

# EDUCATION STAFF RETENTION AND RECRUITMENT GRANT

## FREQUENTLY ASKED QUESTIONS (FAQs)

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## General

**Q: Where can I read the administrative rules (OARs) for this program?**

A: When final, the rules will be posted on the [Secretary of State website](#) in OAR 581-017-0780.

**Q: Are grantees required to bargain these funds with unions?**

A: HB 4030 does not require grant recipients to bargain these funds with unions. It only requires that school district personnel be significantly involved with the application.

- Note: HB 4030 does not waive any bargaining provisions. If any of the strategies selected require bargaining, the grantee will still need to do so. This could happen later after the application is submitted because it will be part of the work of the grant.

## Application

### **Q: Which entities are eligible to apply for the grants?**

A: School districts, charter schools, and education service districts (ESDs) are eligible to apply. School districts are strongly encouraged to apply on behalf of their charter schools. Should a district opt to not participate or is unable to apply on behalf of a charter school, then the charter school may apply separately. ESDs may apply on their own, on behalf of a school district, or on behalf of a consortia of districts. Similarly, multiple districts or charter schools may apply as a consortium.

### **Q: When is the application period?**

A: The application period opens on **May 6, 2022**, and closes on **May 31, 2022, at 5:00 PM**.

### **Q: Where can I find the application?**

A: The application is posted on the [HB 4030 Education Staff Grants webpage](#).

### **Q: What happens to the allocations for ESDs, districts, and charter schools that do not apply?**

A: If an ESD, district, or charter school chooses not to participate in this grant program, their allocated funding is reallocated to the recipients that did apply by the end of the application period. Updated allocation amounts were posted in mid- to late-June.

### **Q: If an ESD, district, or charter school is applying as a consortium, do individual members also need to submit an application?**

A: No, only the entity applying on behalf of the consortium needs to complete the application.

### **Q: Is a grant application required to access the funds that are allocated to the entity?**

A: Yes, an application approved by ODE is required in order to access funds.

## Program Timeline

### Q: When can grantees spend the funds for the Education Staff Grants?

A: Grant funding can be used for any eligible expenses incurred between **April 15, 2022**, and **June 30, 2023**.

### Q: What is the grant timeline?

A: The timeline is:

- **May 6, 2022:** Application period opens.
- **May 19, 2022:** State Board of Education reviews the temporary rules.
- **May 31, 2022:** Application period closes.
- **June 15, 2022:** Grant recipients determined, and reallocations calculated.
- **October 5, 2022:** Final report templates and requirements made available.
- **October 20, 2022:** State Board of Education approves final rules.
- **January 11, 2023:** Grantees can begin submitting their final reports.
- **May 1, 2023:** Final reports due to ODE.
- **June 30, 2023:** Last day for grantees to expend funds.
- **July 31, 2023:** Last day for grantees to claim funds from ODE.

## Eligible Uses of Funds

### Q: Is there a full list of eligible expenses?

A: Yes. The list of eligible expenses can be found on page 4 of the [Program Summary](#).

### Q: What are examples of acceptable uses?

A: Examples include, but are not limited to:

- Providing bonuses for all staff
- Hiring and retaining transportation personnel that are a contract service (offering a higher starting rate)
- Developing a teacher residency program with post-secondary partner
- Funding tuition reimbursement
- Providing a health and wellness program
- Extending insurance to student teachers to relieve their non-earned financial burdens
- Supporting Administration and other non-union staff members
- Paying student interns for teaching or other positions
- Adding an additional contract day for workload relief
- Retaining staff that might be lost due to declining enrollment

Grant funds should be used to meet local needs, which vary considerably across the state, and should be used to support evidence-based strategies which are proven to be effective.

Grantees have significant flexibility, but are required to work with their personnel to identify a clear problem related to root causes of workforce retention and recruitment challenges. Once the problem(s) is identified, the applicant can select strategies and key action steps. Problems and strategies must be connected to the categories outlined in the [Program Summary](#).

The HB 4030 Equity and Innovation Menu in the [Grant Guidance](#) has suggested strategies. If selecting a strategy not on the menu, particularly one that is responding to a short-term need (one-time bonus, one-time increase in pay, etc.), it is critical to **consider**:

- How could this strategy be adjusted to help address the problem in the long-term?
- How can the strategy be maintained when these funds are no longer available?

### Q: Can grantees use funds for administrative or indirect expenses?

A: No. Per the Grant Agreement, Section II, Indirect / Administrative Costs: *Grantee will not be reimbursed for any indirect or administrative costs with Grant Funds.*

**Q: Can grantees use these funds for capital expenses?**

A: Yes, in some circumstances. Grantees would need to be able to explain how they would maintain the project going forward, and what other funds would be used. They would also need to be able to explain how these expenditures linked to their Problem of Practice (POP).

