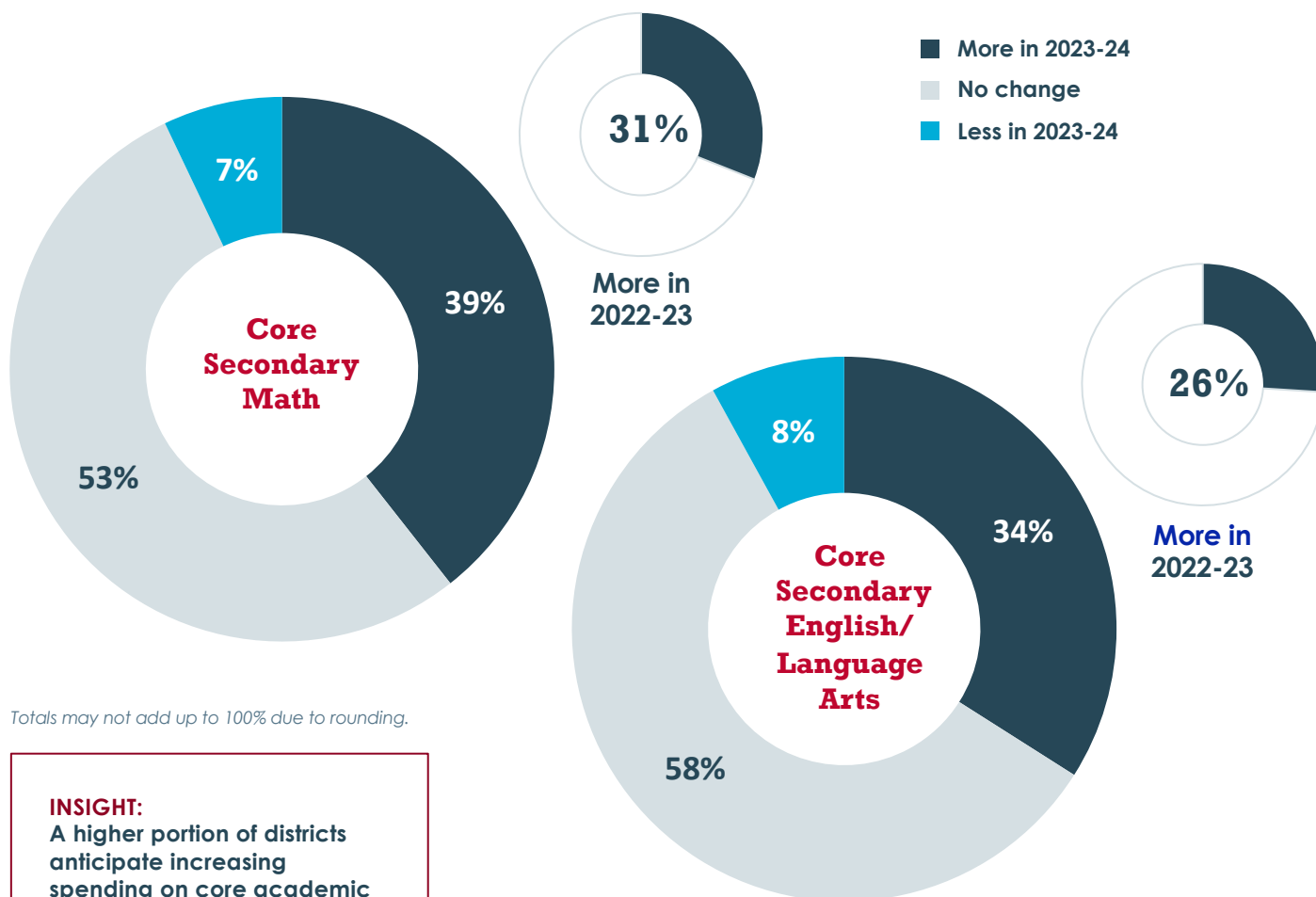
Survey Question:
 When it comes to the following types of elementary school curricula, how do you anticipate your spending for NEXT YEAR'S budget (2023-24) will compare to the spending in the current (2022-23) budget?

Link to relevant story:
 ■ <https://marketbrief.edweek.org/k12-insider/one-state-pushing-science-reading-schools-curriculum-providers/>

SOURCE: EdWeek Research Center August 2022 nationally representative survey of 231 district leaders and 295 school leaders

SPENDING BY PRODUCT CATEGORY

District Officials Say Spending on Core Secondary Math, ELA Resources Will Rise



Totals may not add up to 100% due to rounding.

INSIGHT:

A higher portion of districts anticipate increasing spending on core academic materials in secondary math and ELA next year than said so this year. This may be a sign of districts recommitting to strengthening resources for older students after years of looking for solutions focused on making up lost academic ground in early grades.

Survey Question:

When it comes to the following types of middle and high school curricula, how do you anticipate your spending for NEXT YEAR'S budget (2023-24) will compare to the spending in the current (2022-23) budget?

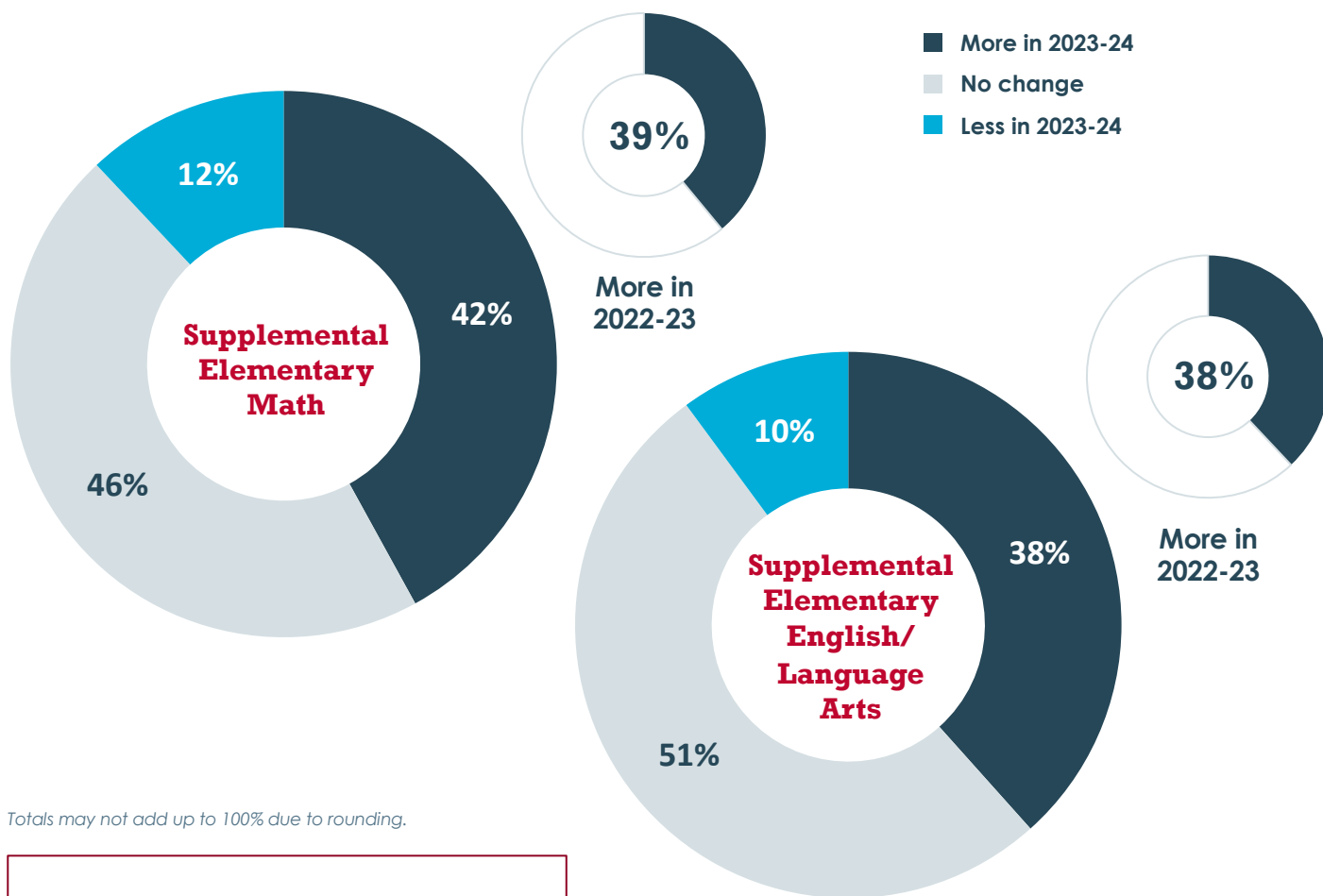
Link to relevant story:

- <https://marketbrief.edweek.org/k12-insider/schools-education-companies-need-rethink-math-curriculum-assessment/>

SOURCE: EdWeek Research Center August 2022 nationally representative survey of 231 district leaders and 295 school leaders

SPENDING BY PRODUCT CATEGORY

Spending on Elementary Supplemental Math, ELA Resources Expected to Climb



Totals may not add up to 100% due to rounding.

