Oregon CTE Local and Regional Needs Assessment Guide

Oregon Department of Education
Oregon Higher Education Coordinating Commission
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Introduction

One of the most significant changes in Perkins V—the Strengthening Career and Technical Education (CTE) for the 21st Century Act—is the new requirement for local applicants to conduct a comprehensive local needs assessment (CLNA) and update it at least every two years. The next full needs assessment results will be reported with the 2023-2024 Perkins Basic/Reserve Grant Applications.

> *The new needs assessment is designed as the foundation of Perkins V implementation. At the local level, it drives your local application development and future spending decisions. It should be seen as a chance to take an in-depth look at your entire local and regional CTE system and identify areas where targeted improvements can lead to increased opportunities for student success. The needs assessment, if implemented thoughtfully, can also be a powerful opportunity to engage stakeholders in a common understanding and vision for the future of CTE in your community.*[1]

Our new CTE State Plan requires a tight link between use of funds and local needs, based on data and stakeholder input. Both High School Success and CTE grant funds in Oregon require a process to identify priorities and needs in partnership with a range of stakeholders. Oregon is evaluating needs at the state level, the regional level, and the local level. This guide will help focus the local conversations which will occur in consortia, at schools and or school districts, and at community colleges.

The goals of the needs assessment:

- Regularly engage in conversation with stakeholders around quality, impact, alignment, and equity of CTE Programs
- Set strategic goals and priorities to ensure equity, systematic improvement, and innovation
- Support CTE Programs and opportunities that ensure participation and success for Oregonians that lead to high-wage, high-skill, and in-demand occupations
- Ensure CTE Programs of Study are aligned to and validated by local, regional, and statewide workforce needs and economic priorities
- Coordinate and align work of K-12, higher education, workforce and economic development, and community groups serving our special populations
- Align local and regional priorities

This guide is intended to give Perkins V applicants a framework from which to structure their approach to the regional and local needs assessment efforts by translating the legal language into action steps, providing examples, processes, and ways to engage the required stakeholders. There are efforts underway to examine some of the same questions asked here. Please leverage all of the information that has been collected–there is no expectation that you reconvene or recollect information that has already been collected and examined by other groups. As with all improvement efforts, strengths and needs should be constantly assessed. This is not a one-and-done process. The needs assessment submitted for Perkins V application purposes will be a snapshot in time of the ever-changing landscape of your schools and institutions.

[1] Maximizing Perkins V's Comprehensive Needs Assessment & Local Application to Drive CTE Program Quality and Equity. Association for Career and Technical Education. Updated October 31, 2018

This guide is divided into the following sections:

- Introduction
- First Things First - Getting Started
    - Identifying a leadership team
    - Identifying required stakeholder participants
    - Requirement for ongoing consultation
- Suggested Process, Required Response, and Optional Resources
    - Quick Reference Guides
    - Discussion Records
    - Identifying Need, Setting Priorities, and Identifying Action Steps
    - Required Local/Regional Needs Assessment Responses
- Final Word
- Links to Resources

This guidebook was largely adapted from the original *Oregon Guidance for Local CTE Needs Assessment and Stakeholder Engagement* and the *Wyoming Perkins V: Comprehensive Local Needs Assessment Guidebook* which was created with assistance from our national partners at Advance CTE and ACTE. We have borrowed liberally from their guidance documents. More resources are available in Appendix A.

First Things First – Getting Started

The comprehensive local needs assessment under Perkins V requires consultation with a variety of stakeholders throughout the initial needs assessment process and then in an ongoing fashion. This is an expansion of what was required for Perkins IV regarding stakeholder involvement in the local application. Prior to embarking on the assessment, the following steps will help lay the groundwork for a rigorous and meaningful needs assessment through clear preparation and organization.

Identify a Leadership Team

Consultation with a diverse body of stakeholders is required for the local and regional needs assessment. As you review the list of minimum required participants, it will be important to assemble a leadership team to help guide the work, set priorities, and maintain priorities. The team should be small but must include people who can leverage systems to assist in the task ahead. Suggested participants on the leadership team should include secondary and postsecondary administrators and educators, local workforce agency staff, local economic development board members, parents, and students as appropriate for your size and location.

