

# APPENDIX E: INTEGRATED NEEDS ASSESSMENT TOOL

Applicants will not be required to submit their needs assessment but are expected to use the inputs gathered through the needs assessment processes to inform their integrated application, plan, and budget.

**Please Note:** Completion of the Early Literacy [Program Review Tool](#) is a requirement and should be completed as you work through your needs assessment.

## FACILITATION AND USE

Engaging in a needs assessment occurs over time, not in one sitting. It is informed by community input, varied perspectives, data analysis, and discussion with a diverse team who can speak candidly about the district or school's strengths and opportunities relative to the four common goals. There are many approaches teams can take as they engage with this process.

A few general considerations:

- Consider the scope and timing of engaging with this integrated needs assessment. Engagement can happen at the school, district, and consortia levels.
- Aligning the needs assessment process with larger strategic planning processes might be helpful to reduce duplication of work. Accreditation efforts can also be integrated with these processes.
- Team make-up can vary. Applicants may choose to have one consistent group meet intermittently over a period of time to move through the integrated needs assessment. Another approach is to have several smaller teams focus on key aspects of the integrated needs assessment.
- Leadership is critical to setting the tone of the work, preparing the team by: attending to scheduling needs, ensuring time is protected, gathering necessary data, setting expectations or community agreements that allow room for transparent discussion, facilitating use of an equity lens and encouraging divergent thinking.
- There are two new appendices in the Integrated Guidance, offering tips and suggestions for effective interaction as a Perkins direct grant recipient or as a member of a CTE regional consortium.

## IDENTIFYING PARTICIPANTS

Consultation with a diverse body of partners is an important aspect of a needs assessment. Review the list of participants below, and identify which roles apply to your team or district. Prior to beginning the integrated needs assessment, assemble a leadership team to help guide the work, facilitate conversations, and ensure an equity lens is employed each step of the way. The team should be small but must include people who can leverage systems to assist in the task ahead. As not everyone can be a part of the needs assessment team, applicants are encouraged to share a summary or highlights of the learning with their education and community partners.

## POTENTIAL PARTICIPANTS<sup>159</sup>

- \*Students and parents (use multiple avenues such as existing meetings, surveys, or focus groups).
- \*Representatives of focal groups as defined within the [Student Success Act](#).
- \*Representatives from Indian tribes or tribal organizations.
  - *If you are a district receiving greater than \$40k in Title VI funding or have 50% or more American Indian/Alaska Native Students, you are required to consult with your local Tribal Government. As evidence of your consultation on all aspects of the Integrated Plan, you will be asked to upload documentation of your meeting(s) containing signatures from Tribal Government representatives as well as school district representatives.*
- \*Representatives from agencies serving at-risk, houseless and out-of-school youth and adults, foster youth, military families, disability services, STEM Hubs, and Regional Educator Networks.
- \*CTE Regional Coordinators.
- \*CTE faculty, advisors, and administrators from secondary and postsecondary institutions.
- \*State or local workforce development board representatives.
- \*Representatives from a range of local businesses and industries, particularly those representing the area labor market needs.
- Mental and behavioral health staff.
- Administrators from all grade levels & educators (including postsecondary representatives).
- Community partners associated with SSA Statewide Plans - [African American/Black Student Success Plan](#), [American Indian/Alaska Native Student Success Plan](#), [Latino/a/x and Indigenous Student Success Plan: Phase 1](#), [LGBTQ2SIA+ Student Success Plan](#).

## DURING THE INTEGRATED NEEDS ASSESSMENT MEETING

The Facilitator will walk the team through an overview of this integrated needs assessment tool, including its purpose and desired outcomes. Then, they will guide the team as they work through each of the four common goals utilizing the following steps:

1. Assign a note-taker.
2. Read the goal and its definition.
3. Solicit clarifying questions from the team.
4. Confirm the team's shared understanding of the goal.
5. Guide the participants through a discussion of each of the primary questions, ensuring the observations or findings of the team are supported by data. The primary questions are intended to be high-level questions that look across the district, schools, programs, etc.
6. A team member should take notes on the data sources used, and capture each new observation or finding as this discussion takes place.
7. Once the team is satisfied with the observations or findings they've listed for the primary questions, move to do the same process with the deeper analysis and high school focus questions.
8. Move the team into thinking about and documenting contributing factors that impact the patterns and trends identified.
9. Finally, utilize a consensus-based approach to determine the priority level of addressing the observation or finding.

