The Student Investment Account

2026 Legislative Report

January 2026

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EXECUTIVE SUMMARY

The Student Investment Account

The Student Investment Account (SIA) was established with the passage of the Student Success Act (SSA) [ORS 327.175](#) in May 2019. The SIA provides all Oregon school districts, eligible charter schools, Youth Corrections Education Programs (YCEP), and Juvenile Detention Education Programs (JDEP) with access to non-competitive grant funds from the SIA when they have complied with application requirements set forth by the legislature and administered by the Oregon Department of Education (ODE). The SIA receives at least 50% of the funds collected and deposited in the Fund for Student Success. SIA grants are established for two purposes: (1) meeting students' mental or behavioral health needs and (2) improving academic outcomes and reducing academic disparities for students of color, students with disabilities, emerging bilingual students, and students navigating poverty, homelessness, and foster care and any other student groups that have historically experienced academic disparity as determined by the State Board of Education (SBE) by rule. The student groups set out in the SIA are referred to in ODE communications and guidance as "focal student groups,'' which will be used throughout this document.

This annual report provides an update on program implementation in the 2024-25 school year, the investment of resources, an analysis of impact of investments, and a report on the 2025-27 application process. This report also marks an update of ODE's integration of ODE programs, a significant effort to further operationally align efforts within the agency that share common elements and common goals. School districts and eligible SIA grantees submitted the first applications in Spring 2023 for the 2023-26 school years and set performance growth goals through the 2027 school year. In Spring 2025, grantees submitted a second application and updated plan for the 2025-29 school years representing updates to the first plans and the integration of three additional ODE programs: Career Connected Learning, Early Literacy Success School District Grants, and Federal School Improvement for Comprehensive/Targeted Support.

This report focuses on the impact of the SIA grants through the 2024-25 school year, which is the second year of a four-year plan, with updated every two years. However, SIA grants are an integral part of the integrated programs and thus, the report will address other aspects of this integration as well. Additionally, the passage of the Education Accountability Act in 2025 (SB141) will further ODE's agency-wide efforts to effectively and operationally align even more programs with the goal of reducing administrative burden for school districts and other grantees and bringing focused attention on supporting student success across all programs.

2024-25 STUDENT INVESTMENT ACCOUNT IMPLEMENTATION

Background

In the 2025 SIA Legislative Update, ODE shared updates to implementation efforts to align six ODE programs, a response to the Student Success Act Budget Bill ([House Bill 5047](#)). The budget note directed "The Oregon Department of Education to explore the potential for combining grant applications, grant agreements, grant monitoring, and reporting for the School District Investment grants established in House Bill 3427 with other programs or grants administered by the agency including grants made from the High School Graduation and College and Career Readiness Fund (Ballot Measure 98), Title I grants where appropriate, and other grant programs identified by the agency."

In the 2024-25 school year, ODE's focused on ongoing support for the implementation of initial integrated plans for the 2023-27 school years, a first review of grantees' longitudinal performance growth targets, and support for grantees submitting plans for the 2025-29 application cycle. This cycle integrated three additional programs: Career Connected Learning, Early Literacy Success School District Grants, and Federal School Improvement for Comprehensive/Targeted Supports.

Working within existing state statutes and administrative rules, ODE developed a framework for success that meets the core purposes of each program while creating a stronger framework to track progress, look for long-term impacts, and develop the learning approach to monitoring and evaluation that is a hallmark of high-performing educational systems. Rather than working on multiple, separate plans for each program, schools and districts are now able to meaningfully plan for desired outcomes for students, schools, and communities, and then think apply the appropriate funding stream(s) for specific activities.

Grantees write plans focused on strategic planning for four years with a cycle of implementing and reviewing progress on the plans and submitting updated plans every two years. This cycle of executing four-year plans within Oregon's two-year biennial budget cycle embraces continuous improvement and allows for regular updates to plans based on reviews of what is working, what needs improvement, and shifting needs and community input.

In fall 2023, districts and SIA grantees began to implement their approved integrated plans. Plans include co-developed Longitudinal Performance Growth Targets for each of the five common metrics of the SIA:

The Student Investment Account

- Four-year graduation
- Five-year completion
- Third-grade reading
- Ninth grade on-track
- Regular attendance

Targets were set beginning with the 2023-24 school year and with annual goals through the 2027-28 school year. Additionally, districts and SIA grantees also had the option to set Local Optional Metrics to track progress in other important metrics with local significance and to demonstrate improvement in meeting outcomes named in their planning on their own terms. This report includes an analysis of the first review of district progress toward meeting growth targets.
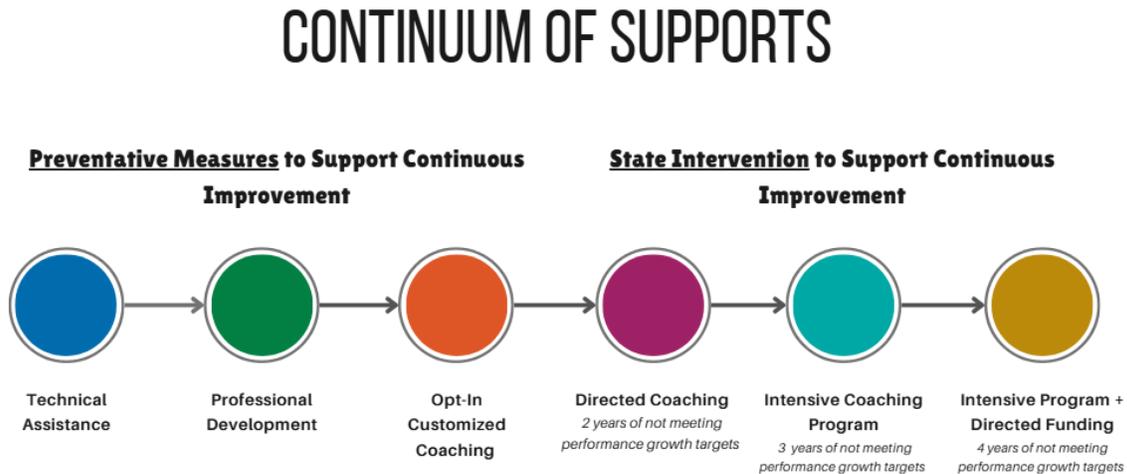
Graphic 1

A visual representation of the four-year planning cycle with biennial updates.
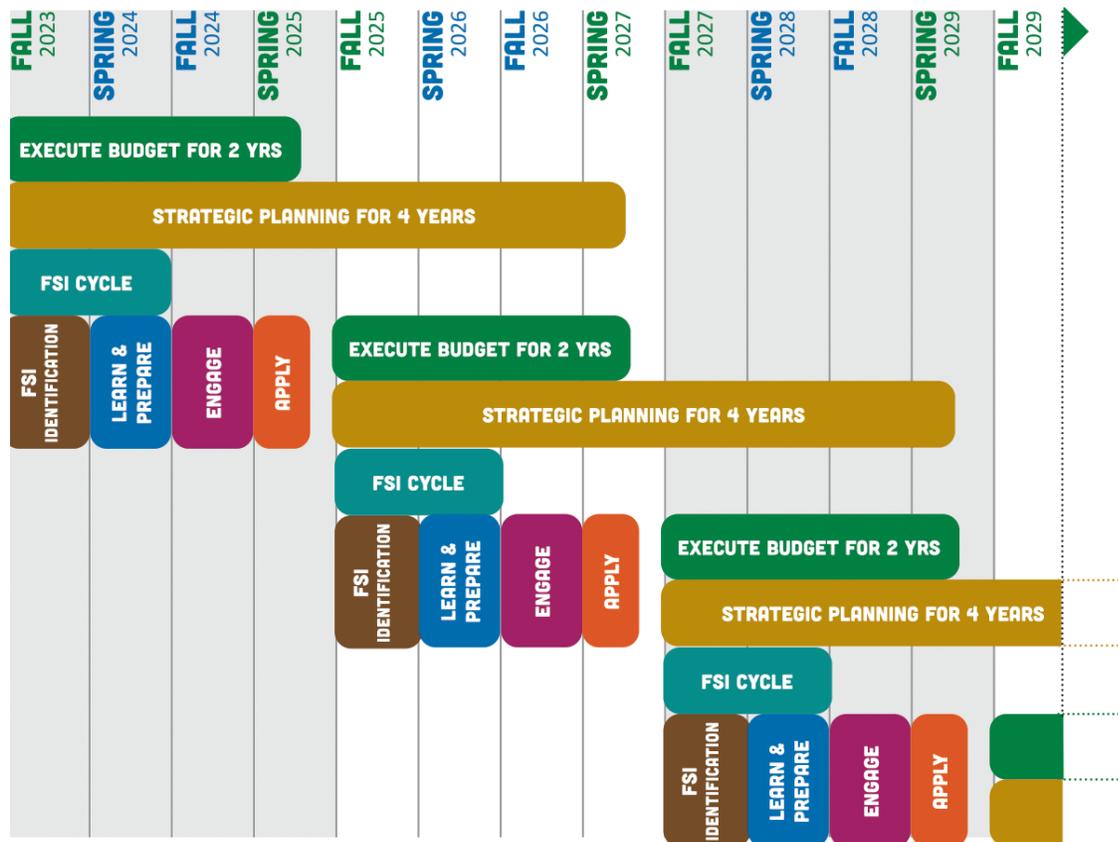
Continuum of Supports

Graphic 2

A visual representation of ODE's continuum of supports. Though depicted in a linear model, the continuum operates in a cycle of improvement.

CONTINUUM OF SUPPORTS

Preventative Measures to Support Continuous Improvement

State Intervention to Support Continuous Improvement

| Technical Assistance | Professional Development | Opt-In Customized Coaching | Directed Coaching *2 years of not meeting performance growth targets* | Intensive Coaching Program *3 years of not meeting performance growth targets* | Intensive Program + Directed Funding *4 years of not meeting performance growth targets* |

In the 2024-25 school year, ODE provided a range of supports for grantees to achieve the goals of the integrated programs. The graphic in this section shows the range of support ODE offers including technical assistance, professional development, and optional customized coaching. These are preventative measures available to all grantees. The Student Success Act and the Education Accountability Act include directed support if a grantee fails to demonstrate progress toward meeting expected growth. Though depicted in a straight line, the continuum of support is intended to be cyclical and non-linear to respond in real time to the needs a grantee has.

The Education Accountability Act calls for ODE to further align a continuum of support across the agency with clear entry and exit points for grantees that is linked to performance reviews and progress toward performance growth targets. Those efforts are underway.

