

Oregon Department of Education Substitute Reimbursement Grants

Program Summary – 3/20/2023

Table of Contents

Definitions	2
Background	2
Purpose.....	2
Timeline	2
Eligible Applicants	3
Funding Availability.....	3
Eligible Uses of Funds.....	4
Expenditure Period	4
Grant Procedures	4
Reimbursement Requirements.....	4
Reporting Requirements	5

Definitions

- 1) “**Instructional Assistant**” means any staff employed by a district, education service district, public charter school, or private third party who assists with preparation of curriculum, assessment and direction of learning in class, in small groups, in individual situations, online, in the library and in guidance and counseling, and; the provision of services to students with a disability. The terms “substitute instructional assistant,” “educational assistant,” and “substitute educational assistant” have the same meaning as “Instructional Assistant”.
- 2) “**Required Training**” means any training required by the state to maintain a credential or any training required by school district policy.
- 3) “**Substitute Teacher**” or “Substitute” means any staff employed by a school district, education service district, public charter school, or private third party who is employed to take the place of a probationary or contract teacher who is temporarily absent.

Background

Substitute Teachers and Instructional Assistants are critical components of the education workforce. They provide important support in the classroom and continuity of instruction when teachers are unable to be in the classroom. Without Substitutes and Instructional Assistants, a child’s education experience would not be as enriching as it could be.

Substitute Teachers and Instructional Assistants, like permanent teachers, have Required Trainings and must maintain certifications and licenses. Often, Substitute Teachers and Instructional Assistants need to pay for these trainings themselves. This can create an additional hardship for these professionals. House Bill (HB) 4030 provides \$19,540,743 in funds to reimburse Substitute Teachers and Instructional Assistants for trainings they are required to take.

Purpose

The Substitute Reimbursement Grant is provided to reimburse the costs of Required Training for Substitute Teachers and Instructional Assistants.

Timeline

The Oregon Department of Education’s (ODE’s) timeline is as follows:

- **April 15, 2022:** HB 4030 signed into law
- **June - August, 2022:** ODE will collaborate with stakeholders to further clarify the program and ensure it is meeting stakeholder expectations
- **August 15, 2022:** Rules completed for September - October State Board of Education adoption
- **September 1, 2022:** Information about grant distributed to the state

- **September 22, 2022:** First read of rules by State Board of Education.
- **October 20, 2022:** Adoption of rules by State Board of Education.
- **November 10, 2022:** Grant application period opens.
- **December 15, 2022:** Application period will close.
- **February 3, 2023:** ODE will release grantee allocations based on the applications submitted.
- **February 13, 2023:** ODE will begin executing grant agreements to grant recipients.
- **June 30, 2023:** Last day to participate in and incur expenses for Required Training to be reimbursed.
- **July 31, 2023:** Last day to submit reimbursement claim to ODE.

Eligible Applicants

Funds will be provided directly to school districts and ESDs to reimburse for tuition or registration costs, travel expenses and any time needed to complete the training by Substitute Teachers and Instructional Assistants. The trainings that will be reimbursed are those that are either required by the state to maintain a license or certification, or those required by a district or ESD to maintain employment with that individual district or ESD.

Funding Availability

The total amount of funds provided by HB 4030 is \$19,540,743. The funding will be available to reimburse required trainings paid for and received between **April 15, 2022 and June 30, 2023**.

Due to complex business relationships between districts and ESDs with their substitute teachers and instructional assistants, a standard ADM-based formula may not adequately distribute the funds. Districts and ESDs will apply for the funds and in the application state how many substitute teachers and instructional assistants they either employ or contract with a third party. If a district contracts with an ESD, then the ESD will state the numbers and not the district. The applications will be reviewed and analyzed and a total number of individuals will be determined. The grant funds will be divided by this total number of individuals and allocated based on the number of individuals that a given district or ESD has a direct relationship with. Districts and ESDs will be required to apply for the funds by **December 15, 2022**.

Eligible Uses of Funds

Districts and ESDs may use the funds to reimburse Substitute Teachers and Instructional Assistants for incurred expenses related to Required Trainings. Eligible expenses include:

- Tuition costs of training;
- Travel expenses related to training hosted outside of the district(s) where a Substitute Teacher or Instructional Assistant normally works;
- Reimbursement for time spent to complete the trainings;
- Conference fees or other professional development expenses incurred by Substitute Teachers or Instructional Assistants.

5% of the funds will be held in reserve to cover unexpected situations and other uses of funds will be examined on a case by case basis.

None of the funds may be used for indirect charges. Per the law, districts and ESDs may not keep any funds from this grant for their costs. All funds must be provided directly to Substitute Teachers and Instructional Assistants.

Expenditure Period

Grant funding is available for any eligible use of funding incurred between **April 15, 2022** and **June 30, 2023**.

Grant Procedures

To participate in the Substitute Reimbursement Grant, all districts and ESDs must submit an application by December 15, 2022. The purpose of the application is to indicate which districts and ESDs will participate in the grant and get a full count of the eligible Substitute Teachers and Instructional Assistants. Numbers provided in the application will be used to allocate funds to a District or ESD based on their direct relationship. Districts and ESDs that do not submit a required application will not be able to participate in the grant. The funds allocated to those entities will be redistributed among the entities that applied.

Reimbursement Requirements

ODE will provide the reimbursements to Districts and ESDs. Those entities will pass through all available funds to the individual Substitute Teachers or Instructional Assistants that submitted claims. School Districts and ESDs cannot retain any part of the reimbursement for administrative costs. The grant agreement must be signed by the District or ESD prior to submitting any reimbursement claims. Reimbursements submitted to ODE from school districts and ESDs will be submitted on the form to be provided by ODE.

Reporting Requirements

All reporting for this grant will be completed through the reimbursement process. There will not need to be a separate final report submitted. It is expected that individuals will submit any expense reports, receipts, or other documents indicating costs paid to the districts and ESDs as part of the district/ESD's normal processes. Districts and ESDs are expected to keep an electronic copy of all records to be provided to ODE upon request to respond to any audit, request for information, or other reason.