The Student Investment Account

2025 Legislative Report

January 2025

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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, a term used throughout this update.

This annual report provides an update on program implementation, investment of resources, and analysis of impact of investments focused on the 2023-24 school year. This report also marks the first update on the implementation of ODE's integration of six ODE programs, an initial step to further operationally align efforts within the agency that share common elements and common goals. School districts and eligible SIA grantees submitted the first Integrated Application in Spring 2023 and set goals through the 2027 school year. The 2023-24 school year, the focus of this report, is the first year that SIA grantees implemented the plans approved by the department in spring of 2023. Though this report focuses on the impact of the SIA grants, it is a part of the integrated programs and thus, the report will address other aspects of this integration as well.

ALIGNMENT OF SIX PROGRAMS

Aligning for Student Success: Integration Guide for Six ODE Programs

Background

In the 2024 SIA Legislative Update, ODE shared implementation efforts to align six ODE programs, a response 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 and an update of this guidance in April 2024. To support the implementation of Integrated Guidance, ODE released a number of supplemental resources and tools, all of which are posted on the Office of Innovation and Improvement webpage. Under this guidance, the following programs were operationally brought together without changes to statute or legislation:

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

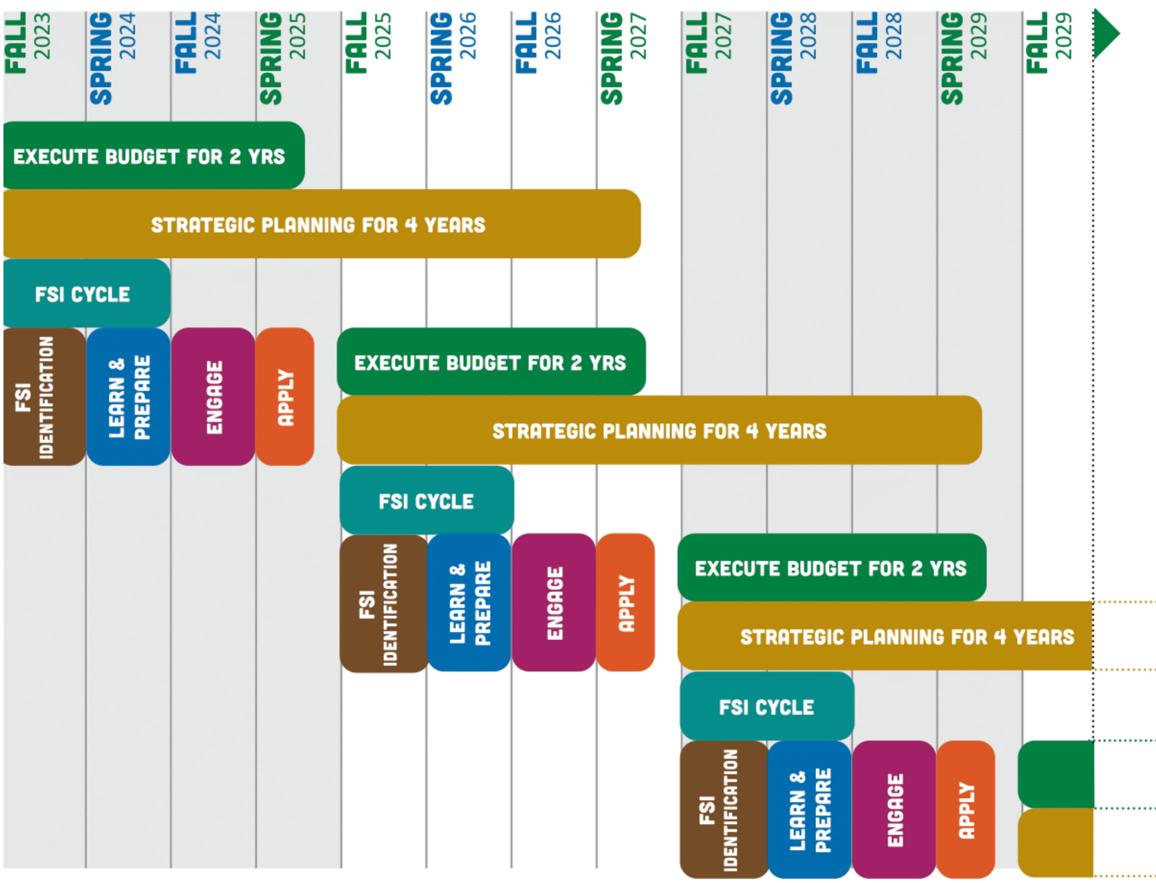
For the coming biennium (2025-27) and the next round of implementation, ODE has added three additional programs to the integrated program framework: Career Connected Learning, Early Literacy Success School District Grants, and Federal School Improvement for Comprehensive/Targeted Supports.

