

*High School Success – M98  
Frequently Asked Questions*

**March 2018**

# High School Success

High School Graduation and College and Career Readiness Act of 2016



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## High School Success

### What are the goals of the High School Success Plan?

The law creating the High School Success fund states monies from the High School Success fund should “improve students’ progress toward graduation beginning with grade 9, increase the graduation rates of high schools and improve high school graduates’ readiness for college or career.”<sup>1</sup>

The law calls out specific eligibility requirements and includes three programmatic areas where services should be provided: 1) career and technical education, 2) college-level opportunities, and 3) dropout prevention. It is important to note that implementation of programs in these areas is not the goal of the bill but are means to the end of improving high school completion rates and college and career readiness.

Districts and charter schools receiving High School Success Fund monies are required to submit plans for approval by the Oregon Department of Education (ODE). The planning work is divided into two phases:

Phase	Available to Recipients	Due to ODE
Eligibility and Self-Assessment Tool	November 15, 2017	January 31, 2018
Planning	February 1, 2018	March 31, 2018

<sup>1</sup> Section 12, chapter 1, Oregon Laws 2017 (ballot measure 98) edited to show final language.

Sec. 12. (1) The State Board of Education shall by rule adopt eligibility requirements, biennial plan guidelines, biennial plan submission deadlines, reporting criteria and audit processes to ensure that amounts apportioned under section 3, chapter 1, Oregon Laws 2017 (Ballot Measure 98 (2016)), improve students’ progress toward graduation beginning with grade 9, increase the graduation rates of high schools and improve high school graduates’ readiness for college or career.

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Subsequent plans are required for each odd numbered year and due dates for those plans will be set at a later date.

The plan must include a four-year vision to improve high school engagement and completion and college and career readiness. The initial plan can be limited to just three years if that is more accommodating to the needs of the grant recipient.

## What is High School Success and when does it go into effect?

High School Success (Measure 98) was a 2016 ballot initiative approved by Oregon voters. It provides direct funding to school districts and charter schools serving grades 9 through 12 to improve students' progress toward graduation beginning with grade 9, increase the graduation rates of high schools and improve high school graduates' readiness for college or career.

High School Success identifies three specific areas where fund recipients must direct available funds:

- establish or expand career and technical education programs in high schools
- establish or expand college-level educational opportunities for students in high schools
- establish or expand dropout-prevention strategies in high schools

High School Success went into effect 30 days after the November 8, 2016 election, December 8, 2016.

In March 2017, the State Board of Education adopted rules to address eligibility requirements, biennial plan guidelines, biennial plan submission deadlines, reporting criteria, and audit processes.

In July 2017 the High School Graduation and College and Career Readiness Fund was established.

Funds were available to grant recipients for the 2017-18 school year. Funds disbursement is immediate upon receipt of a signed grant agreement. Grant agreements were distributed to most recipients during the week of August 28, 2017.

## The timeline says we need a “multiyear” plan. What period is the plan to address?

The “multiyear” term is used because the rules call for a four-year plan but the first plan (2018-19) can be a three-year plan.

The term of the plan is reflected not in the list of tasks or activities but in the expected outcomes. That is, we will be asking for short-term (first year) outcomes, intermediate (2-4 year) outcomes, and long-term outcomes (beyond 4 years). These are expected to be fairly specific in the short term but grow less so the further out you look.

## Are sponsoring districts responsible to or for charter schools that receive independent funding for High School success?

Sponsoring districts have no responsibility for or to the charter schools in this work if they choose to operate separately. This does not circumvent or nullify anything addressed in the charter agreement which takes precedence over this outside support.

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## What was the process for the Oregon Administrative Rules (OARs) development for High School Success?

ODE hosted a Rulemaking Advisory Group December 6, 2016 to address original rule development.

The State Board of Education reviewed and adopted the Administrative Rules specific to High School Success at scheduled board meetings:

- January 26, 2017 -- First reading of proposed rules
- January 30, 2017 -- Formal public hearing on the proposed rules
- February 23, 2017 -- Second reading and adoption of rules

## Was additional rule development necessary following the close of the 2017 Legislative session so the rules can be brought into alignment with the newly passed law?