This section outlines some of the supports available but is not an exhaustive list of all the supports offered across the agency.

Regional Support Model

ODE developed a regional support model with the rollout of the first Integrated Program Application in the 2023-24 school year. The purpose of this effort was to de-silo and better coordinate internally across programs. The model involved a dedicated team to support grantees across the programs within the Integrated Plan. Regions are organized around Education Service Districts. Since implementation, stronger relationships have been built

between regional teams, ESD staff, and grantees. A regional approach allows ODE staff to become more familiar with the context of a region, develop collaborative relationships, and focus on a holistic picture of a region to improve how ODE responds to regional needs.

ODE has continued to expand and improve this model since the 2023-24 implementation year based on feedback and continuous learning. The regional model is now configured as:

- Regional Supports: This approach seeks to understand the needs of school districts and schools in an ESD region as it relates to Integrated Programs (and beyond) and ODE's ability to deploy resources and needs to respond to these needs.
- Regional Structure: The structures in place to deploy regional supports.
- Integrated Program Specialists: Staff dedicated to implementing regionalized support plans and development.
- District Grant Managers: Staff assigned to an ESD region to support grant management and monitoring.
- Content Specialists: Staff specializing in implementation efforts for mental health, multilingual and migrant education, career and technical education, attendance, student success systems, and professional earning.

Customized Coaching and Professional Learning (CCPL)

Section 17 of the Student Success Act established a coaching program to support Student Investment Account (SIA) recipients in achieving improved mental and behavioral health, improved academic outcomes, and reduced academic disparities for focal student groups. In response, ODE developed the Intervention and Strengthening Program, now known as Customized Coaching and Professional Learning (CCPL). CCPL provides differentiated coaching and professional learning tailored to regional, district, and school contexts, with scalable intensity based on need.

CCPL has expanded significantly since inception and is growing partnerships with other agency departments. All Oregon Comprehensive Literacy State Development (CLSD) grantees participate in state-sponsored coaching that includes CCPL literacy coaching, with plans to extend support to additional early literacy grantees. ESDs are leading regional partnerships to broaden access, and districts statewide increasingly request CCPL support. ODE regional teams also encourage participation for districts facing challenges meeting focal student needs, including schools identified by Oregon's federal school improvement framework.

At the time of this report, CCPL supports 49 executed contracts, including partnerships with seven ESDs, and works with 15 pre-vetted vendors. This shows growth from the last report where there were 10 contracts executed. Coaching is available across multiple focus areas, including mental health and wellness, literacy, fiscal stewardship, multilingual learner support,

multi-tiered systems of support (MTSS), equity-based data practices, career-connected learning, and family and community engagement.

Oversight and monitoring include ODE approval of co-developed annual coaching plans and quarterly vendor reports documenting activities, progress, strengths, and emerging needs. These reports are reviewed by the CCPL Steering Committee and regional support teams, with increasing attention to alignment of the common performance growth target metrics.

Early evidence indicates progress in adult practices, systems development, and implementation capacity aligned to ODE's Progress Marker Framework. Consistent with implementation science, CCPL recipients are in early implementation stages, transitioning from exploration to installation and initial implementation (Fixsen et al., 2005; Fixsen et al., 2015). Student outcome impacts, as measured by PGTs, are expected at full implementation, which typically requires multiple years.

Coaching recipients report high satisfaction with CCPL's customized, responsive model, including support to outline needs, choice among pre-vetted vendors, and consistent requests to continue receiving support.

Looking ahead, CCPL will continue to serve as a core component of ODE's evolving Continuum of Support, including both requested and directed coaching aligned with the Student Success Act and the Education Accountability Act requirements.

ESD Comprehensive Support Plans

ORS 327.254 requires that all 19 ESD regions receive funding from the Statewide Education Initiatives Account (SEIA) within the Fund for Student Success. Funding is based on a prescribed formula for the purpose of supporting schools and districts in the region to meet performance growth targets established in SIA. ESDs do this through technical assistance in developing, implementing and reviewing a plan for the Student Investment Account and for coordination with the department in administering and providing technical assistance to recipients of the SIA. ESDs create a Comprehensive Support Plan to outline the staff and activities that will support these purposes.

The Comprehensive Support Plans must be aligned with the ESD's Local Service Plan. An ODE staff team stewards the plan review and approval process, involving staff representing the Integrated Programs. Through the plan review process, ODE staff offers feedback and works collaboratively with the ESD to clarify the outcomes, strategies, activities, and budget to meet grant agreement expectations. Assistance provided by the ESD can include a range of activities including but not limited to capacity building in the region, coordinating between grantees and ODE, providing professional learning, and supporting application development and reporting. With the technical assistance funding, each ESD is required to hire at least a 1.0 FTE for the

biennium, who serves as the primary point of contact for collaboration with ODE. Allocations are determined by formula using ADMw, with the establishment of a minimum grant amount to ensure floor funding for the smallest ESDs.

In addition to the funds from the SEIA, ODE also provides ESDs with funds to support attendance, high school success programs, and targeted support for small and rural schools. Grant agreements include allowable uses for these programs and the overall intent is to continue to build capacity in the region to advance student outcomes.

ODE staff steward a close partnership with the ESDs to ensure that implementation of these plans meets intended outcomes, contributing to continuous improvement efforts in the region. ODE can monitor expenditures, activity reporting, and implementation of these plans, through regular virtual meetings with key ESD staff funded by these plans.

Intensive Program

Implementation Progress

The 2024-25 school year marked growth in district participation in the Intensive Program, with the fourth district (Cohort 3) fully coming on board. Cohort 3 joined Cohort 1 and Cohort 2 districts in implementing Student Success Teams (SST), collaborating with programmatic steward contractors, and working through the recommendation process.

In Spring 2025, ODE provided an additional $6.6 million in funding to the four participating districts using a formula model. The additional funding – along with most districts being in the middle of the four-year program – prompted a bundled approach to the recommendation process for these additional funds. This approach differed from previous years, where a single recommendation would work through the SST process for approval. Instead, these bundles brought forward seven or more recommendations addressing a wide range of needs for approval concurrently. Recommendations varied based on district need and community input, including developing additional Career and Technical Education pathways, hiring a Native Language Specialist, providing Financial Stewardship Coaching, and standing up professional learning for multi-tiered systems of support (MTSS).

Upon reflecting on the program's progress from the 2024-25 school year, the brightest spot was district feedback about the critical and supportive role that the Student Success Team model played in bringing community voice into district decision-making. For two districts, there was no pre-existing system to solicit or incorporate community input on how to spend funding or the day-to-day challenges of the district. Leadership and community in both districts named how impactful having the SST time was in deepening understanding, building transparency, and bringing community to the table.

Implementation Challenges

While there has been substantial progress over the last four years of program implementation, both districts and program staff experienced challenges. Oregon's school districts, including those participating in the Intensive Program, navigated the 2024- 2025 school year marked with extensive budget cuts leading to reductions in staffing, services, and offerings for students. Districts operated with an awareness that the funding outlook was not likely to improve for the 2025-26 school year. Participating districts – from the smallest and most rural to the largest urban – were forced to make deep cuts that significantly changed what school looked like for students, inclusive of furlough days and extensive staffing cuts. These budget realities shaped the recommendation bundle conversations and caused some districts to repurpose or shift how previous recommendations were implemented.

The most significant implementation challenge for ODE program staff has been a special procurement process that began in 2022 to create a permanent process for contracting and retaining stewards. Stewards are external contractors who provide critical expertise and guidance in leadership, community engagement, and pedagogical practice for participating districts as part of the SST. However, this special procurement request did not move forward. In consultation with Agency leadership, this original procurement request was cancelled, and program staff submitted a new special procurement request in January 2025. As of this report, this special procurement process was still not complete, which causes significant and challenging delays in program implementation.

Staffing to support program implementation and participating districts has also been a significant issue. ODE implemented a hiring freeze Spring through Fall 2025, which compromised the program's ability to retain the Office Support Specialist and one District Support Specialists. Given the challenging and relationship-oriented nature of this program, these staffing changes left the team markedly smaller while holding the same level of responsibility for districts going into the 2025-26 school year.

Next Steps

The 2025-26 School Year is one marked by excitement and uncertainty. It means continued collaboration between districts and the Agency and the implementation of bundled recommendations. The first participating district will also start Exit Year conversations to transition out of the program. With anticipated budget cuts and the unknown timeframe for when stewards will be able to resume their support, participating school districts will have to bear the burden of implementing multiple recommendations without stewards' support until the special procurement process is resolved.

With the passage of the Education Accountability Act (SB 141), substantial changes are on the horizon for the program. The 2025-26 school year will include visioning what the "Intensive

Coaching Program" will entail as part of the more robust Continuum of Supports outlined in the legislation. While new districts will not enter the program until the 2029-30 school year, the next few years will be full as the reduced program staff work to support the current district cohorts with the same level of relationship and responsibility through their minimum four-year participation agreement as well as developing the Continuum of Supports in accordance with the [Accountability Implementation Action Act](#) timeline and in alignment with the [Renewed Vision for Oregon's Accountability System](#).

Small and Rural Support

Small, rural districts are defined for purposes of the Integrated Programs as those districts with less than 1650 ADMw enrollment. Over the 2024-25 year, there was ongoing support extended to these districts namely in filling FTE within ODE. Additionally, ODE made several adaptations to the Integrated Programs application noted later in this report.

ODE was able to hire a position in 2022 with the specific role description of supporting the state's small and rural schools. There was a gap in this position for a portion of the 2024-2025 year; however, the position was refilled in late 2024. This position is a critical liaison for small, rural districts in the Integrated Application and implementation process in coordination with regional integrated program specialists and grant managers.

Additionally, as will be described later in the report, there were several adjustments to both the application and process for the 2025-27 application that were implemented in the spring of 2025. Many of these changes especially support small and rural schools, specifically:

- Differentiated application templates based on programs and context.
- Pre-populated responses to questions to lighten the administrative burden.
- Embedding the Early Literacy requirements within the Integrated Programs.

Further, during the review stage of the application, the most impactful process shift came in the development of the review teams. Review teams prioritized including an ODE staff member familiar with the district. Small, rural districts have very district-specific nuances that can be hard to express in an application setting. These teams allowed for discussion around district responses with at least one member familiar with the district operations, instruction, and prior year plan.