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<sup>159</sup> Asterisk (\*) indicates required participants for all recipients with a CTE Program of Study.

## COMPLETING THE INTEGRATED NEEDS ASSESSMENT

Once all participants have had a chance to provide input on the integrated needs assessment, it is important to share your learnings with your community, your CTE Regional Coordinator to inform regional planning, and other partners who may like to offer additional input. Additionally, the information captured should be accessible as applicants move to completing the integrated application and integrated plan and budget.

### QUALITY OVER QUANTITY

Engaging in this integrated needs assessment involves developing shared understanding and articulating plans for the integrated application. The tools and resources provided here aim to support rigorous analysis of data, bringing collaborators together, and building consensus on priority issues. A highly attentive process for each goal chart row may take more time but yields valuable insights and agreement on core system issues. For instance, assigning a single staff member may quickly populate the needs assessment but lacks diverse perspectives and may miss contributing factors. Alternatively, a diverse team working collaboratively may fill fewer entries but uncover new insights altering district priorities. Consider the benefits of a high-quality process over a quick one that overlooks significance.

### DATA SOURCES & ANALYZING DATA

The insights that are gleaned from data review and community engagement must inform the selection of priorities for the planning and application processes as it relates to the system's responsibility to better meet the strengths and needs of students. The use of data is a critical component of this integrated needs assessment as applicants prepare for the integrated application. Reviewing data can help uncover trends, highlight students' strengths, identify gaps in access or opportunity, and help make meaning out of the complexity of the school, district, or consortium. Disaggregated data, or data broken out into smaller categories such as focal groups, can be illuminating and limiting.

*Examples of disaggregated data for analysis include, but are not limited to:*

#### K-12 Continuum

- Students identified as eligible for Special Education services and Special Education outcomes
- Student discipline rates
- Student regular attender/chronic absenteeism rates
- District & staff demographics (including retention)
- Teacher credentialing, tenure, performance, and observational information
- SEED survey

#### Early Learning & Elementary Focused

- PreK and early learning experiences of children arriving in kindergarten
- Universal screening data
- Third grade reading and math proficiency rates in assessment
- Local metrics for student wellness

#### Middle/High School

- 9th grade on track rates, graduation rates, and completion rates
- CTE/Perkins disaggregated data on performance targets<sup>160</sup>
- [Oregon CTE Participation Data Explorer](#)
- Labor Market Information
- Transitional outcomes for students entering middle and high school
- Credits earned including dual college credit, including CTE dual credit, and AP/IB achievement

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<sup>160</sup> Perkins Performance data can be found on the [district website](#) in the Achievement Data Insight section, or by consulting with the CTE Regional Coordinator.

- Rates of participation, concentration, and success in career and technical education Programs of Study including work-based learning experiences
- Learning opportunities and outcomes in alternative learning environments
- Results of High Quality Program of Study assessments
- FAFSA/ORSA completion and college enrollment
- Participation in the arts, sports, or other extracurricular and co-curricular programs

## CONTRIBUTING FACTORS

While analyzing data and making observations and findings, it is crucial to begin to identify contributing factors that impact trends and patterns. These may include factors that are both within and outside your sphere of influence, but are important to name so that clear prioritization can occur based on your system's capacity and readiness. It is important to try and note both what is known and unknown. *Example Factors to consider include:*

- **Learner Factors** (e.g. Engagement, Mobility, Language Barriers, Mental Health, Socio-economic)
- **Instructional Factors** (e.g. Culture of high expectations, Continuous improvement processes, Aligned instructional system, Use of RtI systems, Extended Learning Time, Teaming, Transition)
- **Climate/Culture Factors** (e.g. Safe, orderly, engaging and challenging learning environments, Communities of Practice, Recruitment/Retention, Integrated and aligned interventions, Supports for the whole-child, Partner Engagement, Two-way Communication)
- **Family & Community Factors** (e.g. Support for the learners' families, Family/community engagement in the learning process, Authentic community engagement, Ability to leverage new and existing partnerships)

While analyzing contributing factors, it is important to try and name the factors that you are confident are occurring, *as well as* factors that may be beyond your awareness (or for which you don't have sufficient data) that you may wish to track. For example, your district may be confident that professional learning and coaching is happening around literacy instruction. At the same time, students are navigating unfinished learning due to pandemic impacts that are contributing to the patterns you are noticing. The latter may reveal a new need or priority for data collection.