ODE has made minor changes to the rules based on legislative changes to the law in the 2017 Legislative Session.

Revised rules were presented to the State Board of Education for first reading at the regularly scheduled October meeting of the Board.

A second reading occurred at the November meeting and during the period between the two meetings ODE encouraged the public to comment on the changes.

At this point, ODE does not anticipate any additional changes to the rules as they are in alignment with the law.

## How were stakeholders engaged in High School Success implementation?

Stakeholders provided feedback and assisted in guiding and shaping the specifics of High School Success through the Oregon Administrative Rule (OAR) rulemaking process.

Groups of stakeholders were also tapped to review materials including the annual plan template prior to release.

Stakeholders include a wide range of interested parties from school administrators, families, teachers, education leaders and community organizations to business and industry partners and key advocates.

## What are the primary methods ODE is using to communicate with educators and the public regarding High School Success?

ODE maintains a [High School Success webpage](#) and a listserv supporting communication between ODE and the field. Subscribe to the listserv by completing the [online form](#).

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## How can I be involved in local efforts?

Connect and engage with your local school district or high school, and/or provide feedback at the State Board of Education public meetings.

## Equity

### The Equity Lens

ODE has developed and propagated the concept of the [Equity Lens](#) described in a document available on the ODE website. This will be at the forefront of reviewer's minds as they evaluate plans. As indicated by the Goals of High School Success above, the plan should target improvement of freshman on-track rates, graduation rates, and college and career readiness among other outcomes for students.

The work of improving outcomes for students cannot be limited to those students who are currently succeeding. This work is about a reform or revision of our current system. It may require re-envisioning these systems significantly. Plans that do not include a clear intent to address the needs of students who are marginalized by current practices within the education system, and who are identified either in your local self-assessment or through data available to reviewers, will not be approved without revision.

High School Success is intended to include everyone in your schools and to create and maintain a welcoming and inclusive atmosphere. This will not be enough to make real change, however. The needed change will demand a review of and changes to services for students who have traditionally been underserved by Oregon's education systems. This change should be evident throughout your self-assessment and should be clearly called out or observable in your planned outcomes and activities.

### How is equity represented in High School Success?

Equity is a central tenet of High School Success as a program but also of high school success as a concept for students. The stated purpose of this legislation is to improve freshman on-track rates, graduation rates, and college and career readiness. This demands attention to underserved populations. Student groups traditionally underserved under the current system are to be targeted for needed services to ensure their needs are met and they are able to fully participate in and benefit from the experience of high school.

A required feature of services under High School Success is regular meetings of teachers to discuss and address ways to improve student success in their movement toward graduation. This requirement includes providing information on traditionally underserved groups of students as well as groups of students particular to the district who are underperforming their peers. Data supporting teacher discussions in these meetings including data disaggregated to describe the performance of these groups is required of all districts and supported under this effort.

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## Budget & Funding

### Are districts and charter schools required to apply for High School Success funds?

Potential recipients may choose not to accept funds under this program.

Districts and charter schools were not required to apply for the funds for 2017-18. ODE distributed these funds automatically with no application required as soon as a signed grant agreement was returned to ODE.

For the 2017-18 school year, all eligible recipients were sent grant agreements to initiate first year funding for the period 2017-19 (two years). Those choosing not to receive the funds could return the agreement unsigned.

Eligible recipients must submit a self-assessment and plan for 2018-19.

### How is funding calculated and awarded?

The Oregon Department of Education (ODE) calculates allocations for each year of the biennium at the beginning of each biennium based on the State School Fund formula (ADMw). As a result of unique circumstances of each school district, allocations vary greatly. ADMw accounts for significant variances in student life experiences and contexts.

Funds are released through the ODE E-Grant Management System (EGMS).

All claims are based on a reimbursement system consistent with existing ODE state and federal funding requirements and processes.

### I understand there are a number of items that must be addressed in order to ensure eligibility for funds for 2018-19 and beyond. What are the requirements in brief?

