

SIA Progress Report Guidance for Grantees 2021-2023

This document is designed to provide guidance for grantees in completing their SIA Quarterly Reporting for the 21-23 Biennium and is meant to accompany the 21-23 Progress Reporting Dashboard Template. The tables below outline key due dates, highlight areas of change from last year's reporting dashboard, and provide examples for the type of information ODE is hoping to receive for each question or data point.

Quarterly Report Due Dates	
Quarter 1 (Updating Budgets & Activities for 2021-22)	October 31, 2021
Quarter 2 (July 1, 2021-December 31, 2021)	January 31, 2022
Quarter 3 (January 1, 2022-March 31, 2022)	April 30, 2022
Quarter 4 (April 1, 2022-June 30, 2022)	September 30, 2022 (with Annual Report Questions)

What is the Purpose of SIA Progress Reports?
<ul style="list-style-type: none"> ❖ <i>The SIA represents a key investment into education systems change in Oregon and is rooted in community engagement and transparency.</i> ❖ <i>SIA progress reports combine programmatic reporting with fiscal and narrative reporting that we hope will illuminate the ways in which SIA activities are contributing to shifts and changes in attitude, behavior, action or policy, even if unintended.</i> ❖ <i>Quarterly reporting allows for increased transparency and accountability to our communities, taxpayers and legislators.</i> ❖ <i>ODE views this effort as a partnership, our intent is that grantees also use this report as a space to communicate challenges in SIA implementation that will assist ODE in identifying legislative needs or gaps and/or offer support to grantees.</i>

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Your Customized 2021-2023 Reporting Dashboard	
General Overview	
What's the same?	What has changed?
<p>Grant recipients will continue to share programmatic and financial information, categories in three areas: Strategies & Activities, Tracking Expenses, and Journaling Progress.</p>	<p>We have merged the Strategies & Activities and Tracking Expenses into one section now named “Strategies, Activities, and Budget” in order to more closely align our reporting structure to the optional ODE SIA Integrated Planning Tool and required Budget Template offered during the original SIA Application Cycle and through SIA Plan Updates.</p>

Strategies, Activities	
What's the same?	What has changed?
<p>Strategies and activities remain aligned.</p>	<p>The strategies from your approved SIA plan will be imported by ODE staff and displayed at the top of your Customized Reporting Dashboard for your reference.</p> <p>Your activity numbers and names will also be imported from the Integrated Planning Tool and/or the Budget Template.</p>
<p>Your progress in activity implementation will be reported via activity notes and color coded ratings.</p>	<p>Documentation of activity implementation will be maintained internally by the grantee for auditing purposes, but will no longer be listed as “available evidence” in quarterly reports to ODE.</p> <p>This biennium, you will color code your activities according to their <i>implementation</i> status - as opposed to their spending status - which differs from the prior use of color coding. Your color coding will now align with whether steps are being taken to move an activity forward, even if funds have not yet been spent. <i>See color code descriptions in the Reporting Dashboard Sections below.</i></p>

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Budget	
What's the same?	What has changed?
We are still asking for your 2021-2022 planned budgets and have imported the budget numbers that were submitted via your SIA Plan update. These submitted budgets were based on preliminary allocations.	Now that allocations are finalized, grantees need to update their budgets to align with their actual allocation. You will have the opportunity to update your budget during the first quarter report, but will not be required to continually update your budget with each subsequent report.
	<p>We now auto sum your spending throughout the year. This information is displayed by the green "Total Reported Spent" bar in the "Recipient Allocation and Reported Spent" bar chart and in the "Total spent 2021-22" column.</p> <p><i>*Please note that this spending is inclusive of any charter school spending associated with your SIA Plan.</i></p>
The Allowable Use Category, Object Code, and FTE columns remain, and will now be imported to your dashboard.	For any activity that includes FTE, you will need to select an FTE Type that aligns with the position. Once completed during the first quarter report, you will not need to adjust this column moving forward, unless you make changes to your plan that impacts FTE.
	You will now report SIA dollars spent alongside Activity Notes and color coded Progress Ratings each quarter.

Journaling Progress	
What's the same?	What has changed?
There are still four journaling progress questions	<p>The questions have been refined in an effort to draw a stronger connection between the Journaling Progress section and Progress Markers</p> <p><i>See Journaling Progress section below for refined questions.</i></p>

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Reporting Dashboard Sections

- *Items shaded in green are pre-populated by ODE for grantees.
- *Items in grey are only to be filled in by grantee during first quarter reporting.
- *Items in yellow are for the grantee to fill out each quarter.

