Student Investment Account Engagement Toolkit

A Resource for Oregon School Leaders to use in Support of the Student Success Act
"The Student Success Act marks a turning point for education in Oregon. We can finally invest in an education system that will ensure every single student in our state is on a path to realizing their dreams for the future. What we have come together to do over the past few months will be felt by students, teachers and schools for years to come."

Governor Kate Brown, July 1, 2019

Join In.
Our Students. Our Success
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Introduction

Dear Oregon School District Leaders:

Thank you for the work you do every day on behalf of Oregon’s children and families.

We are pleased to share the first resource we’ve developed for school districts and eligible charter schools interested in applying for funds from the Student Investment Account (SIA) within the Student Success Act (SSA).

This opportunity holds the potential to improve relationships, increase outcomes, and foster a sense of belonging while building on the strengths and assets of young people, educators, families across the state, including members of the nine federally recognized tribes; students of color; students with disabilities; emerging bilingual students; and students navigating poverty, homelessness, and foster care.

One of the most promising aspects of this new law is that it is rooted in the ideas of authentic community engagement and equity.

If we are to realize the potential of the SSA, it is imperative that we implement with equity, authentic stakeholder engagement and shared accountability for student success.

This toolkit aims to clarify how this first set of engagement processes will enable school districts to stay on track with the steps they need to follow to apply for SSA Student Investment Account funds. We know many districts and communities may have already engaged in needs assessment or self-evaluation processes, continuous improvement or strategic planning, and community engagement work. Please use this opportunity to align your work to meet the requirements in the law and reach out with questions, needs and challenges you’re experiencing.

We are partners in this work and we each have a distinct role to play in it. Please use the Student Success Act Engagement Toolkit Feedback form to send us your first impressions of this toolkit by 5 p.m. on Friday, September 13 so we can incorporate your ideas and improve the tool for all Oregon school districts. This will be a work in progress. We will do our best to provide consistency, clarity, and state-level systems and expertise around how the requirements of the SSA relate and can be coupled with other investments and requirements of districts and charter schools, so that integration between continuous improvement plans, ESSA, High School Success, and other initiatives can be linked over time.

We do ask that you stay in the conversation, raise any questions, and name barriers to our goal. We are focused on supporting you in order to help our students succeed.

Colt Gill
Director
For more information visit: https://www.oregon.gov/ode/StudentSuccess
Part One: About the Student Success Act

For more information visit: https://www.oregon.gov/ode/StudentSuccess
The Student Success Act
When fully implemented, the Student Success Act is expected to invest $2 billion in Oregon education each biennium; that’s a $1 billion investment in early learning and K-12 education each year.

In the 2019-21 biennium, the SSA adds $200 million to the State School Fund, with the remaining funds divided among three targeted accounts.

**Engagement and Shared Accountability**
For communities and school districts across Oregon, our collective vision to improve schools and the outcomes of students relies on collaboration and partnership. Shared accountability to use this investment well, transparently, and in a manner that fulfills this vision is critical across local and state entities.

**Advancing Equity**
At the heart of the SSA is a commitment to improving access and opportunities for students who have been historically underserved in the education system.

**Leading with ODE’s Equity Stance**
Education equity is the equitable implementation of policy, practices, procedures, and legislation that translates into resource allocation, education rigor, and opportunities for historically and currently marginalized youth, students, and families including civil rights protected classes. This means the dismantling and restructuring of systems and institutions that create the current dichotomy of beneficiaries over oppressed and marginalized peoples.
What is the Student Investment Account?

When fully implemented, the Student Investment Account provides close to a $500 million investment that goes directly to Oregon school districts and eligible charter schools. The Student Investment Account is a non-competitive grant program and the purpose is to:

1. Meet students’ mental and behavioral health needs
2. Increase academic achievement and reduce academic disparities for:
   - students of color;
   - students with disabilities;
   - emerging bilingual students;
   - students navigating poverty, homelessness, and foster care; and
   - other student groups that have historically experienced academic disparities (Section 9).