## PRIORITY LEVELS

Once your team starts to examine data sources, make observations/findings, and identify contributing factors, priorities may start to emerge (or you may have already had a sense of priority as you went through the process). It is important to note that what might be priority for one person or group can look different than others, or that what might seem like a "naturally" high priority level relates to one's own values, positionality, and even unconscious biases. A clear process or protocol for assigning priority level is therefore needed. It is recommended that you utilize your equity lens throughout the needs assessment and in particular when prioritizing issues over others. Understanding that there are a variety of logistical realities that go into setting priorities, some key considerations are:

- **Who** determines (and should determine) priority? What power do they have (or not have)?
- **How** should priority be determined (i.e. what process will you use)? Are you using a consensus-based approach (like Fingers to Five) or delegating decision-making power? Why?
- **If** you are navigating differences in perspective and feelings about prioritization, how will you address that? What agreements have you created about engaging tension, allowing for pause/non-closure, or decision-making?

The table below is an example of a structure to help you in your discussions on Equity Advanced, Engaged Community, Well-Rounded Education and Systems and Capacity.

<i>Data Sources</i>	<i>Observations/Findings</i>	<i>Contributing Factors</i>	<i>Priority Level</i>
<i>(List sources of data used)</i>	<i>(Summarize positive and negative key findings from review of data source. Statements should be in response to the guiding questions above.)</i>	<i>(Use community, educator, and student engagement to explore and expand on potential root causes of the finding. Ask students about their experiences.)</i>	<i>(Minimal, Minor, Moderate, Significant, or Severe)</i>
<i>CTE/Perkins Data</i>	<i>Students navigating poverty are underrepresented in CTE courses.</i>	<i>Recruitment efforts have not intentionally included students navigating poverty.</i>	<i>Significant</i>
<i>Parent Survey</i>	<i>Elementary after school enrichment program has provided opportunities for students to experience a variety of activities, and has provided necessary support for families as we continue to navigate COVID-19 impacts.</i>	<i>Support for the learner’s families.</i>	<i>Moderate</i>

**EQUITY ADVANCED**

Each of the programs integrated under this guidance are linked to outcomes that would end the predictable disparity in academic success and student well-being based on both poverty and race. Each initiative contributes to creating richer and more meaningful learning conditions where children, young people, their families, and educators are seen as whole.

**PRIMARY QUESTIONS**

- How have we advanced equity in the past two years? Where do we need more focus?
- What patterns or trends can we identify in our school environment over the past 3-5 years?
- As we look at disaggregated data, what patterns or trends do we identify among the focal student groups?
- What factors contributed to the patterns/trends identified?

**DEEPER ANALYSIS**

- What barriers currently exist that prevent certain focal student groups from accessing programs?
- What adaptations and supportive services would help ensure access and equity for students within programs?
- How effective have you been in recruiting diverse populations of learners into your programs?
- Which recruitment efforts are most and least successful?
- How are teacher instructional practices systematically reviewed and needed changes incorporated into school level professional development plans?

**HIGH SCHOOL FOCUS**

- Which focal student groups are underrepresented in our CTE Programs of Study and CTE Student Leadership Organizations (or CTSO)? Representation by gender?
- How are schools ensuring English Language Learners are taking appropriate courses to ensure on-time graduation?
- Looking at demographic data related to advanced course enrollment (CTE, AP, IB, dual credit, etc), what systems need to be put in place to ensure equitable participation, retention, and success rates in those classes? If there are multiple high schools, including alternatives sites, in our district, what does each school’s policies look like?

## WELL-ROUNDED EDUCATION

Well-rounded education moves beyond the courses students take and into the essential knowledge and skills students need to be successful in life. This requires a focus on the whole student. This means student mental and behavioral health, safety, and well-being cannot be separated from academic opportunity and achievement. This requires a commitment to pedagogy and practices that ensure students are known and seen in their learning and school experiences.