Activity Number	<i>SIA activity number as indicated in your required SIA Budget Template on the 2021-22 Expenditures tab. It is pre-populated for grant recipients.</i>
Activity	<i>SIA activity description as indicated in your required SIA Budget Template on the 2021-22 Expenditures tab. It is pre-populated for grant recipients.</i>
2021-2022 Budgeted Cost	<i>SIA budgeted amount as indicated in your required SIA Budget Template on the 2021-22 Expenditures tab. This will be updated in Q1 to reflect the finalized allocation amount for 2021-22.</i>
Total Spent 2021-2022	<i>This information is displayed by the green “Total Reported Spent” bar in the “Recipient Allocation and Reported Spent” bar chart and in the “Total spent 2021-22” column.</i>
Allowable Use Category	<i>SIA allowable use category as indicated in your required SIA Budget Template on the 2021-22 Expenditures tab. It is pre-populated for grant recipients.</i>
Object Code	<i>Object Code as indicated in your required SIA Budget Template on the 2021-22 Expenditures tab. It is pre-populated for grant recipients.</i>
FTE	<i>FTE (if applicable) as indicated in your required SIA Budget Template on the 2021-22 Expenditures tab. It is pre-populated for grant recipients.</i>
FTE Type	<i>Select the appropriate type of position that aligns with this activity, if applicable. This provides valuable information for ODE to identify trends and needs across the state.</i>

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To be Completed 2nd Quarter and Beyond	
Progress Notes	<p><i>This is an opportunity to document your progress for each activity. It could read something as simple as, “Not yet started” or “Staff training underway,” or “New PD written.”</i></p> <p><i>Progress should include steps taken to move an activity forward, even if no funds have been spent yet.</i></p>
Progress Rating	<p><i>Select a color rating to indicate progress toward implementation of this activity.</i></p> <ul style="list-style-type: none"> ● <i>Red indicates implementation of this activity has not yet started;</i> ● <i>Yellow indicates some progress has been made, but there is more to be done (progress could include steps taken that move an activity forward, even if no funds have been spent yet); and</i> ● <i>Green indicates this activity is complete, or very near completion, and there is no additional work to be done (e.g. an activity to “Hire a Counselor” can be coded green once the hire occurs and continue to be coded green in subsequent quarters as the counselor’s work contributes to your strategy and is being funded by SIA).</i>
Monies Spent	<p><i>Please indicate how much money was spent during the reporting period on each activity. This information is automatically calculated, and displayed by the green “Total Reported Spent” bar in the “Recipient Allocation and Reported Spent” bar chart and in the “Total spent 2021-22” column.</i></p>

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Journaling Progress

As you respond to these journal questions, refer back to the [Progress Markers](#) set for the 2020-21 school year and extended through June 30, 2023 via grant amendment.

This progress journal is designed to help illuminate the depth and complexity of changes that advance over time; the intent is to move from early and expected changes, towards likely changes; and extending to profound changes based on the efforts of SIA grant recipients.

Each question's response is limited to 500 words or less.

Question	Context and Guidance	Sample Response
<p>What has been the impact of the implementation of the activities in your SIA plan so far on the behavior, actions, policies, or practices in your school community? Reflect on the Progress Markers as you develop your response.</p>	<p><i>Your district or charter may already be seeing areas where you are noticing early positive responses (Expect to See), active engagement (Like to See), or deep transformation (Love to See). Every Grantee will be starting at a different baseline in progress markers and won't need or be working to address every progress marker, but this question provides space to note the beginning of change in specific areas that have been identified as important to your community.</i></p>	<p>Our district personnel have seen the need to better support our refugee students by ensuring they feel welcomed, supported, and culturally understood in our schools. So, we have launched a concerted outreach to better understand our refugee communities by partnering with [CBO] to support students in school and to offer PD that will help staff become responsive to the unique needs of our refugee students.</p>
<p>What evidence can you point to that supports the impact you have described occurring?</p>	<p><i>Here we are looking for indicators that longer-term change is starting to occur.</i></p>	<p>Memorandum of Understanding in development with [CBO] to provide mentorship to our refugee population and to conduct professional development with our staff.</p>
<p>Share stories or anecdotes about who is contributing to your SIA activities and how they are making significant contributions.</p>	<p><i>This is not limited to only those within your school building or school district. There may be other partners in your larger community or state who are supporting your efforts in implementation.</i></p>	<p>Through conversations with [CBO] representatives, we are learning the significant value (on student outcomes) of having adults in our schools that are representative of our student communities. These representatives have helped to expand our conversation around student support into HR</p>

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Question	Context and Guidance	Sample Response
		recruitment methods and developing employment pathways to diversify eligible candidates for district employment.
<p>What lessons, constructive or critical, have you learned throughout the last period of SIA implementation?</p>	<p><i>We would like this question to be an opportunity for the grantee to reflect on lessons learned from implementation thus far. This could include noting activities that need to change or pivot due to a change in community need or realization that a particular intervention is not having the intended impact that you originally hoped for. This could also point to an intervention that has been particularly well-received or embraced by students, faculty and families.</i></p>	<p>Our SEL implementation began focusing on building student capacity to manage everyday academic and life stressors, and while this approach has value, our data teams were still unable to note shifts in student engagement. Through this process, we learned that it was also necessary for educators to consider their role in student engagement and have begun to ensure prioritized time for educator meetings to integrate this adult-level SEL work.</p>