The SSA Requires Strategic and Continuous Improvement Planning that includes Authentic Needs Assessment, Engagement and Data Review Processes

The SSA altered the requirements for local needs assessment and engagement processes that informs a district’s Continuous Improvement Plan (CIP) and the Application for Student Investment Account (SIA) funds. Strategic plans must also show how data has been reviewed by applicants for SIA Funds to enable equity-based decisions. These processes cannot be accomplished by a formula, template, or checklist alone. The guidance and tools provided within this document are intended to support and complement the judgment and professionalism of educators and school leaders to enact this legislation.

By law (Section 21), the needs assessment must:

- Be conducted in a manner that is inclusive of school employees, specific student groups and families of those students named above.
- Address Five Priority Areas
  - Reducing academic disparities for students.
  - Meeting students’ mental or behavioral health needs.
  - Providing equitable access to academic courses.
  - Allowing teachers and staff to have sufficient time to:
    - Collaborate with other teachers and staff.
    - Review data on students’ grades, absences and discipline, based on school and on grade level or course.
    - Develop strategies to ensure that at-risk students stay on track to graduate.
  - Strengthening partnerships.

For more information visit: https://www.oregon.gov/ode/StudentSuccess
Student Investment Account Grants

Non-Competitive Grants
To receive grant money from the Student Investment Account (SIA), all Oregon school districts and eligible charter schools will be expected to meet the strategic planning, needs assessment and authentic engagement requirements.

Allowable Uses
All grant requests must have a spending plan focused in any, some or all of the four allowable use categories.

Reducing Class Size
- Use evidence-based criteria to ensure appropriate student-teacher ratios or staff caseloads;
- This may include increasing the use of instructional assistants.

Well-Rounded Education
- Developmentally appropriate and culturally responsive early literacy practices and programs in pre-K through third grade.
- Culturally responsive programs and practices in grades 6-8, including learning, counseling and student support that is connected to colleges and careers.
- Broadened curricular options at all grade levels including: Art, Music, PE, STEM, CTE, engaging electives, accelerated, dual credit, IB, AP, Life Skills, TAG, dropout and prevention programs, and transition supports.
- Access to licensed educators with a library media endorsement.

Instructional Time
- More hours and/or days.
- Summer programs; before or after school programs.
- Technological investments that minimize class time used for assessments administered to students.

Health & Safety
- Social and emotional learning, trauma-informed practices; student mental and behavioral health.
- Improvement to organizational structures that lead to better interpersonal relationships at the school; improvement to teaching and learning practices.
- More school health professionals and assistants.
- Facility improvements directly related to improving health or safety.

For more information visit: https://www.oregon.gov/ode/StudentSuccess
How to Use:
This calendar suggests activities to help school districts stay on track to apply for Student Investment Account (SIA) funds.

AUGUST
- Learn about the Student Success Act (SSA) and Student Investment Account (SIA). See ODE’s SSA Webpage.
- Make a plan for engaging stakeholders on your needs assessment.

SEPTEMBER
- Begin to engage community and stakeholders in the needs assessment process that will inform your CIP and your SIA application. Document your process, participation, and input.
- Hold a School Board Meeting to inform your Board and community on the SSA, the SIA, the Continuous Improvement Plan (CIP) and engagement and needs assessment requirements.

OCTOBER
- Complete your engagement and needs assessment process that will inform your CIP and your SIA application. Document your process, participation, and input.
- Develop a CIP with the input you gathered to inform your needs assessment.
- Review your CIP at a School Board Meeting.

NOVEMBER
- Finalize your CIP with the input you gathered to inform your needs assessment.
- Submit your CIP to ODE between November 1 and December 6.
- Post your CIP on your website.

DECEMBER
- Complete any tasks from October and November.
- Respond to CIP feedback from ODE.

Key Dates
November 1: CIP submission window opens
December 6: CIP submission window closes
January 22-25: SAVE THE DATE Learn about the SIA application process at the COSA’s OASE/OACOA Winter Conference
January - March 2020: Submit SIA Application

Please Note:
While CIP submission dates are final, other SSA and SIA process dates are tentative and require district and stakeholder input before they are finalized. Check the ODE SSA Webpage for updates and opportunities to provide input.

For more information visit: https://www.oregon.gov/ode/StudentSuccess
How to Use:
This calendar suggests activities to help school districts stay on track to apply for Student Investment Account (SIA) funds.

