

The Student Investment Account

2024 Legislative Report

January 2024



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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 Update.

This annual report provides an update on program implementation, investment of resources, and continued analysis of impact of investments. The update begins by detailing ongoing work to support alignment of programs, including the SIA, under the Integrated Guidance. At the time of writing, grantees are actively implementing their first approved Integrated Plan submitted in spring 2023. Following the first section, the report details the spectrum of supports, from technical assistance to coaching, that have been developed to support grantees. The report then turns to a deep dive on analysis of implementation of the SIA during the 2022-23 school year, with information on investment and impact. The report concludes with a summary of behind the scenes work to operationalize the SIA and begin to integrate the Early Literacy Success School District Grants.

ALIGNMENT OF SIX PROGRAMS

Aligning for Student Success: Integration Guidance for Six ODE Programs

In the [2023 SIA Legislative Update](#), ODE shared the initial steps to align six ODE programs, an effort to respond 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 response to this budget note, ODE released the [Aligning for Student Success: Integrated Guidance for Six ODE Initiatives](#) in February 2022. To support the implementation of Integrated Guidance, ODE released a number of supplemental resources and tools, all of which are posted on the [OEI Innovation and Improvement webpage](#). Under this guidance, the following programs were operationally¹ brought together without changes to statute or legislation:

1. High School Success (HSS)
2. Student Investment Account (SIA)
3. Continuous Improvement Planning (CIP)²
4. Career and Technical Education - Perkins V (CTE)
5. Every Day Matters (EDM)
6. Early Indicator and Intervention Systems (EIS)

Working within existing state statutes and administrative rules, ODE developed a framework for success that meets and retains the core purposes of each program while trying to create a stronger framework from which we can mark progress, look for long-term impacts, and develop the learning approach to monitoring and evaluation that is a hallmark of high-performing educational systems³. Rather than focusing on working on multiple, separate plans for each program, schools and districts are now able to meaningfully plan for what they are trying to cause for their students, schools, and communities, and then think about which funding stream(s) to use to fund specific activities.

In fall 2022, applicants began to engage focal student groups, families, Tribes, educators, and broader community and identify patterns in feedback, while also reviewing data and completing a comprehensive needs assessment. Throughout the fall and into last winter, applicants continued to:

- Review community engagement input
- Apply an equity lens
- Consult the best practice recommendations from the Quality Education Model (QEM) reports and SSA Student Success Advisory Plans,

¹ This effort reflects where operational alignment could be reached amidst programs with shared aims, statutory language, and program designs without requiring changes in statute.

² In order to implement this note, ODE shifted the timeline for Continuous Improvement Planning (CIP) submission to the spring of 2023. This adjustment supports the alignment of engagement and planning processes with other initiatives.

³ Schleicher, A (2018), World Class: How to build a 21st-century school system, Strong Performers and Successful Reformers in Education, OECD Publishing, Paris. https://www.oecd-ilibrary.org/education/world-class_9789264300002-en

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- Consider Elementary and Secondary School Emergency Relief fund (ESSER III) engagement feedback
- Review regional labor market information and regional CTE priorities
- Create an integrated plan and budget, with consideration of a tiered plan
- Use the continuous improvement tools to workshop and develop plans, budget, and application, including outcomes, strategies, activities, and Longitudinal Performance Growth Targets (LPGTs)
- Post Integrated Application to the community for comment, present at an open meeting, and have the board approve prior to submission

Integrated Application Submission & Review Process

In December 2022, the Department asked applicants to submit an Intent to Apply form by January 15, 2023 via Smartsheet for the Integrated Application. The purpose of the Intent to Apply form was to share with ODE if the applicant planned to apply independently, with charter schools, or in consortium with other applicants prior to the full application opening in March 2023. Based on the information provided in the Intent to Apply form, the Department pre-built Integrated Application dashboards for each applicant, which ensured that they received the correct Integrated Application version based on how they were applying and the programs they were eligible to receive funds from. A total of six variations of the application existed based on the applicants replies in the Intent to Apply form.

- District/Independent Charter with CTE Program - The most common version of the application, this included all questions for all programs.
- District/Independent Charter without CTE Program - This version of the application omitted the CTE related questions for districts and eligible independent charter schools without CTE programs.
- K/6-K/8 - This version of the application was for applicants that did not serve students in high school, omitting questions that are specific to high school level students.
- CIP Only - This application was for districts that were declining funds from programs under the Integrated Application and were just answering the Continuous Improvement Plan questions.
- Virtual Charter with CTE - This version of the application was for virtual charter schools that weren't eligible for SIA funding, omitting non-applicable questions to virtual charter schools.
- Virtual Charter without CTE - In addition to omitting questions that did not apply to virtual charter schools ineligible for SIA funding, this version also omitted questions related to CTE programs.

During March 2023, applicants submitted their first Integrated Applications for the six programs, with ODE receiving a total of 225 applications during the submission period. The intake process was the first step in the review process to ensure the completeness of an application, including all of the required documentation and artifacts had been submitted via Smartsheet. If something was missing from the application, ODE would reach out to the applicant to submit any additional information prior to the application being moved into the review process. Once complete, the application was reviewed by a primary reviewer, secondary reviewer, budgetary reviewer, and as applicable, a CTE reviewer - all of whom had engaged in robust reviewer training prior to applications being received. These reviewers went through the application in its entirety to review responses to narrative questions, artifacts, and the planning and budgeting document based on the [application evaluation criteria](#). Once the reviewers had completed their independent review, they met to determine if the application:

1. Met requirements,
2. Met with small changes, or
3. Needed significant changes to meet requirements.

Quality Assurance and Learning Panels

In alignment with ODE's commitment to develop shared responsibility and confidence in our public schools and to facilitate learning within and across schools, districts, and communities, the final step of the application review process was the Quality Assurance & Learning Panel (QALP) review.

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

1. Support public understanding and grow confidence in the implementation of the various initiatives,
2. Create conditions conducive for learning across districts and communities, and
3. Support ODE's review efforts with a quality check ODE has identified four principles that will guide our approach to reviewing applications and co-development of the Longitudinal Performance Growth Targets for each eligible applicant.

The basic concept was to bring together, virtually, panels of people across the state to review and affirm/challenge the determination made by ODE staff while also increasing learning about the work being done in districts, charter schools, YCEPs, JDEPs, regions, and communities across the state of Oregon. Over three months, ODE engaged with 200+ panelists during QALP sessions, who represented 26 counties across Oregon, with various backgrounds, lived experiences, and roles including advocates, community, business, and philanthropic partners, parents and families, practicing and retired educators and leaders, local school board members, ESDs, and CTE partners.

The panel review did not determine whether or not an application met the requirements. Rather, the panel review either affirmed or challenged the assessment made by ODE staff and spurred additional review processes for that given application, if not affirmed.

If ODE's assessment of small or significant changes was affirmed, the Department would reach out to the applicant and request additional materials or narrative responses. Additional information submitted would be reviewed by reviewers as it was submitted by applicants. As of January 2024, all Integrated Applications have been reviewed, along with any additional information submitted, and all but one applicant now meets application requirements and moved into the co-development of performance targets detailed further below. ODE is continuing to support the final applicant in meeting application requirements.

Longitudinal Performance Growth Targets & Local Optional Metrics (LOMs)

With the passage of the Student Success Act, grantees and ODE were required to collaborate in the development of LPGTs for five common metrics of students' educational achievement, which include:

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

Although specified in statute for the Student Investment Account, these metrics also correspond closely to key improvement measures outlined for High School Success, Every Day Matters, Comprehensive Support and Intervention (CSI)/Targeted Support and Improvement (TSI), and Career and Technical Education. In addition to these metrics, the statute states that targets must be based on data available

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for longitudinal analysis, include targets for all students combined as well as for disaggregated data, and allow for the development of LOMs.

For disaggregated data, the following student focal groups were identified as having historically experienced academic disparities, and data for each group was examined separately:

- Students navigating poverty⁴, homelessness, and foster care
- Students with disabilities
- Emerging Bilingual students
- American Indian/Alaskan Natives
- Black/African Americans
- Hispanic/Latinos
- Native Hawaiian/Pacific Islanders
- Additional student groups that have experienced academic disparities

For both LPGTs and LOMs, grantees were required to co-develop targets with ODE. Targets were set for each year over a five-year period beginning with the 2023-24 school year and ending with the 2027-28 school year. Targets were set for all students within the institution (i.e., “baseline” targets) and for the combined population of student focal groups (i.e., “gap-closing” targets). Following co-development and calibration (see below), these targets then became part of the formal SIA grant agreement. In addition, *ambitious* targets for all students within the institution (i.e., “stretch” targets) were also set for a five-year period, though they did not become part of the formal grant agreement.

Local optional metrics are an opportunity for SIA grantees, in collaboration with ODE, to name and create their own monitoring measures and to set targets for those measures over time. Local optional metrics are included in review by ODE. SIA grantees were encouraged to put forward optional local metrics that may more accurately align to the particular strategies, activities, and investments outlined in their Integrated Application. In addition, the Oregon Administrative Rules provides definitions ([OAR 581-014-0022](#)) and the purpose ([OAR 581-014-0025](#)) of LOMs specifically for mental and behavioral health.

Eligibility Criteria for Development of LPGTs/LOMs

Grantees with less than 80 ADMr (Average Daily Membership) were released from setting LPGTs on the five common metrics and were instead encouraged to set LOMs. If a grantee had over 80 ADMr, but the cohort for one of the five required metrics was less than ten students in the most recent year of finalized data (2021-22 at the time of application), then the grant recipient was released from setting targets for that particular metric. This applied to baseline and gap-closing targets individually.

Those who applied in a consortia used an ODE supplied aggregation of each members’ combined students for this calculation, and created one set of targets for all applicants in the consortia. Grantees in consortia with virtual charter schools ineligible for SIA grants were aggregated without the students from those programs.

⁴ Students Navigating Poverty group uses the new definition of the group that the State Board of Education adopted in December 2022 in [OAR 581-014-0001](#), which was not yet available to grantees in their [ADI](#) (Achievement Data Insight).

Training Materials and Events

In support of grantees' development of LPGTs and LOMs, a number of resources were specifically produced and made available in various formats.

- **Data Visualizations:** ODE released PDF files of suppressed data visualizations and Excel spreadsheets of unsuppressed data to each school and district in fall 2023 with an update in the early spring to coincide with newly updated data. Data visualizations and spreadsheets included data for the five common metrics to support districts in beginning to draft their LPGTs.
 1. [Data Literacy Recording](#): In follow-up to ODE releasing data and visualizations, ODE created this recording to support applicants' understanding of their data and visualizations in order to facilitate their review ahead of beginning to draft LPGTs.
- **Webinar Series:** A four part [webinar series](#) provided background information on how to approach metric data, go over the specifics of setting LPGTs and LOMs and included a panel discussion later used to develop a target setting section in an [FAQ document](#).
- **In-person Presentations:** Additionally, a [presentation at the January COSA Winter Conference](#) focused on Setting Growth Targets, Progress Markers, and Considering Local Optional Metrics. When possible webinar and meeting presentation artifacts were made available for reference.
- **Guidance:** All technical aspects of submitting LPGTs and LOMs are covered in detail in the [Integrated Programs Reporting and Application Dashboard Technical Guidance](#) and it also includes details on eligibility criteria and timelines. To complement this documentation, a [video tutorial](#) for entering LPGTs and LOMs was also produced.

Internal Co-development Supports

In preparation for working with grantees, a series of internal training sessions were developed for staff serving as co-development partners. The training contained similar content to that provided to applicants, while also providing additional details on the various ways to manage data provided in drafted targets, the submission process as well as potential areas where grantees might have questions or need additional support. Presentation artifacts and documentation were also provided to complement these training sessions. Further, to supplement the original training events and to make use of knowledge gained as teams moved through the process, regularly scheduled office hours were held to answer questions, provide updates, and discuss challenges.