INSIGHT:
 Many districts appeared to show an increased appetite for supplemental curriculum during the pandemic, as they sought support for newly identified areas of academic need. Since then, demand for supplemental resources has remained strong as K-12 officials look for new ways to make up for historic slides in academic achievement, particularly in math.

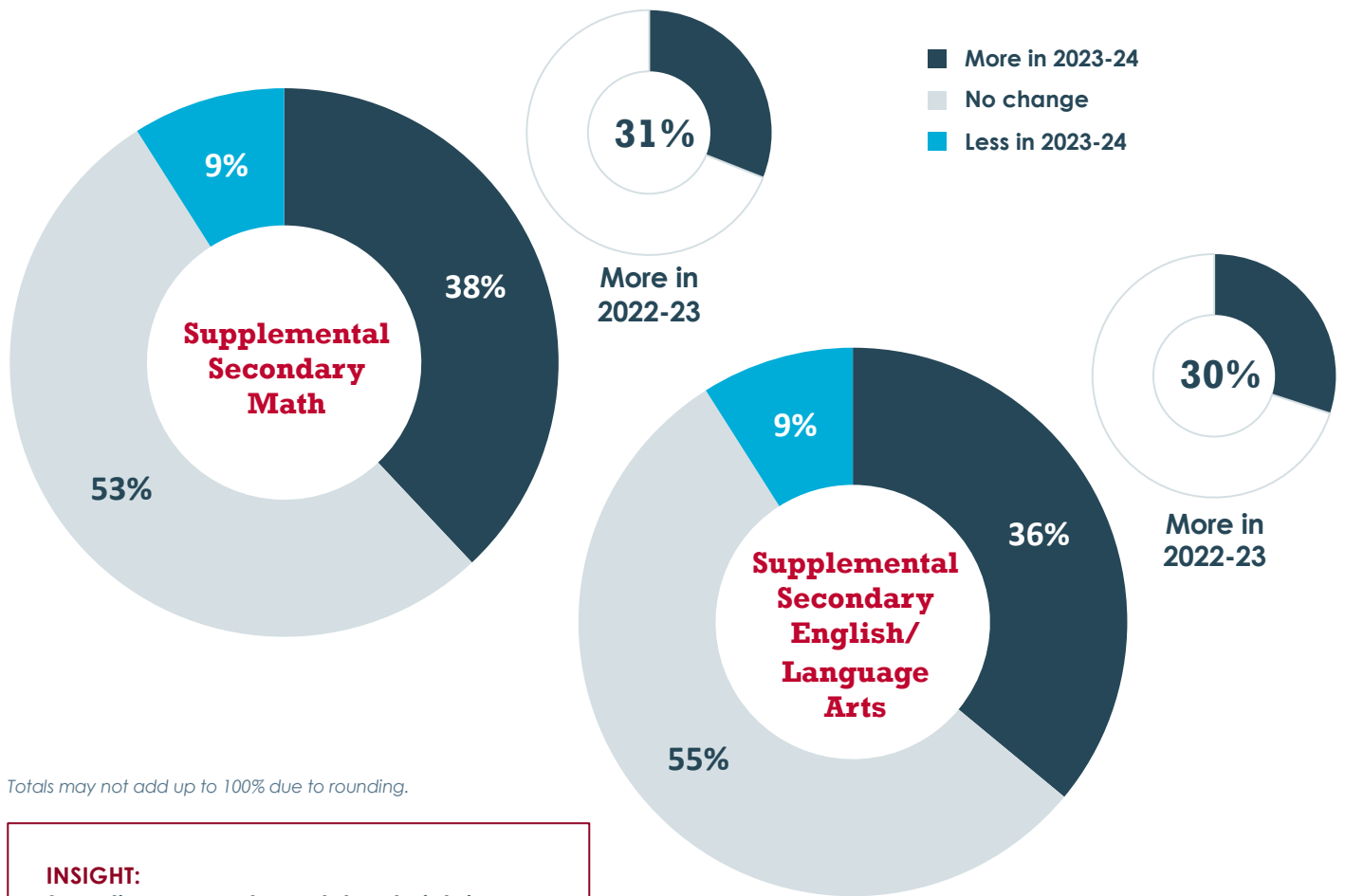
Survey Question:
 When it comes to the following types of elementary school curricula, how do you anticipate your spending for NEXT YEAR'S budget (2023-24) will compare to the spending in the current (2022-23) budget?

Link to relevant story:
 ■ <https://marketbrief.edweek.org/marketplace-k-12/will-education-companies-respond-deeply-troubling-national-test-scores>

SOURCE: EdWeek Research Center August 2022 nationally representative survey of 231 district leaders and 295 school leaders

SPENDING BY PRODUCT CATEGORY

Spending on Supplemental Secondary Math, ELA Resources Poised to Grow



Totals may not add up to 100% due to rounding.

INSIGHT:
 Spending on supplemental materials in math is poised to rise by greater amounts at the secondary level than it is at the elementary level, the survey found. It's another sign of the work school systems want to do in supporting middle- and high school-age students. Resources designed to fill in gaps in the fabric of academic resources appear to be an important part of that secondary-level strategy.

Survey Question:

When it comes to the following types of middle and high school curricula, how do you anticipate your spending for NEXT YEAR'S budget (2023-24) will compare to the spending in the current (2022-23) budget?