Small, rural districts often utilize their regional ESD for a more hands-on support approach than their larger counterparts. ODE having structured time to connect with ESDs provides an ongoing framework to collaborate around best practices in small schools. The collaboration between regional pairs - Integrated Program Specialists and District Grant Managers - with ESD liaisons is a powerful alignment and point of collaboration as well.

Small, rural districts represent 66% of school districts in the state of Oregon. In 2024-25, ODE continued intentionality in providing on-time, right sized support for our district leaders, staff, and students.

Professional Learning

Building on foundations from the 2024 Legislative Report[1], ODE expanded professional learning during 2024-25 to support integrated implementation and build statewide capacity for continuous improvement. Professional learning included the following opportunities:

- *Centering Health and Well-being in Education, a* virtual learning series and document created in collaboration between ODE and the Oregon Health Authority, including recordings helping schools identify funding streams for student physical, mental, and behavioral health initiatives.
- The eight-part Mental Health Community of Practice supported district leaders in advancing school-based mental health systems, covering needs assessment, teaming, screening, tiered interventions, and sustainability.
- Early Indicator and Intervention Systems (EIIS) Foundations for Middle and High School: a yearlong EIIS Community of Practice, an ESD Train the Trainer series, and EIIS Office Hours, asynchronous modules, and a Facilitator Toolkit.
- Monthly statewide virtual Attendance Learning Series, convening attendance teams, family engagement coordinators, Tribal liaisons, and behavioral health staff to share practices and foster networks.
- Integrated Community Partnership grantees meet bi-monthly in a Community of Practice to strengthen systems through sustained partnerships with districts and communities.

Looking ahead, ODE will launch EIIS Student Success Systems and Equity-Centered Data Systems offerings through Customized Coaching and Professional Learning, as well as the EIIS Networked Improvement Community in January 2026 that invites all 19 ESDs to lead district teams in action research. Evaluation frameworks to measure the impacts of these Professional Learning offerings will reinforce the continuous improvement of these supports to build capacity, strengthen systems, deepen partnerships, and support student success.

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[1] The 2024 Legislative Report names Professional Learning offerings including: Engaging Equity series (4 clusters, 18 modules), Community Engagement Systems and Practices series (4-part), and EIIS professional learning series (Foundations for Student Success; Middle and High School). These asynchronous offerings are free content made available on the EII Professional Learning webpage.

SIA Annual Report Summary and Analysis

Integrated Program (IP) grantees are required to submit annual narrative summaries of their progress and barriers to program implementation to EII on an annual basis. In 2025, 215 grantees submitted narrative summaries. EII asked each grantee to summarize their progress on implementing programs in 2024-25 funded by IP dollars, barriers to implementation they faced over the past year, and status on their current Longitudinal Performance Growth Targets (LPGTs). Some grantees also submitted required narrative summaries of their CTE programs of study.

EII research and program analysts reviewed and qualitatively coded the responses on progress and barriers to identify key themes that tell the story of IP implementation in 2025. After coding responses, analysts identified relationships between the applied codes to determine major themes based on areas most frequently mentioned by grantees. Four major themes emerged that summarize the story of IP implementation in 2025: Early Literacy, Attendance, Preparing Students for Success After High School, and Student Well-Being. Additionally, analysts identified several other relevant minor themes.

Early Literacy

Early Literacy was the most frequently mentioned implementation area in grantees' Annual Reporting responses. Early Literacy has been a top priority for the Governor, the legislature, and ODE. Grantees shared this emphasis as it was the most prevalent theme in the Annual Report responses this year. Grantees reported on their efforts to build comprehensive Early Literacy systems that would improve students' Early Literacy achievement. Elements of these systems included strong data practices, implementation of research-based curriculum and materials, increasing capacity through additional staff, and professional development.

Grantees reported developing data systems for literacy and strengthening their use of data. Grantees described how gathering, reviewing, and responding to data led them to make informed decisions on how to respond to student needs and improve literacy instruction.

> *"By embedding literacy-focused data cycles, consistent use of research-aligned tools, and student-centered PLC practices, we are building a stronger, more coherent foundation to accelerate literacy outcomes for all students."*

High-quality literacy curriculum and materials are a foundational element of improved Early Literacy instruction and outcomes. Overall, grantees reported progress in implementing new materials. However, they cautioned that quality implementation takes time and that they did not expect to see an immediate impact on their 3rd grade reading Longitudinal Performance Growth Target. Highlights of their implementation year include training staff to understand the

materials, strengthening instructional practices, and seeing student growth on interim local assessments.

> *"Slow progress on state measures is anticipated due to the timing of our new ELA adoption and realignment of curriculum maps. Implementation required a significant learning curve for staff and revealed gaps in both supplemental materials and professional learning. In response, during 2024–2025 we invested in professional learning for all K–2 teachers on the Science of Reading (SOR) and adopted Magnetic Reading Foundations to address foundational literacy needs. These adjustments have already led to strong growth on interim local assessments, and we anticipate this momentum will extend to state outcomes in 2025–2026 as all K–5 teachers complete SOR professional learning."*

> *"Coaches now provide observations, targeted feedback, and training for K-3 teachers and instructional assistants, alongside the adoption of a supplemental curriculum designed to strengthen foundational literacy skills. These efforts build on prior investments but require time to show measurable impact, with growth anticipated in 2025-2026."*

While grantees reported seeing early signs of progress as students displayed growth on local interim assessments, some also reported feeling challenged by a disconnect between improvements they are seeing on interim assessments and the state's summative tests for literacy.

> *"One of the complexities we are working to address is the disconnect between our local benchmark data and state assessment results. While our benchmark assessments indicate steady progress and strong growth in early literacy, particularly in grades K–2, this growth has not yet translated into improvements on the state summative assessment at grade 3."*

> *"Although our diagnostics tell us that students are improving, it is discouraging for staff and students alike to not see that reflected in the state assessments, and subsequent headlines, at the end of the year. We need support from the state in changing the narrative that our schools are failing, which we know they are not"*

Grantees also commonly reported investing in increasing staff capacity to provide Early Literacy coaching, instruction, and tutoring. Hiring these positions was crucial to building strong literacy systems. Some grantees were able to increase one-on-one literacy support, strengthen literacy instruction, and dedicate more time to implementing their Early Literacy data systems.

> *"Each Kindergarten classroom was provided with a 4-hour Early Literacy Educational Assistant (EA) to support foundational reading instruction. These EAs focus primarily on*

leading small group instruction using UFLI to build early literacy skills, while also supporting students during independent reading and writing time. Every Kindergarten teacher received dedicated coaching support, with one coach or TOSA assigned. Coaches worked in classrooms for a minimum of two hours per day, offering support through modeling, co-teaching, planning, and feedback, as well as additional assistance outside of classroom hours when needed."

Early Literacy professional development was also a priority for grantees this year. Grantees who made investments for professional development emphasized that it was critical for staff to have the knowledge, skills, and confidence to implement new learning materials and strengthened systems.

"We are committed to strengthening early literacy by investing in professional development for elementary teachers with an emphasis on writing instruction. This training centered on evidence-based strategies, aligned curriculum maps, and consistent instructional practices that build students' capacity as writers. The impact of this work is visible not only in assessment results, but also in the quality of student learning. We have seen students grow in their ability to use textual evidence, organize ideas, and write with voice and clarity — skills that extend beyond a single test and support their success as communicators and thinkers."

Attendance

Over the last several years, ODE has partnered with ESDs and school districts to improve regular attendance rates after a statewide decline during and immediately following the COVID-19 pandemic. Attendance is also a key pillar of Oregon's new education accountability framework, with districts required to set and record progress towards meeting targets on both overall regular attender rates district-wide as well as rates for kindergarten through second grade.

Many grantees reported varying degrees of progress with attendance strategies and outcomes during the 2024-25 academic year. Attendance improvement strategies tend to target systemic changes that take time to develop, implement, and bear fruit. Now that the Integrated Programs are several years into implementation, many grantees report that they are beginning to see measurable improvements in their regular attendance rates.

"As we stack our actual metrics against the Longitudinal Performance Growth Targets (LPGTs), the picture is one of clear progress, with targeted fixes and strategies delivering results. Regular Attenders reached 94%, surpassing the LPGT of 82%."
"Attendance rates continue to be the largest area of improvement this past year. We purposely targeted this area at both the elementary school and the high school. While

> *we still have plenty of room for improvement, we continue to be trending in the right direction when it comes to regular attendance at both buildings.*

Grantees who reported attendance as an area of progress named two specific kinds of strategies as being particularly helpful in their efforts. The first strategy identified was stronger family and community engagement practices.

> *"Last year the district's work attending to relationships and providing flexibility to students created a culture shift large enough to almost double our enrollment, moving us significantly closer to consistent achievement of both of our planned outcomes. We achieved this by listening to our students and their families and letting them come back to the district on their own terms and in their own time. This individualized approach built trust with our stakeholders and motivated students, improving our school culture... In a sign that our culture is improving and families are prioritizing school, our regular attender rate ticked up in 2024-25."*

The second strategy grantees reported as being effective was strengthened systems for collecting, tracking, analyzing, and utilizing data.

> *"Our district continues to make meaningful progress in cultivating a positive and inclusive school culture, centered on collaboration, data-driven practices, and comprehensive student support... These efforts include clarifying the purpose and use of data collection to better monitor student progress and inform interventions. This ongoing refinement supports a more systematic approach to both academic and behavioral growth, ensuring that each student receives targeted, timely, and appropriate support."*

However, not all grantees have seen even progress in attendance, and some grantees still report substantial challenges in increasing regular attendance rates, especially for some student focal groups. Some grantees highlighted the need for additional resources and supports from ODE in order to make further progress on attendance.

> *"While our % of regular attenders increased across all three schools in 24-25, "Regular Attenders- Gap Closing Target: All Focal Group Students" have been the largest challenge across the district. Within this group, students experiencing poverty are the most at risk. This group has less than 60% of students attending regularly. This group also has a lower % of students achieving at grade level in math and ELA, emphasizing the direct correlation between attendance and academic achievement."*

> *"One significant challenge has been in sustaining improvements in regular attendance, which remains below our long-term targets. Despite staff and student goal-setting activities, chronic absenteeism continues to impede progress toward both academic and*

graduation-related outcomes… We would benefit from state and regional support in identifying effective attendance interventions, as well as guidance on balancing fiscal pressures with maintaining equitable student supports."