Eligibility in the law includes:

1. Needs Assessment
2. Plan of Activities
3. Teacher Collaboration Time around Data
4. Equitable Assignment of Students to Advanced Courses
5. Systems Ensuring On-time Graduation
6. Practices to Reduce Chronic Absenteeism
7. Partnerships
8. Program Establishment or Expansion

The "Needs Assessment" and "Plan of Activities" will be taken care of as the application for funds, so they are not commonly listed as eligibility requirements.

Additional documentation specific to requirements can be found online on the [High School Success website](#).



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## Is every recipient required to address all three areas in every school?

No, the revision of the law by the Legislature during the 2017 regular session created a tiered system for the three areas based on funding levels:

<i>First Year of Biennium Funding</i>	<i>Required Strands</i>
Less than \$100,000	Recipient may choose to address any or all of the three areas as is appropriate to local need.
More than \$100,000 but less than \$350,000	Recipient must address career technical education and one of the other two area but may address all three.
Above \$350,000	Recipient must implement all three strands.

Recall that the recipient in most cases is the district rather than individual high schools. This means that the amount used to define the funding level is relative to district funding rather than funding provided by the district to individual schools. Charter school funds are separate allocations and are not counted in district allocations.

## Is High School Success funding based on a competitive application model?

No. High School Success funding is based upon successful submission and approval of the school district's biennial plan for raising high school graduation rates. The allocation is based on the school district's Average Daily Membership weighted (ADMw) figure as is the State School Fund.

## ODE produced a document indicating the [Biennial Grant Fund allocations in August, 2017](#). How accurate are those numbers prior to fund distribution for the 2018-2019 school year?

The assumptions on the allocations were based on the 2017-2018 Estimate of Membership and Revenue Data. Unless your high school enrollment changes drastically, these allocation assumptions should be fairly accurate.

## Can my district carry High School Success funds over from year to year?

Yes. You can carry funds over from one year to the next within each biennium. However, all High School Success funds must be spent by June 30<sup>th</sup> of the last year in the biennium. If any funds remain they will return to the High School Success fund for reallocation in the next biennium.

It is not necessary to submit a carryover request for funds. Funds allocated for the first year of the biennium are allocated for two years while those for the second year are allocated for a single year. No carryover request is necessary for the first year of the biennium and none is allowable for the second.

All claims for reimbursement must be submitted by September 30<sup>th</sup> of the second year of each biennium.

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## What are the administrative allowances that grant recipients will be able to utilize for program implementation?

Grant recipients are allowed to retain up to 5% of the funds for the indirect costs of the new programs for the first two allocations (2017-2018 and 2018-2019), and 4% every year thereafter.

For the purposes of High School Success funds, administrative costs are synonymous with indirect costs and will commonly be referred to as indirect costs.

## What can we include in our budget using Measure 98 monies?

As mentioned earlier, indirect costs are a legitimate expense under this program, 5% for the first biennium and 4% for each biennium thereafter.

The following sections of Oregon Laws 2017, Chapter 1, provide guidance on both eligible and required services as specified in the law:

### Career Technical Education

§5(2) For purposes of this section, establishment or expansion of a career and technical education program includes the purchase of equipment, the construction of facilities and, the recruitment, licensing, employment and training of personnel to provide career and technical education

### College-level Opportunities

§6(2) For purposes of this section, the college-level educational opportunities must include:

- (a)(A) Advanced Placement, International Baccalaureate or comparable college-level courses; or
- (B) Dual credit and other accelerated college credit programs offered in conjunction with an Oregon community college, public university or other accredited institutions of higher learning or post-high school career schools;
- (b) Assisting students with the selection and successful completion of college-level educational opportunities; and
- (c) The recruitment, licensing, employment and training of personnel to provide college-level educational opportunities for students in all high schools.