**Q: What are some suggestions on how to avoid using these funds as just a "one-time" retention bonus?**

A: See the HB 4030 [Equity and Innovation Menu](#) in the Grant Guidance document for suggested strategies.

**Q: Is there anything to prevent neighboring districts from offering a one-time bonus which could cause staff in our district to leave?**

A: No. Any district that applied for the funds needed to state in their application what persistent problem of practice they are attempting to solve and what strategies they will use to solve that problem. Grantees are allowed to tie a one-time bonus to a problem of practice.

## Claiming Funds

### Q: How do grantees request funds?

A: Claims can be submitted through ODE’s Electronic Grant Management System (EGMS).

### Q: How soon after the initial approval will grantees receive grant money?

A: Grantees are eligible to claim 85% of their total grant award as soon as their agreement is fully executed. They may claim the remaining 15% of their grant after they have submitted their final reports and these have been approved by ODE.

The Education Staff Retention and Recruitment Grant program was designed to allow grantees to claim 85% of their total grant amount as soon as their agreement was approved, allowing a claim for the remaining 15% after their final report is submitted and approved (by May 1, 2023).

Unlike other grant programs, it is not reimbursement-based. Our expectation is that each grantee will generally submit a total of two (or three) claims.

### Q: How do ESDs, districts, and charter schools that apply as a consortium submit a disbursement request?

A: Recipients that applied as a consortium identified a lead entity to act as the fiscal agent for the consortium (who is responsible for submitting the combined EGMS claims and distributing claimed funds to the members). This entity is also responsible for submitting the final report for the consortium.

### Q: Will grant recipients have to report on these funds separately from other funds?

A: Yes. Grantees will need to track these funds separately and follow the requirements in Appendix G of the [Program Budget and Accounting Manual](#).

### Q: What fund code do I use to track HB 4030 grant expenditures?

A: Grantees have the flexibility to use the fund code that works best for them. There is no required fund code for districts to use, unlike other state grants. However, we recommend creating a new special revenue fund in the 200 series.

### Q: When is the last day that a grantee can spend funds?

A: **June 30, 2023**, is the last day grantees can spend these funds. This means that grantees must have received all goods and services purchased with grant funds by this date.

### Q: When is the last day to request funds from ODE?

A: Grantees must submit all claims to ODE through EGMS by **July 31, 2023**.



## Reporting

### Q: What are the final reporting requirements?

A: Grantees are required to submit both a Narrative and Financial Final Report.

The Final Report consists of two parts: the **Final Narrative Report** and the **Final Financial Report**.

- Final Report submissions will be accepted **starting January 11, 2023**.
- Both reports must be **completed no later than May 1, 2023**.
- The Final Reports must be submitted and approved before grantees can claim the remaining 15% of their grant funds.

We recognize that some grantees will not have spent all of their grant, nor executed all of their strategies by the May 1st date. However, we know that grantees have a plan for their grant fund – know where they will be spending them – so final reporting will reflect funds that have been obligated by this date and final expenses estimated to the best of your ability.

### Q: How will grantees report?

A: There are two parts to the final reporting for this grant: a Narrative Report and a Financial Report. The Narrative and Financial Report templates can be found on the [Education Staff Grants webpage](#) under the “Final Reports” heading.

The Final Narrative Report will be submitted via Microsoft Forms. (At the end of the report, grantees will select “Submit” and it will be sent directly to ODE.

The Narrative Report allows grantees to briefly describe:

- Any substantive changes made to their implementation strategies,
- Specific impacts and measurable outcomes of the funding,
- Identified high needs specialties or workforce shortage groups,
- How the grant supported immediate workforce shortages,
- Ways the grant supported long-term solutions,
- Planned efforts to sustain these efforts, and
- How these funds were used in conjunction with other funding sources.

The Final Financial Report will be submitted on an Excel spreadsheet that must be emailed to [ODE.RetentionGrants@ode.oregon.gov](mailto:ODE.RetentionGrants@ode.oregon.gov)). The Financial Report allows grantees to report their grant expenditures by Strategy and Function and Object code.

**Q: How should Grantees select the Strategies for the Financial Report?**

A. Grantees should review their approved applications to determine which Strategies to report. The Financial Report spreadsheet tab – Summary of Expenses – has a list of Strategies at the top, with details of the Strategies and descriptions on the Strategy Definitions tab. If a Grantee used a Strategy that was not on the Equity and Innovation Menu, they can use the “Other” Strategy category.

**Q: How should Grantees select the Function Codes and Object Codes for the Financial Report?**

A. The Financial Report spreadsheet has separate tabs for many of the frequently used Function and Object Codes.

ODE will be using data from the final reports to explain how this grant program provided benefits to Oregon’s school districts, charter schools, and ESDs. Therefore, we are requiring Grantees to select Function Codes that clearly indicate the type of personnel benefitting. Please see the “Instructions” and “Example” tabs of the Financial Report template for additional information.