Preparing Students for Success After High School

A major theme of the Annual Report responses was the implementation of strategies to support student success in high school and prepare students for their plans after high school. Grantees commonly mentioned two key indicators of progress: increased ninth grade on-track rates and graduation rates. Frequently cited strategies in this effort are developing data-driven on-track systems and building systems that can support academic achievement and engage students in planning for their future.

> *"…on-track to graduate rates have risen from 56% to 65%. These improvements reflect policy and practice adjustments informed by staff feedback—such as faster referral processing and proactive guardian outreach—embedded in the Intervention Lead's workflow. School leaders monitor implementation through monthly I-Team data reviews, enabling real-time adjustments to sustain progress."*

> *"One significant area of progress is our four-year graduation rate, which remains above target and continues to grow—particularly for students of color and those enrolled in our alternative high school program. This progress reflects strategic investments supported by braided funding through the Student Investment Account (SIA) and High School Success (HSS). These resources have made it possible to sustain critical positions such as school counselors, college and career coordinators, and academic coaches."*

Another strategy grantees implemented was expanding well-rounded learning experiences. Grantees reported that high interest coursework, like CTE Programs of Study or enhanced elective opportunities, increased students' interest in school, enhanced their sense of belonging, and contributed to high 9th grade on-track and graduation rates.

> *"Our high school teams that meet regularly and monitor 9th grade on track and graduation have gotten more precise and specific. At the high school level, the addition of more CTE offerings have helped connect students to school and have been a factor in improving the graduation rate. We have increased music offerings, world language, art, welding and now offer soccer as a sport. All of these things contribute to increased student belonging and interest in school."*

Incorporating student and family voice into planning also led grantees to offer support and opportunities requested by students and families. Strengthening student and family engagement was also a key strategy for improving focal group outcomes.

> *"Student voice has shaped our work through over 5,700 student surveys (grades 3–12) and six diverse high school focus groups, highlighting themes around high school experience and postsecondary readiness. In response to parent feedback, [district] staff also provided more workshops on high school and postsecondary pathways. Finally, we've seen progress in key outcome metrics: on-track rates increased to 84.0% overall, with Hispanic/Latino/a/x students rising to 76.9%, and graduation rates improving significantly for students in foster care (+21.4%) and those experiencing houselessness (+9.3%)."*

However, budget constraints limit grantees' ability to maintain enhanced student supports and opportunities. This was exacerbated for districts that also say a decline in overall enrollment, impacting funding. As grantees face budget reductions or fiscal uncertainty, they may need to scale back their Integrated Program activities and use Integrated Program funds where possible to protect core instructional investments. Grantees reported that they must focus on maintenance and are unable to use funds to implement strategies to reduce academic disparities and support student mental health.

> *"A decline in enrollment, coupled with a significant reduction in our Student Investment Account (SIA) allocation, has limited our ability to sustain elective programming—especially in music, art, and world languages. Many of these offerings were previously funded through SIA dollars."*

Student Well-Being

The last major theme that emerged was a focus on providing support for students' collective well-being. This is a broad category that takes many potential forms including mental and behavioral health supports, student behaviors and discipline, social-emotional learning, and school culture and climate. Student well-being is an important pillar of education that contributes to academic success. As such, understanding and supporting student well-being at school was reported as a critical area of focus for many IP grantees. The kinds of supports needed often vary between districts and even among schools and individual grade levels, reflecting the broad nature of approaches districts reported.

Many grantees reported progress in this area throughout the 2024-25 academic year.

> *"One of the most impactful additions was having our Mental Health Counselor on campus full-time. She provided vital support to students, working individually with many and facilitating several small groups that addressed social and emotional needs. Alongside her efforts, our Behavior Specialist collaborated closely with teachers to strengthen the delivery of social-emotional learning materials, ensuring that students had consistent and meaningful access to resources that supported their well-being."*

> *"We have strategically invested to build a safe and welcoming environment where every student feels a sense of belonging and can thrive. Our continued focus on counseling has been instrumental, allowing us to provide essential mental and emotional support across all grade levels."*

However, there is still much to be done, and often the most challenging aspects of providing for students' mental and behavioral well-being are outside of districts' control. In particular, many small and/or rural districts report challenges in hiring qualified staff or establishing supportive community partnerships that would provide access to counseling and other important resources for students:

> *"Limited time and scheduling constraints make it difficult to provide sustained, in-depth training without disrupting instructional time, while access to specialized trainers—particularly in mental health—remains limited in rural or small school settings."*

> *"Students in [this district] face several significant barriers to accessing counseling and mental health services, despite recent efforts to expand support. Some of our challenges include [a] shortage of Mental Health Professionals. [Our ESD] currently employs only 12 behavioral health staff to support nearly 50% of the county's 13,000 students. This limited staffing means many students still lack access to timely and consistent mental health care."*

One positive intervention that many grantees reported in their responses was the development and implementation of social-emotional learning (SEL) curricula. Several grantees reported progress in this area over the last year:

> *"Our professional development efforts have deepened, with an increased emphasis on social-emotional learning (SEL), trauma-informed approaches, and culturally responsive practices. These enhancements, along with the reinforcement of our systems and best practices, have contributed to stronger student engagement across the board."*

Along with a greater focus on SEL, grantees are also reporting ongoing changes to their school or district culture and climate. A positive school culture and climate provides many benefits to students: it makes them feel more welcome at school, can reduce instances of exclusionary discipline and disruption that interrupt learning, and engages students and families to become active participants in their school community.

> *"In our most recent family climate survey more than 80 percent of families reported that their children feel welcome, accepted, and represented at school, sustaining and slightly exceeding the gains we celebrated last year... These strategies reinforce a positive school culture and ensure that students and families see themselves reflected in the curriculum and environment."*

Other Minor Themes

In addition to the themes above, some less frequently mentioned themes provide important data and context for the progress and barriers grantees face in implementing their strategies. Key highlights from these minor themes included:

- Grantees are just beginning to see changes in broader systems and capacity several years into SIA implementation
- Grantees continue to struggle to hire specialist staff, both teaching and non-teaching, especially in rural areas and small districts
- Equity and student focal groups remain a priority for grantees
- Grantees are facing fiscal challenges in part due to complex changes ongoing at the federal and state educational agency levels
- Community partnerships continue to be an important relational resource for grantees to support students and families

Policy

SB141

The publication of this legislative update comes amid significant changes at ODE following the passage of the Education Accountability Act (SB141) in 2025. This act, in many ways, scales up the innovations of the Integrated Programs and further solidifies the department's commitment to the two purposes of the Student Investment Account: (1) meeting students' mental or behavioral health needs and (2) improving academic outcomes and reducing academic disparities.

Senate Bill 141 — also known as the 2025 Education Accountability Act— is a major legislative achievement that creates a new statewide system for improving student outcomes and strengthening accountability throughout Oregon's K-12 education system. The law, passed with significant effort from lawmakers and support from education partners, sets clear expectations for school districts and the state, and provides clear authority for the Oregon Department of Education (ODE) to implement a new shared accountability framework. Senate Bill 141 charts the course for a foundational shift in how ODE collaborates with and delivers services to Oregon's school districts and students by:

- Measuring student outcomes using an expanded list of statewide metrics (e.g., early grade attendance, third-grade reading, eighth-grade math, graduation rates) and ensuring that this data is used to drive continuous improvement.
- Setting local performance growth targets and requiring districts to show progress.
- Providing defined, dynamic, and differentiated supports for districts, ranging from technical assistance to coaching to state-directed use of funds.
- Reducing administrative burden by consolidating grant application processes and reporting at the state level.
- Increasing transparency through data visualizations and improved access to financial and academic data.

ODE has been implementing this legislation since the publication of our original action plan in June 2025. ODE has already made meaningful progress, including:

- Reorganizing internally to strengthen ODE's capacity to align and focus how we support school districts in meaningful ways.
- Transitioning ODE's district support system to a regional delivery model, enabling more strategic, targeted, and comprehensive resource deployment.
- Engaging with 34 school districts to begin streamlining reporting processes and consolidating grant applications, including piloting a unified application.

- Launching data dashboards with user-friendly visuals and longitudinal data, making school, district, and state spending and performance information accessible for districts and the public, and enabling year-over-year analysis.
- Developing the initial administrative rules that establish clear targets, measure improvement, and track progress. These efforts, and others, lay the groundwork for a more efficient, responsive, and outcomes-focused K-12 education system led by Oregon's state education agency.

HB 3199 and SB 315

These two related bills establish a possible foundation for deeper investment in attendance initiatives, a critical area of focus identified in the 2024-25 SIA annual report analysis. HB 3199 directs the Legislative Policy and Research Office (LPRO) to study statewide attendance initiatives undertaken by the agency since the 2017-2018 school year as well as current policies governing attendance data. The bill also directs ODE to convene an advisory committee to review that study and recommend a policy on improving attendance to the State Board for adoption. Both LPRO and the advisory committee will issue legislative reports with their findings in September 2026 and February 2027, respectively. SB 315 requires ODE to review, make recommendations, and develop best practices related to attendance coding with a report to the Legislature and the State Board of Education by May 2026.

HB 3037

With the passage of this bill, the State Board is now allowed to establish a minimum grant amount for small school districts and reduce their administrative burden related to applying for and reporting on grants. The bill also made important adjustments to eligibility and funding for High School Success and EIIS and expands the entities eligible for the Student Investment Account. This will further add to the supports ODE offers small and rural school districts.
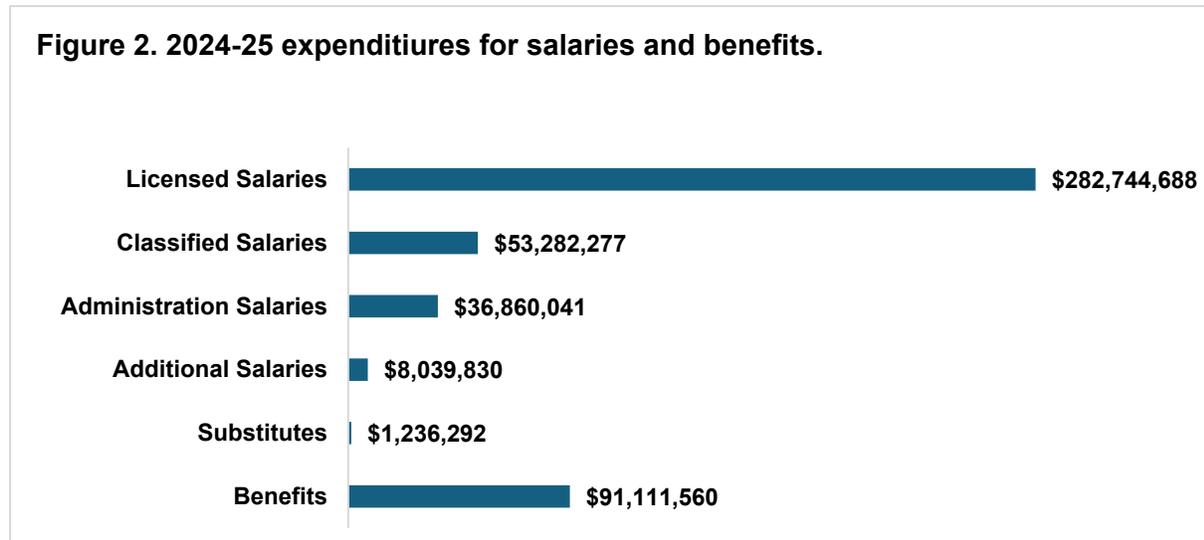
2024-25 STUDENT INVESTMENT ACCOUNT ANALYSIS

SIA Grantee Expenditures

SIA grantees were allocated a total of $559,688,049 for the 2024-25 fiscal year, and claimed 559,508,530 (> 99.9%), with individual grants ranging in size from $41,801 to $45,309,123. Grantee expenditure data were extracted and analyzed in early January 2026 following the conclusion of the final reporting period for the 2024-25 school year. Overall, grantees reported specific expenditures totaling $551,495,257, or 98.6% of claimed funds.