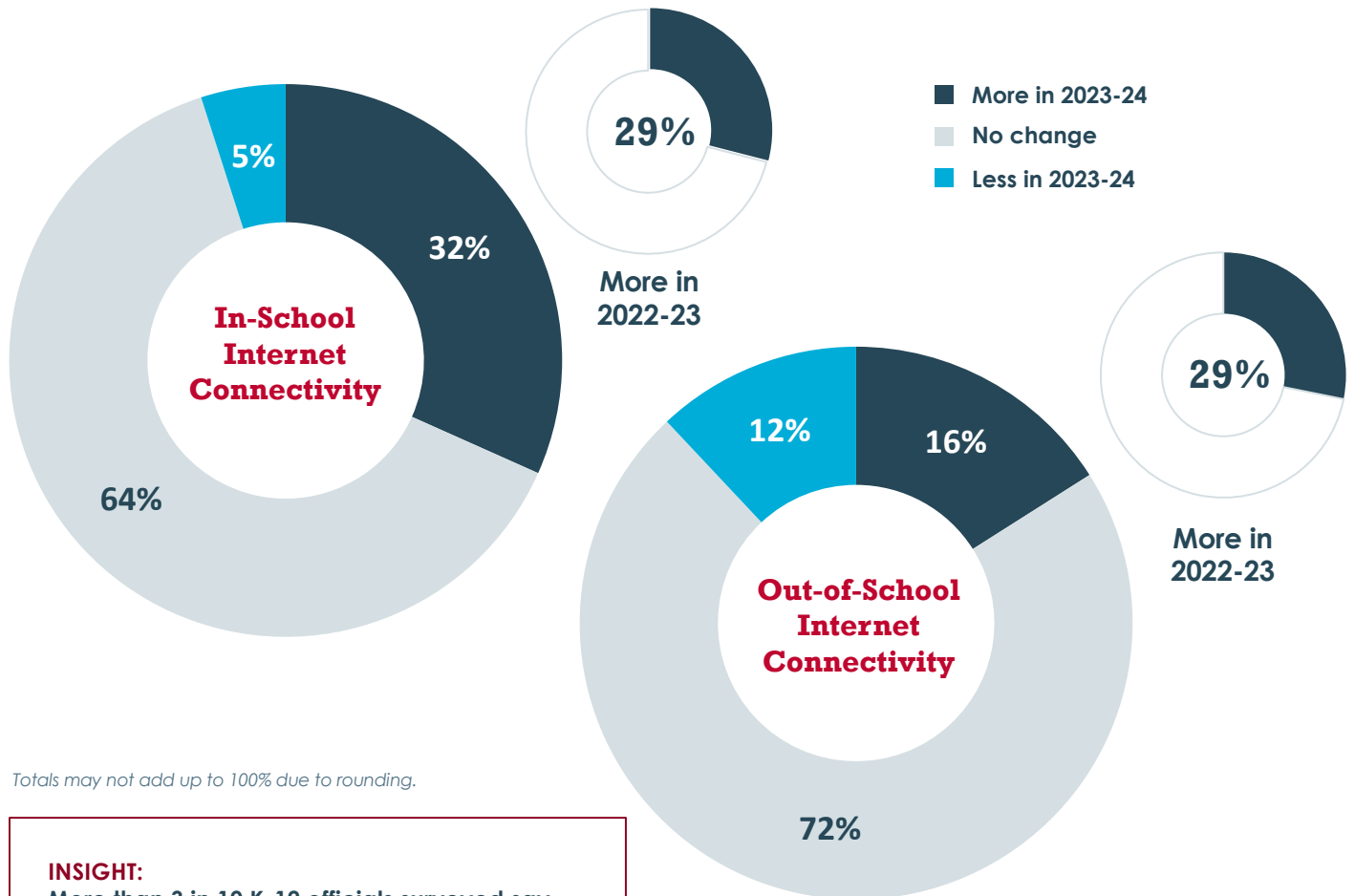
Link to relevant story:

- <https://marketbrief.edweek.org/marketplace-k-12/access-to-high-quality-curriculum-is-on-the-rise-but-pd-is-not-keeping-up/>

SOURCE: EdWeek Research Center August 2022 nationally representative survey of 231 district leaders and 295 school leaders

SPENDING BY PRODUCT CATEGORY

Less Projected Spending on Out-of-School Connectivity, Compared to Last Year



Totals may not add up to 100% due to rounding.

INSIGHT:

More than 3 in 10 K-12 officials surveyed say their systems will invest in in-school internet connectivity, more so than in out-of-school bandwidth upgrades. This survey finding mirrors the trend many tech experts see in schools, where there is surging demand for stronger on-campus internet speed, as the number of devices has surged. In a recent survey by the E-rate consulting group Funds for Learning, 84 percent of district officials said their on-campus internet bandwidth needs will increase in the next three years.

Survey Question:

When it comes to the following technology-related expenses, how do you anticipate your spending for NEXT YEAR'S budget (2023-24) will compare to the spending in the current (2022-23) budget?

Link to relevant story:

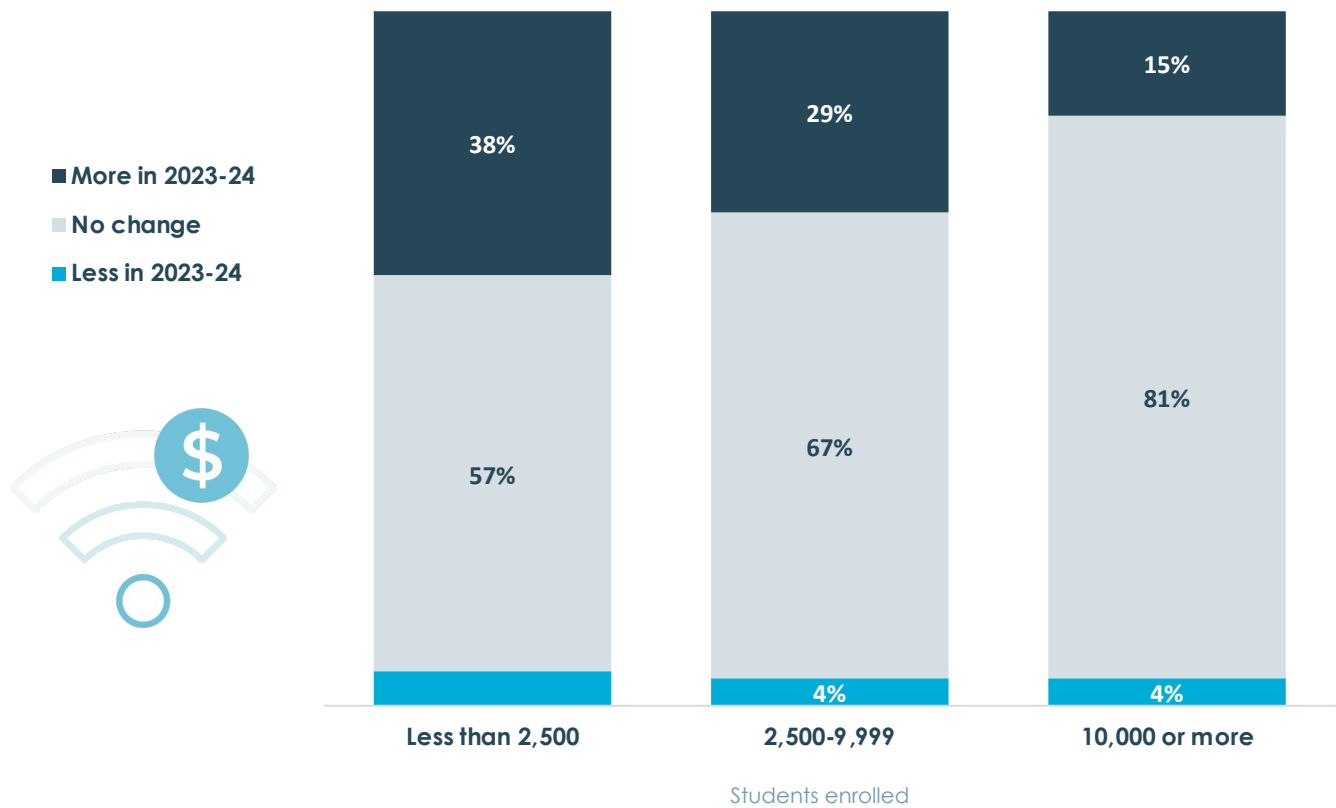
- <https://marketbrief.edweek.org/market-trends/district-demand-campus-connectivity-off-charts-implications-vendors/>

SOURCE: EdWeek Research Center August 2022 nationally representative survey of 231 district leaders and 295 school leaders

SPENDING BY PRODUCT CATEGORY

Small School Systems Are Poised to Invest the Most in On-Campus Connectivity

In-school internet connectivity



Totals may not add up to 100% due to rounding.

INSIGHT:

The surge of demand for stronger on-campus connectivity is especially strong in the smallest school systems. That demand has nationwide implications—about 75 percent of the country’s school districts have 2,500 or fewer students.

Survey Question:

Approximately how many students are enrolled in your school district?

