SECTION 4: HOW PLANS WILL BE REVIEWED, EVALUATED, AND FINALIZED

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Section Snapsot
This section describes the values and processes plans will move through to complete review.

At the completion of the integrated application submission and review period in Spring 2023, ODE solicited feedback from the field. Grantees, ESDs, and other invited partners identified areas that moved smoothly and places in the process where grantees experienced friction. Some changes in the application review process include:

- **Additional Assurances** - Requirements have been re-assessed, leading to the addition of new assurances. This reduces the need for narrative responses, and instead, an assurance verification will be required.

- **Review Process** - The evaluation criteria was examined and adjusted to be more clear and to better align with requirements. Additionally, the category of Needs Significant Changes to Meet Requirements was adjusted based on grantee feedback.

- **QALP Process** - At times, the QALP delayed the timeliness of grantees getting feedback on their applications. Adjustments have been made to the process while still allowing for ODE's review process to go through a quality check.

- **Added Appendices** - Additional details have been included in the new appendices, providing further information and clarity on small and rural supports, working with CTE/Perkins, LPGTs, and other relevant topics.

APPLICATION EVALUATION PROCESS

Each application will undergo a thorough evaluation process for approval; after which, it will be known as an integrated plan. The timing for this process is outlined below as there are a number of variables, including when applicants submit their initial application and any required follow up of submissions, that can impact these processes.
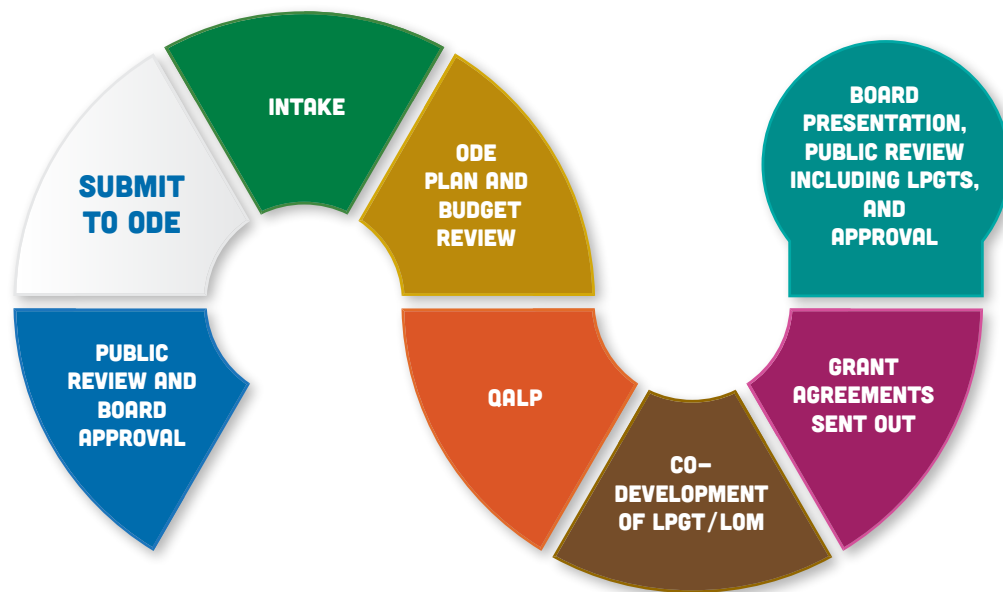
PRE–SUBMISSION TO ODE: PUBLIC REVIEW AND BOARD APPROVAL

Presenting the integrated application to an applicant's governing board[55] is a requirement and is beneficial as investments in education must be accompanied by transparency and accountability. Sharing the application is key to being responsive to community needs and building trust.

In order to meet his requirement, you must **present** your integrated application, which includes:

- Integrated application questions;
- Outcomes;
- Strategies; and
- Activities (for two years of budgets).

There must be an oral presentation of the integrated application, during an open board meeting, with opportunity for public comment. This cannot be a consent agenda item. The application must also be **approved** by the governing board.