**Please Note:** Completion of the Early Literacy [Program Review Tool](#) is a requirement and should be completed as you work through these questions as a part of your needs assessment.

### PRIMARY QUESTIONS

- How have we supported a well-rounded education in the past two years? Where do we need more focus?
- What patterns or trends in well-rounded education opportunities can we identify over the past 3-5 years?
- What factors contributed to the patterns/trends identified?

### DEEPER ANALYSIS

- How do we ensure equitable access to well-rounded education for students from focal student groups both within individual schools and between schools in our district?
- Where do the biggest gaps in performance exist between student groups? Why might these gaps exist?
- What are the top mental and behavioral health needs of our students? How are we supporting them? Where are there still unmet needs?

### HIGH SCHOOL FOCUS

- Are there systems in place to provide academic support to students that are at risk of not graduating on time? If there are multiple high schools in your district how do you ensure these systems are in place at each site? Are there any barriers that prevent students from accessing these supports?
- Are your CTE Programs meeting student interest and labor market demand? What programs might need to be developed, discontinued or retooled? How has work-based learning been incorporated into your programs??
- What opportunities exist for students to earn postsecondary credit while in high school (CTE, dual credit, IB, AP)?
- How well does your school, institution, or region provide training, information, and support to educators, counselors, family, and administrators and/or volunteers about and around CTE as an opportunity for students to envision career options and start along a career pathway?

## ENGAGED COMMUNITY

Communities form the larger education system that supports families and students. Deepening relationships, partnerships, and engagement with communities is critical to achieve equitable outcomes and build healthy school and district systems.

### PRIMARY QUESTIONS

- How have we strengthened partnerships in the past two years? Where do we need more focus?
- What patterns or trends among community participation can we identify over the past 3-5 years?
- As we look at disaggregated data, what patterns or trends do we identify among focal student group feedback or input?
- What factors contributed to the patterns/trends identified?

## **DEEPER ANALYSIS**

- What opportunities exist in our region to improve communication and information flow to create a more coherent and inclusive process with students, families, staff, and community members?
- How have we engaged with partners such as ESD liaisons, CTE Regional Coordinators, and others to assist with the implementation of this integrated guidance and completing the needs assessment?
- What are our communication processes and feedback processes between buildings within our districts?
- How are we doing on the Community Engagement spectrum? Are we using the spectrum to grow skill and build trust?

## **HIGH SCHOOL FOCUS**

- How have we strengthened engagement with district CTE teachers, local or regional workforce development boards, and local business and industry, and local community college CTE deans and instructors? Where can we improve?

## **STRENGTHENED SYSTEMS & CAPACITY**

Educational systems are made up of people, practices, policies, resources, community assets, and partnerships. Joint determination is needed to strengthen the capacity for whole system success. Shared responsibility and accountability for the success of students in Oregon's schools requires systemic change.

## **PRIMARY QUESTIONS**

- How have we strengthened district systems and capacity in the past two years? Where do we need more focus?
- What patterns or trends about our district systems can we identify over the past 3-5 years?
- As we look at disaggregated data, what patterns or trends do we identify among the focal student groups?
- What factors contributed to the patterns/trends identified?

## **DEEPER ANALYSIS**

- What evidence based practices are being used to increase student attendance? What barriers exist?
- What factors influence the recruitment, retention and training of educators and counselors? What groups are underrepresented in teaching, support, counseling and leadership?
- What root causes prevent focal student groups from deeper levels of engagement, belonging and attendance?
- What strengths in systems exist in supporting students and families with transitions in early childhood education to elementary? Elementary to middle? Middle to high school? High to postsecondary and/or workforce? Where can improvements be made?
- How is Career Connected Learning, including awareness, exploration, preparation, and training, incorporated into your district system?

## **HIGH SCHOOL FOCUS**

- How are you systematically partnering with students and families in grades 9-12 to discuss transcripts, graduation requirements, and students' career and educational goals? If there are multiple high schools in your district how do you ensure these systems are in place at each site?
- How are you engaging students and parents to talk about college and careers in order for them to be informed and prepared for course selection?