Working within existing state statutes, ODE developed a framework for success that meets and retains the core purposes of each program while creating 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 systems. Rather than focusing on working on multiple, separate plans for each program, schools and districts are now able to meaningfully plan for what outcomes they desire for their students, schools, and communities, and then think about which funding stream(s) to use to fund specific activities.

In fall 2023, districts and SIA grantees began to implement their approved plans. Plans include co-developed Longitudinal Performance Growth Targets for each of the five common metrics of the SIA, which include:

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

Targets were set beginning with the 2023-24 school year and with annual goals through the 2027-28 school year. Additionally, districts and SIA grantees also had the option to set Local Optional Metrics to track progress in other important metrics with local significance and to demonstrate how they are improving and meeting outcomes named in their planning on their own terms. The following graphic depicts the cycle of continuous improvement.



2025-2027 Integrated Guidance Update

In Spring 2024, ODE released [Aligning for Student Success: Integrated Guidance Update 25-27](). The update replaces the previous Integrated Guidance from 2022 and includes several changes and new resources. It also brings fully integrates the Early Literacy Success Initiative's School

District Grant (HB 3198). Moving forward, Integrated Plans will now integrate nine programs or initiatives. Embedded programs are those that are intentionally woven into a grantee's integrated application and don't have distinct funding streams, while focused programs are those with distinct funding streams grantees include within the integrated budget (see graphic below for a visual representation of the nine programs).

Embedded Programs

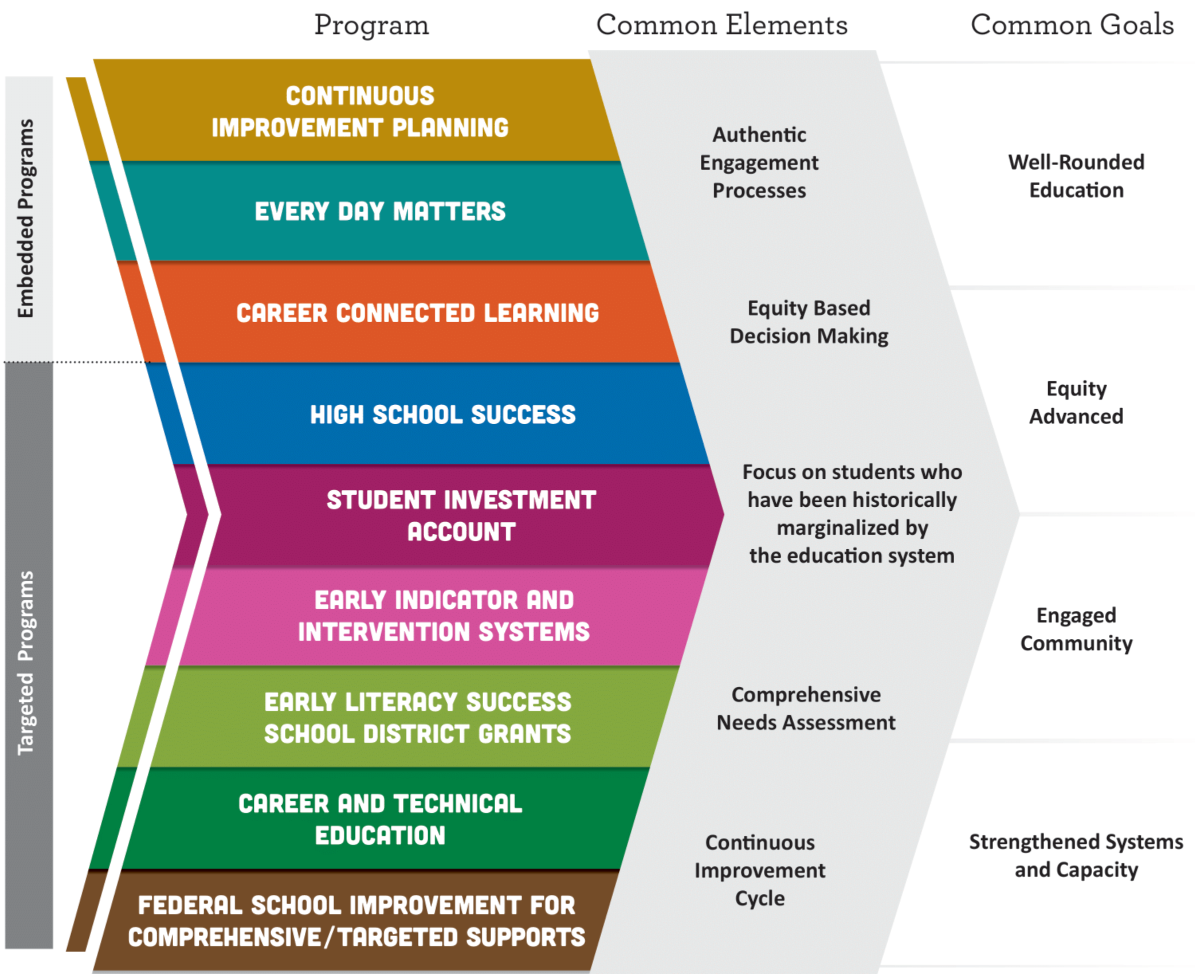
- Continuous Improvement Planning (CIP)
- Every Day Matters (EDM)
- Career Connected Learning