### Dropout Prevention

§7(2) For purposes of this section, the dropout-prevention strategies must include:

- (a) Implementing activities designed to reduce chronic absenteeism;
- (b) Establishing and maintaining data management systems that provide timely reports on students' grades, absences and discipline by school and by course;
- (c) Beginning with grade 8, using attendance, course grades, credits earned and disciplinary referrals to identify students at risk of not graduating;

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(d) Beginning in the summer after grade 8, providing academic and social supports for students at risk of not graduating to ensure that the students are on track to graduate by the time the students enter grade 10 and stay on track to graduate after entering grade 10, including such supports as summer programs, additional instructional time before and after school hours, tutoring or small group instruction during the school day or counseling services; and

(e) Providing counseling and coaching to provide early exposure for students to employment opportunities and requirements and options for post-secondary education.

## Services to 8th Grade Students

The law was amended by the 2017 Legislature to allow up to 15% of the total allocation to be spent on services to students during their 8th grade year. This can be used from the day after the last attendance day in 7th grade until the day after the last attendance day in 8th grade. Following the last attendance day in 8th grade, the students are considered 9th grade students and there is no restriction on the amount which can be spent on these students.

## What guidance is there for determining if an expense is allowable through the High School Success fund?

The law creating the High School Success fund states moneys from the High School Success fund should “improve students’ progress toward graduation beginning with grade 9, increase the graduation rates of high schools and improve high school graduates’ readiness for college or career.”<sup>[1]</sup>

This gives the question, “Will your work improve student progress toward graduation (freshman on-track), the graduation rate, and/or college and career readiness and does it equitably address appropriate student populations?”

## If a school district establishes a program or initiative with their first plan for school year 2018-2019, are they allowed to use High School Success funding in subsequent plans to maintain those programs?

Yes. The programs offered must be established and expanded after the law was enacted on December 8, 2016. Continuing these programs and utilizing subsequent funding from High School Success dollars will be supported; however, continuous improvement and expansion are fundamental to the law.

## How do alternative education and special education programs fit into High School Success funding?

High School Success funding is allocated to grant recipients, not to programs. It is true, however, that many districts will be challenged to significantly improve their graduation or freshman on-track rates without addressing the services offered in these programs.

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<sup>[1]</sup> Section 7, HB 2246 amending Section 12, chapter 1, Oregon Laws 2016 (ballot measure 98).  
Updated 3/22/2018

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The very reason alternative education programs exist is to improve the likelihood of graduation for students identified as at significant risk of failing to complete high school. Similarly, students served by special education programs generally have a greatly lowered rate of graduation than the average within a district.

While not all students in special programs such as alternative education, special education, or those for English language learners will require additional supports to reach graduation, some certainly will. The effectiveness of these programs should be frequently reviewed to ensure they are both meeting the needs of individual students and supporting the goals set for them by the district. Where the district identifies these programs as in need of additional resources to improve graduation and freshman on-track rates for the district it would be appropriate to supplement program budgets with High School Success funds.

### **Are Oregon charter schools eligible to receive High School Success funds for students in grades 9-12?**

Yes. Charter schools are eligible to receive High School Success funds. A charter school must serve students in at least one grade 9-12 and meet the eligibility requirements. A charter school could choose to submit a separate plan or join in collaboration with the sponsoring district or with other partners.

### **Is a school district allowed to use High School Success funds for grades below 9-12?**

The activities, programs, and/or initiatives are to provide services to grade 9-12 level students.

Funds may be used for students the summer after their grade 8 school year. Specifically, funds are to be used for:

- Examination of attendance, course grades, credits earned and disciplinary referrals to identify students needing extra supports.
- Beginning in the summer after grade 8, grant recipients are to provide academic and social supports for students.

With the revisions to the law enacted during the 2017 Legislative Session, there is an opportunity to set aside up to 15% of the total allocation for use in providing services during the 8<sup>th</sup> grade school year. The same restrictions on program use of funds are applied at 8<sup>th</sup> as are applied at grades 9-12.

High School Success funds are not allowed to be used for activities and/or programs for students in grades PK-7. Grant recipients will be encouraged to leverage other funding sources to make a comprehensive plan for all students in the grades served.

### **Is a school district allowed to use High School success funds for students who have graduated?**

No. The activities, programs, and/or initiatives are to provide services to students in grades 9-12 who have not received their high school diploma.