**JANUARY**
- Respond to CIP feedback from ODE.
- Learn about the SIA application process.

**FEBRUARY**
- Engage in SIA application process.
- Hold a School Board meeting focused on your SIA application.
- Post your SIA plan and application on your website.
- Make your SIA plan and application available at your district office.

**MARCH**
- Submit SIA plan and application to ODE.
- Revise application as needed.

**APRIL**
- Host a School Board meeting to present the SIA grant agreement.
- Develop and negotiate grant agreement with ODE.

**MAY**
- Finalize grant agreement with ODE.
- Continue to update stakeholders and your community.

**JUNE**
- Continue to update stakeholders and your community.
- Finalize and adjust implementation plans based on final agreement and ahead of receiving any additional funding.

**JULY**
- SIA funding is anticipated to begin for approved districts & eligible charter schools.

**Resources to Support your Efforts**

**Engagement**
Check the [ODE SSA Webpage](#) for updates and supports.

**Needs Assessment & Continuous Improvement Planning**
Go to the [ODE Continuous Improvement Process and Planning Webpage](#)

**Need Help?**
ODE is working to provide resources and support. Contact Tamara Dykeman at tamara.dykeman@state.or.us with your questions.
Part Two:
Engagement Strategies
Meaningful Engagement

Why Engagement?
The Student Success Act represents the hopes, dreams and values for Oregon’s students and schools. The law is an explicit call to action and investment in our schools. But who do schools belong to? Engagement is about co-creation, sharing ownership, breaking down barriers and building bridges. Engagement is a foundational educational principle that is borne out in the science of learning, culturally responsive and sustaining pedagogy, and literature on combatting chronic absenteeism and sustaining authentic family and community engagement.

What is “Stakeholder Engagement”? Stakesholders are the people who have a “stake” in the outcomes of students and the climate, culture, and learning conditions of students, educators, classified staff, and the larger community - even folks who don’t have a student currently enrolled in a school. Engagement is the process of communicating to, learning from and alongside, and collaborating with stakeholders to leverage the unique needs and strengths of the children and their families. It is a process where expertise and resources between multiple community partners can help make a true difference in realizing a shared vision for children and youth in our education system.

The SSA Requires all School Districts to Conduct Ongoing Engagement with Stakeholders

By law (Section 9), Oregon school districts are required to engage staff, students and families, particularly:
- Students of color;
- Students with disabilities;
- Emerging bilingual students; and
- Students navigating poverty, homelessness, and foster care; and other students that have historically experienced disparities in our schools.

For more information visit: https://www.oregon.gov/ode/StudentSuccess
Principles for Community Engagement

Every Oregon community collectively benefits when each and every student and family is engaged. Community engagement processes are a means to understand what conditions and differentiated supports are needed to provide every student the opportunity to reach their full potential. And for any community engagement process to be effective, significant attention must be paid to equitable practices.

To guide successful community planning, the following four principles are excerpted from the Governor’s Community Planning and Engagement Guidance.

Principle One: Promote Equitable Engagement
Equity is foundational to community engagement. All aspects of community engagement must recognize, honor, and respect the diversity of the community—including its many cultures—through an inclusive and representative process that brings forward the assets and needs of the communities you serve.

Principle Two: Partner Up
Partnering with the community is necessary to create change and improve opportunities for all children. Connecting with the community in meaningful ways is possible in partnership with trusted groups and organizations, especially those that serve and support children, youth and families who are less often included.

Principle Three: Mobilize & Empower Decision-Making
Community engagement can only be sustained by mobilizing, strengthening, and empowering diverse community partners and their knowledge. Maintaining and sustaining these connections requires an ongoing openness to new approaches, and flexibility in meeting changing needs.

Principle Four: Keep Going!
Collaboration requires a commitment over time to working together and building relationships toward the creation of collective solutions.

We Believe
Effective community engagement facilitates a process of co-creating a common vision, goals and a plan where the community is involved in identifying needs and assets, developing ideas and making decisions. It also comes with the shared responsibility among all participants to be engaged in ensuring the success of strategies to achieve the community’s goals.
Planning for Engagement

Clarify your Goals for Communication and Engagement

Before reaching out to stakeholders, district and school leaders must be clear on what they want to hear from partners. Start at the top by asking:

- What is the district’s vision for student success?
- How can stakeholders help inform the district’s work toward these goals?
- How will the district create the conditions necessary to promote authentic engagement?