Figure 1, below, shows the 2024-25 SIA expenditures by grantees for the six SIA allowable use categories. Of the $551,495,297 in reported expenditures during the year, the largest share, accounting for one-third of the total funds spent, went towards activities related to Health and Safety ($184,894,088, or 33.5%). This was followed by $175,426,962 (31.8%) spent on Well Rounded Education, and $127,108,327 (23.0%) for Reduced Class Size. Spending in the three other allowable use categories was substantially less, with $24,463,218 (4.4%) for Increased Instructional Time (e.g., summer school, before/after school, tutoring), $24,440,384 (4.4%) to support Ongoing Community Engagement, and $11,435,498 (2.1%) spent on Administration (allowed indirect costs and grant administration). The remainder of expenditures ($3,726,780; 0.7%) could not be categorized at the time of this report due to missing data from grantees. ODE has a process for following up with grantees on these expenditures.

Figure 1. 2024-25 expenditures by allowable use category.

Total Spent = $551,495,257

Category	Amount
Health & Safety	$184,894,088
Well Rounded Education	$175,426,962
Reduced Class Size	$127,108,327
Increased Instructional Time	$24,463,218
Ongoing Community Engagement	$24,440,384
Administrative	$11,435,498
Uncategorized	$3,726,780
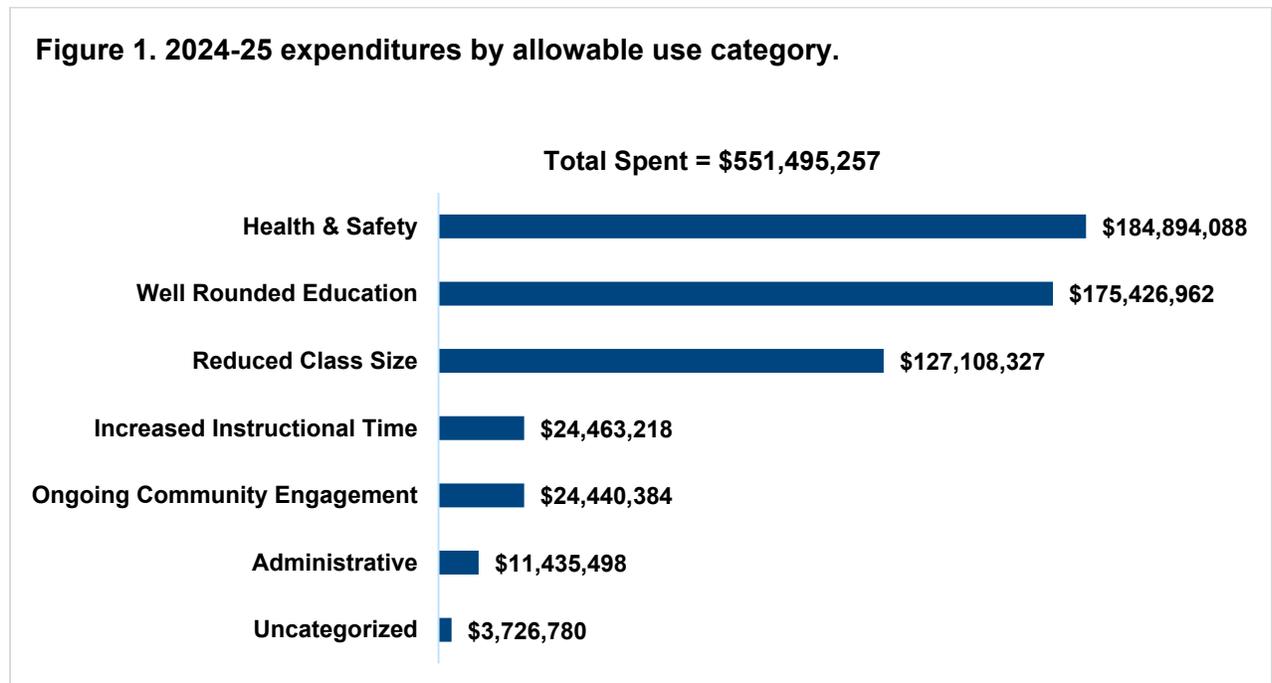
When examining SIA 2024-25 expenditures by the type of expense rather than allowable use categories, salaries and benefits accounted for $473,274,688, or 85.8% of all funds spent during the year (see Figure 2, below). Of the salaries, almost three-quarters (74.2%), or
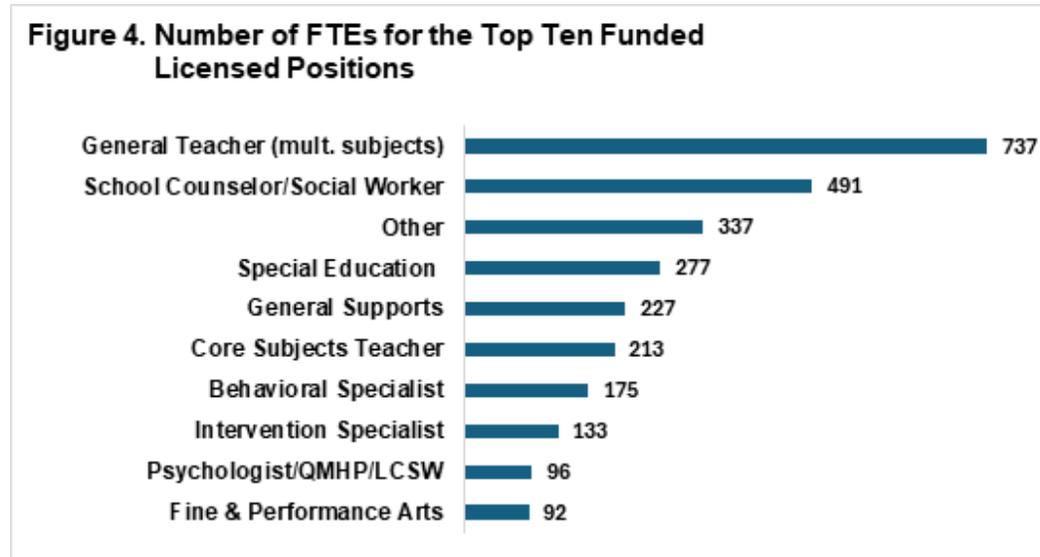
Figure 2. 2024-25 expenditiures for salaries and benefits.

Licensed Salaries	$282,744,688
Classified Salaries	$53,282,277
Administration Salaries	$36,860,041
Additional Salaries	$8,039,830
Substitutes	$1,236,292
Benefits	$91,111,560

$282,744,688, was for Licensed salaries. Classified salaries accounted for $53,282,277 (14.0% of salaries), and $36,860,041 (9.7%) went towards Administration Salaries. Another $8,039,080 (2.1%) was spent on Additional salaries (e.g., extra duty stipends) and $1,236,292 (0.3%) was expended for Substitutes. In addition to salaries, $91,111,560 was specified as going toward Benefits across all staff positions, though this amount is an underestimate of benefits as they could have been combined with, and designated as, salaries.

Considerably less money went towards other types of expenses (see Figure 3, below). For Supplies and Materials, the second largest type of expense after salaries and benefits, $24,390,579 (4.4% of all funds) was expended. Spending on Instructional, Professional, and Technical Services, largely for professional development and mental health service contracts, was $20,766,184 (3.8%), while Other/Miscellaneous expenditures totaled $13,839,241 (2.5%). Administrative/Indirect expenses for SIA grant administration and indirect costs have remained relatively stable at $11,435,498, or 2.1% or all expenses. Capital expense spending decreased significantly over the previous year by approximately $10,000,000 to $3,761,429, or .7% of all expenditures. The remaining portion, under .5% each, went towards Travel ($2,218,172; 0.4%), Dues and Fees ($1,556,448; 0.3%), and Uncategorized expenditures ($253,019; < .1%).

Figure 3. 2024-25 expenditures by type of expense.

Total Spent = $551,495,257

Type of Expense	Amount
Salaries & Benefits	$473,274,688
Supplies & Materials	$24,390,579
Instruct, Prof, & Tech Services	$20,766,184
Other/Misc	$13,839,241
Administrative/Indirects	$11,435,498
Capital Expenditures	$3,761,429
Travel	$2,218,172
Dues & Fees	$1,556,448
Uncategorized	$253,019

As mentioned above, SIA 2024-25 expenditures for Salaries and Benefits totaled $473,274,688. Further analysis indicated that this amount funded a total of 4,420 full-time equivalent (FTE) staff positions: 3,182 Licensed positions and 1,239 Classified positions. The 3,182 FTE licensed staff positions were then categorized into one of 24 staff categories, with the ten most common positions appearing in Figure 4, below. The most common SIA funded licensed position was a General Teacher (i.e., elementary or multiple-subjects high school teacher), with 737 FTEs, which accounted for 23.2% of the licensed staff positions. School Counselor/School Social Worker was the second most common SIA funded licensed position with 491 FTEs (15.4% of licensed positions). Other Staff comprised another 337 FTEs (10.6%), Special Education staff totaled 277 FTEs (8.7%), and 227 FTEs (7.1%) for General Supports rounded out the top five licensed positions. The only other type of staff position with over 200 funded FTEs was the combined Core Subjects Teachers, with 213 FTEs (6.7%). Rounding out the top ten positions, each accounting for between 92 – 175 FTEs (2.9% – 5.5%) were Behavioral Specialist, Intervention Specialist, Psychologist/QHMP/LCSW, and Fine and Performance Arts.