Targeted Programs

- High School Success (HSS)
- Student Investment Account (SIA)
- Early Indicator and Intervention Systems (EIIS)
- Early Literacy Success School District Gants (ELSSDG)
- Career and Technical Education/Perkins V (CTE)
- Federal School Improvement for Comprehensive or Targeted Supports

Additional updates include changes to the application, changes to the review process, program updates, and new appendices. These revisions, along with changes to the application process, were made based on extensive feedback both internally and externally and reflect the department's commitment to continuous improvement alongside grantees.

At the time of this writing, districts and eligible SIA grantees are actively working to submit 2025-27 Integrated Applications during Spring of 2025. In Spring 2024, following the release of the Integrated Guidance Update, eligible SIA grantees began reflecting on the previous cycle, completing internal planning and budgeting, and continuing ongoing engagement and needs assessment processes. In Fall of 2024, the ongoing engagement and needs assessment processes continued, Tribal Consultation and Coordination was conducted, and eligible grantees began to identify patterns in feedback and data. During Winter 2025, grantees will begin to refine their planning in preparation of the application window opening in Spring 2025.


Program
Common Elements
Common Goals
Embedded Programs
Targeted Programs
CONTINUOUS IMPROVEMENT PLANNING
EVERY DAY MATTERS
CAREER CONNECTED LEARNING
HIGH SCHOOL SUCCESS
STUDENT INVESTMENT ACCOUNT
EARLY INDICATOR AND INTERVENTION SYSTEMS
EARLY LITERACY SUCCESS SCHOOL DISTRICT GRANTS
CAREER AND TECHNICAL EDUCATION
FEDERAL SCHOOL IMPROVEMENT FOR COMPREHENSIVE/TARGETED SUPPORTS
Authentic Engagement Processes
Equity Based Decision Making
Focus on students who have been historically marginalized by the education system
Comprehensive Needs Assessment
Continuous Improvement Cycle
Well-Rounded Education
Equity Advanced
Engaged Community
Strengthened Systems and Capacity

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 comprehensive program, outlined in Section 7: Getting Better of the Integrated Guidance. ODE has designed a range of supports including TA, professional learning, customized coaching, the Intensive Program, and the authority to take corrective action over time based on the performance framework set into the program. The supports ODE holds responsibility for developing and deploying continue to grow and improve. The following section will focus on improvements and changes made in these programs since the January 2024 report.

Tools to Support Aligned Implementation

ODE offers a range of tools to support grantees in aligning the implementation of the Integrated Plan programs that include support regionally, to education service districts, school districts and other grantees, and individual schools.

Regional Support Model

ODE developed a regional support model with the roll out of the first Integrated Application. The purpose of this effort was to de-silo and better coordinate internally across programs. The model involved a dedicated team to support grantees across the programs within the Integrated Plan. Since implementation, stronger relationships have been built between regional teams, ESD staff and grantees.