Keep in mind why the district is engaging stakeholders in the first place, and develop goals and a plan to support and guide engagement efforts. Focus on facilitating timely, authentic, two-way dialogue by:

- Asking stakeholders what brings them to the meeting.
- Letting stakeholders know why they were invited.
- Making engagement activities public.
- Coming prepared to listen and learn from stakeholders.

Who Are Your Stakeholders?

- Your staff
- Students and youth, including historically underserved
- Families
- Communities
- Tribal Members
- Civil Rights Organizations
- Community-Based Organizations
- Service Clubs
- Early Learning Advocates and Providers
- School Board Members
- Budget Committee Members
- PTAs, PTOs, Boosters, Parent Clubs, Site Councils
- Researchers and Advocacy Organizations
- Elected Officials
- Faith-Based Organizations
- Higher Education
- Health and Social Services
- Youth Development
- Business Community
- ...and many more!

A Regional Resource Hub

Oregon’s 19 Education Service Districts are provided $24 million to assist school districts with SIA grant application and implementation. Consult the OAESD map to locate the ESD near you.

For more information visit: https://www.oregon.gov/ode/StudentSuccess
Leverage Already-Existing Networks

**Classified staff** are vital parts of what make schools work and can be helpful in spreading the word about community meetings and providing important feedback that should be utilized in planning.

**Parents, families and guardians** care deeply about their children and their school. Lean on social media as one way to engage with some parents. Connect with partner organizations whom families’ trust. Offer food, child care and translation services to increase participation. Provide engagement activities at different times of the day including evenings and mornings; consider transportation.

**Indian education, migrant education, Title I parent groups as well as STEM Hubs, CTE Regional Coordinators and leaders, your local business community, community college and university partners, culturally specific and community-based organizations, and other regional collaboratives, such as Early Learning hubs** can and should be leveraged in your engagement process.

Many people in your community are not formally connected to any of these groups but may be reached through networks that includes Parks-and-Recreation, libraries, community centers, and places of worship or community gathering. Consider mapping the networks and relationships you have or could reach via these channels of invitation.

Oregon has nine federally recognized tribes that are geographically dispersed, and may need time to convene and engage in SSA efforts. Tribes are sovereign governments. Many tribes have an agency for education and a director who can connect the district to its parents and community members. Information on the tribes including contact information is available on the Oregon Tribal page.

A Tip from Lincoln County School District

Educators are champions for student success. Working with licensed and classified staff, including association leadership, ensures educator voice is represented in the district-level Improvement Planning Process.
Consider your Audience

Engagement strategies that may be successful with one group may not work with another. The timing of meetings, the primary language(s) spoken, and supports for child care and transportation can all have an impact. You can improve your engagement efforts with something as simple as agenda design. Stakeholders have much to contribute to the conversation and everyone has input that matters.

Staying open to listening well, holding space for diverse perspectives and learning from one another are hallmarks of high quality, inclusive stakeholder engagement. This means that more spacious or less formal agendas could be generative if the right tone and conditions are created at the outset. Our schools serve all students and all community voices should be heard. Recognize that many stakeholders will not be education experts and may need context to fully contribute and engage in a valuable discussion.

- Ask stakeholders what interests them and about their hopes and dreams and worries.
- Anticipate stakeholders’ concerns and questions so you have information to share while also avoiding being defensive.
- Have documents translated and reviewed in advance.
- Avoid “edu-speak,” use plain and clear language.
- Create ample time for stakeholders to share.
- Identify a clear point of contact for people to stay engaged.

Ideas for Engaging Your Audiences

- Social media
- Websites
- Webinars
- Online Chats
- Livestreaming
- Email lists
- Personalized emails
- Surveys
- In-person forums
- Roundtable discussions
- Newsletters
- Monthly coffee chat
- Community group gathering
- School board meeting

A Tip from Coos Bay School District

Involve your school board in your planning process by including them in reviewing data. Most school board members have obligations during the day, so scheduling time that is convenient for them to regularly review a district’s data as it relates to their strategic plan and offer input is a great way to involve the community.