Figure 4. Number of FTEs for the Top Ten Funded Licensed Positions

Position	FTEs
General Teacher (mult. subjects)	737
School Counselor/Social Worker	491
Other	337
Special Education	277
General Supports	227
Core Subjects Teacher	213
Behavioral Specialist	175
Intervention Specialist	133
Psychologist/QMHP/LCSW	96
Fine & Performance Arts	92

Longitudinal Performance Growth Targets

Longitudinal Performance Growth Targets (LPGTs) and Local Optional Metrics (LOMs) are strategy-driven targets set by grantees funded by the Student Investment Account portion of the Integrated Programs, as required in statute. Grantees with at least 80 students (80 ADMr) are required to set targets for each of the five common metrics (4 Year Cohort Graduation Rate, 5 Year Cohort Completion Rate, 9th Grade On-Track to Graduate Rate, Regular Attendance Rate, and 3rd Grade English Language Arts Proficiency Rate) that has at least 10 students in the denominator. Local Optional Metrics were set by grantees alongside the changes in the five common metrics and represent the pursuit of meaningful and allowable investments that do not directly or immediately correspond to changes in the five common metrics but are critical to demonstrating evidence for the effectiveness and expected outcomes of submitted plans.

LPGTs and LOMs are set following the odd-year application cycle for the Integrated Programs. For LPGTs, baseline data/targets and stretch data/targets include all students for that metric. Gap-closing data/targets uses an aggregated student group called the Combined Focal Student group. Students are included in this group if they are a member of any of the following:

- Students Navigating Poverty[2]
- Students with Disabilities,
- Emerging Bilingual Students,
- American Indian/ Alaska Native Students,
- Black/ African American Students,
- Hispanic/Latina/o/x Students,

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[2] As defined using the State Board of Education adoption in December 2022 in OAR 581-014-001 using SNAP or TANF participation, Students Navigating Homelessness, Students Navigating Foster Care, and Migrant Students.

- Native Hawaiian /Pacific Islander Students,
- Asian Students,
- Multiracial Students,
- Nonbinary Students,
- Students Recently Arrived,
- Students with Experience of Incarceration or Detention.

When codeveloping the first set of targets in 2023, grantees and ODE staff met either virtually or in person and reviewed the ODE-provided historical data; talked through the outcomes, strategies, and activities of the grantee's plan; and considered the top growth seen historically for each of the metrics. Codeveloped targets then had a final review by ODE staff and were put into SIA grant agreements that were approved by the grantee's governing board. More detail on the LPGT and LOM targets set can be found in the Targets and Reports for LPGTs and LOMs the primary source for the following summary.

In late winter of 2025 ODE provided grantees with five years of data for the common metrics via data sheets to review ahead of their Integrated Application submission. However, in anticipation of changes due to the Education Accountability Act (SB141), ODE paused adding additional years of targets in 2025 as had been planned.

Grantees will engage in a co-development process with ODE for Performance Growth Targets (PGTs) in spring of 2026, including the new metrics K-2 Regular Attenders, 8th Grade Mathematics, and additional Local Metrics.

The 2023-2028 LPGTs and LOMs: Grantee Targets spreadsheet details all approved Integrated Program grantee LPGTs and optional LOMs set in 2023 for the 2023-24 through 2027-28 academic years during the 2023 application cycle. It is worth noting that a small number (21) of LOMs were set by a small number of grantees (12) in that application cycle. An overview of LPGTs set for the 2023-28 biennium analyzed patterns in target setting and includes a summary of LOMs set. Considerable variation existed among grantees in their baseline data and the five years of LPGT targets and that variation was associated with grantee student population size such that grantees with smaller populations had the greatest variation in their data. Smaller grantees can see large jumps or drops in their data when one student can change the result of a metric by multiple percentage points. This is especially evident when metrics include 20 students or less. The tables in the overview present detailed information regarding Baseline, Gap-Closing, and Stretch targets for the five common metrics and the projected increases across those targets.

For a high-level overview on target achievement for two years of data is available for 3rd Grade ELA, 9th Grade On-Track, and K-12 Regular Attenders see Appendix A and see the 2023-24 LPGT Progress update for one year of data for all metrics including 4 Year Graduation and 5 Year

Completers. These documents review grantee targets on these metrics versus their actual rates for the 2023-24 and 2024-25 school years where available. The percentage of grantees who were required to set targets and that also met those targets varies by metric and student population.

The change seen for Ninth Grade On-Track was substantial in the 2024-25 school year, with nearly 75% of grantees meeting their targets. Both K-12 Regular Attendance and Ninth Grade On-Track saw a higher median of change for their combined focal group than their all-student group, indicating that progress is being made to close the gaps between those populations. More than half of grantees met their Four Year Graduation baseline and gap-closing targets in 2023-24, while half of grantees met their baseline Five Year Completer targets, only 46.5% met their gap closing targets.

Progress Markers

Progress Markers (PMs) are examples of the kinds of changes that the ODE expects investments and integration will lead to over time. Progress markers are intended to show how grantee's plan implementation eventually led to changes in the five common metrics via the Longitudinal Performance Growth Targets (LPGTs) and integration with the four common goals (Equity Advanced, Engaged Community, Well-Rounded Education and Strengthened Systems and Capacity). Although Progress Marker tracking and reporting are required, grantees are not required or expected to meet all Progress Markers. The information provided via Progress Marker reporting informs the technical assistance and coaching ODE provides throughout the year and supports ODE in keeping the educational field, the public, and the legislature informed regarding the important progress being made with significant taxpayer investments that might not otherwise be illuminated by slower moving metrics. ODE uses these Progress Markers to partner with applicants in determining and assessing where changes occur. They may also be used to inform agency considerations requiring grantees to participate in the continuum of supports as outlined in Section 7 of the Integrated Guidance. The data presented and interpreted below is from the last quarter of reporting for the 2023-24 school year (grantees submitted their self-rankings in Quarter 4) and from the last quarter of reporting for the 2024-25 school year (Quarters 3 and 4 combined in an effort to reduce the reporting burden on the field).

The Student Investment Account

Table 1

Summary of the 15 Progress Markers within the three major timepoints. Please see the [Progress Marker Summary](#) for greater detail.

Start To See: Early Signs of Progress (3-6 months)

Represents initial, easy to achieve changes likely occurring in the first three to six months of program implementation put forward in integrated planning

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PM 1: Community engagement

PM2: Equity tools

PM3: Data teams

PM4: Literacy inventory

Gaining Traction: Intermediate Changes (6-18 months)

Represents the kinds of changes occurring within six to eighteen months of implementation when more significant changes in engagement and student and educator learning conditions occur

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PM 5: Two-way communication

PM6: Student agency

PM7: Action research

PM8: Literacy plans

PM 9: 9th grade course scheduling

PM 10: Foundational learning practices

Profound Progress: Substantial and Significant Changes (18+ months)

Describes the kinds of transformational changes that would occur in the first 18-months to four-years of implementation

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PM 11: Strengthen partnerships

PM12: Financial stewardship

PM 13: Balanced use of assessment systems

PM 14: Address systemic barriers

PM 15: Schools create places and learning conditions

For each Progress Marker reporting event, grantees were asked to rank themselves along both a continuum of change (No observable Change to High) or whether they felt they had attained the aims of that progress marker in that quarter. We examined how many grantees ranked that Progress Marker at each level and performed a comparison of those rankings between the last quarter of reporting for 2023-24 versus the last quarter of reporting for 2024-25:
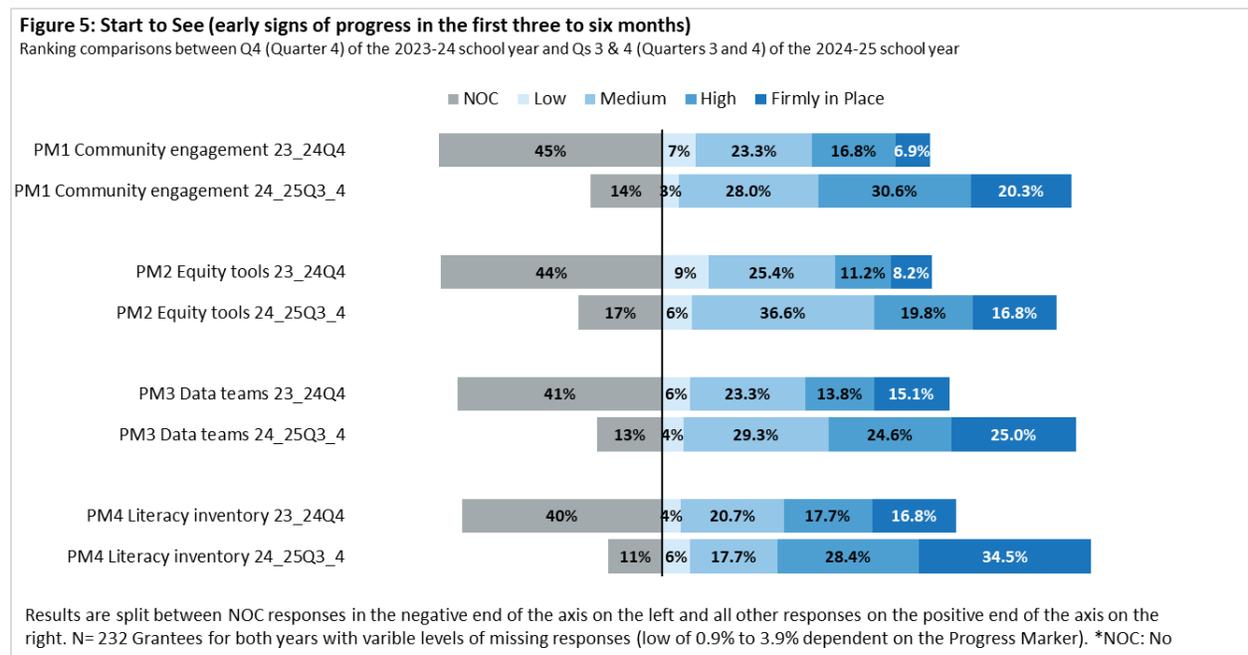
- NOC (No Observable Change)