Co-development Structure and Timeline

Grantees were encouraged, but not required to submit drafted targets with their grant application before the March 2023 application deadline. An example of what LPGT submission looks like is visible in this [sample](#) in Smartsheet. After the grant application met requirements the co-development process began with grantee and ODE staff meeting to discuss their five-year historical data and review planned strategies to develop realistic and attainable targets unique to the recipient's needs, goals, and funding strategies. Once the targets had been finalized, they were then calibrated, a process discussed in the next section, before being added into SIA grant agreements for board approval. As described in the [Integrated Guidance \(appendix I\)](#) document, no single formula was used to create these targets, but ODE prepared information on the 10% of highest performing school districts to use, updating information previously shared in the integrated guidance discussion for what might be considered overly ambitious targets. Below is a table of the original average yearly growth attained by the highest

achieving 10% of school districts in the second column as well as the updated average yearly growth attained in 2016-2021, once more data was available.

Indicator	Original: Yearly Growth Achieved by 10% of Districts, 2013-2018	Updated: Yearly Growth Achieved by 10% of Districts, 2016-2021
Regular Attenders	1.2	-1.1
3rd Grade ELA	3.4	1.3
9th Grade On Track	5.4	3.2
4-year Graduation	4.2	3.4
5-year Completion	2.6	2.4

Internal Calibration Process

Once all LPGTs and LOMs for a grantee went through co-development process (i.e., targets were agreed to by both the applicant and the ODE co-developers), the targets were assigned to a member of the LPGT calibration team for a final review. The purpose of calibration was to ensure consistent development of targets across all grantees and that the targets followed internal guidelines.

The calibration process checked for:

- Completeness, meaning targets were set for all metrics and groups for which they were required
- Suppression, meaning no specific values above 95% or below 5% were reported; no targets for groups with fewer than ten students
- Consistency, meaning gap-closing targets were in fact closing gaps; baseline targets aimed to be at or above minimum values; and stretch targets consistently surpass baseline targets

If the member of the calibration team had questions and/or concerns about the targets, issues were discussed at a calibration team meeting. Calibrators could also ask for clarification from co-developers if targets seemed unusual or followed unusual patterns to guard against data entry errors and ensure equitable target setting.

SIA Grant Agreements & Board Approval Process

Following co-development and calibration of the LPGTs and any LOMs, the baseline targets, gap-closing targets, and any LOMs were included in the SIA grant agreements along with Progress Markers named below. Grant recipients were then required to provide their SIA grant agreement to their institution’s main office, post the agreement to their website, orally present their grant agreement to their governing body, and provide an opportunity for public comment on the agreement and co-development targets at an open meeting. Grant agreements became valid once the preceding steps occurred and the agreement was approved by the governing body of the grant recipient.

Refresh of Progress Markers Framework

In addition to LPGTs and LOMs, Progress Markers are a part of the overall monitoring and evaluation framework for grantees. Progress Markers are intended to support applicants and SIA grantees to learn and attend to their changemaking efforts and to support understanding of how specific activities/strategies are contributing to desired outcomes and targets. Progress Markers illuminate the

depth and complexity of changes that advance over time. Moving from early signs of progress, towards likely changes; and extending all the way toward profound changes desired based on the efforts of grant recipients.

Starting in fall 2022 and continuing into spring 2023, ODE worked with external partners and community members to refresh the Progress Markers Framework originally published in the Integrated Guidance. The aim of Progress Markers is to help set clear indicators of the kinds of changes that might occur ahead of changes in traditional education metrics. Refreshing the framework was to support alignment across integrated programs and to provide a more useful tool for participating grantees. The field had shared points of initial confusion on elements of the initial Progress Markers language and structure, and these key components were addressed in the refresh.

Three live engagement sessions occurred during the fall of 2022, with invites to ODE colleagues, community partners, district staff, and Education Service District (ESD) staff. Rounds of feedback were utilized to fine tune the structure, language, and format of the progress marker framework. Coding was also added to help grantees track the four main goals from the Integrated Guidance and progress on Longitudinal Performance Growth Targets. An initial draft of the refresh was taken to an in-person engagement session at the 2023 Winter COSA Conference for additional refinement.

The finalized version of the refreshed [Progress Markers](#) was shared with the educational community in March 2023. In addition, a [crosswalk](#) between Cognia accreditation metrics was also developed by agency staff to support schools finding throughlines to the markers. With the newly updated Progress Markers published, the Office of Education Innovation and Improvement (OEII) team shifted to teaching into the new markers. Training for OEII colleagues took place in August 2023. Similar training was also provided to ESD Liaisons in early September 2023. Regional Support staff from OEII incorporated Progress Markers training and resources into their visits occurring throughout the fall of 2023.

Refreshed Progress Markers are now included in the SIA grant agreements for the 2023-25 biennium and starting in fall 2023, are required to be reported on quarterly by grantees. This is a shift from previous bienniums where SIA grantees optionally reported on Progress Markers. SIA grantees are not expected or required to meet all progress markers, only to track and report quarterly, when the investments create or contribute to the changes outlined as determined by the recipient.

Survey of the Integrated Grant Application Process

Following the completion of the Integrated Application submission, review process, and LPGT co-development process, ODE designed a survey to elicit quantitative and qualitative feedback from participants regarding their experience. Surveys were sent to individuals involved in the grant application process, including school district and charter staff, ESD Liaisons, CTE Regional Coordinators, and ODE staff. The survey was released on June 28, 2023 and closed on August 21, 2023. A total of 123 individuals completed the survey. What follows is a high-level overview of the survey and its results.

Effectiveness of Application Processes

Survey respondents rated six application processes:

1. Application preparation, guidance, and webinars;
2. Intent to apply;
3. Application submission;
4. Application review/update;
5. Quality Assurance and Learning Panels; and

6. Longitudinal Performance Growth Targets and Local Optional Metrics.

The effectiveness of the six application processes were rated using the following options:

- *Very effective*
- *Mostly effective*
- *Neutral*
- *Not effective*
- *Not applicable*

The majority of all respondents indicated that four of the six parts of the application process were *effective*. The application preparation, guidance, and webinars was most likely to be considered *effective* (63%), followed by the application submission (57%), the intent to apply (56%) and the application review/update (50%). Only the QALP and the LPGTs/LOMs had *effective* ratings under 50%, with 46% of respondents indicating the LPGTs/LOMs were *effective*, and 36% rating QALP as *effective*.

Survey results also indicated that staff from large school districts tended to rate the six application processes as more effective than staff from medium or small districts. For large districts, the majority of respondents rated each part of the process as *effective*, ranging from 88% *effective* for the application preparation, guidance, and webinars and the application submission, to 50% *effective* for the application review/update. Ratings of effectiveness from medium and small districts were lower with about half of respondents saying four of the six parts were *effective* (range: 46% - 56%), with a smaller percentage indicating QALP and LPGTs/LOMs were *effective* (range 25% - 35%).

Impact/Disruption of Application Processes

The six parts of the application process (see previous section) were also rated in terms of their impact or disruption. The response options were:

- *Went as smoothly as possible*
- *Went somewhat smoothly - a few frustrations*
- *Challenging/confusing*
- *Extremely difficult/frustrating*
- *Not applicable*

Across all respondents, the majority (range; 53% - 68%) said each of the six parts of the application process went smoothly. The Intent to Apply was rated overall as the part of the process that went most smoothly (68%), while application preparation, guidance, and webinars was rated most challenging (*challenging to extremely difficult* = 38%), followed by LPGTs/LOMs (*challenging to extremely difficult* = 32%).

As for the size of the district, large, medium and small districts rated three parts of the process similarly: for the application preparation, guidance, and webinars, the range for the percentage indicating the process went smoothly across the three sizes of districts was 49% - 60%, for Intent to Apply the range was 63% - 76%, and for the application review/update the range was 59% - 68%. On the other hand, ratings differed for the application submission, with 88% of respondents from large districts indicating it went smoothly, compared to 68% from medium districts and 54% for small districts. And for LPGTs/LOMs, over three-quarters (76%) from large districts said it went smoothly, compared to 48% and 44% for medium and small districts, respectively.

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Helpfulness of Communication Processes

Five aspects of Integrated Grant Application communication processes were also rated in terms of their helpfulness:

1. Aligned program communications - listserv;
2. Smartsheet application portal;
3. Smartsheet automated notifications;
4. Integrated Planning and Budget Template; and
5. Tiered planning within the budget template.

Respondents rated these processes on the following scale:

- *Very helpful and clear*
- *Somewhat helpful and clear*
- *Neutral*
- *Confusing and/or unclear*
- *Not applicable*

Of the five processes, Aligned Program Communications - Listserv was considered to be the most helpful, with over half (53%) reporting it was *somewhat* or *very helpful*, and only 6% saying it was *confusing and/or unclear*. On the other hand, tiered planning within the budget template had the lowest ratings, with 45% reporting it was *somewhat* or *very helpful* and 15% reporting it was *confusing and/or unclear*. The small range between the highest and lowest ratings indicates all five processes were rated fairly similarly.

With respect to the size of the district, respondents from large districts were more likely to indicate the processes were helpful in comparison to those from medium-sized districts, who in turn rated the processes more favorably than those from small districts. Differences were most pronounced for the Aligned Program Communications - Listserv, with 88% of respondents from large districts indicating it was *somewhat* or *very helpful*, compared to just 44% from small districts. The discrepancy between large and small districts was considerably less for the other communication processes, ranging from 8 to 28 percentage points.

Accomplished Goals

Three additional questions on the survey were designed to determine the degree to which OEII accomplished three of its broad goals:

1. Clear and comprehensive Integrated Guidance to assist districts with their application;
2. Encouraging more effective, strategic, and equitable planning; and
3. Whether the process “made the right work easier.”

One question asked, “*Did the Integrated Guidance and online materials/resources prepare you for the process?*” Two-thirds (66%) of respondents indicated that the materials and resources prepared them “as much as possible” (26%) or “more often than not” (40%). Another 30% said they partially prepared them, “but with key gaps,” and just 3% said “Not much/not at all.”

The next question asked respondents how much they agreed or disagreed with the following statement: “*The IG application process resulted in more effective, strategic, and/or equitable planning.*” Overall, nearly half (49%) either *agreed* (42%) or *strongly agreed* (7%) with the statement. In comparison, 22%

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either *disagreed* (18%) or *strongly disagreed* (4%) that the application process resulted in more effective, strategic, and/or equitable planning. An additional 29% of respondents were *neutral*.

The third question asked respondents their level of agreement with the statement: “*The process ‘made the right work easier’ even if the process required significant time and energy.*” Overall, 42% of respondents were in agreement with the statement (*agree* = 34%, *strongly agree* = 8%), and 42% were in disagreement (*disagree* = 33%, *strongly disagree* = 9%). Another 16% were *neutral*.

Qualitative Analysis of Open-ended Questions

Overall, the qualitative analyses supported the results of the quantitative analyses: the majority (or occasionally, the plurality) of respondents found the process was effective, went smoothly, and was helpful. In addition, most of the quantitative analyses and the qualitative analyses indicated that small districts, very small districts, and charter schools had the greatest challenges and difficulties with the Integrated Grant Application process. Some key takeaways from the Qualitative Analysis of Open-Ended Questions included:

- Across all district sizes, respondents described the large amount of time and effort put into the application. Small and very small districts, and charter schools most often described the process as overwhelming.
- Small and very small districts, charter schools, and medium districts noted that the application process took away time from other important work.
- Across all respondents, many noted that the application questions seemed redundant or that the process did not save time compared to previous application processes.
- Small and very small districts, and charter schools said they believed their smaller size made completing the application process more difficult, many citing that the workload fell onto very few people or just one person, many of whom already carried multiple responsibilities at their district.
- Across all sizes and roles, respondents wanted future applications to be simpler and more streamlined, while also being consistent so that future years wouldn’t require learning a whole new process.

SPECTRUM OF SUPPORTS

All SIA grantees have access to technical assistance (TA), which is provided by ODE staff through a regional model as well as from all 19 Education Service Districts.

A spectrum of supports for SIA implementation were designed into the law through the establishment of a coaching program, which are outlined in [Section 7: Getting Better](#) of the Integrated Guidance. ODE is designing a range of supports including TA, professional learning, onsite coaching, the Intensive Program, and the authority to take corrective action over time based on the performance framework set into the program, but suspended in implementation as part of the Legislature's pandemic response. The supports that ODE is responsible for developing and deploying have made great strides since the February 2023 Legislative Report.