For more information visit: https://www.oregon.gov/ode/StudentSuccess
Meet People Where They Are
Traditional outreach methods like parent nights or flyers are no longer the only – or even the best – ways to reach every audience. Blogs, websites, social media, webinars, SMS (texting), focus groups and surveys are among a myriad of other strategies to connect with specific stakeholders. Meet people where they are and consider using a combination of communication vehicles.

Your district will need to adopt a strategy that incorporates **more than one way of authentically engaging your community**. Not all people get their information in the same way, so to be most effective – and to ensure that no one is inadvertently left out – districts need to intentionally seek out and use the vehicle that works best for the people they are trying to reach.

Consider:
- How will you engage participants based on who they are and what they do (i.e. classroom teacher, parent, student, community leader, school board member)?
- What type of forum works best for each audience (i.e. small group conversation, large forum, partner-led discussion, online)?
- What supports and services will promote and encourage greater engagement (i.e. childcare, translation, food)?
- Where does your audience feel most safe (i.e. coffee shop, school, church, community center)?

**A Tip from David Douglas School District**

Student voice is essential in gauging how the district efforts are impacting the end-user. As part of our needs assessment for our Continuous Improvement Plan (CIP), David Douglas School District utilized various strategies to engage with students and get feedback on school culture, relationships and overall school experience. One highly-effective strategy was the use of **YouthTruth**, a student survey administered to students grades three through high school. The anonymous survey gave us feedback based on grade level, school and demographics. To go deeper with the survey data, we engaged in one-on-one empathy interviews with students at all levels to learn more about their school story. In addition, we held three community events and public input forums for our general population and culturally-specific groups. Feedback was solicited from those who attended. Perception data from all three sources were analyzed in conjunction with student outcome data to inform our plan.
Convene Stakeholders

Bringing together parents and families to engage in meaningful conversations requires thoughtful planning. Hosting an input session is **not a one-time event**. The intent of meaningful engagement is to make sure the people affected are at the table from the start.

**Ask for Input Before Decisions are Made**

Approach stakeholders with rough ideas to get their reaction and be clear from the start on which issues have been resolved and are no longer up for discussion.

- Clarify what is possible.
- Come with questions your district needs answered.
- Ask for ideas.
- Close the feedback loop by reporting out to stakeholders.

**Keep Materials Simple and Brief**

All written, online or presentation materials should be concise and easy-to-understand, written to illustrate how the content relates to student achievement and to the district’s vision.

- Differentiate materials by audience and design them to be as responsive to questions and concerns as possible.
- Keep in-the-weeds details about process for in-person discussions.
- All materials should be translated and accessible.

**SSA Requires School Districts to Engage Stakeholders in Five Priority Areas**

The input collected in the five priority areas below must be used to inform districts’ needs assessment process.

1. Reducing academic disparities.
2. Meeting students’ mental or behavioral needs.
3. Providing equitable access to academic courses.
4. Allowing teachers and staff sufficient time to collaborate and review student data and develop strategies to support all students.
5. Establishing strong partnerships for student achievement.

**A Note on Charter Schools:**

If you are a charter school leader or have a charter school in your school district, engage in a conversation about eligibility for Student Investment Account funds as soon as possible. Virtual Public Charter Schools are not eligible. You can find information about eligibility criteria in Section 10 of the law. ODE will post additional resources and guidance on the Student Success webpage. Please check back regularly for updates.

For more information visit: https://www.oregon.gov/ode/StudentSuccess
A Toolkit for Engaging your Community.

Tools you can Use!
The following tools and templates are customizable and may assist school district leaders in bringing together stakeholders to contribute their input to a discussion about the Student Success Act’s Student Investment Account. To get started, begin by reviewing the “Start Here!” Guidance Document.

Some tools may be used by education advocates and partner organizations to help facilitate conversations with their community. Districts and other SIA applicants are not limited to these tools. Use what works and if you think you have a stronger tool to meet the spirit of what is outlined here, please use them.