> *TIP:*
> ***Identify the wrangler.*** *One person should be given the responsibility to coordinate the work. This does not mean this individual does all of the work, but serves as project manager by coordinating meeting times, ensuring deadlines are met, and making sure the work continues to move forward.*

Identify Required Stakeholder Participants

Perkins V requires, at a minimum, the following participants be engaged in the needs assessment and the local application development, and in ongoing engagement:

- CTE faculty, advisors, and administrators from secondary and postsecondary institutions
- State or local workforce development board representatives
- Representatives from Indian tribes or tribal organizations
    - Districts with an enrollment of 50% or greater and/or Title VI Indian Education grant of more than $40,000 are required to consult with tribal nations
    - Tribal consultation is a separate process from stakeholder engagement
- Representatives from a range of local businesses and industries, particularly those representing the area labor market needs
- Students and parents (use multiple avenues such as existing meetings, surveys, focus groups)
- Representatives of special populations
- Representatives from agencies serving at-risk, homeless and out-of-school youth and adults, foster youth, military families, disability services, STEM Hubs, and Regional Educator Networks

A worksheet is provided in the Optional Resources (links at the end of this guide) to assist with brainstorming possible participants in your stakeholder engagement activities around the needs assessment.

Don't be afraid to think of engagement in a broad fashion. There are some great resources already created to help you with developing your strategy for engaging the required partners. There is also ongoing improvement work within schools, districts, and regions that can be leveraged to reduce redundancy and duplication.

Secondary Direct Applicants

You have gone through the High School Success Self-Assessment (HSS) and Continuous Improvement Processes. The CTE Needs Assessment should be viewed as a complement to this work. The requirements of the CTE Needs Assessments identify programmatic and systems issues at a finer grain and can be used to fulfill a portion of the HSS Needs Assessment moving forward. If your district spends HSS funds on CTE initiatives, you will be required to complete the Local CTE Needs Assessment.

Postsecondary Direct Applicants

If you have completed another self-assessment, you can use the information gained through that process in your CTE Needs Assessment. The Career Pathways grant required a self-assessment that can be leveraged here. Some examples of other assessments you may have conducted include the Alliance for Quality Career Pathway Local/Regional Partnership Self-Assessment, the Guided Pathways adoption template, or your Performance Measures Certification for WorkSource Oregon.

Consortium Applicants

You may leverage the work mentioned above at the secondary and postsecondary level and roll that information into your Regional Needs Assessment. The key will be to ensure you have a variety of voices at the table to help you identify the regional needs and priorities. Make sure that if your consortia have

both secondary and postsecondary members, representatives from both levels are included.

Section 7 of the Oregon CTE Policy Guidebook has more information and resources for engaging partners in the Perkins Needs Assessment. That section includes strategies and links to a variety of high quality resources.

Remember:

- All stakeholder input and engagement can be used to inform your CTE Local/Regional Needs Assessment discussions, whether the input was gained through a specific CTE discussion or not.
- There are many other partner discussions that can and should be used for the CTE Local/Regional Needs Assessment; leverage those ongoing discussions to add richness to your needs assessment.
- All required stakeholders do not have to participate in every discussion, but must be included and consulted throughout the process.

Requirement for Ongoing Consultation

As mentioned earlier, the comprehensive local needs assessment is not intended to be a one-and-done process, but instead should be part of the continuous improvement process. Perkins V requires Perkins recipients to continue to consult with the required stakeholders described above on an ongoing basis. The consultation should provide input into the annual update to the needs assessment and grant application, as well as the continuous improvement and relevance of the CTE Programs of Study.

Suggested Process, Required Response, and Optional Resources

The comprehensive local needs assessment has five required parts:

1. Evaluation of student performance
2. Evaluation of CTE Program quality and alignment to industry need
3. Description of recruitment and retention of staff
4. Description of career exploration and guidance
5. Description of progress on access to high quality CTE Programs for all students

Many of these parts are interwoven and it is important to remember that insights gained in one part may be helpful in tackling another part.

> *TIP:*
> ***Share the load**. If possible, assign two people to be leads for each part of the needs assessment. While completing the assessment will take everyone working together, it will be the pair's role to gather information, including any necessary discussion notes, and organize the information to share with the group. Their role is not to judge the information gathered, but to present and help make sense of what has been collected so effective discussion can take place.*

In the revision process of this guide, consultation with stakeholders suggests providing more resources and tools to help with the process.