OEII Regional Support Model

Prior to the launch of the Integrated Guidance, staff were organized by distinct programs. This meant staff worked on one program and connected with school and district staff on that particular program, rather than on multiple programs. To the field, this meant that a district might connect with up to six different staff members from the office at any given time. With the rollout of the Integrated Guidance, the office went through a process to de-silo and better coordinate across programs.

After staff initially learned about each of the six programs housed within OEII, the office instituted a regional support model, where two staff members were assigned to regions (in alignment with the 19 ESD regions) to better support grantees on all of the programs under the Integrated Guidance and in better coordination with ESD teams.

Since implementing this model, relationships between Region teams, ESD staff, and grantees have grown tremendously. Region teams have learned more about the context of their districts, schools, and programs - and often engage in visits to share information in regional meetings and/or see programs in action. In addition to site visits, Region teams engage in calls with their ESD regions on a biweekly to monthly basis, sharing overarching updates while also checking in on specific grantees and/or working to resolve challenges. Grantees also know that they have a dedicated support team they will receive information from and also can go to with questions and/or needs. As the Early Literacy Success Initiative is incorporated into the renewed Integrated Guidance for the next biennium⁵, Region teams are growing their own knowledge base in order to be able to support their districts, schools, and programs with this program as well.

ESD Technical Assistance

[ORS 327.254](#) requires that all 19 ESD regions receive funding from the Statewide Education Initiatives Account (SEIA), another account within the Fund for Student Success, based on the prescribed formula. The passage of [Senate Bill 225](#) adjusted the formula to establish floor funding for the smallest ESDs.

In the 2021-23 biennium, \$41.1M was allocated from the SEIA to ESDs to provide technical assistance to districts, eligible charter schools, and YCEPs/JDEPs in their region. The passage of [Senate Bill 215](#) in 2023 adjusted who the ESD had to provide services to within their region - shifting from just school districts to include eligible charter schools and YCEPs and JDEPs as well, given they are eligible applicants for SIA

⁵ More information about the renewed Integrated Guidance is shared in the "On the Horizon" section further in this report.

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funding. TA 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 TA funding, each ESD is required to hire at least a 1.0 FTE for the biennium, who is the primary point of contact for collaboration with ODE. This 1.0 FTE could be fulfilled with one person or the combination of time across multiple people based on the content and design of each ESD.

Building off the existing ESD structures established with SIA implementation, ODE furthered this partnership by providing additional funds to ESDs to support implementation of the Integrated Guidance. ODE worked closely with each ESD to execute grant amendments for the 2021-23 biennium that brought in additional funding, including:

- Every Day Matters funding, focused on strategies to address the root causes of chronic absenteeism
- High School Success funding, focused on strategies to support 8th-12th grade students
- Every Student Succeeds Act federal funding, focused on supporting TSI and CSI schools
- Governor’s Emergency Education Relief (GEER) funding⁶, which ends September 30, 2024, focused on reducing administrative burden for small and rural districts

With the increase in funding, rather than singular ESD Liaison roles - small teams of different sizes within each ESD have formed with clear coordination and joint meetings across the programs. As part of the ESD grant agreement, for the 2021-23 biennium, ESDs were required to submit the following deliverables on an annual basis:

- Draft Comprehensive Support Plan, which details the support and technical assistance that each ESD will provide to districts, schools, and programs in their region to support the development, implementation, and review of draft plans
- Documentation that the Comprehensive Support Plan has been adopted and incorporated into the ESD Local Service Plan (LSP)
- Annual financial report of expenditures, which details how ESDs spent each funding stream each year

ESDs continue to receive funding in the 2023-25 biennium, with a slight increase in overall funding. ESDs will continue to meet with ODE on a regular basis through calls and regional visits, and will submit the same three deliverables in the new biennium.

Small and Rural District Support

ODE committed \$4,450,000 in Federal GEER funding through September 30, 2024 to support small and rural school districts in Oregon through allocating:

- \$4,227,735 to 19 ESD regions
- \$222,265 for a full-time ODE staff
- \$42,275 for part-time coordination among ESDs through the Oregon Association of Education Service Districts (OAESD)

The focus of these GEER funds is to provide responsive and intensive support from the ESDs to small districts that are 1650 ADMw or under within their regions and may provide these supports to districts that have up to 2000 ADMw. Often smaller districts have limited personnel capacity to move through all

⁶ While the GEER funding ends on September 30, 2024, the Legislature sustained the dedicated funding to support small and rural districts with state funding in the 2023 Legislative session through [package 104 in House Bill 5014](#).

of the administrative and reporting requirements for various programs and initiatives the districts are receiving. ESDs are using the funds in accordance with the allowable uses to provide support, coordination, and alignment of any of the 145 state or federal programs for the small districts in their region.

Given the GEER funds ESDs receive must be spent by September 30, 2024, ODE submitted a Policy Option Package (POP) request to sustain the small and rural support funding in the long session, shifting from federal to state funding. This POP was supported by the Department and approved by the Legislature in 2023. This means that starting in the 2023-25 biennium, each ESD will receive state funding from the SEIA to support continued emphasis on small and rural district support to relieve administrative burden for the 145 state and federal programs across ODE. This also shifts the ODE staff position focused on this work from limited duration to permanent and continues to provide funding to support a part-time OAESD staff coordination role.

Professional Learning Series

In response to the requirement for a coaching program to support the SIA, ODE moved forward with a Request for Proposal (RFP) process in spring 2021, which resulted in two contracts awarded for the development of two professional learning series. These professional learning opportunities are universally available to all schools and districts across the state of Oregon. The content developed is open access, available at no cost to grantees, and can be accessed asynchronously, with encouragement for grantees to engage in learning cohorts or Professional Learning Communities (PLCs).

The first series of professional learning, “Engaging Equity: Equitable Systems, Mindsets, and Practices,” launched last February. The deep aim for the Engaging Equity modules was to support a quality baseline for advancing culturally specific and sustaining education practices in alignment with outcomes set forth in legislation with specific attention to focal students. The Engaging Equity professional learning series is made up of four clusters with a total of 18 individual modules. The first two clusters of modules - Racial Equity Foundations and Culturally Responsive and Sustaining Practice - have been released with the final two clusters of modules - Apply Equity Skills to Educating a Diverse Population and Building Equitable Educational Systems - to be released in spring 2024⁷.

A second series, the “Community Engagement Systems and Practices” modules launched in spring 2023. The four part series is designed to provide another avenue for Oregon educators to dive more deeply into the ODE Community Engagement Toolkit - and offers videos, examples, planning resources, and oration of key elements throughout.

ODE also developed two series of professional learning to support the Early Indicator and Intervention System (EIS) program - [EIS Foundations for Student Success and EIS at Middle and High School](#). An EIS is a collaborative approach between educators, administrators, parents, and communities to use data effectively to identify opportunities to support all students to be on the pathway to graduation throughout their educational experience. These learning series provide educators and leaders with resources and skills to expand and deepen EIS best practices, with both synchronous and asynchronous sessions.

Intervention and Strengthening Program

⁷ Engaging Equity [full scope and sequence](#) of clusters and modules.

[Section 17 of the Student Success Act](#) established a coaching program intended to provide capacity building, system improvement supports, and accountability structures to support SIA implementation.

ODE established the Intervention and Strengthening Program (ISP) as the general coaching program funded through the SIA for grant recipients who do not meet LPGTs. Each biennium, ODE is expected to monitor and determine if a grant recipient does not meet the LPGTs identified in the grant agreement. If a grant recipient does not meet the LPGTs, the grant recipient may submit an explanation for the reasons why the targets were not met. After taking into consideration the explanation submitted by the grant recipient, ODE may require the grant recipient to enter into the ISP. If required, participation in the coaching program must be for at least one year, unless the department allows for a shorter period of time.

As named above, ODE has been pursuing a universal and targeted approach to deploy technical assistance, coaching, and high-quality professional development that supports the implementation of the SIA, the 28 programs in the Student Success Act, and the programs aligned in the Integrated Guidance. The legislature allocated about \$9M per biennium to develop these efforts. In addition to the professional learning series named above, ODE launched a second RFP process using a price agreement model to secure pre-approved vendors to provide onsite coaching in the following focal areas:

- Equitable mindsets and systems
- Community engagement
- Fiscal stewardship
- Early literacy
- Middle school literacy

ODE ran the RFP twice during the 2022-23 school year and determined five vendors met the requirements to be a pre-approved vendor for these focal areas. ODE has worked closely with DAS Procurement to establish master service agreements with each vendor and has hosted introductory kickoff meetings with each vendor. ODE is in the process of finalizing the Statement of Work process under the price agreement structure to begin matching district interest with vendors. ODE anticipates vendors will begin working with grantees in spring 2024.

Intensive Program Background

[Section 18 of the Student Success Act](#) established an Intensive Program (IP) for school districts with the highest need for support and intervention. The Intensive Program is invitational, and only public school districts are eligible to receive an invitation to participate. School districts that accept the invitation agree to participate for at least four years and as such are eligible for additional funding from the Statewide Education Initiatives Account. For the 2021-23 biennium, a total of \$25 million was included in the grant-in-aid section of the SEIA for the additional funding for participating districts, which reflects unspent monies distributed to participating districts from the previous biennium. The AY23 Legislatively Adopted Budget (LAB) had \$3,413,134 in total operations funding, which includes \$750,013 for three staff positions and services/supplies.

As outlined by statute, the Intensive Program creates Student Success Teams (SST). Administrative rules passed by the State Board of Education with input from ODE's Rules Advisory Committee (RAC) established that each SST for a participating district would include two bodies: a broad Advisory Body with members from across the school district and larger community and a smaller Stewarding Body with seven members. The Stewarding Body includes individuals internal and external to the district - the superintendent, a board member, a teacher, an ODE point person, and three ODE-contracted stewards -

who support the district in leadership, teaching and learning, and community engagement. With the guidance of the Advisory Body, the Stewarding Body makes recommendations on how to work collaboratively with staff, families, and community partners to improve performance outcomes and meet Longitudinal Performance Growth Targets. The participating school district must follow these recommendations when they pertain to programmatic decisions and funding for the SIA and the Intensive Program; for other areas of district operations, the district may choose to follow the recommendations.

The program currently has two active cohorts of districts participating. Cohort 1 invitations were extended in 2021, with one district participating during the initial year of implementation. Cohort 2 invitations were extended in 2022 to four districts, with two additional districts selected into the program for the 2023-24 school year. Cohort 3 invites took place in fall 2023, with the aim of adding an additional two districts for the 2023-25 biennium.

Intensive Program Implementation Challenges

As the program continues to partner and work with Cohort 1 and 2 districts, multiple challenges continue to impact implementation of the Intensive Program. Three primary challenges have surfaced, or continue to surface: procurement execution time, mindsets around equity in leadership and funding, and trepidation around participation from invited districts.

With procurement services, the structure of the Intensive Program has offered unique challenges in drafting grant agreements that meet legal sufficiency requirements for the program. The Intensive Program offers additional grant-in-aid for recipients, but unlike other grant-in-aid programs, the funds are only usable through recommendations from the Student Success Teams. This impedes the ability to develop allowable uses and budgetary considerations common in other grant-in-aid programs. While the procurement and Intensive Program teams have moved toward a drafted standing grant-in-aid agreement for districts, it has taken significant time to execute these grants leaving Cohort 2 districts with a grant timeline beginning January 1, which misaligns with district calendars.

The most significant challenge facing the program currently is the procurement of external contractors to serve as stewards. In 2022, the Intensive Program team pursued making a special procurement process permanent practice for contracting additional stewards. This move came after two failed RFPs in 2021 and discussion with OEII, procurement, and DAS leadership for potential next steps. However, during 2023 movement on this special procurement approach has been delayed due to procurement staffing changes. While the team was able to add four additional stewards under the previous contract, only single-year amendments to extend currently serving stewards and the new additions were completed at the end of 2023. This has been especially difficult considering larger contracts and spending limitations. For continued program viability, being able to procure additional stewards through a consistent special procurement process is needed to ensure enough stewards can be obtained that have the specific skills and knowledge to support the diverse range of districts the program aims to serve.