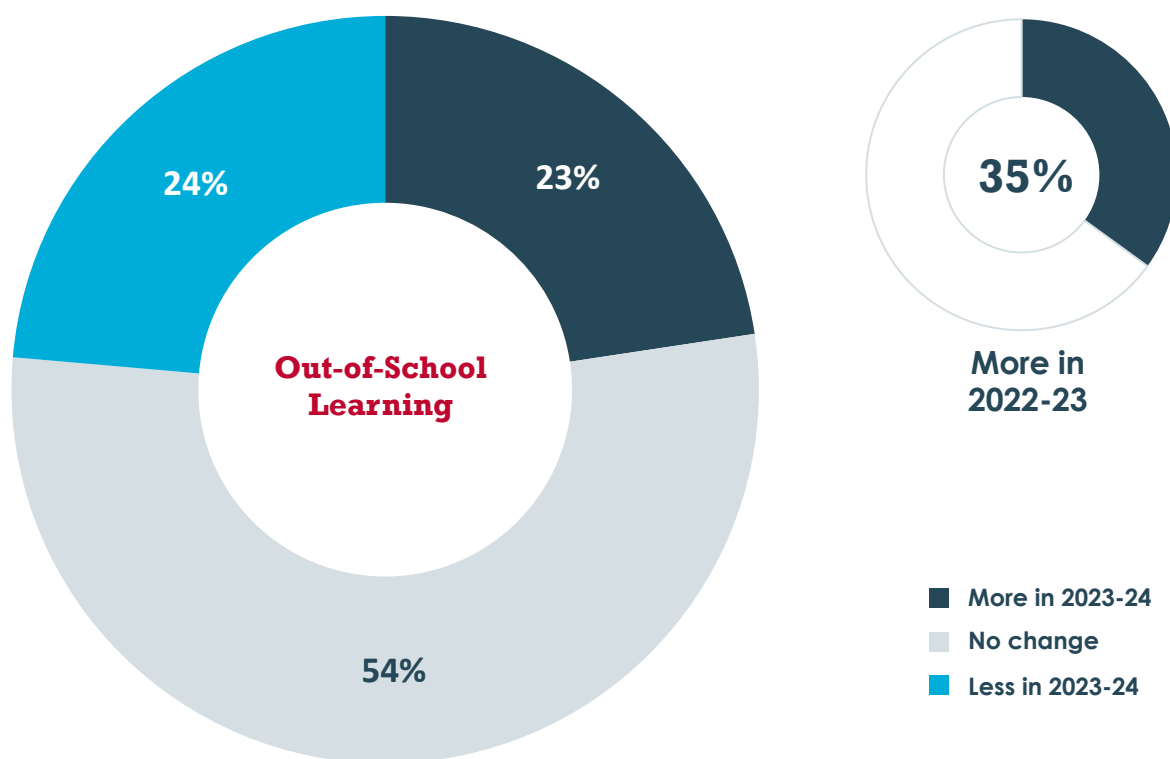
Link to relevant story:

- <https://marketbrief.edweek.org/k12-insider/districts-have-invested-heavily-in-devices-but-can-their-internet-connectivity-keep-up/>

SOURCE: EdWeek Research Center August 2022 nationally representative survey of 231 district leader and 295 school leaders

SPENDING BY PRODUCT CATEGORY

Less Than a Quarter of K-12 Officials Expect Higher Spending on Out-of-School Learning



Totals may not add up to 100% due to rounding.

INSIGHT:

Anticipated spending on out-of-school learning is poised to fall a bit compared to last year. This runs counter to some other findings in recent EdWeek Market Brief surveys, such as those that show a major focus of spending stimulus dollars on summer learning programs. It could be that survey respondents defined “out-of-school learning” in a limited way, to not include options such as like tutoring.

Survey Question:

When it comes to out-of-school learning, how do you anticipate your spending for NEXT YEAR’S budget (2023-24) will compare to the spending in the current (2022-23) budget?

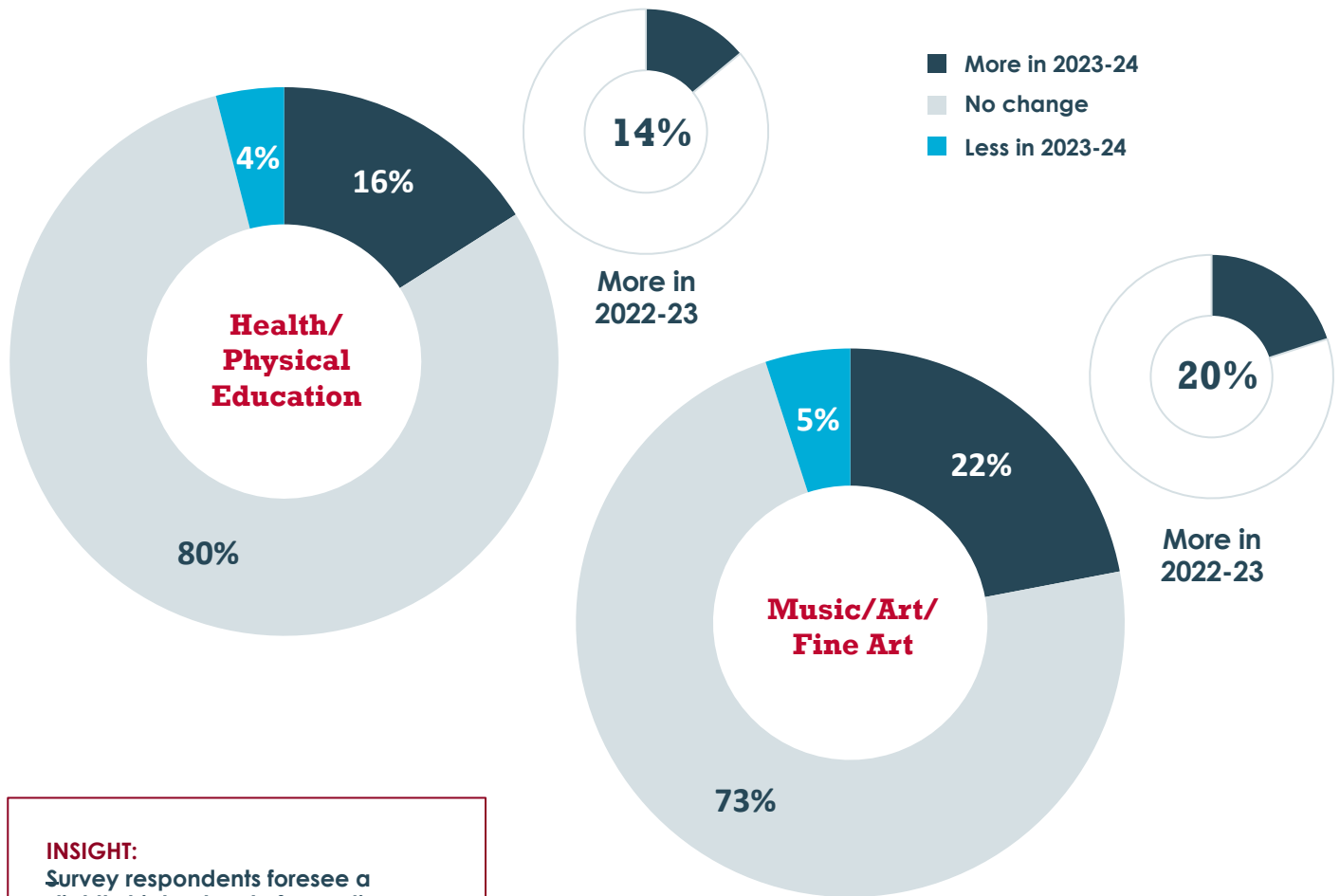
Link to relevant story:

- <https://marketbrief.edweek.org/exclusive-data/school-districts-biggest-obstacles-tackling-learning-loss/>

SOURCE: EdWeek Research Center August 2022 nationally representative survey of 231 district leaders and 295 school leaders

SPENDING BY PRODUCT CATEGORY

Largely Unchanged: Likely Spending On Health/PE and Music/Arts



INSIGHT:
 Survey respondents foresee a slightly higher level of spending on health/physical education and music and the arts than they predicted last year. School districts may be trying to enhance the resources they offer in these areas, with the goal of supporting a well-rounded education, after several years of heavy core academic focus.