ODE has continued to expand and improve this model over the 2023-2024 implementation year based on feedback and continuous learning. The regional model is now configured as:

- Regional Supports: this approach seeks to understand the needs of school districts and schools in an ESD region as it relates to Integrated Plans (and beyond) and our ability deploy resources and needs to respond to these needs.
- Regional Structure: the structures in place to deploy regional supports.
- Integrated Program Specialists - Staff dedicated to implementing regionalized support plans and development.
- District Grant Managers – Staff assigned to a ESD regions to support grant management.

- Content Specialists – Staff specializing in implementation efforts around Mental Health, Migrant and Multilingual, Career and Technical Education, Attendance/Every Day Matters, Early Indicator and Intervention Systems, and Professional Learning.

ESD Comprehensive Support Plans

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 a prescribed formula. The passage of Senate Bill 225 adjusted the formula to establish floor funding for the smallest ESDs.

In the 2023-25 biennium, $42.8 million 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 funding. Technical assistance 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 2023-25 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 schools identified for support through the federal school improvement system.
- Governor's Emergency Education Relief (GEER) funding, which ended September 30, 2024, focused on reducing administrative burden for small and rural districts.

With the increase in funding, ESDs have been able to support teams of different sizes with clear coordination and joint meetings across the programs, leading to stronger integration. As part of the ESD grant agreement, for the 2023-25 biennium, ESDs were required to submit the following deliverables on an annual basis:

- Comprehensive Support Plans detailing the support and technical assistance that each ESD provides to districts, schools, and programs in their region to support the development, implementation, and review of Integrated Applications.
- Documentation that the Comprehensive Support Plan has been adopted and incorporated into the ESD Local Service Plan (LSP).
- Annual financial report of expenditures detailing how ESDs spent each funding stream each year.

ESDs also met with department staff in the winter and spring of 2024 for conversations focused on successes and challenges, including how the department could better support ESDs. At the time of this writing, ESDs are preparing plans for the 2025-27 biennium and department staff are once again engaged in check ins with ESD teams.

Small and Rural District Support

Through legislative action in 2023[1], ESDs now have secured and ongoing funding to support small and rural school districts. These funds were first provided through Federal GEER funding, which expired Sept. 30, 2024. The focus of these funds is to provide responsive and intensive support from the ESDs to small districts within their regions with enrollment of 1650 ADMw students or fewer. ESDs may extend that support for districts up to 2000 ADMw.

Often smaller districts have limited personnel capacity to move through the extensive administrative and reporting requirements for various federal and state programs and initiatives districts are required to participate in. ESDs are using the funds in accordance with allowable uses to provide support, coordination, and alignment of any of the more than 100 state or federal programs for the small districts in their region.

The stable funding provided through the legislature for this program in the 2023 legislative session also allowed ODE to shift a staff position focused on this work from limited duration to permanent and continues to provide funding to support a part-time Oregon Association of ESDs staff coordination role.

[1] 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.

Customized Coaching and Professional Learning

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. Previously called the Intervention and Strengthening Program (ISP), the name was updated to Customized Coaching and Professional Learning (CCandPL) to better align with the purpose of the program, especially since supports are primarily accessed voluntarily by grantees.

Grantees can access the program supports at any time, and ODE works with grantees to suggest areas for customized coaching and professional learning based on a grantee's data and context.

ODE established this program as the general coaching program funded through the SIA for grant recipients not making progress toward achieving the Longitudinal Performance Growth Targets and/or Local Optional Metrics (LPGT and LOM). Each year, ODE monitors grant recipient growth towards achieving these targets and considers what support a grantee may need to see growth and progress. At the time of this report, ODE is awaiting the final data for two of the five common metrics and will finalize the first review of LPGTs through winter and spring 2025. Based on those reviews and through conversations with grantees, the department may strategically invite grant recipients to participate in the customized coaching program.

ODE has been pursuing a universal and targeted approach to deploy technical assistance, coaching, and high-quality professional development to support the implementation of the SIA, the 28 programs in the Student Success Act, and the programs aligned in the Integrated Plans. The legislature allocated about $9M in the 2023-25 biennium to support these efforts.

ODE currently offers customized coaching and professional learning in the following focal areas:

- Equitable mindsets and systems
- Community engagement
- Fiscal stewardship
- Early literacy
- Adolescent literacy

Currently, the department is evaluating Requests for Proposals (RFPs) from vendors the current focal areas and in seven new focal areas. These new areas were added to respond to needs elevated by current grantees.