Another challenge that has become apparent is district perspectives around grant-in-aid programming. As mentioned in regard to grant agreements, the Intensive Program's unique approach to recommendations being approved through the Student Success Team is different from any other grant programs in which districts participate. Generally, the program has identified the need to onboard and train districts in recommendations to shift district planning to a holistic, collaborative approach. As of 2023, the majority of recommendations have all been initiated by district leadership on the Student

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Success Team, whereas the aim would be to see recommendations come from more group discussion or from the vast array of voices that make up the Student Success Team participants. Districts are still planning around how they would like to use the funds, opposed to working with the Student Success Team to collectively determine recommendations that will foster improvement.

Each biennium the program invites between three to ten districts as per [OAR 581-017-0738](#). Programmatically, the aim is to have invites out by April of the initial year of the biennium to allow for execution of grant agreements by July 1. However, in 2023 invites were delayed and did not take place until September.

Implementation Progress

The 2023 year saw continued partnership with participating districts, two additional invites for Cohort 3 going out to school districts, a growth in the Intensive Program staffing, as well as navigating large shifts in both programmatic elements and district changes.

Much of the focus during implementation in winter and spring 2023 was in partnership and support of the three participating districts in Cohort 1 and 2 around the integrated application. Work with the Cohort 1 district included providing feedback on application and process through the Student Success Team model. Cohort 2 districts were still in the planning phase of the program, so Intensive Program staff worked alongside district staff in their application process while learning into the district prior to Student Success Team work commencing.

Winter 2023 saw a change in superintendent for the Cohort 1 district. This transition coincided with the first memo production by steward contractors serving the program, and allowed an opportunity for the stewarding body to connect early and often with the new leadership. Continued biweekly meetings with Intensive Program staff and new leadership has supported a smooth transition from a programmatic lens and continuation of the Student Success Team model has progressed with no pauses.

The largest programmatic shift was in the passing of [Senate Bill 215](#), which exempts Student Success Teams from public meeting law requirements. This technical fix was sought after invited districts naming this element as a structural barrier for them in participation. Minutes continue to be posted for all Student Success Team meetings for all participating districts to support transparency.

Within the agency, ODE program staff for the Intensive Program have invested and refined internal alignment work to better support participating districts across ODE programs and initiatives. ODE staff who directly support programs being implemented in participating school districts meet monthly to share updates, align strategies, and integrate process requirements. Feedback from participating staff has been positive in providing a space to learn more about common elements of programs and work toward reducing administrative burden for districts.

Next Steps for the Intensive Program

To fulfill statutory requirements and provide the greatest level of support to participating districts as the program grows, the Intensive Program team expanded this fall by adding two limited duration District Support Specialists (Education Specialist 2) and a limited duration Office Specialist 2. The team will be pursuing funding and position authority, through a Policy Option Package, to make these limited duration positions permanent and add an additional District Support Specialist and an Administrative Support Specialist ahead of Cohort 4 invites. Permanently funded positions will allow the Intensive

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Program to grow its capacity to fully support high-needs districts and live into the intention and purpose of the Intensive Program.

Another key component of the program staff aim to solidify in 2024 is technical assistance contract to support the growth and development of the Stewards as well as ODE and participating district staff through Technical Assistance. Funds for the technical assistance contract are earmarked in the operations budget for the program. At the time of this report, staff submitted necessary documentation to begin working on this process with procurement.

Despite the challenges in developing and implementing a new approach to supporting school districts, the program shows tremendous promise. While other states' models of supporting districts with similar needs are punitive and often result in a contentious dynamic, the Intensive Program aims to collaboratively work with districts – alongside their community in the spirit of the Student Investment Account – to provide deeper support and funding to build capacity in the districts that need it most. Also, while other states' models often rely on a single coach, the Intensive Program builds a broad base of support for participating districts – from stewards safeguarding a key perspective in the district's decision making process to their Advisory Body that draws from the community to the designated ODE Point Person to build internal alignment at ODE to support the district's work.

One significant area of promise for the program's effectiveness has been a level of trust developed between the participating school districts and agency staff. District personnel have been more willing to proactively name areas of need that have historically been areas of tension. Another area of promise has been the ability to authentically center equity in Student Success Team meetings and bringing in voices who have often been absent or ignored from conversations around improving experiences and outcomes for students.

Continued Groundwork for Corrective Action

Based on learnings from the High School Success program and the [recent SOS audit](#), ODE has developed a plan for corrective action for the SIA and in coordination with the six programs under the Integrated Guidance. ODE is prepared to intervene to ensure that compliance is achieved when a grant recipient does not meet specific requirements or outcomes, including, but not limited to:

- Longitudinal Performance Growth Targets;
- At least 90% of the Perkins performance targets at the consortia or direct grant recipient level;
- Eligibility requirements;
- Application alignment with available performance and demographic data;
- Misuse of or inadequate reporting of finances;
- Community engagement priorities; and/or
- Observing all civil rights laws.

Corrective Action Plans (CAPs) are improvement plans that outline specific actions that must be taken and outcomes that must be met. Plans will be developed to address areas that need improvement and will draw upon the spectrum of supports designed to support SIA grantees. CAP supports may include:

- A written plan identifying specific actions that must be taken and outcomes that must be met
- Requirement to enter into a coaching program
- A compliance review and/or investigation of unlawful actions
- Direct investments of grant funds
- Withhold grant funds

2022-23 SIA IMPLEMENTATION AND ANALYSIS

Background

Timelines of Implementation

- May 2019: Passage of the Student Success Act, inclusive of the SIA
- March-April 2020: Districts and schools submit first SIA application, plan, and budget coinciding with the start of COVID-19
- August 2020: Special legislative session results in reduction of SIA funding to \$150M, release of LPGTs, and encouragement to invest funds in support mental and behavioral health
- Fall 2020: Opportunity for districts and schools to make adjustments to the SIA plan due to reduction in funding
- Fall 2020-June 2021: First year of SIA implementation
- May-June 2021: SIA plan updates due to ODE, pivoting from original plan to complete a full application cycle
- July 2021-June 2022: Second year of SIA implementation
- February 2022: Release of Integrated Guidance, inclusive of SIA
- July 2022-June 2023: Third year of SIA implementation, final year of implementation with program specific guidance
- March 2023: Districts and schools submit first Integrated application, plan, and budget

On Allowable Use

SIA funding offers wide latitude to applicants in determining, through required community engagement processes, how best to use the allocated funds to improve outcomes for students as long as the use falls within one of the described allowable use categories. Those categories are⁸:

1. **Increased Instructional Time** - Applicants may increase hours or days of instruction time or add summer programs and/or before and after school programs.
2. **Improving Student Health and Safety** - Applicants may focus investments on social-emotional learning and development, student mental and behavioral health, improvements to teaching and learning practices or organizational structures that lead to better interpersonal relationships at school, student health and wellness, trauma-informed practices, school health professionals, or facility improvements that improve student health or safety.
3. **Reducing Class Size** - Applicants may increase the use of instructional assistants, educators, and counselors, using evidence-based criteria to ensure appropriate student-teacher ratios or staff caseloads.
4. **Well Rounded Education** - Applicants may include developmentally appropriate and culturally responsive programs for literacy in pre-k through third grade, culturally responsive practices and programs in grades six through eight that includes counseling and student support connected to colleges and careers, broadened curricular options at all grade levels (including access to art, music, PE, science, etc...), and access to educators with a library media endorsement.
5. **Ongoing Community Engagement** - Applicants may use a portion of funds to improve ongoing community engagement practices.
6. **Administrative Costs** - Applicants may utilize up to five percent or \$500,000 of the total amount spent, whichever is lower, each year for administrative costs.

⁸ It is worth noting that within each category the statute ends with the clause “which may include,” which creates both flexibility and challenges in determining allowable use in administration.

2022-23 SIA Implementation

As shared last year, for the 2021-23 biennium, SIA grantees were required to submit a SIA Plan Update, detailing whether they would make an adjustment (minor changes) or amendment (major changes) to their initial three-year plan submitted in the original application. This process required previous SIA grant recipients to submit a new budget for the 2021-23 biennium, narrative information on the use of an equity lens, and information on continued community engagement to inform plan changes. This was a pivot from the original guidance that named districts and schools would complete a full application cycle in spring of 2021 given the impacts of COVID-19.

Grant recipients were required to submit SIA Plan Updates during the window of May 1 - June 30, 2021. ODE received 203 SIA Plan Updates from previous SIA grantees. One previous SIA grantee opted not to submit a SIA Plan Update given capacity to implement and monitor the work. The two districts that did not apply in 2020-21 opted to apply for funding in the 2021-23 biennium due in large part to the overlapping requirements between SIA and ESSER III district plans. Two newly eligible independent charter schools also applied for SIA funds; previously both had received SIA funding by applying with their sponsoring district.

The review process of SIA Plan Updates was completed by 8 staff members within OEII. SIA Plan Updates were deemed to fall into one of three categories:

1. **Meet Requirements:** The SIA Plan Update was determined to meet all requirements and was ready to move forward to the grant amendment process.
2. **Generally Meets Requirements:** The SIA Plan Update generally met requirements, but needed additional information or materials to fully meet requirements. Examples of small changes included re-submitting the budget using the required budget template or minimal addition of narrative to support the application. Once the additional information was submitted, reviewed, and approved, the district or school then moved into the grant amendment process.
3. **Does Not Meet Requirements:** The SIA Plan Update did not meet the requirements and required substantial changes to be made prior to moving forward in the process. Districts and schools falling into this category were invited to have a call with ODE to discuss the changes and additional information that would need to be submitted in order to meet requirements. Examples of major changes included submitting missing documents such as community engagement artifacts or substantial additions to narrative portions of the application. Once the additional information was submitted and approved, the district or school then moved into the grant amendment process. SIA Plan Updates that were deemed to meet with small changes and did not meet the requirements initially were remedied prior to grant amendments and funds being disbursed to SIA grantees.

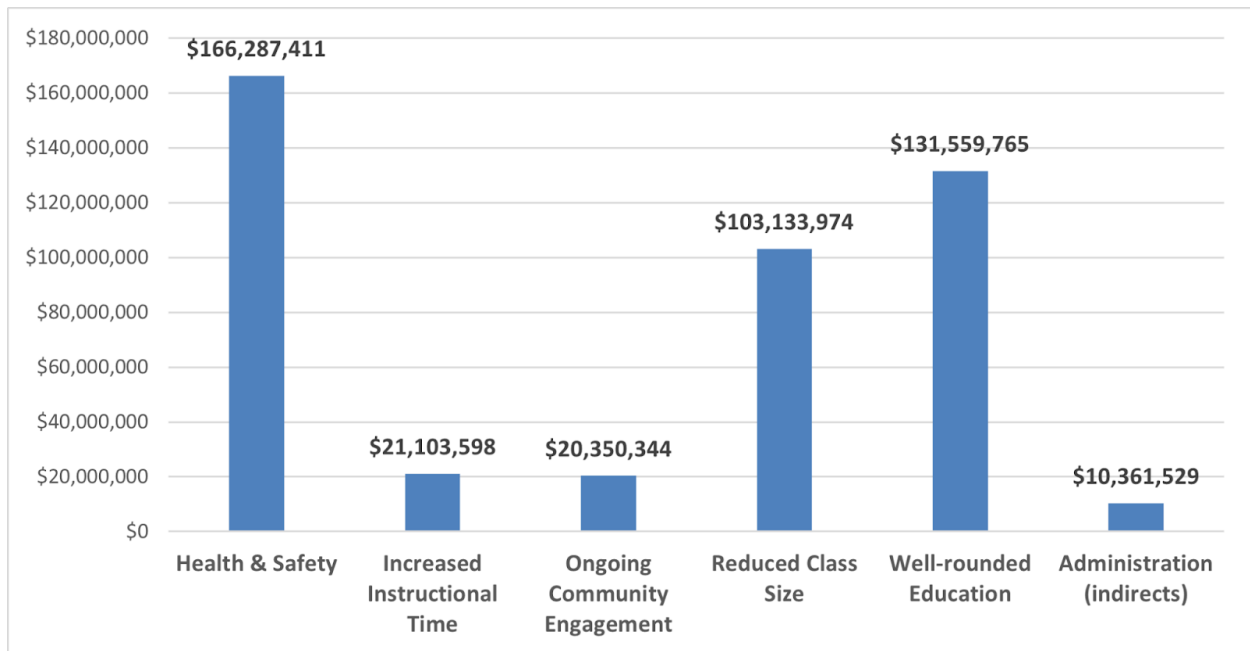
SIA District and Charter Expenditures: 2022-23

Regarding SIA grantees' 2022-23 expenditures, data for the following analyses were extracted on January 16, 2024. For the 2022-23 academic year, SIA grantees budgeted \$455,194,074 of the \$455,404,000 allocated by the state Legislature for the second year of the 2021-23 biennium. Grantees reported spending a combined \$452,796,619, or 99.4% of the total allocation. Of the 268 SIA grantees, 227 (84.7%) reported expenditures within \$1,000 of their allocation. Of the remaining 41 grantees, 11 overspent their allocation and were being resolved at the time of publication, and 30 grantees either did not use all their available funds or had not yet reported all expenditures.