Know the Big-Picture:
- Talking Points on SSA and the SIA
- Infographic
- Planning Guide for the 2019-2020 School Year
- “Stay on Track” – Ideas to meet all requirements
- Frequently Asked Questions
- Crosswalk – SIA’s 5 Priority Areas and ODE’s Needs Assessment Template

Spark Interest and Generate Awareness:
- Social Media Posts & Graphics
- Student Success Act Logo and Banner
- Letter to Staff
- “What you can do” – Handout for students, families and educators

Listen to Your Community:
- Email Invitation & Flyer
- Sign-In Sheet
- Agenda
- Presentation Slides
- Timeline
- Feedback Form

Additional Tools
The following resources are from other states or are national in scope but can offer relevant and research-based insights for deepening community engagement:
- Learn more about developing needs assessments from NEA’s Asset Assessment document.
- Adopt a strong foundation on family and community engagement. Dr. Karen Mapp’s research is a national best example.
- Chart a Course to Equitable Collaboration – a resource on engagement from the State of Washington.
- Consider the Community School Standards and their recommendation to create a representative site-based leadership team, including partners, families, staff, and representation of union and school administrators, to guide collaborative planning, implementation, and oversight.
- Check out Research-Based Guidelines for Engagement – A 2015 Hanover Report providing clear and practical strategies for engagement.

For more information visit: https://www.oregon.gov/ode/StudentSuccess
Part Three:
Using Stakeholder Input to Inform Your Planning
Incorporate Staff and Community Voice

The SSA Requires School Districts to Conduct Local Needs Assessment Processes and Facilitate Authentic Engagement

The needs assessment and input from engagement must inform a district’s Continuous Improvement Plan (CIP) and the Application for Student Investment Account funds.

In order to meet the requirements to submit a CIP (ORS.329.095), districts are strongly encouraged to follow these steps and refer to the planning guide in this toolkit.

### SSA STUDENT INVESTMENT ACCOUNT TIMELINE 2019-2020

- **Community Engagement**
  - September - October

- **Apply for Student Investment Account Funds**
  - January - February

- **Continue Community Engagement**
  - May - June

- **November - December**
  - Continuous Improvement Plan

- **March - April**
  - Submit Student Investment Account Application

- **July - beyond**
  - Work Together to Put Plan into ACTION

### Step One: Deepen your District’s Community Engagement

**August – October 2019 and Beyond**

Engagement with stakeholders is an ongoing, iterative process and it is required by the Student Success Act. Intentionally reach out to staff and students and families of historically underserved communities, including students of color, students with disabilities, emerging bilingual students, and students navigating poverty, homelessness, and foster care. Document your engagement efforts and the input you receive.

### Step Two: Facilitate a Needs Assessment Process

**September - October 2019**

Engagement is a requirement for the needs assessment. A district team should use data and the information collected through the engagement process to complete a comprehensive needs assessment. Hold a school board meeting to inform your board and community on the Student Success Act and the Student Investment Account (SIA), the Continuous Improvement Plan (CIP) and engagement and needs assessment processes.

- ODE has developed needs assessment tools and templates that meet the requirements of the SSA. These are made available on the CIP Process and Planning webpage along with other information that can guide your district team through this process.

For more information visit: https://www.oregon.gov/ode/StudentSuccess
Step Three: Use Input to Inform your Planning

October 2019

Complete your engagement and needs assessment process that will inform your CIP and SIA application. All school districts will need to show evidence for how they collected community input. To do so, document input on the five priority areas for engagement under the Student Investment Account.

- To help your process, ODE has developed a crosswalk to align the five priority areas with the ODE needs assessment template’s domains and indicators.

Step Four: Develop Your District’s Continuous Improvement Plan (CIP)

October – November 2019

The date for districts to submit their CIP to ODE, as reflected in Executive Numbered Memo 005-2018-19 is November 1, 2019. Some districts may need more time to complete high quality community engagement, a thorough needs assessment, and the creation of a substantive CIP. Districts should thoughtfully consider the school year timeline before opting to delay CIP submission.

The SSA Student Investment Account Planning Guide for the 2019-20 School Year may be helpful for planning purposes.

Districts who are set to meet the November 1 deadline should still submit on that date. Districts that need additional time for this process may have an extension and submit no later than December 6, 2019, as outlined in the Continuous Improvement Plans Executive Numbered Memo.