- Mental health and wellness

- Leadership for continuous improvement
- Student success systems
- Equitable data practices
- Student engagement for improved attendance
- Support for multilingual learners
- Family engagement at the school and classroom level

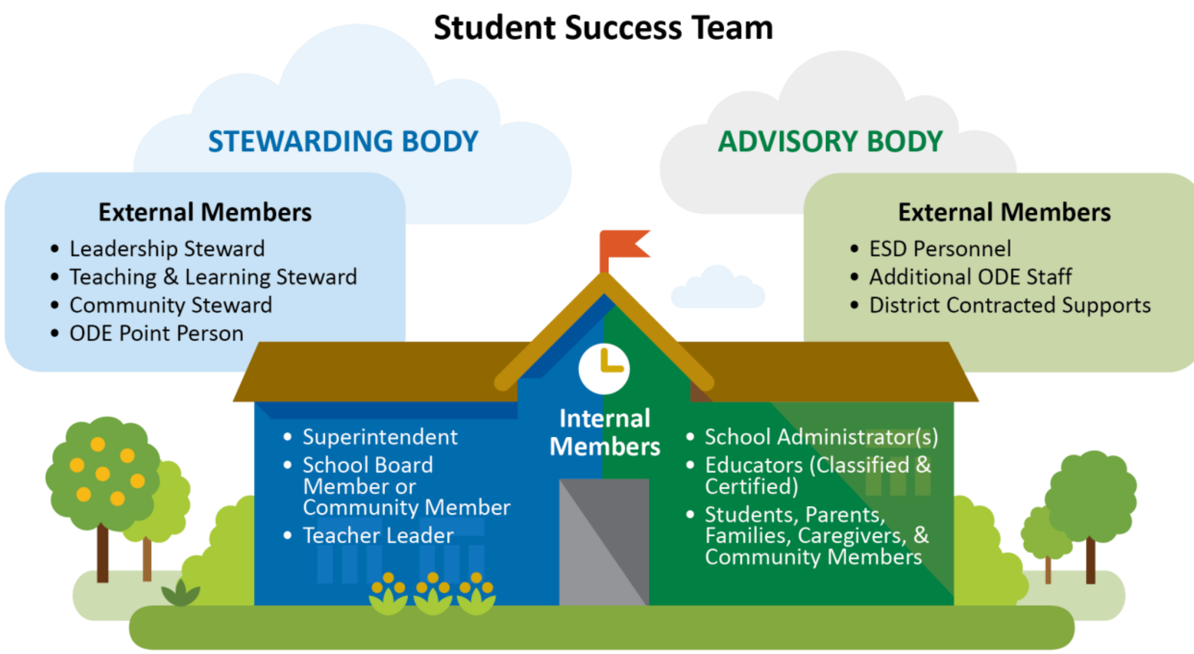
The addition of these areas expands the ability of the department to support grantees.

Currently, 10 individual districts and/or schools and three ESDs are mobilizing supports from the customized coaching and professional learning program. Quarterly progress reports are provided about the coaching work, and recipients have reported appreciation for this support. In many cases, recipients are requesting more support through the coaching program.

Intensive Program

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 2023-25 biennium, a total of $26,083,344 was included in the grant-in-aid section of the SEIA for the additional funding for participating districts. The AY23 Legislatively Adopted Budget (LAB) had $3,766,699 in total operations funding, which includes $918,642 for three staff positions.



The Student Success Teams (SST) are the core of the program, with statute and rule establishing that each SST for a participating district will 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 including 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 three active cohorts with four total participating districts. One district accepted invitation into the first Cohort in 2021, two districts accepted invitation into Cohort 2 during the 2022-23 school year, and one district accepted invitation into Cohort 3 in the fall of 2023.

Implementation Progress

The 2023-24 school year marked extensive progress and growth for the program.

The Intensive Program team grew in staffing to meet the needs of adding additional districts to the program. Three limited duration positions began in late summer of 2023, which included two additional District Support Specialists working directly with districts and an Office Specialist dedicated to supporting programmatic needs. These additional staff have brought depth to the team allowing for increased capacity to build stronger relationships with participating districts as well as support and professional learning for ODE contract stewards.

Beginning in May 2024, the team started the Oregon Administrative Rule update process to better align programmatic rule language with learnings from the first years of implementation as well as the shift to the Student Investment Account being integrated into the *Aligning with Student Success Integrated Application.* Through rounds of feedback with the Ongoing Rules Community Advisory (ORCA), participating districts, steward contractors, and the State Board of Education, rule changes were drafted that can be categorized into five main buckets: aligning Tribal Consultation with current requirements; refining and aligning exit criteria; allowing districts to participate beyond four years; access to coordination and collaboration funds; and minor and conforming edits. The updated rules are currently on track to be adopted by the State Board of Education in February 2025. These rules will enable stronger levels of both accountability and support for districts participating in the Intensive Program.