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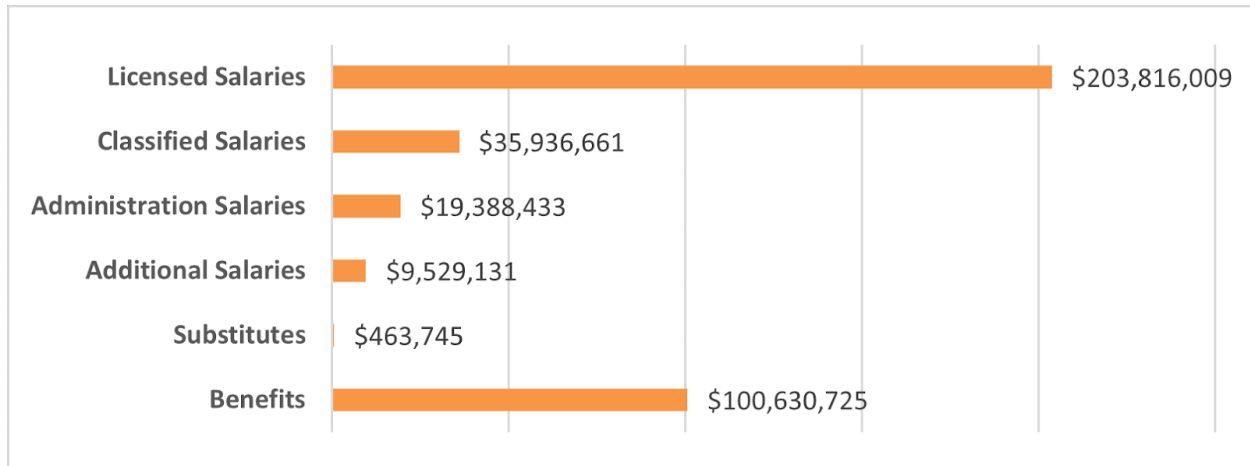
Chart 1, below, shows the 2022-23 SIA expenditures by grantees for the six allowable use categories. Of the \$452,796,619 spent during the year, the largest share, accounting for over one-third of the total funds spent, went toward activities related to Health and Safety (\$166,287,411, or 36.7%). This was followed by \$131,559,765 spent for Well Rounded Education (29.1%), and \$103,133,974 for Reduced Class Size (22.8%). Spending in the three other allowable use categories was substantially less, with \$21,103,598 (4.7%) for Increased Instructional Time (e.g., summer school, before/after school, tutoring), \$20,350,344 (4.5%) to support Ongoing Community Engagement, and \$10,361,529 (2.3%) spent toward Administration (allowed indirect costs and grant administration).

Chart 1. SIA 2022-23 expenditures by allowable use category.



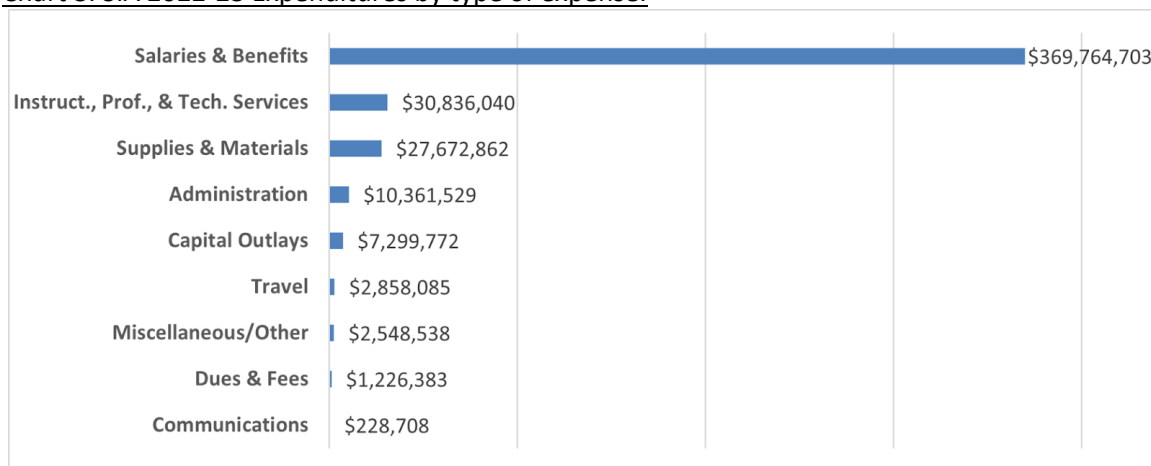
When examining SIA 2022-23 expenditures by the type of expense rather than allowable use categories (see Chart 2, below), Salaries and Benefits accounted for \$369,764,703, or 81.7% of all funds spent during the academic year. Of these salaries, over half the amount (55.1%), or \$203,816,009, was for Licensed Salaries, \$35,936,661 (9.7%) went toward Classified Salaries, and \$19,388,433 (5.2%) was for Administration Salaries. An additional \$9,529,131 (2.6%) was spent on Additional Salaries (e.g., extra duty stipends) and \$463,745 (0.1%) was expended for Substitutes. The remaining 27.2% (\$100,630,725) 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.

Chart 2. SIA 2022-23 Expenditures for salaries and benefits.



Considerably less money went towards other types of expenses (see Chart 3, below). For Instructional, Professional, and Technical Services, the second largest type of expense, \$30,836,040 (6.8%) was expended, mostly for professional development and contracted services for mental health. Spending on Supplies and Materials, such as technology, training materials, and textbooks, totaled an additional \$27,672,862 (6.1%). Another \$10,361,529 (2.3%) went towards Administration expenses (allowed indirect costs) and SIA grant administration. Capital outlays⁹ accounted for an additional \$7,299,772, or 1.6% of the total expenditures through SIA during 2022-23. Examples of common capital outlays included projects to become compliant with the Americans with Disabilities Act, safety and security projects, restrooms, gym renovations, and HVAC updates. For the remaining SIA expenditures, under 1% each went towards Travel (\$2,858,085; 0.6%), Miscellaneous/Other expenses (\$2,548,538; 0.6%), Dues and Fees (\$1,226,383; 0.3%), and Communications (\$228,708; 0.1%).

Chart 3. SIA 2022-23 Expenditures by type of expense.



⁹ Capital outlays that are directly related to improving student health or safety are allowable with SIA funds. All other capital outlays are required to show evidence of the following before being approved as allowable with SIA funds: 1) identify how capital outlay meets the intent of the SIA and is within the allowable use areas, 2) describe community engagement and input that elevated the need for the capital outlay, and 3) articulate how an equity lens was applied in choosing the capital outlay as a priority to address equity-based disparities of students.

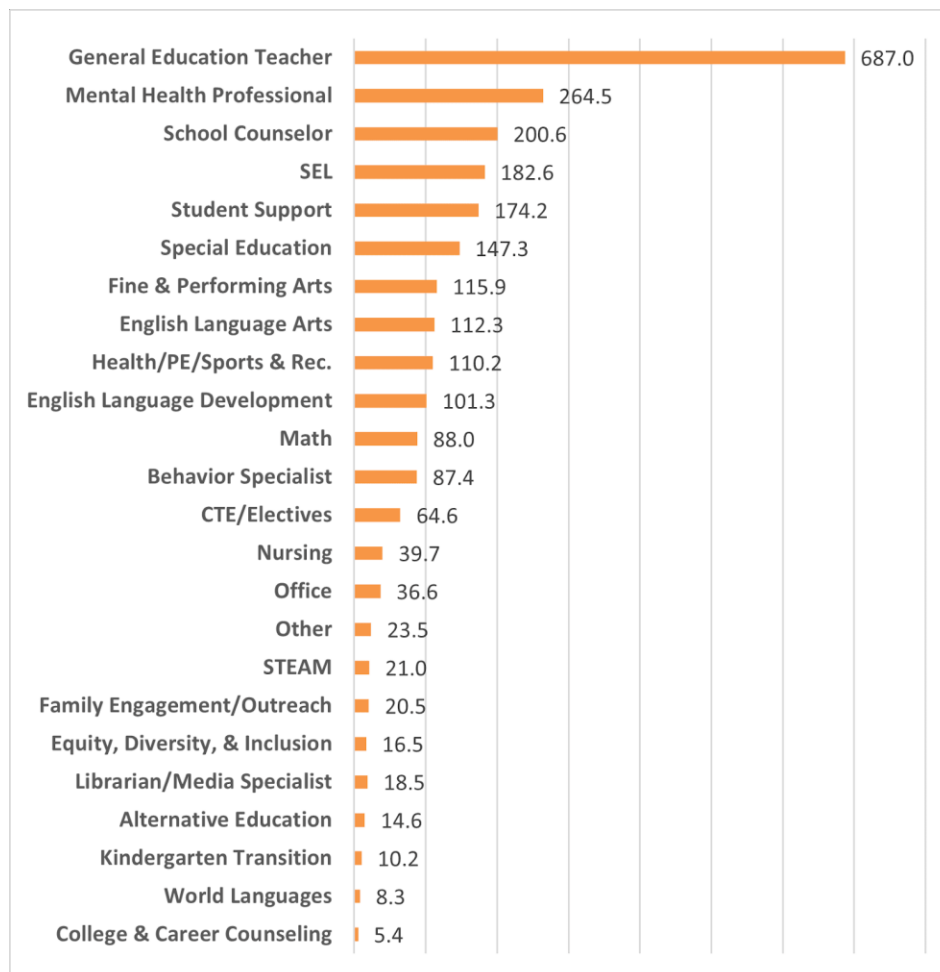
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As mentioned above, SIA 2022-23 expenditures for Salaries and Benefits totaled \$369,764,703. Further analysis indicated that this amount funded a total of 2,551 full time equivalent (FTE) Licensed staff positions, 1,029 FTE Classified staff, and 170 FTE Administration staff.

The 2,551 FTE licensed staff positions were then categorized into one of 24 staff categories (see Chart 4, below). The most common SIA funded licensed position was General Education Teacher, which accounted for just over one-quarter of the funded licensed staff positions (687 FTEs, or 26.9%). Mental Health Professionals (i.e., Qualified Mental Health Professionals, Psychologists, and Licensed Clinical Social Workers) accounted for 264.5 FTE or 10.4% of licensed staff, Guidance/School Counselors accounted for an additional 200.6 FTE, or 7.9% of funded licensed staff, and staff providing SEL accounted for 182.6 FTE (7.1%).

SIA funds also supported 174.2 FTE (6.8%) licensed staff designated for Student Supports, 147.3 for Special Education staff (5.8%), 115.9 FTE (4.5%) for the Fine & Performing Arts, 112.3 FTE (4.4%) positions designated for English Language Arts, and 110.2 FTE for Health/Physical Education/Sports & Recreation. The remaining types of funded licensed staff accounted for 21.8% of staff, with no single position type exceeding 4% of funded licensed staff (see Chart 4, below).

Chart 4. SIA 2022-23 Funded licensed staff positions.