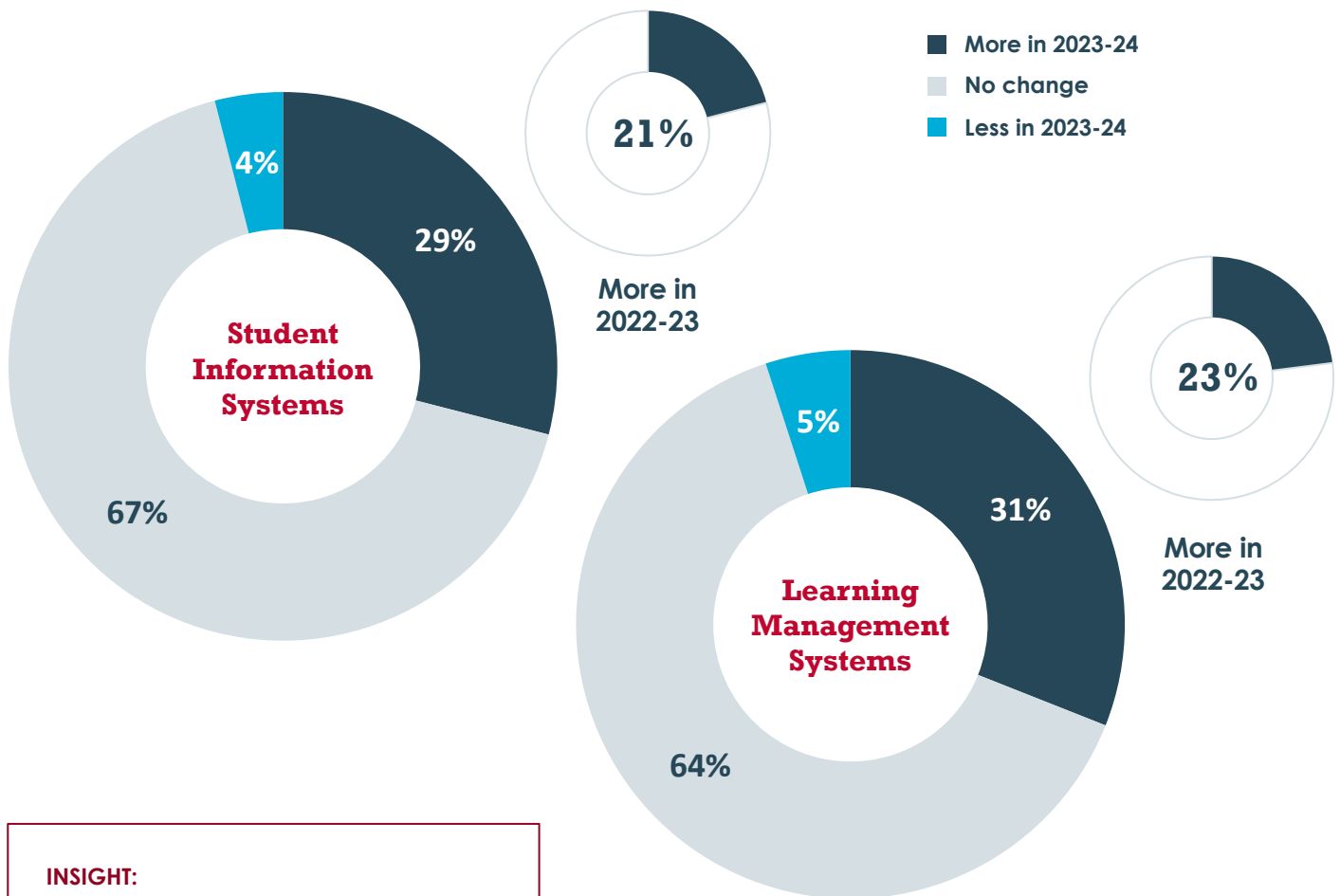
Survey Question:
 When it comes to the following types of curricula, how do you anticipate your spending for NEXT YEAR'S budget (2023-24) will compare to the spending in the current (2022-23) budget?

Link to relevant story:
 ▪ <https://marketbrief.edweek.org/market-trends/can-social-emotional-learning-woven-school-day/>

SOURCE: EdWeek Research Center August 2022 nationally representative survey of 231 district leaders and 295 school leaders

SPENDING BY PRODUCT CATEGORY

Projected Spending on Student Information Systems, Learning Management Systems Poised to Rise



INSIGHT:
 More district officials predict their spending will rise over the coming year on student information and learning management systems than did last year. One possibility is that districts are turning their focus to these relatively big-ticket spending items after deferring those decisions during the pandemic to focus on more immediate needs.

Survey Question:
 When it comes to the following technology-related expenses, how do you anticipate your spending for NEXT YEAR'S budget (2023-24) will compare to the spending in the current (2022-23) budget?

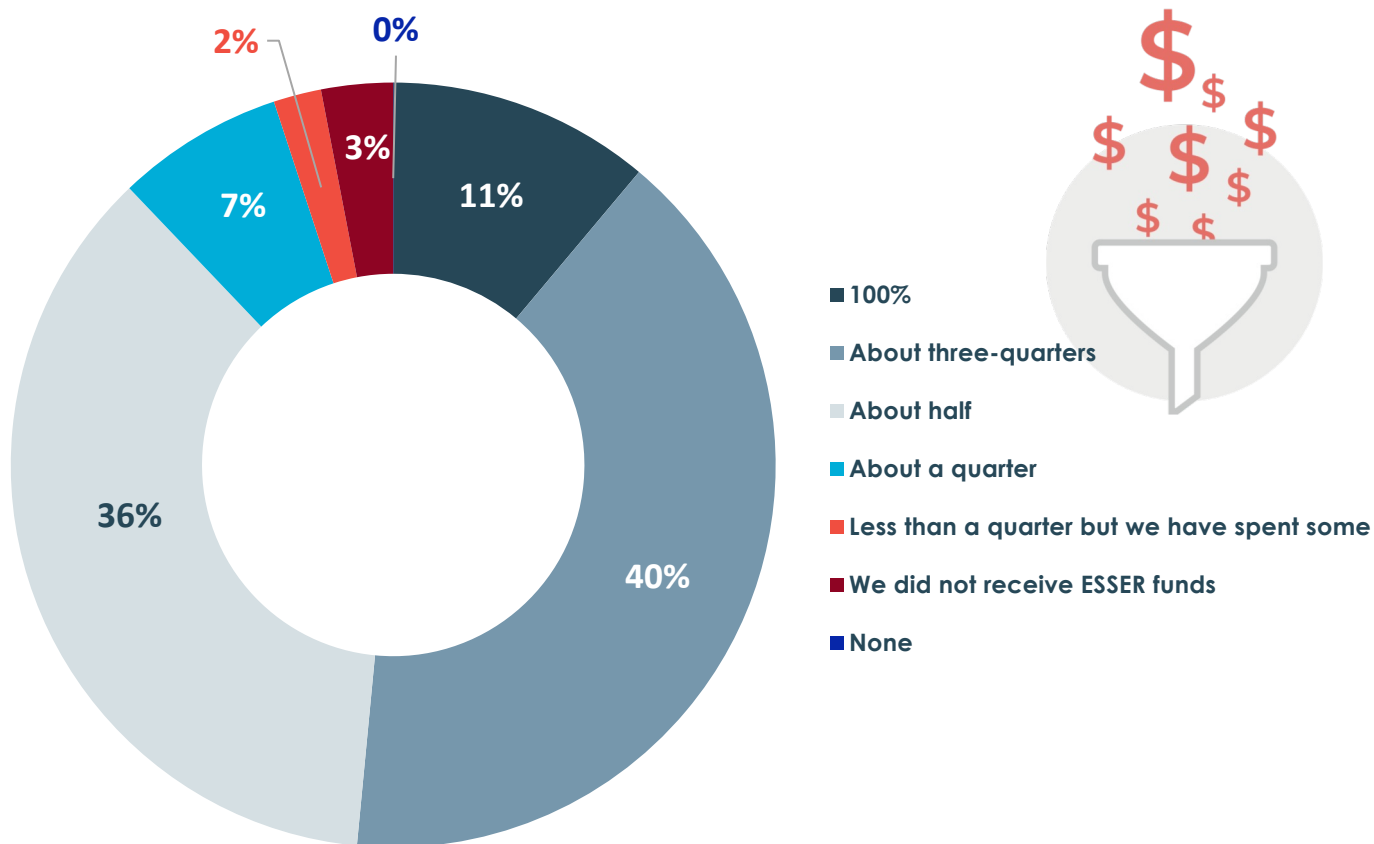
Link to relevant story:
 ▪ <https://marketbrief.edweek.org/marketplace-k-12/d2l-major-provider-learning-management-systems-schools-goes-public/>

SOURCE: EdWeek Research Center August 2022 nationally representative survey of 231 district leaders and 295 school leaders

The Impact Of Stimulus Funding

THE IMPACT OF STIMULUS FUNDING

Vast Majority of Districts Have Gone Through at Least Half of Their Stimulus Funding



Totals may not add up to 100% due to rounding.