Step Five: Design a SSA Student Investment Account Plan and Application

January – February 2020

In partnership with stakeholders, design a SSA plan that:

- Addresses how your district will meet students’ mental and behavioral health needs and increases academic achievement for the student populations called out in the law.
- Is informed by a needs assessment process and stakeholder engagement.
- Is aligned to your district’s continuous improvement plan (CIP).
- Includes data for equity-based decision making.
- Identifies and addresses resource inequities.
- Describes how early stakeholder input was solicited and used in plan development.
- Is informed by the Quality Education Model Report.
Step Six: Discuss Your Plan at Open, Public School Board Meetings

January – February 2020

Your district is encouraged to engage your school board early and often. To meet the requirements outlined in the law:

- Hold a school board meeting focused on your SIA application.
- Make the district’s SIA plan available on your district webpage and at your district office.
- Receive approval by your school board in an open, public meeting.

Step Seven: Submit SIA Plan and Application to ODE

March 2020

A complete SIA application includes the SIA plan, needs assessment and budget estimates.

Meeting All Requirements

ODE will review plans and applications looking for how the input from engagement with staff and community is shaping district plans for the use of SIA funds. Districts are explicitly encouraged to strategize about the use of input from ongoing and continuous authentic engagement.

Using and integrating the input gathered in the engagement process goes beyond reporting and dissemination. Reporting and dissemination may be a means to facilitate use, but it should not be confused with making decisions, improving programs, changing thinking, empowering participants, and generating knowledge¹. Find more information in ODE’s Frequently Asked Questions resource.

The SSA Requires Ongoing Engagement and Use of Data to Inform Equity-Based Decisions

One of the highest priorities and aims of the Student Success Act is to support the use and integration of:

- Ongoing family and community engagement;
- The data gathered during the needs assessment; and
- The focused review of equity-based data the district is collecting to inform decision-making.

Questions to Support Your Planning
The following questions can assist district teams with considering and deciding how best to utilize the input gathered from the engagement processes employed by your district:

1. Who will or can use the input gathered?
2. How can the knowledge generated from the needs assessment and community engagement process be shared?
3. How are existing strategies, programs, and investments considered, or adjusted, based on the information gathered and where trends, patterns, or important outliers exist?
4. What are we doing well and what should we continue doing?
5. What can we improve?
6. What do we need to consider to better address the organizational practices needed based on what we are learning?
7. Who is responsible for making changes in practice or policy? What are the timelines?2
8. How might the following questions3 ensure district investments meet the needs of students who have been marginalized or underserved in the current system?:
   - Who are the racial, ethnic and underserved groups affected?
   - What is the potential impact of the resource allocation and SSA investment to these groups?
   - Does the decision being made ignore or worsen existing disparities or produce unintended consequences?
   - What is the impact towards eliminating the opportunity gap?
   - What are the barriers to more equitable outcomes? (e.g. mandated, political, emotional, financial, programmatic or managerial)

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2 Questions 4-7 are adapted from the planning, monitoring and evaluation framework known as Outcome Mapping. More at outcomemapping.ca.
3 Adapted from the Oregon Equity Lens
Here to Help

The Oregon Department of Education is responsible for implementing the Student Success Act. The Student Investment Account is one of 28 investments within the SSA, albeit the largest. ODE is very early in the process of adding dedicated staff and partnering with ESDs to provide support and guidance to school districts and community leaders. Your questions are welcome and ODE staff will be as responsive as possible, while building staff and support teams to further support SSA and SIA implementation over the next few months.

Please make use of the resources provided here, your ESDs, peer districts, and the culturally specific and/or school supporting organizations based in your community along with your own judgment and skill-building.

Contact Information

Scott Nine
Assistant Superintendent
Office of Education Innovation and Improvement
SSA & SIA Questions
scott.nine@state.or.us

Tamara Dykeman
Student Success Act Coordinator
Office of the Director
General Questions on SSA
tamara.dykeman@state.or.us

Tim Boyd
Director of District & School Effectiveness
Office of Teaching, Learning & Assessment
CIP Questions
tim.boyd@state.or.us

General Inquiries

Student Investment Account
General Mailbox
SIAinfo@state.or.us

Help Desk
503-378-5125

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Additional References

Allan Kaplan, 1999 UN publication “Organizational Capacity.”


“Capacity Building for Whole System Reform” by Fullan & Quinn, 2010.

Community Schools Playbook published by The Partnership for the Future of Learning and found at https://communityschools.futureforlearning.org.


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4 While not directly cited or quoted, these additional resources helped inform the development of this toolkit.