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## Can High School Success funds be used for teachers, instructional assistants, and other personnel costs?

Yes. If a school district identifies a strategy that requires staffing to complete the activity, then the cost of staffing (FTE) could be a justified expense.

The program would have to be expanded/established after enactment of High School Success.

There is a 5% indirect cost allowance from the initial allocation and 4% each year thereafter. Grant recipients should plan accordingly.

## Can I use High School Success funds to purchase food for students, staff, and/or members of the community?

Yes. The reasonable purchase of food for students, families, staff, and other stakeholders is allowable through this state fund.

We would encourage you to connect with [Child Nutrition](#) as you develop your High School Success plans.

## The rules for High School Success prescribe a 5% (shifting to 4% after the first year) cap on indirect costs. Our district has an approved indirect rate we use for Federal grants. Are there any guidelines for costs directly related to the administration of the funds over and above the cap?

The indirect cost cap is fixed. This includes any administrative charges. The district can hold up to the cap for indirect costs. For the purposes of High School Success funds, administrative costs are synonymous with indirect costs and will commonly be referred to as indirect costs.

- Indirect Costs – Indirect Costs are those portions of reasonable, necessary and allowable costs associated with the overall project/program management and administration, which are not directly related to the provision of service to participants or otherwise allocable to the grant-in-aid program cost objectives/categories. These costs may be both personnel and non-personnel costs. Additionally, indirect expenditures are for resources that cannot be specifically identified with a program, such as the portion of expenditures for data processing, accounting or state governmental service charges that support the grant.
- Direct Costs - Direct expenditures are those that can be specifically identified with a particular sponsored project/program and which can be directly assigned to activities, relatively easily and with a high degree of accuracy. Examples: salaries and benefits of program specialists, administrators, travel, facility expenses, telephone costs, legal fees, professional services (contracts), professional development and supplies and services that may be incurred by the program and office management staff.
- Professional Services (Contracts) - The written agreement between the Agency and the contractor describing rights, obligations and the work to be completed between parties. Funds are provided to acquire a product or service from the contractor. Scope of work is specific and detailed. Contracts are more restrictive than grants-in-aid.

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## Could a school district utilize High School Success funding to develop mentoring, Career Technical Student Organizations (CTSOs), clubs, summer programs, internships, apprenticeships, after school programs, and other co-curricular activities?

Yes. Co-curricular student organizations are evidence-based, and many are integral to CTE instruction.

### **Isn't the money for High School Success just money districts are to get anyway that the legislature just repurposed?**

No. The districts received an increase in funding for the 2017-19 biennium independent of High School Success (Measure 98). High School Success funds were allocated over and above that increase. While it is possible the legislature could have provided this \$170 million through the state school fund in addition to the increase, we cannot speak to hypotheticals. There are a number of priorities for the state across all agencies. The legislature made high school graduation a priority with this money.

### **Many of my expenses are both eligibility and programmatic costs. Do I put the costs in both or distribute them across the two areas?**

Eligibility expenses relate to startup costs, not to ongoing expenditures. Each expense is either a startup eligibility cost or an ongoing programmatic cost.

For example, if you need to purchase new software to manage data for teacher teams, this would likely result in a one-time expense charged as an eligibility cost. If you are purchasing a software subscription and will continue to pay this expense from these funds, it would be a programmatic cost and should be included there.

Hiring someone to manage the use of software to support the teacher teams would be an ongoing expense and should be charged to dropout prevention as this person would support ongoing efforts to lower your dropout rate and improve your graduation rate.

If you hire an intervention specialist or perhaps a graduation coach to work with grade 9 students this is an ongoing cost related to dropout prevention and so should be entered as a dropout prevention expense. If instead you offer training to an in-place employee (or group of employees) to manage this work, that training likely would be a one-time cost and an eligibility expense.

## Programmatic Areas

### **Why are Career and Technical Education (CTE), College-level Educational Opportunities, and Dropout Prevention the key strategies for High School Success?**

All three strategies are evidence-based and collectively support the needs of students related to engagement, personalization, achievement, and college and career readiness. Collectively and systematically implemented, these strategies could significantly impact a student's high school experience and "next steps" opportunities.