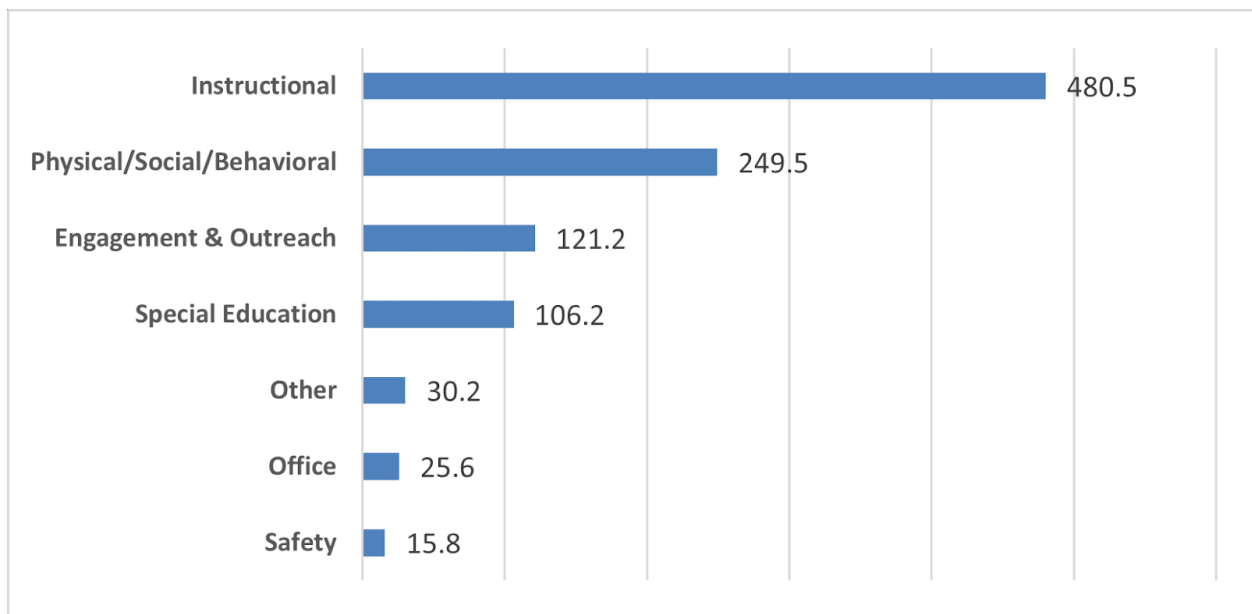


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Regarding SIA 2022-23 funded classified positions, the 1,029 FTE were categorized into one of seven categories (see Chart 5, below). The most frequent type of funded classified position was Instructional Assistant staff, with 480.5 FTE accounting for 46.7% of all funded classified staff. Classified staff assisting in Physical, Social-Emotional, and/or Behavioral issues totaled 249.5 FTE (24.2%), while those involved with family and community Engagement & Outreach totaled 121.2 FTEs (11.8%). And 106.2 FTE (10.3%) classified staff were designated for Special Education.

For the remaining three categories, Other staff (e.g., kitchen, janitorial, maintenance staff) accounted for 30.2 FTEs (2.9%), 25.6 FTE classified staff (2.5%) were for a variety of Office positions, and 15.8 FTE (1.5%) were for Safety (e.g., building, playground, campus, bus monitors).

Chart 5. SIA 2022-23 Funded classified staff positions.



SIA Grantees Reported Impact: 2022-23

The following themes reflect the changes that SIA grantees have described occurring over the course of the 2022-23 school year. This data has been pulled from the narrative sections of SIA grantees' quarterly reporting submissions and analyzed into large themes. Direct quotes from SIA grantees are included throughout to provide more context and background to each theme and also to highlight some of the more personal impact that the SIA is making in and with our school communities. These narratives and quotes are included as part of a theory of systems change, where we monitor changes and shifts in *behavior* as an indicator of change occurring. It is important to note that the quotes from SIA grantees shared in this report are representative of the leading themes, but no single quote represents the views of all.

Increased capacity: Of 283 districts and charter schools, 151 reported observing and experiencing increased capacity to better serve their students due to investments in classified and certified personnel, professional development, and curriculum and technology. This increased capacity was specifically named as contributing to the following: academic improvements, more instructional time and individualized support for students, increased knowledge/training for staff, reduced class sizes and

students being more appropriately placed at their grade level, less teacher burnout, and increased teacher efficacy and motivation. The following outlines some of those themes in more detail:

“Our two Literacy EAs [Educational Assistants] have shown a greater confidence in understanding how students learn to read and write, which has translated into building more smaller-groups getting more targeted activities and interventions with a specific need being identified. They are confident in their own skills, which has allowed them to be more independent in their lesson planning, assessments, and data for the classroom teachers.”

Academic Improvements: Around 15% (a 5 % increase from last year) of SIA grantees mentioned an impact towards academic improvements occurring due to SIA implementation, with substantial mentions of literacy (28%) and math (14%) specifically. For example:

“I watched two first grade students lead the class through the warm-up of sounds, and the drilling of sounds. The whole class followed their lead and through choral response practiced the sounds, without any teacher intervention. This freed the teacher up to move about the room and listen closely to the students as they repeated the sounds of the letters being pointed to by the student leaders. Then the class moved onto Word Fluency, and a different student got up, went to the front of the room and stood at the document camera. This student took a stack of cards with words, and methodically put one under the document camera at a time allowing the class to provide a choral response pronouncing each of the words. At one point the student leader, with a keen ear stopped because the word had a "sh" and they heard some pronouncing what sounded like "ch." They signaled to the teacher, "I think I heard some "ch"es out there, what do you think?" The teacher confirmed what they had heard and the student backed up and the class redid that particular word, and then continued on! These warm-up jobs rotate everyday to new students, giving all students the opportunity to lead the warm-up sounds and words of the day. It became incredibly clear to me that they clearly understood the routines, the sounds, and the words being learned and practiced whole-group. It was so exciting to see the empowerment and ownership the students had over their own literacy learning!”

Mental & Behavioral Health: 41% reported increases in mental health supports due to SIA funds. Due to said investments in mental health supports, around 20% of SIA grantees reported a decrease in behavioral challenges, disruptions, or disciplinary referrals. Additionally, (and similar to last year) around ten percent specifically described improvements to mental health outcomes amongst their students as well as improvements to school climate. These are a result of both direct investments in mental health professionals as well as providing staff with the tools, training, and/or capacity to better serve students and support staff mental health.

“Our mental health counselor has been a boom to our community here... Students have become more comfortable with her presence and, as a result, more feel comfortable using her counseling services. In addition, she has been a helpful guidepost to teachers and staff when negotiating difficult social-emotional situations.”

“We contract with our local mental health provider to place a full time Skills Trainer in each elementary and middle school. A total of 10 skills trainers have and are working with approximately 258 students. These students would not have the targeted, individualized and small group support they are receiving without the addition of these Skills Trainers in our schools.”

“Student feedback at the secondary level about the changes at the school this year have been nothing short of remarkable. With the new administrator, a new counselor, intervention groups, and the implementation of the SEL [social emotional learning] program, students are feeling safer, and more supported than they have in some time. All staff have worked hard to create a safe learning environment in the school. The opportunities the SIA grant have provided us at the elementary level have also provided us with great success both academically and with student behaviors. We have some examples where some of our elementary students who have had years of little growth are now showing expected, or advanced growth due to changes in instructional practices, and the implementation of our intervention groups and the SEL program. Staff are able to spend more time instructing and less time dealing with discipline issues.”

“Our behavior profile, since implementing our SEL program, has been amazing at both levels – there has been a marked decrease in assaultive and aggressive behaviors, and students are feeling safer and more engaged in the classroom setting according to behavior referral data and student surveys.”

Strengthened Systems of Support (SSS): Around 35% of SIA grantees identified changes that we have classified as SSS. Some SSS include enhanced systems being in place, such as data and communication, resulting in more efficient and comprehensive processes that better support students and meet their needs. When it comes to attendance, it was revealed that strengthening systems led to an enhanced understanding of some of the barriers to student attendance and engagement to inform better processes for how to systematically address them. For more than 10% of SIA grantees (double from the previous year), such investments resulted in improvements in attendance. And for a fourth of grantees, that led to improved data systems.

“The attendance rate at [our school] has been considerably higher in the past couple of years. This could be for many reasons. The increased communication system with faculty and families could be playing a huge role in the attendance spike. Also, students are coming to campus feeling much safer with all the SIA allocation upgrades. This has been a domino effect. With the increase in attendance there has also been improved grades overall.”

“The best piece of evidence that supports this work right now is our attendance rates. Nearly all students attended 80-90% of the time during the first trimester. Because our students show up nearly every day we are able to provide necessary academic, social, and mental health support that, in turn, encourages and supports their continued regular attendance.”

“Our Dean of Students and transition specialist continue to add to the improvement of our educational processes. We have been able to make sure that both are well versed in our Improvement planning process and conveying this information to staff at both buildings. They are both also helping to address the poor attendance issues at the elementary level. We have had attendance protocols for a number of years, however, we have never had the people to actually follow through in a proactive manner. We have used these two individuals to make contact with parents to help with this issue.”

Well-Rounded Education (WRE), including Increased Engagement & Enrollment in Extra-curriculars: Nearly one-third of SIA grantees reported changes and improvements related to Well-Rounded Education. These were identified through increases in offerings of and enrollment in extracurricular activities. There was also frequent mention of increased participation of focal group students who may have previously experienced barriers to participation in those extracurriculars. Further, as investments

in WRE center whole-child learning they were also attributed for engendering improvements in both student engagement and social emotional learning.

“Parents in the ... community have been waiting decades for a high school soccer program. This desire was strongly expressed by parents who speak languages other than English during last year’s strategic planning sessions. A soccer program was established and student response was strong. We had a robust and full team for a first-year program. It was both meaningful and powerful to see Latino parents at sporting events, cheering on their children, many attending and fully participating for the first time.”

“Students are enthusiastic about PE and the mindfulness and movement lessons. Students love to participate in the activities offered by the instructors. The district administrator has observed students showing excitement each day during snack time as they eagerly anticipate what is planned for PE that day. The PE adjunct instructor attended ... as a student and has developed strong relationships with students. There is an instructional focus in PE on teamwork and positive encouragement toward one another. Students take turns modeling these behaviors formally and the impact of this practice can be observed throughout the day.”

“By eliminating pay to play fees, extracurricular participation has increased significantly, especially at the junior high school level. Turnout for girls and boys basketball is at an all-time high. We have had to add teams and coaches.”

“One student voiced to the administrator, ‘I love the mindfulness and movement class. It is relaxing and calming when you are stressed.’”

Improved Ongoing Community Engagement: Around 28% (8% increase from last year) of SIA grantees noted that throughout the 2022-23 school year they have experienced increased and improved ongoing community engagement. This includes, but is not limited to: enhanced community partnerships, improved systems for regular communication and feedback loops with families, and individualized mechanisms for receiving student input and feedback. The following are examples of results from these investments in ongoing community engagement:

“The impact on the implementation of these activities has brought our community together. We have had more community engagement and have had many families appreciate the knowing of what is going on in our school. I have had many families ask a lot more questions about upcoming events, curriculum and policies. The ability to improve our facilities has had a huge impact on our community engagement as well! Being able to offer new classrooms for new students and programs is exciting. The community here in ... supports our school so much and it is nice to see their interest and support on the direction we are going.”

“Lastly, the SIA funded family/community advocate position has been vital in the recovery efforts following the [wildfire]. This person serves on four different nonprofit organization boards ... This position serves as a liaison between the school and the community, often bringing the needs of the community to the school and vice versa.”

Equity Advanced & Focal Group Improvements: 16% of SIA grantees (a 4% increase from last year) reported focal group improvements throughout all of the aforementioned categories and/or improvements made towards advancing equity. The following are quotes describing some of the changes that are being observed.

“One creative way the district was able to elicit student responses in underrepresented groups was by using trusted adults such as club leaders or special education teachers to facilitate surveys specific to their needs. By using these trusted adults, the results of deep discussions of barriers and supports were able to be shared with the SIA team.”

“By targeting our most at-risk students for after school support in areas of math, ELA, and SEL, we have seen significant improvement in grades, attendance, and overall connection.”

“An increase in proactive communication has been evidenced between special educators and families regarding student growth, areas suggested for improvement as well as individualized supports necessary for students with disabilities.”