INSIGHT: Districts have received about \$190 billion in federal emergency aid over the past few years. More than half surveyed say they've gone through a strong majority (three-quarters) of that money. The funding has supported everything from broad, expensive efforts in areas like professional development, tutoring, and social-emotional learning to more district-specific needs such as hiring classroom aides, and arranging teletherapy for students, EdWeek Market Brief's reporting has found.

Survey Question:
 How much of your Elementary and Secondary School Emergency Relief (ESSER) funds have you spent?

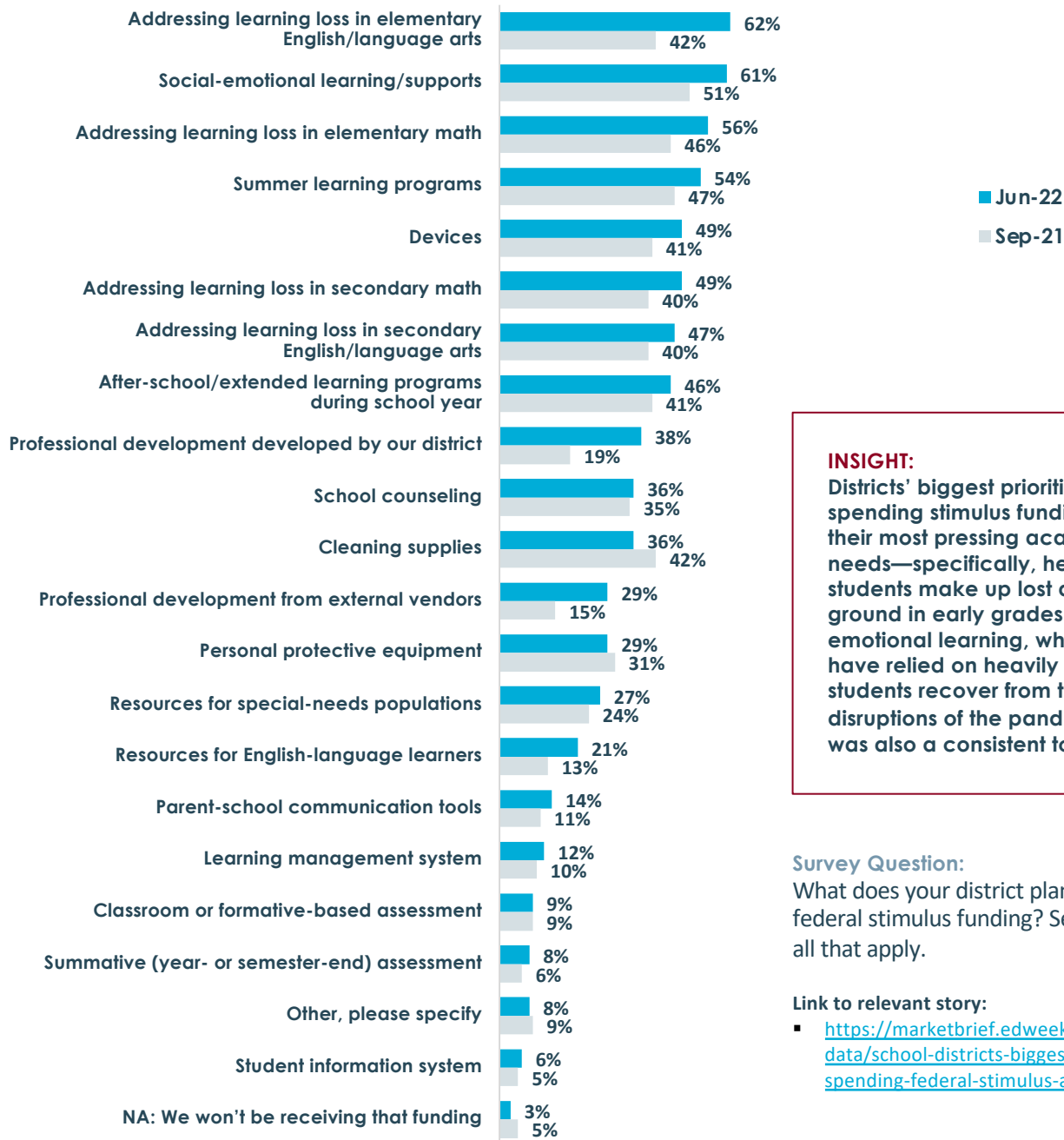
Link to relevant story:
 ▪ <https://marketbrief.edweek.org/market-trends/tutoring-expanded-summer-school-sel-inside-look-districts-spending-federal-stimulus-dollars/>

SOURCE: EdWeek Research Center nationally representative June/July 2022 survey of 280 district administrators

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THE IMPACT OF STIMULUS FUNDING

How Have Districts' Top Stimulus Spending Priorities Changed From Last Year?



INSIGHT:
Districts' biggest priorities for spending stimulus funding reflect their most pressing academic needs—specifically, helping students make up lost academic ground in early grades. Social-emotional learning, which districts have relied on heavily to help students recover from the disruptions of the pandemic, was also a consistent top need.

Survey Question:
What does your district plan to fund with federal stimulus funding? Select all that apply.

Link to relevant story:

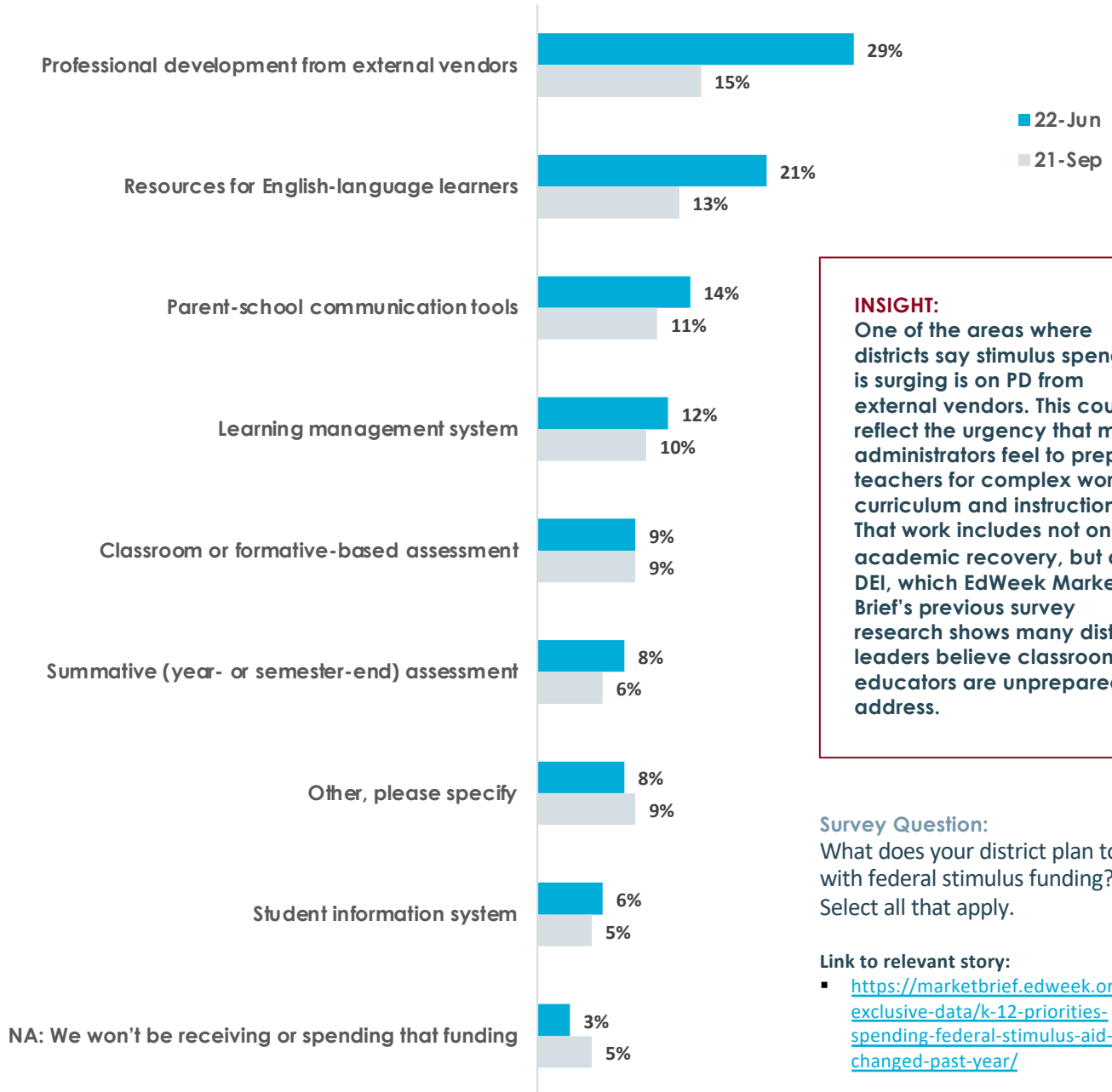
- <https://marketbrief.edweek.org/exclusive-data/school-districts-biggest-worries-spending-federal-stimulus-aid/>