ODE EVALUATION STEP 1: INTAKE

The first step in the application review process will be completed by ODE. ODE staff will review the application and supporting attachments submitted as part of a district or school's application and will communicate directly with the identified district or school staff if any questions arise. Once all applications and related attachments have been confirmed the application will be assigned to an ODE review team.

ODE EVALUATION STEP 2: ODE PLAN AND BUDGET REVIEW

ODE staff reviewers trained to review and evaluate applications according to the evaluation criteria and overall ODE guidance will complete the formal review. Attention will be given to teaming ODE reviewers who bring a diversity of lived and professional experience.

The purpose of the ODE review is to conduct a comprehensive evaluation of the application to ensure all of the following:

1. Application completion;
2. Legal sufficiency; and
3. Clearly defined use of funds that meets the intent of the laws.

Multiple reviewers will read and evaluate each application and its attachments. Reviewers will reach agreement on a school or district's application with one of three assessments:

1. Application meets requirements.
2. Application will meet requirements with small changes.
3. Application needs more information to meet requirements.

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55   See Appendix O: Board Requirements for more detail

ODE EVALUATION STEP 3:
QUALITY ASSURANCE & LEARNING PANEL

In alignment with our commitment to develop shared responsibility and confidence in our public schools and to facilitate learning within and across schools, districts, and communities, a random sampling of 25-30 applications will consist of a Quality Assurance and Learning Panel (QALP) review. The panel review is not determining whether or not an application meets the requirements but rather is affirming or challenging the assessment made by ODE staff and spurring additional review processes for that given application through a set process. In addition to reviewing the work done by ODE staff, the goal is to also increase the learning about the work being done in districts, charter schools, YCEPs, JDEPs, regions, and communities across the state of Oregon.

The purpose of the Quality Assurance and Learning Panel is to:

1. Support public understanding and grow confidence in the implementation of the various initiatives.
2. Create conditions conducive for learning across districts and communities.
3. Support ODE's review efforts with a quality check.

Panel Composition:

- A Quality Assurance & Learning Panel will ideally be composed of:
    - Practicing or retired educators
    - Current students
    - Community partners and employers
    - Family members and/or advocates representing/serving parents and families
    - Representatives from philanthropy or business
    - School board members and elected representatives
    - School and district administrators - including ESD leaders
    - Postsecondary leaders

Reviewers will share their evaluation criteria findings with a Quality Assurance & Learning Panel (QALP). This will include which indicators did and did not meet requirements as well as information about proposed spending.

ODE EVALUATION STEP 4:
CO-DEVELOPMENT OF LONGITUDINAL PERFORMANCE GROWTH TARGETS (LPGT) AND LOCAL OPTIONAL METRICS (LOM):

The final stage of the application process prior to the release of grant agreements is the Longitudinal Performance Growth Target and Local Optional Metric co-development phase. Applicants will co-develop two additional years of LPGTs and LOMs. This process is addressed in more detail in Section 6 and a resource is provided in the appendix. Applicants will move into this phase when their application either "Meets" or "Meets with Small Changes". Applications needing more information to meet requirements will wait for co-development until the additional information is received and reviewed; this will allow applicants to focus on the needed information.

FINALIZED INTEGRATED PLANS

The finalized integrated plan consists of the approved application, including any changes made or additional information submitted, and the co-developed LPGTs and LOMs.

GRANT AGREEMENTS

The finalized grant agreement (inclusive of the LPGTs and LOMs) must be presented and approved by the governing board. Similar to the application, an oral *presentation* of the grant agreement must be made at an open meeting, with opportunity for public comment. This cannot be a consent agenda item and must be *approved* by the board following the oral presentation. Presentation to the governing body and approval from the governing body must happen prior to the grant agreement being fully executed and funds being released to the grantee. For more information about these requirements, please see the Board Requirement Appendix.