**Q: How do ESDs, districts, and charter schools that applied as a consortium report on their grant?**

A: For recipients that applied as a consortium, it is the responsibility of the consortium lead entity to provide a single final report for the activities of all consortium members. The final report for the consortium should be completed with the same level of detail as the plan specified in their application.

For example, if the consortium application was completed as if the consortium was a single entity (all members would be using the same strategies and activities), the final report should be completed in a similar manner.

In contrast, if the consortium application called out specific strategies and activities for each member, the final report should include data for each member individually.

## Appendix A: Updated Strategies by Category

Many of the below strategies were originally presented in the HB 4030 Equity and Innovation Menu on page 12 of the [Grant Guidance](#) document. The remaining strategies were commonly included in the HB 4030 applications and are indicated by an \*.

Category	#	Strategy Title	Description
Bonuses and Rewards	1	<b>Contract extensions for career advancement</b>	Develop cross-office partnerships to provide job rotations during non-contracted hours to enhance career opportunities for advancement.
Bonuses and Rewards	2	<b>Establish a transparent and equitable rewards program</b>	Design a total rewards system that helps to strategically evaluate non-compensatory rewards in alignment with organizational strategic goals.
Bonuses and Rewards	3	<b>Differentiated, multi-payment bonus compensation program</b>	Design a bonus option package that is allocated quarterly, for example, and aligned to performance goals to support minimum one-year commitment that includes onboarding support. For hard to fill/ shortage areas.
Bonuses and Rewards	4	<b>*One-time retention bonus for existing staff</b>	Offer a one-time bonus to staff current staff, either as recognition of their past commitment or as incentive to continue in their positions.
Bonuses and Rewards	5	<b>*Recruitment/sign-on bonus for new staff</b>	Offer a sign-on bonus, given to new staff upon accepting or starting their position.
Career Pathways and Preparation	6	<b>District post-secondary partnerships</b>	Districts work with post-secondary partner(s) to redesign educator preparation or offer accelerated endorsement programs, educator diversification, etc. that are aligned to local needs.
Career Pathways and Preparation	7	<b>Expand/connect to career pathways</b>	Identify education careers, particularly for adult students, career changers, and local community members who might otherwise not access required education or career opportunities.
Community and Culture	8	<b>Build a thriving organizational culture</b>	Conduct an organizational assessment to identify priorities for shifting organizational culture where every employee feels valued.
Community and Culture	9	<b>Collaborative leadership: Culture change</b>	Build a culture of collaboration, innovation, capacity building, and empowerment with your instructional leadership team.
Community and Culture	10	<b>*Relationships and community building</b>	Events or supplies which aim to foster positive working relationships between staff.
Data-driven Inquiry	11	<b>Develop a data-driven recruitment process</b>	Develop a recruitment process for hard to fill areas that identifies targeted states and universities, using data and research protocols to drive decision making.

Category	#	Strategy Title	Description
Data-driven Inquiry	12	<b>Engage in disciplined inquiry to understand root causes of burnout</b>	Utilize Plan, Do, Study, Act cycles to investigate root causes of staff job dissatisfaction specific to your local context and within your internal locus of control.
Mentoring	13	<b>Differentiated mentoring programs for staff</b>	Establishing in-district or regional mentorship programming/support, (including paid planning time), for matched licensed educators, and instructional aides or paraprofessionals.
Mentoring	14	<b>Induction and mentoring programs for new or novice staff</b>	Establishing in-district or regional supports for novice staff by role.
Professional Learning	15	<b>Cross-district, networked learning opportunities</b>	Work across districts to learn and identify strategies that will address root causes of working conditions that lead to burnout, such as providing staff with supportive structures, time for planning and collaboration, job embedded learning opportunities.
Professional Learning	16	<b>Professional learning: Additional hours</b>	Provide opportunities for contract extension hours (i.e. including afterschool and/or summer programs) to participate in professional development.
Professional Learning	17	<b>Professional learning: Ongoing, self-paced</b>	Provide multi-modal (online, in-person, hybrid) training options that are ongoing and allow self-pacing as well as build capacity for flexible school/district assignments.
Professional Learning	18	<b>Professional learning: Professional growth plans</b>	Move from evaluations to professional growth plans to create shared ownership and responsibility for professional growth.
Professional Learning	19	<b>*Professional learning: Other</b>	Other professional learning opportunities, such as one-time or multiple sessions delivered to staff district or school-wide (i.e. delivered at an all-staff meeting, grade-level or subject area coaching, etc.).
Staff and Family Assistance	20	<b>*Staff support: Childcare</b>	Provide support to staff with finding, financing, or accessing childcare.
Staff and Family Assistance	21	<b>*Staff support: Housing</b>	Provide support to staff with finding, financing, or accessing housing.
Other	22	<b>*Other (describe)</b>	Describe the strategy in the "Detailed Expenditure Description" column.