SOURCE: EdWeek Research Center nationally representative surveys taken in September 2021 of 277 district leaders and June 2022 of 280 district leaders

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THE IMPACT OF STIMULUS FUNDING

A Surge in Stimulus Spending On PD From External Vendors



INSIGHT:
 One of the areas where districts say stimulus spending is surging is on PD from external vendors. This could reflect the urgency that many administrators feel to prepare teachers for complex work in curriculum and instruction. That work includes not only academic recovery, but also DEI, which EdWeek Market Brief's previous survey research shows many district leaders believe classroom educators are unprepared to address.

Survey Question:
 What does your district plan to fund with federal stimulus funding?
 Select all that apply.

Link to relevant story:
 ▪ <https://marketbrief.edweek.org/exclusive-data/k-12-priorities-spending-federal-stimulus-aid-changed-past-year/>

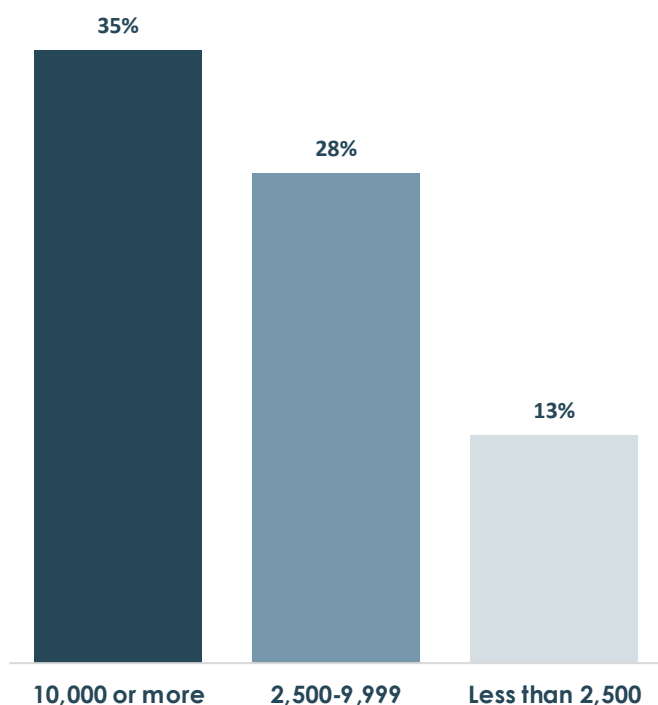
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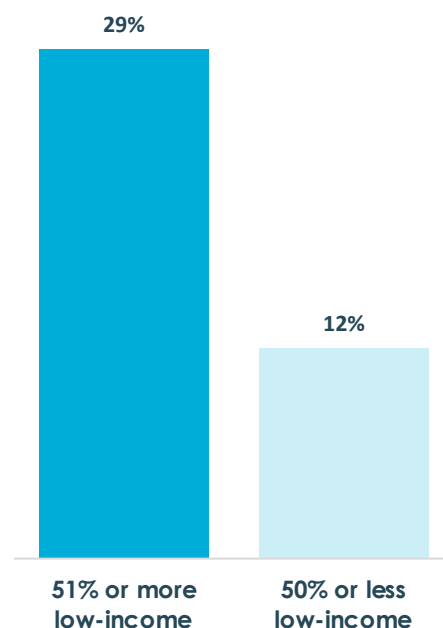
THE IMPACT OF STIMULUS FUNDING

Much Greater Need for ELL Resources In Urban, and in Impoverished K-12 Systems

District size/enrollment



Reduced price lunches



INSIGHT:

High-poverty school systems and those with the largest enrollments are most likely to spend stimulus dollars on ELL needs. It's a reflection of the populations those school systems serve, and perhaps also of the academic struggles those districts have seen those student populations as their school systems emerged from COVID-19.

Survey Question:

What does your district plan to fund with federal stimulus funding? **Resources for English-language learners**

Link to relevant story:

- <https://marketbrief.edweek.org/exclusive-data/school-districts-biggest-worries-spending-federal-stimulus-aid/>

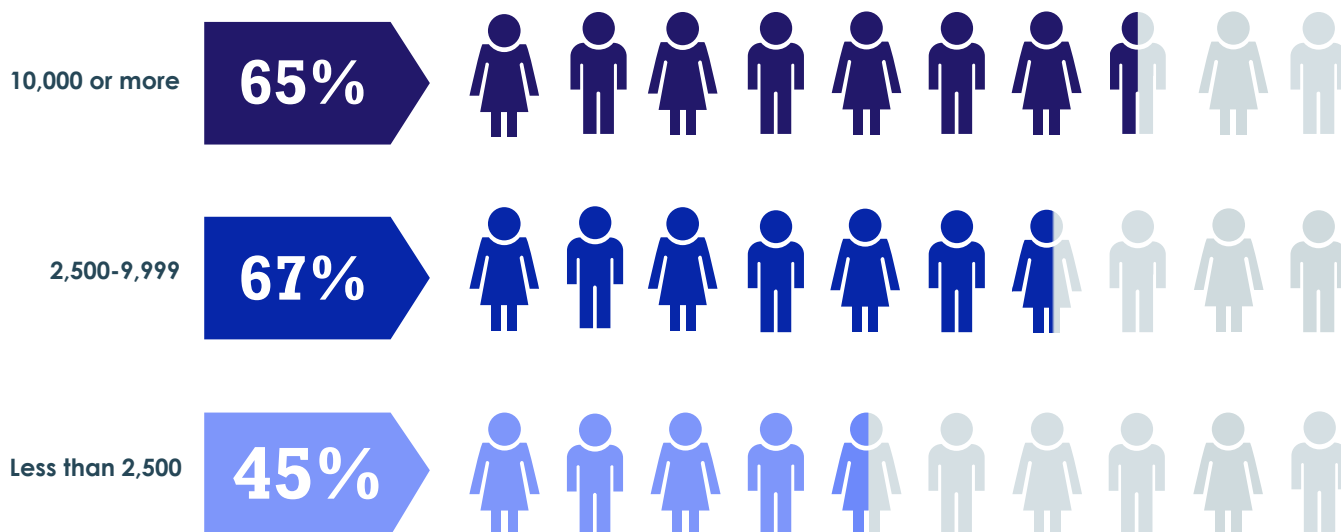
SOURCE: EdWeek Research Center nationally representative survey of 280 district administrators and 255 school leaders

THE IMPACT OF STIMULUS FUNDING

Large Districts Expect More Stimulus Spending on Summer Learning

Approximately how many students are enrolled in your school district?