Implementation Challenges

As the program continues to partner and work with districts, multiple challenges continue to impact implementation of the Intensive Program. One primary challenge continues from last report and a new challenge has emerged for nearly all districts: procurement execution time and navigating budgetary issues at the district level.

The structure of the Intensive Program has offered challenges in navigating procurement processes, due to the unique nature of its grant-in-aid structure and need for individual external contractors. The Intensive Program offers 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 ODE staff have navigated these challenges, it has taken significant time to execute these grants for all cohorts of districts, thus impacting programmatic implementation integrity. Recent rule changes will lead to a need to further engage with the procurement process to amend current grant agreements to account for things like timeline as well as to include additional provisions as the new rules are implemented.

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 ODE and Department of Administrative Services leadership for potential next steps. However, during 2023 and 2024 movement on this special procurement approach has continued to be delayed. Only single-year amendments to extend currently serving stewards have been executed. This has been especially difficult as multiple stewards have shifted roles, which has a direct impact on program fidelity. The program currently has no additional stewards poised to join districts invited in 2025, and current stewards are at capacity. A request has been submitted to procurement to bring in additional stewards. For continued program viability, being able to procure additional stewards through a consistent process is needed to ensure enough stewards can be obtained that have the specific skills and knowledge to support both the geographic and diverse array of districts the program aims to serve.

The 2023-24 school year saw budgetary concerns emerge at all participating Intensive Program districts. All districts faced budget cuts during the spring of 2024, with one district having additional cuts into the fall of 2024. Budgetary concerns have been raised throughout the state and are not necessarily unique to Intensive Program districts. However, there have been some common issues across participating districts such as leadership transitions and an emerging need to improve skills at the business office level to ensure less errors in accounting. While these concerns have been experienced statewide, this has demonstrated a need within Intensive Program districts to support fiscal processes to more proactively address budget shortfalls.

Next Steps for the Intensive Program

The remainder of the 2023-25 biennium will bring a new round of invitations to the Intensive Program to start a Cohort 4. Invitations will begin in early spring 2025, with the intention of new districts beginning participation in July 2025. Inviting two additional districts into Cohort 4 will be possible only if current limited duration positions are made permanent or extended and the procurement of additional steward contractors can be completed within this timeframe.

Prior to this next round of invitations, the Intensive Program team is working on implementing the new rule changes, which will include the need to update existing grant agreements with the four participating districts. In addition, the more defined exit criteria in rule will need processes and procedures developed for application as the first district nears the end of their third year of participation.

Finally, the release of *Oregon's Accountability Framework* and *Renewed Vision for Oregon's Accountability System* has the potential to impact the Intensive Program. From further refinement of the program to align with the recommendations, to what the future of accountability and districts looks like in Oregon spurred by these groundbreaking works, the Intensive Program will be fundamentally connected under a common vision to support districts and students throughout the state.

Additional Resources for Aligned Implementation

To supplement the Integrated Guidance, ODE also released a number of additional resources and tools to support the implementation of the guidance, including:

- LPGT and Progress Markers: Slide Deck Template to LPGT Discussions with School Boards
- Guidance following Removal of Class C Violations for Irregular Attendance
- Chronic Absenteeism: When to go to School
- District Equity Committee Guidance
- Arts Access Toolkit
- Community Engagement Survey Item Tool Bank and Resource Guide: Between the guide and the bank of questions is a customizable tool to adapt to meet the individual needs of school and district communities. The resource can help applicants make the most of engagement efforts.
- 23-24 Estimated and Final Allocations released to support planning for the 25-27 Integrated Program Application submission in Spring 2025 and these updated numbers were based on the results of Legislative sessions.
- Reporting Calendar: This calendar contains ODE-required school district submissions. Included in this calendar: Data collections; Data validations; Data reviews; Grant reporting and Other required submissions.
- Aligned Messages: The Integrated EII Monthly Communication is a central source for updates and information about Aligning for Student Success: Integrated Guidance and implementation of the integrated programs. The monthly message aims to streamline the number of communications sent by our office and will be released during the last week of each month. Periodically, the office may release additional messages on an as-needed basis.
- Technical Assistance and Professional Learning and Coaching Webpage: EII maintains a Technical Assistance, Professional Learning and Coaching webpage which provides a

single location to find professional learning opportunities, technical assistance and informational recordings hosted by the office.