The Student Investment Account

- Low = small, incremental changes have been observed
- Medium = bigger changes observed, but still work to be done
- High = significant change observed, but not yet fully in place
- Firmly in place = no additional work needs to occur in this area

Across all progress markers, we saw increases from year to year in the "Firmly in place" category from 2023-24 to 2024-25 (average increase was 9.7%, minimum of 4.5% and maximum of 17.7%), implying that more grantees attained the objectives of more progress markers than in the previous school year. Moreover, we also saw that the degree of chang that grantees experienced in the progress markers in the final quarter of reporting was higher in 2024-25 than in 2023-24 (the Medium and High change categories all saw increases from the prior year).
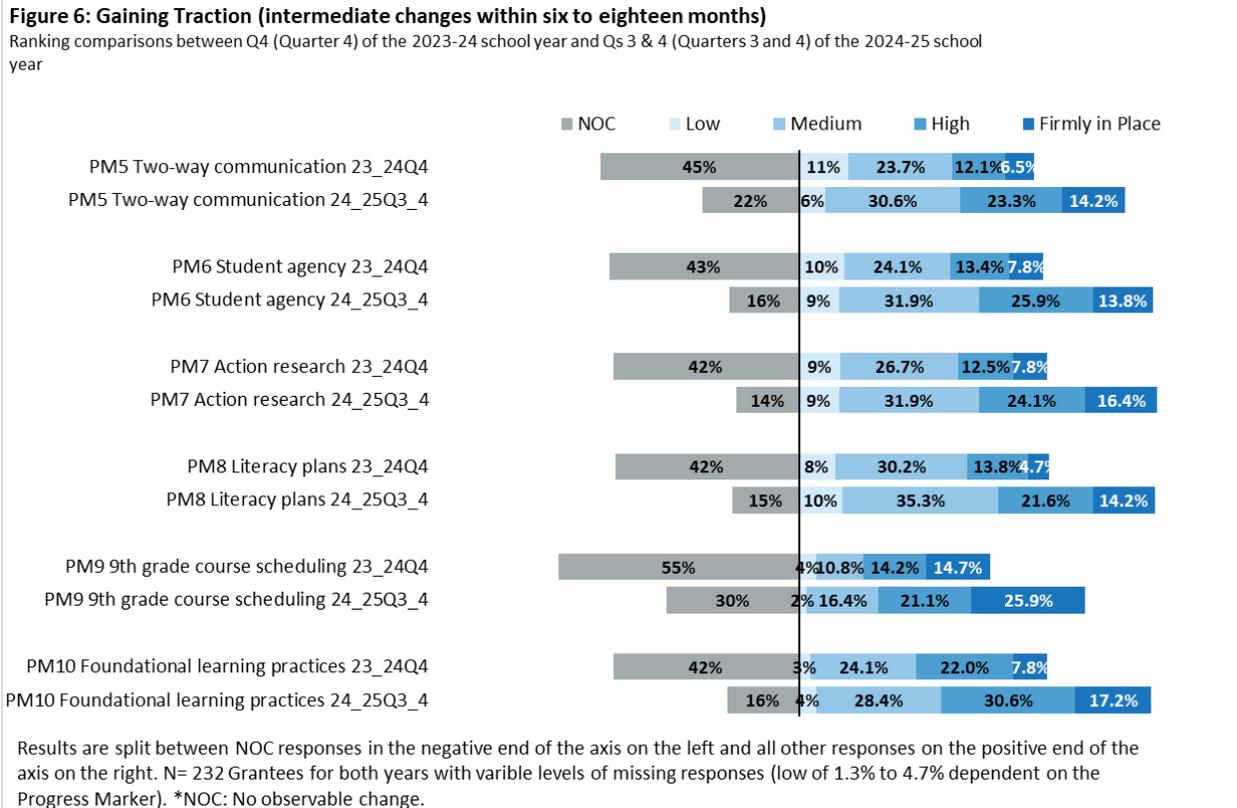
Five progress markers (PM4 Literacy Inventory: 34.5%, PM12 Financial stewardship: 32.8%, PM9 9th grade course scheduling: 25.9%, PM3 Data teams: 25% and PM1 Community engagement: 20.3% in order from highest to lowest) showed the top levels of "Firmly in place" in the 2024-25 school year. Four of these were also in the top five progress markers showing the greatest level of change in the number of grantees reporting that progress marker as "Firmly in place" relative to the 2023-24 school year (PM4 Literacy Inventory: 17.7%, PM1 Community engagement:13.4%, PM12 Financial stewardship: 12.9%, PM11Strengthened partnerships: 11.6%, and PM9 9th grade course scheduling: 11.2%) and all of these progress markers were in the top six of both categories and span all three of the timeline categories (Start to see, Gaining traction, and Profound progress).

Below we provide more detailed assessments of each of the three progress marker time periods.

Figure 5: Start to See (early signs of progress in the first three to six months)
Ranking comparisons between Q4 (Quarter 4) of the 2023-24 school year and Qs 3 & 4 (Quarters 3 and 4) of the 2024-25 school year

Results are split between NOC responses in the negative end of the axis on the left and all other responses on the positive end of the axis on the right. N= 232 Grantees for both years with varible levels of missing responses (low of 0.9% to 3.9% dependent on the Progress Marker). *NOC: No
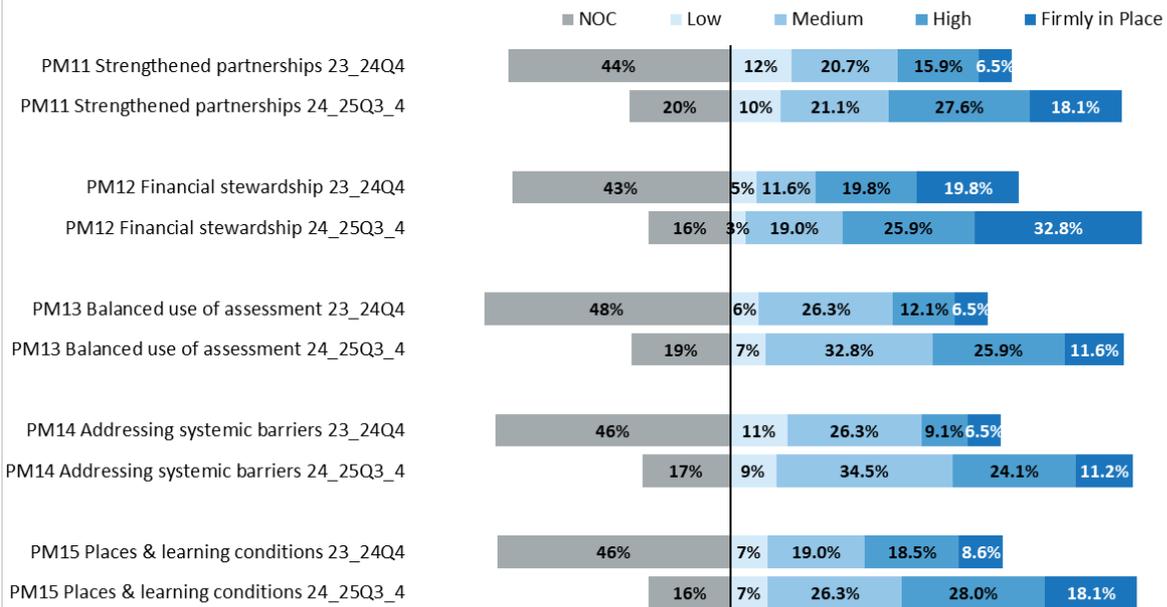
The Student Investment Account

In the Start to See Progress Markers (Figure 5), the comparison of the first four Progress Markers between the last reporting quarter of 2023-24 to the last reporting quarter of 2024-25 showed that all gained in the Firmly in place category and all saw increases in degree of change. As mentioned above, Literacy inventory (PM4), Community engagement (PM1), and Data teams (PM3) were among the progress markers most categorized as Firmly in place by the end of the 2024-25 school year. This is likely due to significant policy initiatives, supports, and investments in these areas both by the state, the ODE and districts.

Figure 6: Gaining Traction (intermediate changes within six to eighteen months)
Ranking comparisons between Q4 (Quarter 4) of the 2023-24 school year and Qs 3 & 4 (Quarters 3 and 4) of the 2024-25 school year

Results are split between NOC responses in the negative end of the axis on the left and all other responses on the positive end of the axis on the right. N= 232 Grantees for both years with varible levels of missing responses (low of 1.3% to 4.7% dependent on the Progress Marker). *NOC: No observable change.

The Student Investment Account

Figure 7: Profound Progress (substantial and significant changes in the first eighteen months to four years)
Ranking comparisons between Q4 (Quarter 4) of the 2023-24 school year and Qs 3 & 4 (Quarters 3 and 4) of the 2024-25 school year

Results are split between NOC responses in the negative end of the axis on the left and all other responses on the positive end of the axis on the right. N= 232 Grantees for both years with varible levels of missing responses (low of 10.9% to 4.3% dependent on the Progress Marker). *NOC: No observable change.

In the Profound Progress category (Figure 7), the comparison of the first four Progress Markers between the last reporting quarter of 2023-24 to the last reporting quarter of 2024-25 again showed that all gained in the Firmly in place category and all saw increases in degree of change. Of these, Strengthened partnerships (PM11), and Financial stewardship (PM12), were in the top six progress markers for this self-assessment category. Although progress markers are not linear, the high level of "Firmly in place" attainment in the Community Engagement (PM1) progress marker (see Figure 5) may imply that efforts in this area where foundational community engagement practices are emphasized would have downstream impacts at the deeper levels of the community engagement spectrum covered in the ODE [Community Engagement Toolkit](#) and emphasized by PM11.

In summary, all progress markers showed increases in levels of change and in terms of attainment of a "Firmly in place" self-assessment by grantees in 2024-25. Although being "Firmly in place" should not be expected to remain permanent given that resources and capacity fluctuate from year to year, our ability to compare the progress marker self-assessment changes across these two years of required reporting provides insight into the pace of progress across the diverse yet integrated conditions for achieving systemic change.