Summer learning programs



INSIGHT:

Large- and medium-sized school districts are much more likely to spend stimulus funding on summer learning programs than are the smallest systems. Larger districts could regard summer learning programs as a key vehicle for addressing the unfinished learning bedeviling their districts. Smaller systems, meanwhile, may lack the personnel and financial resources to sustain them.

Survey Question:

What does your district plan to fund with federal stimulus funding? **Summer learning programs**

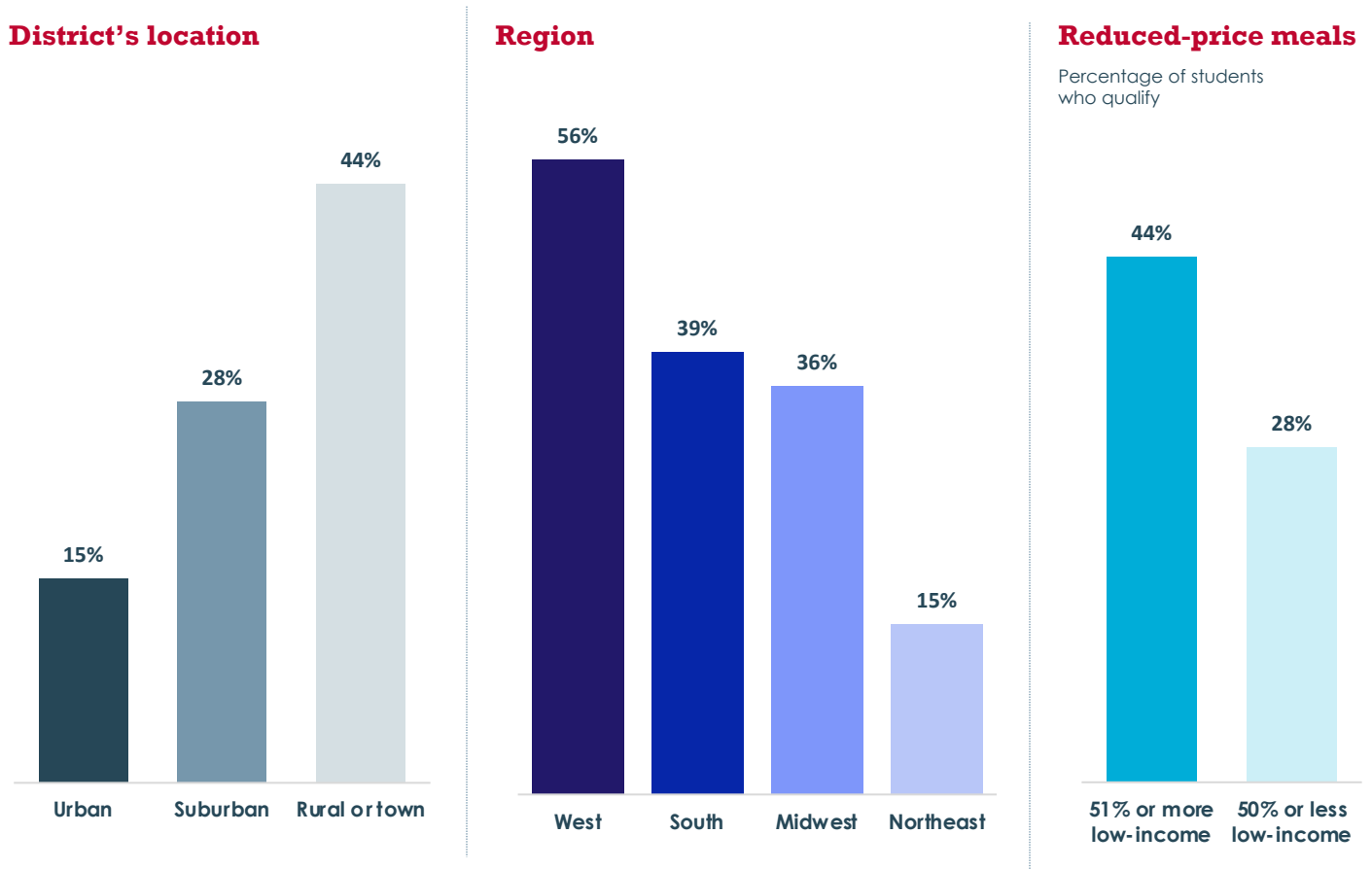
Link to relevant story:

- <https://marketbrief.edweek.org/marketplace-k-12/message-summer-learning-providers-make-equity-priority/>

SOURCE: EdWeek Research Center nationally representative survey of 280 district administrators and 255 school leaders

THE IMPACT OF STIMULUS FUNDING

Legacy of the Pandemic: Rural And Impoverished Systems More Likely To Spend Stimulus on Cleaning Supplies



INSIGHT:
 Many districts are still spending emergency aid on cleaning supplies associated with fighting COVID. Some continue to rely on federal money for that purpose. Rural and impoverished school districts, for instance, are much more likely than others to spend on cleaning supplies.

Survey Question:
 What does your district plan to fund with federal stimulus funding? **Cleaning supplies**

Link to relevant story:
 ▪ <https://marketbrief.edweek.org/k12-insider/california-district-needed-bounce-back-covid-focused-re-engaging-students/>

SOURCE: EdWeek Research Center nationally representative survey of 280 district administrators and 255 school leaders

Key Contributors



Sean Cavanagh is the managing editor of *EdWeek Market Brief*, where he leads a team of editorial staff focused on delivering actionable intelligence about the needs and priorities of school districts to companies and other organizations working in the K-12 market. Before he began working on business and technology issues, he covered a variety of beats for Education Week, including math and science education, charter schools and school choice, state policy, and federal policy. Prior to joining Education Week, he was a reporter for daily newspapers in Tennessee and Florida.



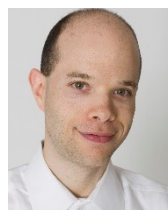
Maurice Bakley is the publisher of *EdWeek Market Brief*. In this role, he oversees the team creating original reporting, actionable analysis and proprietary research to inform the K-12 business community and leads Education Week's overall revenue strategy and customer service offerings for K-12 Districts, K-12 Industry and Higher Education. Prior to joining Education Week, Maurice was President of FierceMarkets, a B2B media company serving professionals in the Telecom, Healthcare, Life Sciences, Technology and Retail markets throughout the US, Europe and Asia. He holds an MBA from Harvard Business School and a BA in International Relations and German from Tufts University.

Liz Yap is the lead designer for the report and data visualization.

EdWeek Research Center



Holly Kurtz directs the Education Week Research Center, which produces standalone studies as well as analyses for Education Week and special reports such as Quality Counts. Holly began working at Education Week in 2014 after earning a Ph.D. in 2013 from the University of Colorado at Boulder's School of Education and completing a postdoctoral fellowship at the University of Colorado at Denver's School of Public Affairs. Prior to attending graduate school, she spent 11 years covering education and other topics for newspapers in Florida, Alabama, and Colorado.



Sterling Lloyd is the assistant director of the EdWeek Research Center. In this capacity, he manages data analyses and the development of surveys for data-driven journalism, including the high-profile Quality Counts report cards. Since joining the research center in 2005, he has authored articles on college- and work-readiness, school finance, student achievement, and other prominent topics in K-12 education.



Alex Harwin is a quantitative research analyst for the EdWeek Research Center. She works on a wide variety of projects, from marquee annual reports such as Quality Counts to data-driven reporting in collaboration with the Education Week newsroom. She received her education at Stanford, and UT with degrees in Sociology and policy analysis.

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