Increased Student Engagement, Voice, and Belonging: 14% of SIA grantees mentioned an increase in student engagement, voice and belonging due to investments made with SIA dollars.

“We have initiated listening sessions and phone calls to directly ask our families how we are doing, how they are doing and what they need. Students and families report that overall they feel supported by the school. We know that many situations are far less than ideal, but we have plans in place to help support students to grow academically and socially/emotionally despite the barriers. We see this growth as we watch students be engaged in place-based activities, improve social problem solving skills, become peer coaches, graduate from reading intervention, and feel represented in our curriculum offerings.”

Improved Physical Health and Safety: 11% of SIA grantees (double the 2021-22 school year) mentioned that improvements to physical health and safety have been a positive impact of SIA funds. Some examples include: addition of school nurses, fences, school security equipment, increased food security, and more time for physical education courses and activities.

“Adding additional nursing supports has helped our students who experience life-threatening medical conditions be able to be better supported at school through additional training of school staff. The nurse’s role has been expanded to include contacting local and regional physicians to increase services to students as needed. Having this support has helped students to obtain needed medical devices for school so that they do not need to miss school.”

Graduation and Post-Graduation Support: Around 10% of SIA grantees reported improvements or advancements being made in regards to getting students on track to graduate. This includes, but is not limited to 9th grade on-track, credit recovery, enhanced data, and systems and supports following graduation.

“The increasing popularity of our high school technical education classes has doubled the number of courses made available from 3 to 6 classes in the past two years. We continue to promote learning outside of four-year institutions to meet the needs of our students and that is evident in the increasing number of students we have in our work-based learning program; currently, we have 11 of our 64 seniors enrolled in this program and that is an increase from last year.”

“Several student groups also made significant strides in their graduation rate, including students with disabilities at 78 percent (up 6.4 percent), students in homeless situations at 71.4 (up 8.4

percent), and students who were English Language Learners at any time in high school at 86.2 (up 12.9 percent)."

Challenges Impacting Implementation

In order to provide context on the educational and social landscape in which SIA grantees are implementing their SIA plans, SIA grantees had the opportunity to share any challenges they have faced over the course of the school year through their quarterly reports. The following is a list of challenges named in order of frequency:

1. General Staffing Challenges,
2. Systematic Change Takes Time,
3. Small District Challenges,
4. Reporting,
5. Budgeting,
6. New Needs Arising,
7. Completing Professional Development,
8. COVID,
9. Staff Turnover,
10. Mental Health Needs and Behavioral Challenges, and
11. Hiring Mental Health Professionals.

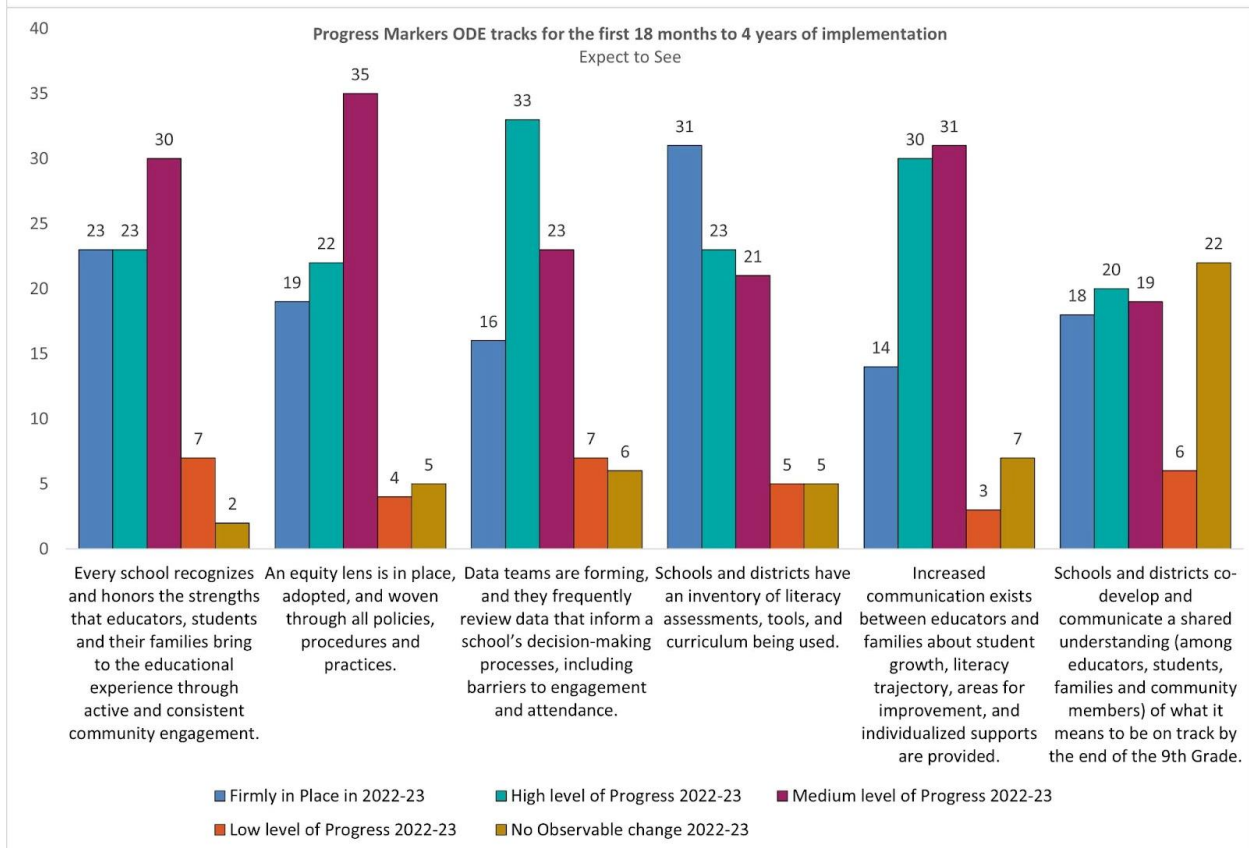
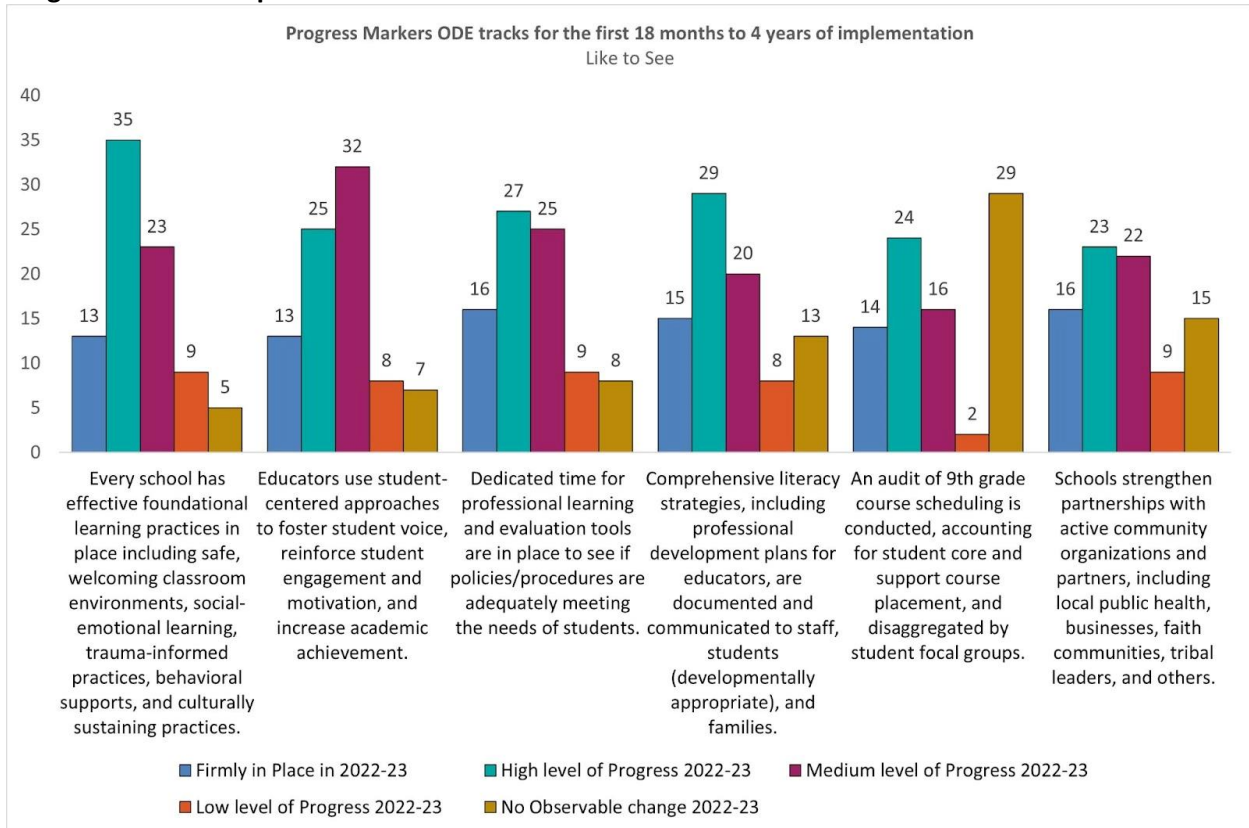
Compared to the 2021-22 school year, the challenges pertaining to effects of COVID and Mental Health have dropped considerably, while staffing continues to remain a top priority challenge. Further, small district needs and reporting requirements continue to impact implementation of the SIA.

Review of Progress Markers Optionally Reported in 2022-23

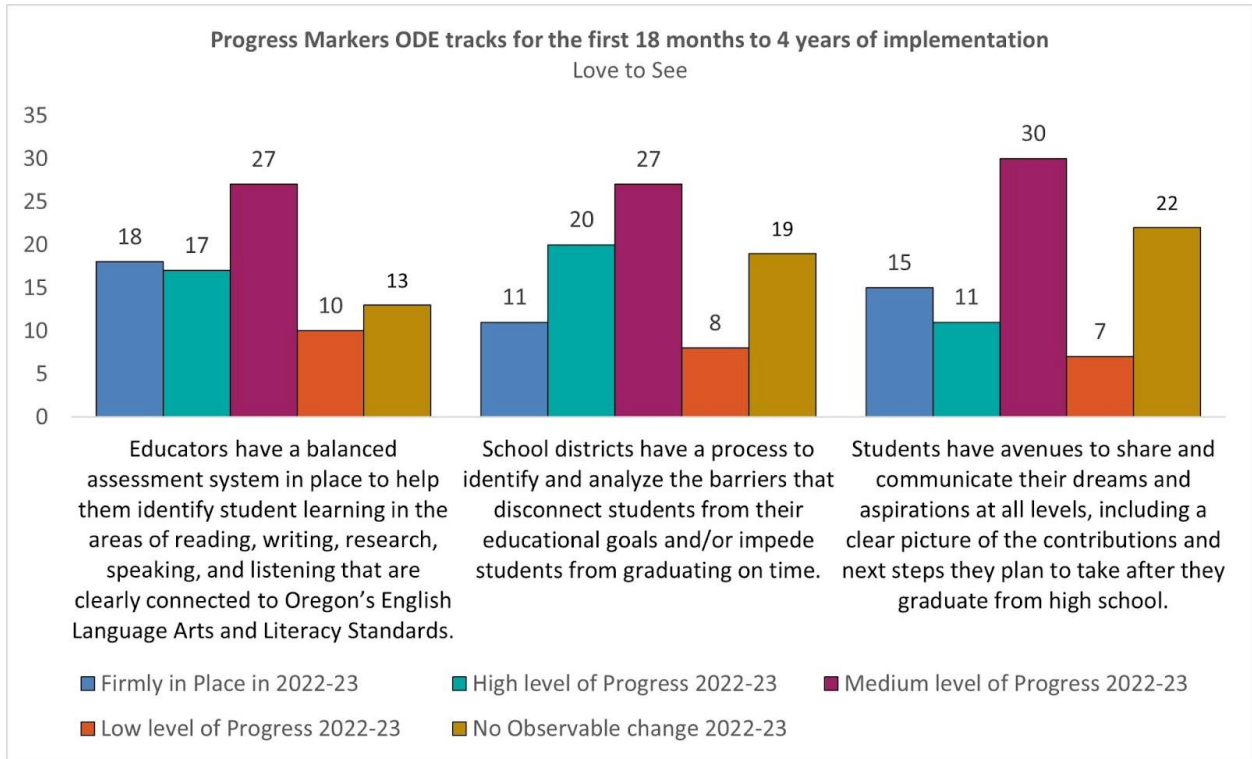
SIA grantees¹⁰ were asked to complete an optional review of their progress on Progress Markers in 2022-23. 271 grantee records were produced. Of those, 185 reported "No Observable Change" (NOC) across all prompts for Expect, Like, and Love to See and one was blank for a total of 186 grantee records out of 271. Given the default entry was "No Observable Change," ODE suspects that the majority of the 185 responses of NOC across all prompts are indicative of no response and were treated as such. That left 85 confirmed grantee responses and those are reported in the charts below. The following charts detail the levels of progress that these 85 SIA grantees are seeing towards the original Progress Markers (before the refresh named above) in the first eighteen months to four years.