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Research Projects

As part of the department's ongoing efforts to advance the two intended purposes of the Student Investment Account – addressing historic disparities in student achievement and supporting students' mental and behavioral health – the research team in OEII undertook a research study on the mental and behavioral health programs at Oregon school districts. "WE'RE TRYING TO BE SUPERHUMAN." An analysis of Integrated Program Funded Mental and Behavioral Health Programs at Oregon School Districts (2025)

This brief presents case studies and survey data on mental and behavioral health activities in Oregon schools. Ongoing local, national, and international trends of heightened mental and behavioral health challenges have dramatically increased the need for robust mental and behavioral health supports for students and employees in the public school system. In Oregon, districts have designed a wide array of strategies and activities aimed at supporting students' mental and behavioral health; however, scarcity of workers and providers, as well as staff burnout, have made it challenging for many districts to fully meet their planned investments. Site visits revealed four major thematic considerations when it comes to supporting students' mental and behavioral health: systems of support and care, student lived experiences, structural barriers to providing adequate supports, and monitoring & evaluation practices. These themes are discussed in more detail in the brief linked above. Overall, there is a great need for a systems-level response to more effectively support mental and behavioral health in Oregon K-12 schools.

2025-29 INTEGRATED PROGRAMS APPLICATION PROCESS

2025-29 Integrated Application Planning and Supports

A primary activity for grantees and ESDs supporting grantees in the 2024-25 school year was planning for the submission of the Integrated Application, which was due April 30, 2025. While each grantee went through its own process to meet the application requirements, all grantees included key planning requirements. Each planning requirement was outlined in detail in the Integrated Guidance to support grantees as they worked through the planning steps.

Graphic 3

A 12-Steps visual to efficient and effective program integration.

A 12-Step Guide to Efficient and Effective Program Integration

Step 1	Step 3	Step 5	Step 7	Step 9	Step 11
Organize your thinking & planning, *including Tribal Consultation*	Engage students, staff and community	Move through a review process	Articulate what strategies you will maintain	Gather and generate the activities and investments	Check your plan

Step 2	Step 4	Step 6	Step 8	Step 10	Step 12
Prepare accessible materials for community and staff engagement	Complete a comprehensive needs assessment	Develop and refine desired outcomes	Get feedback on desired outcomes and strategies	Write and document your plan and budget	Submit your plan

2025-27 Planning Requirements[3]
1. Use of an Equity Lens
2. Community Engagement
3. Needs Assessment
4. Consideration of input from District Equity Committees
5. Consideration of the Quality Education Model (QEM)
6. Consideration of the recommendations from the Statewide Success Act Plans

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[3] Section 2 of Integrated Guidance: Effective Planning
https://www.oregon.gov/ode/StudentSuccess/Documents/ODE_IntegratedGuidance25-27.pdf#page=24

7. Review and use of regional Career and Technical Education (CTE) consortia inputs
8. Tribal Consultation where required
9. Examination of potential impacts on focal students tied to planning decisions
10. Development of a four-year plan with clear outcomes, strategies and activities

ESD partners were critical supports for grantees during planning. Supports around data were most common. ESDs also assisted with communicating around events for community engagement or assisting with conducting empathy interviews as an engagement strategy with data analysis support. ESDs were able to provide support in pulling relevant reports, and grantees cited ESD assistance with gathering, analyzing or triangulating data as one of the most beneficial supports offered. Other beneficial supports reported by grantees included assistance with maintaining virtual folders for application materials, holding collaborative planning sessions, and taking notes, writing, or editing questions for the applications.

2025-2027 Integrated Application Process

In Spring 2025, ODE conducted an application submission and review cycle for the 2025-27 biennium for nine programs under the Aligning for Student Success: Integrated Guidance Update 25-27. The update replaced the previous state guidance from 2022 and included several changes and new resources to support the nine embedded and focused Programs. Embedded programs are those that are intentionally woven into a grantee's integrated application and don't have distinct funding streams, while focused programs are those with distinct funding streams grantees include within the integrated budget (see graphic below for a visual representation of the nine programs).

ODE received a total of 222 applications during the 2025-27 application cycle. Each application was reviewed by a primary reviewer, secondary reviewer, budgetary reviewer, and as applicable, a reviewer with Career and Technical Education expertise. All reviewers engaged in robust training prior to reviewing applications. As of this report, all applicants met requirements and received approval for their Integrated Plans. ODE and grantees have signed and executed grant agreements and grantees are enacting their plans and may access all related funds.

Embedded Programs:
- Continuous Improvement Planning (CIP)
- Every Day Matters (EDM)
- Career Connected Learning

Focused Programs:
- High School Success (HSS)
- Student Investment Account (SIA)
- Early Indicator and Intervention Systems (EIIS)
- Early Literacy Success School District Grants (ELSSDG)
- Career and Technical Education/Perkins V (CTE)
- Federal School Improvement for Comprehensive or Targeted Supports

Based on extensive feedback both internally and externally, and with the goal of streamlining the application process and reducing the application burden, ODE made the following changes and improvements to the process for the 2025-27 application process:

Changes to the Application

- Adjusted the application window from 30 days to 60 days (March 1-April 30, 2025).
- Embedded the Early Literacy Success School District Grant and Career Connected Learning.

- Pre-Populated many application answers with 2023-25 responses so applicants could update content rather than repeat content.
- Adjusted application templates and questions, including considerations for Oregon's small and rural school districts under 1650 ADMw[4].
- Improved resources for grantee Integrated Needs Assessment and Tribal Consultation, where required.
- Increased representation of charter schools in applications where the charter school applied with the sponsoring district.
- Provided program specific resources to support plan development.

Changes to the Review Process

- Shifted the Integrated Planning and Budget Template (IPBT) to a Smartsheet format to reduce errors and unnecessary back and forth communications between ODE and grantees.
- Simplified the evaluation criteria to create deeper calibration among ODE reviewers.
- Revised the Quality Assurance and Learning Panel (QALP) process to reduce delays in application approval.
- Allowed ODE employees already familiar with the local context and regions to review applications within those specific regions.

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[4] "ADMw" means the extended weighted average daily membership computed as provided in [ORS 327.013 (State School Fund distribution computations for school districts)](1)(c).

ON THE HORIZON

2025 legislation requires ongoing work to understand and improve the state's attendance initiatives. As described above, SB 315 requires ODE to review, make recommendations, and develop best practices related to attendance coding. HB 3199 directs ODE to convene an advisory committee to review LPRO's related study as well as current policies governing attendance data. These findings will impact ODE's efforts in this area moving forward.

Further, the passage of Senate Bill 141 reflects a shared commitment to improving outcomes and ensuring that resources and strategies are aligned with the agency's five Priorities for Student Success.

Functionally, ODE will unify the Integrated Programs application, which is inclusive of the Student Investment Account application, into a new consolidated grant application process that will roll out statewide in Spring 2027 for plans that will take effect at the start of the 2027-28 school year. This includes setting new targets for the additional performance growth targets, K-2 attendance and 8th grade mathematics.

As work at the agency continues to implement the Education Accountability Act, the next Student Investment Account legislative update will include information on the implementation and analysis of the nine Integrated Programs during the 2025-26 school year, and a preview of how planning and supports may shift in preparation for the 2027-29 biennium.

APPENDIX A

2024-25 LPGTs and Actuals: Overview of Target Achievement for 3rd Grade ELA Proficiency, 9th Grade On-Track, and Regular Attendance

In the spring and summer of 2023, Student Investment Account (SIA) grantees with more than 80 ADMr (students) met with the ODE's Office of Education Innovation and Improvement staff to co-develop Longitudinal Performance Growth Targets (LPGTs) for the five common metrics.[5] The targets set covered the 2023-24 through 2027-28 school years. Data for three metrics have been released for 2024-25 and we can compare the second year of targets with the actual rates. Note that graduation and completion data are released early in the following calendar year; this report will be updated to add those.

For an analysis of the targets without actuals, including more background information about how the targets were set, see 2023-2028 LPGTs: An Overview of the Targets.

For the report on the 2023-24 school year comparison of actuals to targets, see 2023-24 LPGTs and Actuals.

Grade 3 ELA Proficiency

- 171 grantees met the minimum 'n' size[6] over the past three years and were required to create baseline targets
    - 66 met targets (38.6%)
    - 105 did not meet targets (61.4%)
        - 50 grantees increased from 2023-24 but did not meet targets
- 131 grantees met the minimum 'n' size over the past three years for gap-closing targets
    - 55 met targets (42.0%)
    - 76 did not meet targets (58.0%)
        - 27 grantees increased from 2023-24 but did not meet targets
- The median change in the Grade 3 ELA Proficiency rate for all students from 2023-24 to 2024-25 is 1.78%. The median change in Grade 3 ELA Proficiency rate for the combined focal student group is 1.24%.

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[5] Regular Attenders, 3rd Grade English Language Arts Proficiency, 4-Year Cohort Graduation, 5-Year Cohort Completion, and 9th Grade On-Track to Graduate

[6] There must be a minimum of ten students in the denominator for the target to be set; this is to maintain student confidentiality in reporting.

Ninth Grade On-Track

- 167 grantees met the minimum 'n' size over the past three years and were required to create baseline targets
    - 124 met targets (74.3%)
    - 43 did not meet targets (25.7%)
        - 14 grantees increased from 2023-24 but did not meet targets
- 137 grantees met the minimum 'n' size over the past three years for gap-closing targets
    - 85 met targets (62.0%)
    - 52 did not meet targets (38.0%)
        - 18 grantees increased from 2023-24 but did not meet targets
- The median change in the Ninth Grade On-Track rate for all students from 2023-24 to 2024-25 is 2.21%. The median change in Ninth Grade On-Track rate for the combined focal student group is 2.33%.

K-12 Regular Attendance

- 187 grantees met the minimum 'n' size over the past three years and were required to create baseline targets
    - 93 met targets (49.7%)
    - 94 did not meet targets (50.3%)
        - 29 grantees increased from 2023-24 but did not meet targets
- 182 grantees met the minimum 'n' size over the past three years for gap-closing targets
    - 122 met targets (67.0%)
    - 60 did not meet targets (33.0%)
        - 17 grantees increased from 2023-24 but did not meet targets
- The median change in the Regular Attendance rate for all students from 2023-24 to 2024-25 is 0.01%. The median change in Regular Attendance rate for the combined focal student group is 0.31%.

Overview

The percentage of Student Investment Account grantees who were required to set target that met them is mixed by metric and student population. The change seen for Ninth Grade On-Track was substantial in the 2024-25 school year — with nearly 75% of grantees meeting their targets. Both K-12 Regular Attendance and Ninth Grade On-Track saw a higher median of change for their combined focal group than their all student group, indicating that progress is being made to close the gaps between those populations.