- Research and Data Reports: ODE utilizes data to generate research briefs and reports that are relevant to the goals of the Integrated Programs. ODE also partners with school districts in Oregon to develop case studies supporting understanding key priorities of the Integrated Programs, specifically Mental Health and Focal Student Groups. Reports released during the 2023-2024 implementation year include Student Sense of Belonging in Schools: Predictive Factors and Student Sense of Belonging in Schools: Connection to Outcomes
- Centering Health and Well-being in Education: An updated collaborative resource and planning tool developed by the Oregon Health Authority (OHA) and ODE in support of Oregon school district budgeting and alignment for student success with new strategies, examples, and information to address post-pandemic impacts. This resource supports schools and districts to identify partnerships and funding opportunities that develop and sustain health and wellness initiatives in support of student physical, mental, and behavioral health as well as overall well-being, thus leading to academic improvements.

2023-24 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
- March 2023 – July 2023: Grantees with approved applications set LPGTs and LOMs
- June 2023: Early Literacy Success Initiative's School District Grant (HB 3198) passes and is added as an integrated program
- July 2023-Present: Grantees implement Integrated Plans
- February 2024: 2025- 2027 Integrated Guidance Update

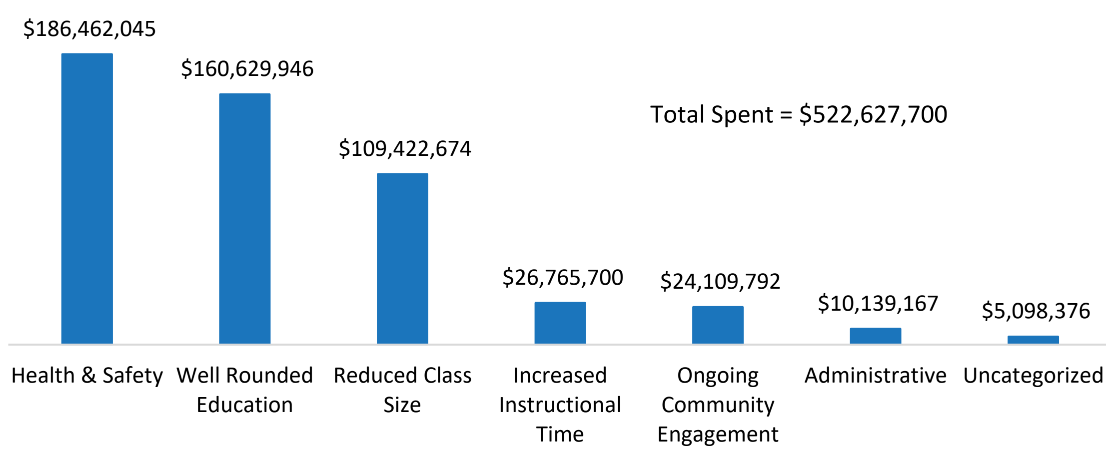
SIA Reporting

SIA Grantee Expenditures

SIA grantees were allocated a total of $532,558,921 for the 2023-24 fiscal year, with individual grants ranging in size from $19,446 to $41,799,277. Grantee expenditure data were extracted and analyzed in early January 2025, following the conclusion of the final reporting period for the 2023-24 school year (ending December 31, 2024). Overall, grantee expenditures totaled $522,627,700, or 98.1% of available funds. Just over two-thirds of grantees (68.6%) had reported expenditures within 1% of their allocated funds at the time data were extracted.

Figure 1, below, shows the 2023-24 SIA expenditures by grantees for the six SIA allowable use categories. Of the $522,627,700 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 ($186,462,045, or 35.7%). This was followed by $160,629,946 (30.7%) spent for Well Rounded Education, and $109,422,674 (20.9%) for Reduced Class Size. Spending in the three other allowable use categories was substantially less, with $26,765,700 (4.6%) for Increased Instructional Time (e.g., summer school, before/after school, tutoring), $24,109,792 (4.6%) to support Ongoing Community Engagement, and $10,139,167 (1.9%) spent toward Administration (allowed indirect costs and grant administration). The remainder of expenditures ($5,098,376; 1.0%) were not able to be categorized at the time of this report due to missing data from grantees. ODE has a process for following up with grantees on these expenditures.