It is not required that you use the Quick Reference Guide, the Discussion Records, or the worksheets to identify needs, priorities, and action steps; however, links to these references are provided at the end of this guide for your use.

Quick Reference Guides (QRG): *optional resource*

A quick reference guide has been developed for each of the five required parts of the needs assessment. You may choose to use the QRG as a planning document or as an actual handout for discussion. The Quick Reference Guide includes:

- Suggested materials to help inform the discussion[2]
- Stakeholders that may have specialized perspective or knowledge to help with that particular section
- Suggested strategies to engage for effective consultation
- A list of possible questions to guide discussion

Discussion Records: *optional resource*

A worksheet is provided that includes all of the recommended questions from the Quick Reference Guide. The discussion record can be used to capture conversation, recommendations, and information for use in priority setting as well as crafting the Required Needs Assessment Responses.

Identifying Need, Setting Priorities, and Identifying Action Steps: *optional resource*

Guidance and a simple worksheet are provided to guide the discussion for gauging the level of need and the priority of identified needs. As priorities are set, groups should think about strategies to address these priorities. Then teams will identify appropriate goals for the Perkins Basic and Reserve Grant, and where there may be opportunities to braid funding with other initiatives.

> *TIP:*
> ***Keep it straight****. There are several processes you might employ to make sense of what you have found. You may want to schedule a separate meeting for each element in order to keep information separate and to keep minds fresh and alert. You will want to keep some documentation so that when you are working on grant goals or doing ongoing consultation, you can capture that information.*

[2] In some cases we know the data may not be available due to the disrupted school year and changing definitions. Please access and use the best data you have available to you.

Required Local/Regional Needs Assessment Responses

Once the analysis and priority setting with partners is complete, each applicant will be required to share the results of the needs assessment as part of the Perkins Strategic Plan and Local Application process. For each part of the needs assessment, there should be at least one strength and one need identified. **The information below will be uploaded into the application platform for the Local/Regional Needs Assessment.**[3]

This is the only information that will be submitted to demonstrate you have thoroughly examined the current status of each element, identified key needs, and included the required stakeholders in the process.

1. General Information –
   This will include information such as applicant and contact information
2. Assurance of Required Stakeholder Participation –
   In the submission, you will be asked who was involved in the assessment, including their name and contact information, to demonstrate the inclusion of each of the required stakeholders
3. Results of Needs Assessment – For each of the five required parts listed earlier, include a narrative response
   a. Identified Strength(s)
   b. Identified Need(s)
   c. Who was consulted in this discussion and how they were part of the process
   d. Discuss the process used to identify this need

For each response there is a prompt to remind you about minimal response requirements. Additionally, there is a rubric included that will be used to evaluate your entry. In the event that responses do not meet at least a Level 3 on the rubric, you will be asked to provide further information, documentation, or clarification.

As the Local/Regional Needs Assessment is a federal requirement for Perkins funds, any records should be retained for five years.

Final Word

The collaboration required through this needs assessment process has the potential to make long-lasting improvements not only to CTE Programs but also in relationships throughout the community. The process of completing the assessment is about helping you make more informed decisions about your programs, using data to ensure your local CTE Programs create successful outcomes for students and employers.

[3] In the past this was uploaded into SMApply

Optional Resources

The links below are 'inserted objects' in the table. Once all editing is done, the resources will be posted to the web and a web link will be provided here.

Potential Partner Worksheet
To help brainstorm possible partners for each of the required roles

Part A - Evaluation of Student Performance
Includes Quick Reference Guide, Discussion Records, Priority Setting, Submission Prompt, Rubric, Samples

Part B - Evaluation and Implementation of High Quality CTE Programs
Includes Quick Reference Guide, Discussion Records, Priority Setting, Submission Prompt, Rubric, Samples

Part C - Recruitment, Retention, and Training of CTE Educators
Includes Quick Reference Guide, Discussion Records, Priority Setting, Submission Prompt, Rubric, Samples

Part D - Career Exploration and Guidance
Includes Quick Reference Guide, Discussion Records, Priority Setting, Submission Prompt, Rubric, Samples

Part E - Progress Toward Equity and Access
Includes Quick Reference Guide, Discussion Records, Priority Setting, Submission Prompt, Rubric, Samples