Updated 3/22/2018

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Even though some of the funded media spots identified solely CTE in messaging, the High School Success language is clear that the law addresses all three areas.

**“Establish and Expand” language is used throughout the bill that created the High School Success fund. If a school district is at capacity with its CTE programs, college-level educational opportunities, or dropout prevention strategies, is the school district required to develop additional programs, or can it expand/retool the existing programs under High School Success?**

As grant recipients identify and implement evidence-based practices for their biennial plans, the grant recipients are to establish and expand current programs beyond the 2016-17 service level. Expanding, elevating, enhancing, and/or re-tooling a program would be allowed; however, backfilling the budget with High School Success funds for programs that were established prior to the effective date of High School Success (December 8, 2016) is not allowed.

Small schools may have barriers in access, resources, and capacity and therefore, are encouraged to collaborate with other partners to assist in meeting their goals and objectives.

**Does the “establish and expand” language make this just like supplement vs. supplant with our federal programs?**

It is not quite the same as the federal supplement vs supplant issue. The law says:

*Sec. 8. (1) A school district must use the amount apportioned under section 3, chapter 1, Oregon Laws 2017 (Ballot Measure 98 (2016)), to establish or expand programs, opportunities and strategies under sections 5, 6 and 7, chapter 1, Oregon Laws 2017 (Ballot Measure 98 (2016)), [5=CTE, 6=college level opportunities, 7=dropout prevention] and may not use the amount apportioned to maintain programs, opportunities and strategies established prior to December 8, 2016, except when a use is necessary to replace the loss or expiration of time-limited grants or federal funds.*

This says that you can establish new programs or you can expand existing programs but you cannot take money away from established programs and replace it with High School Success funds.

That sounds similar to the concept behind the federal “supplement vs. supplant” concept but there is a subtle difference in interpretation. With many federal programs, if you have a program funded with state funds in one school and you want to expand it to another, you cannot use federal funds to do that. If you have state funds for some children, you are expected to have state funds for all children.

Here, if you have two high schools and you have a successful program in one that you want to replicate in the other, you would be welcome to use High School Success money for the new program. This would clearly represent an expansion of the program. Similarly, if you have an established program at one of your high schools and you want to expand the offering by transporting students from the other high school so they can participate, that would be an allowable use of High School Success funds, as well.

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## Will High School Success have flexibility in the development of models in CTE, college-level education opportunities, and dropout prevention strategies?

Yes. This is a new opportunity to examine, share, and collaborate on best practices. High schools, school districts, education service districts (ESDs), consortia, community college partners, science, technology, engineering and math (STEM) hubs and others, could come together and develop innovative models such as: regional centers, virtual partnerships, hybrid courses, online instruction, or other models showing promise worthy of moving them to scale.

### Can we use funds to begin a program this year that doesn't get fully CTE certified until next year?

It is perfectly acceptable to use Measure 98 funds to begin the work of developing a program of study in any area. Both program development and teacher licensure are reasonable and acceptable expenses from your Measure 98 funds.

The work toward development and implementation of the program of study should proceed with all due speed, but given these programs are the product of significant effort, it is anticipated you could begin implementation as the program of study is still under development.

## Planning & Technical Assistance

### Is there flexibility for grant recipients to adjust their activities, program development, and implementation within the biennial plans?

High School Success allows for flexibility within the school's or district's plan. The law calls for what is essentially a rolling four-year plan. That is, with each annual submission the plan is to be extended to include four years of activities with adjustments to those activities addressing change in the school or district and new learning on the part of staff.

It is understood that grant recipients have variables that are specific to their size and location. Amendments will be approved based upon the requirements of the law and the vision and growth continuum of the district's plan.

### Will the Department provide support services and technical assistance to assist in the training, development, approval, and evaluation of the biennial plans?

ODE staff have recorded a series of introductory videos available on the [High School Success website](#). We will also be providing technical assistance and training related to the implementation of High School Success.