¹⁰ District-sponsored charter schools are not required to complete a separate Annual Report. Rather, the district is responsible for including the charter school(s) data into their responses.

Progress Marker Graphs for 2022-23:



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CONTINUING TO OPERATIONALIZE THE SIA THROUGH THE INTEGRATION OF PROGRAMS

This section provides a brief implementation tour of the backend efforts of staff to implement the SIA and create administrative rules to operationalize the SIA, including specific updates about bridging in the Early Literacy Success Initiative passed in 2023.

ODE Staff Hired

To implement the Student Investment Account, 29 new positions were originally budgeted with the Corporate Activity Tax (CAT). During the August 2020 special session, the number of SIA positions was both temporarily reduced to 21 new positions and several positions were frozen, meaning that recruitment and hiring was paused. During the 2021 Legislative session, the number of SIA positions was reinstated to 29 and the office began working to fill both unfilled and reinstated positions. As of January 31, 2024, all positions have been filled, with a note that one position will need to be refilled given a recent vacancy.

Additionally, the limited duration Small District Support Program Manager position¹¹, focused on providing rural and small school support to districts and ESDs, was sustained and made permanent with state funding¹² given the Governor's Emergency Education Relief funds sunset in September 2024.

To support coordination and implementation of the Early Literacy Success Initiative, hiring of new staff has taken place across multiple offices. Specifically in OEII, two Program Analysts have been hired to support the reporting and grant management specific to school district grants. These roles will also support the full integration of the initiative into the Integrated Application and Plan in future biennium.

Development of Oregon Administrative Rules (OARs) for the Student Investment Account

As of January 31, 2024, the State Board of Education has adopted the following permanent rules for the Student Investment Account¹³:

- [Definitions for Student Investment Account](#) (581-014-0001) updated 6/23/22, **anticipate a technical fix to be adopted in April 2024**
- [Fund Administration for Student Investment Account](#) (581-014-0004) updated 1/19/23, **anticipate a technical fix to be adopted in April 2024**
- [Charter School Eligibility for Student Investment Account](#) (581-014-0007) adopted 03/20/20
- [Reduction of Distribution Appeal Process](#) (581-014-0010) adopted 6/22/21
- [Performance Review Standards](#) (581-014-0013) adopted 6/22/21
- [Just Cause and Random Audit Process](#) (581-014-0016) adopted 6/22/21
- [Community Engagement](#) (581-014-0019) adopted 6/23/22
- [Definitions of Optional Targets for Mental and Behavioral Health for the Student Investment Account](#) (581-014-0022) adopted 12/19/22

¹¹ This position previously was under the SIA team. Starting on January 1, 2024, this position moved to the Director's Office given the role was designed to support coordination of all 145 state and federal programs across ODE - and the coordination of all programs is held in the Director's Office.

¹² While the GEER funding ends on September 30, 2024, the Legislature sustained the dedicated funding to support this position with state funding in the 2023 Legislative session through [package 104 in House Bill 5014](#).

¹³ Rules in bold font are in the process of being updated since the 2023 SIA Legislative Update.

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- [Purpose of Optional Targets for Mental and Behavioral Health for the Student Investment Account](#) (581-014-0025) adopted 12/19/22
- [Optional Targets Criteria for Mental and Behavioral Health for the Student Investment Account](#) (581-014-0028) adopted 12/19/22
- [Optional Targets Administration & Report for Mental and Behavioral Health for the Student Investment Account](#) (581-014-0031) adopted 12/19/22
- [Definitions for Student Investment Account: Third Grade Reading Proficiency](#) (581-014-9999) adopted 12/16/19

Definitions for Student Investment Account

ODE is actively pursuing some minor changes to the Definitions for Student Investment Account. The proposed rule changes that will go before the State Board of Education in spring 2024 are aimed at better aligning the SIA definitions with the various SSA Statewide Student Success Plans. Additionally, the Department is proposing to add one additional focal student group to continue to live into the intent of the law and ensure that applicants are engaging with students who have historically experienced academic disparities. The proposed rule change has been presented to the ODE Rules Advisory Committee (RAC) in November 2023 and January 2024. ODE will be gathering feedback on this proposed change again in March 2024. To date, feedback has been positive as the proposed changes continue to support better alignment across initiatives.

Fund Administration for Student Investment Account

ODE is also in the process of a technical fix to the Fund Administration for Student Investment Account rules. Similar to the Definitions, this proposed rule change will go before the State Board of Education in spring 2024. The proposed rule change adds in clarity on how the Department will handle the reallocation of SIA funding in the event an eligible charter school closes mid-year. This proposed rule change has also been presented to the RAC in November 2023 and January 2024. ODE will hear additional feedback on this proposed rule change at the March 2024 meeting. Feedback on this technical fix has also been positive from the RAC to date.

Development of Oregon Administrative Rules (OARs) for the Intensive Program

As of January 31, 2024, the State Board of Education has adopted the following permanent rules for the Intensive program within the SIA.

- [Intensive Program & Student Success Teams: Definitions](#) (581-017-0729) updated 6/23/22
- [Intensive Program & Student Success Teams: Purpose](#) (581-017-0732) adopted 1/28/21
- [Intensive Program & Student Success Teams: Eligibility](#) (581-017-0735) adopted 1/28/21
- [Intensive Program & Student Success Teams: Criteria, Agreement, and Establishing Improvement](#) (581-017-0738) updated 3/25/22
- [Intensive Program & Student Success Teams: Funding](#) (581-017-0741) updated 6/23/22
- [Intensive Program & Student Success Teams: Reporting](#) (581-017-0744) adopted 1/28/21

Connections to the Early Literacy Success School District Grants

With the passage of the [Early Literacy Success Initiative](#) in 2023, cross-agency teams have collaborated in short-term planning to ensure funds are accessible to school districts for the 2023-25 “Jumpstart Biennium¹⁴,” while simultaneously engaging in long-term efforts for implementation of Community, Tribal, and School District grants for future biennium. Section 4 of the legislation specifically states that rules should, to the greatest extent possible, assist in the operational alignment of the SIA and district continuous improvement plans. Much of the ongoing work since this fall has been related to rule-making as well as supporting the development and implementation of the jumpstart biennium.

Temporary and Permanent Rule-Making

An internal coordination team with representation from the Office of the Director, Office of Equity, Diversity, and Inclusion (OEDI), Office of Indian Education (OIE), Office of Teaching, Learning, and Assessment (OTLA), and OEII began meeting in August 2023 to shepherd the literacy initiative rule making process. A narrowly focused set of temporary Fund Administration rules for Early Literacy School District Grants only were the early work of the team. The temporary rules were modeled after the Student Investment Account and High School Success rules, which supports efforts to support alignment across programs. The State Board of Education adopted the temporary Fund Administration rules, [OAR 581-017-0800](#) and [OAR 581-017-0810](#), in September 2023 that will expire in March 2024.

For permanent rule-making, the internal coordination team facilitated engagement sessions for a technical advisory. The Early Literacy Advisory was established in fall 2023 and includes over 45 representatives from community based organizations, associations, practitioners, organizations focused on literacy, and education leaders from 19 counties in Oregon. The Early Literacy Advisory has met five times throughout the fall and winter, providing ideas of what should be included in the rules prior to pen hitting paper, as well as providing feedback on subsequent draft rules for Tribal, Community, and School District grants. The drafted rules spurred from these engagement sessions were taken to the RAC on January 4, 2024 for the first time and the next iteration of draft rules will go back to the RAC in February 2024. The permanent rules-making process is on track to be completed in March with the State Board of Education hearing a first read in February 2024 and a second read and adoption in March 2024.

Jumpstart Biennium Application and Reporting

While the application process for Early Literacy Success School District Grants in the jumpstart biennium fell outside of the Integrated Application for the 2023-25 biennium, ODE has worked across offices to develop and launch [guidance and a grant application process for the jumpstart biennium](#). The application utilized a similar application process to the 2023-25 Integrated Application where applicants submitted their application and supporting materials via Smartsheet by January 8, 2024. Once applications are complete, they go through a robust review process to determine whether they meet requirements or additional information is needed. By building a similar process with the application for the jumpstart biennium in Smartsheet, it sets up the ability to have the application seamlessly included within the Integrated Application for 2025-27. While the application for Early Literacy Success School District Grants is separate from the Integrated Application for the 2023-25 biennium, ODE has been able

¹⁴ The Early Literacy Success Initiative passed at the end of the 2023 session and went into effect immediately when Governor Kotek signed it on August 2, 2023. Given the timeline for districts to build a plan and apply for funds has been fast, the first biennium of implementation – and especially the first year – serves as a jumpstart for districts or a “Jumpstart Biennium.”

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to incorporate the early literacy reporting into the Integrated Plan reporting for the 2023-25 biennium that grantees will submit on a quarterly basis through Smartsheet.

ON THE HORIZON

The Department anticipates the release of the renewed Integrated Guidance in late February 2024, over a year before applicants will submit their 2025-27 Integrated Application. As part of the refreshed guidance, the Department has reviewed all of the input from the survey named above and is actively reviewing all application questions with the aim to continue to streamline the application process and reduce burden on applicants in completing the application.

Additionally, the Department is working to incorporate the Early Literacy Success Initiative School District Grant processes into the renewed Integrated Guidance. This effort is in response to Section 4 of House Bill 3198, which names: “To the greatest extent practicable, a school district or public charter school shall align an early literacy success plan developed under this section with the plan developed for distributions from the Student Investment Account as provided by ORS 327.185 (7).” Given this is named in statute, OEII has been coordinating closely with OTLA, where the Early Literacy Initiative Success School District Grants are formerly held. Part of the work being done now is to make sure the requirements for the Early Literacy School District Grants are incorporated into the requirements for the Integrated Applications for the 2025-27 biennium. Continued collaboration between offices will also support the development of additional guidance for implementation of the Early Literacy School District Grants, as well as coordination of literacy coaching supports across OEII and OTLA.

In spring 2024, ODE will begin to teach into the guidance, particularly where guidance has changed from the original version released in February 2022. ODE anticipates offering webinars as well as in-person meetings across the state in collaboration with ESD partners to bring district and school leaders together as they learn into the updated version of the guidance. ODE will also release updated supplemental resources and templates through spring 2024, ahead of when districts and schools will submit their next Integrated Application.

In an effort to reduce burden on applicants, the 2025-27 Integrated Application will be pre-populated with some responses from the 2023-25 Integrated Application that applicants can adjust as needed. Applicants will submit their 2025-27 Integrated Application between March-April 2025. Applications will then go through an intake process to ensure the application is complete and includes all supporting materials before being moved into a robust review process.

In the next SIA annual report, ODE anticipate releasing information about the following:

- Detailed analysis of 2023-24 SIA spending by grantees in their fourth year of SIA implementation
- Early analysis of progress on LPGTs after the first year of implementation as well as required Progress Markers under the Integrated Plan reporting
- Information on coaching services deployed across the state
- An update and learnings from the first required SIA Performance Review
- An update and learnings from the first Random and Just Cause Performance Audit