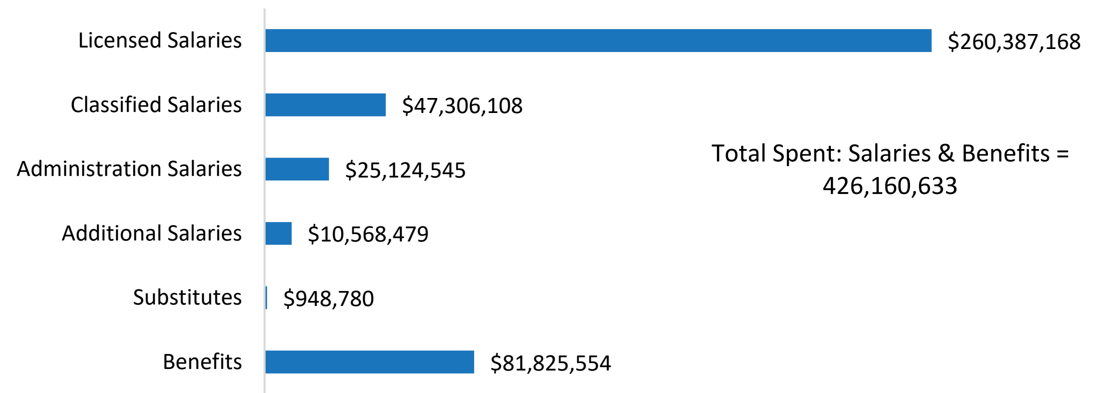
Figure 1. 2023-24 expenditures by allowable use category.



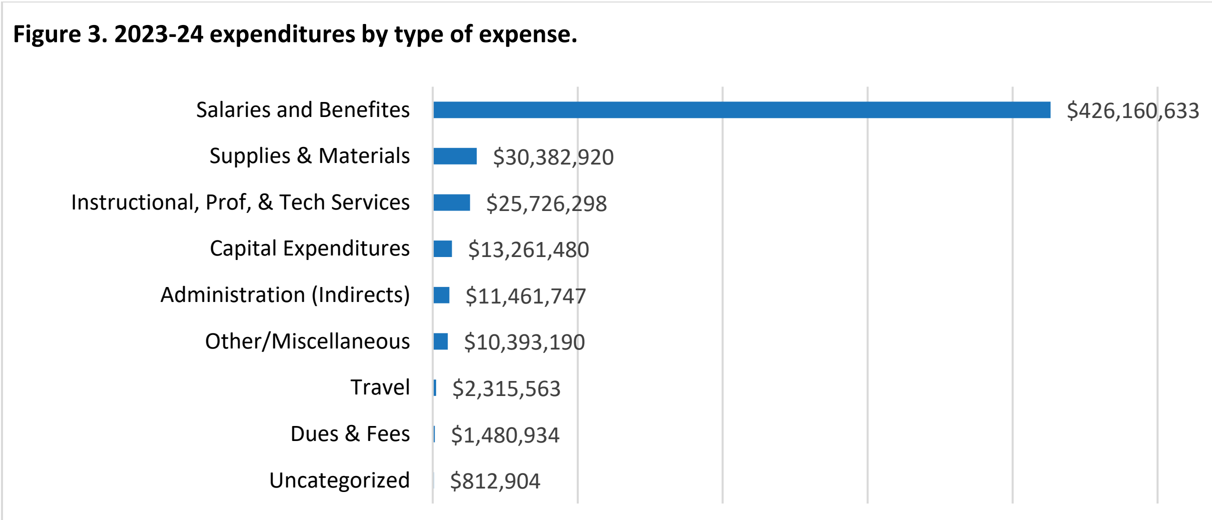
When examining SIA 2023-24 expenditures by the type of expense rather than allowable use categories (see Figure 2, below), salaries and benefits accounted for $426,160,633 or 81.7% of all funds spent during the year. Of these salaries, over half the amount (61.1%), or

$260,387,168, was for Licensed Salaries, $47,306,108 (11.1%) went toward Classified Salaries, and $25,124,545 (5.9%) was for Administration Salaries. An additional $10,568,479 (2.5%) was spent on Additional Salaries (e.g., extra duty stipends) and $948,780 (0.2%) was expended for Substitutes. The remaining 19.2% ($81,825,554) 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.

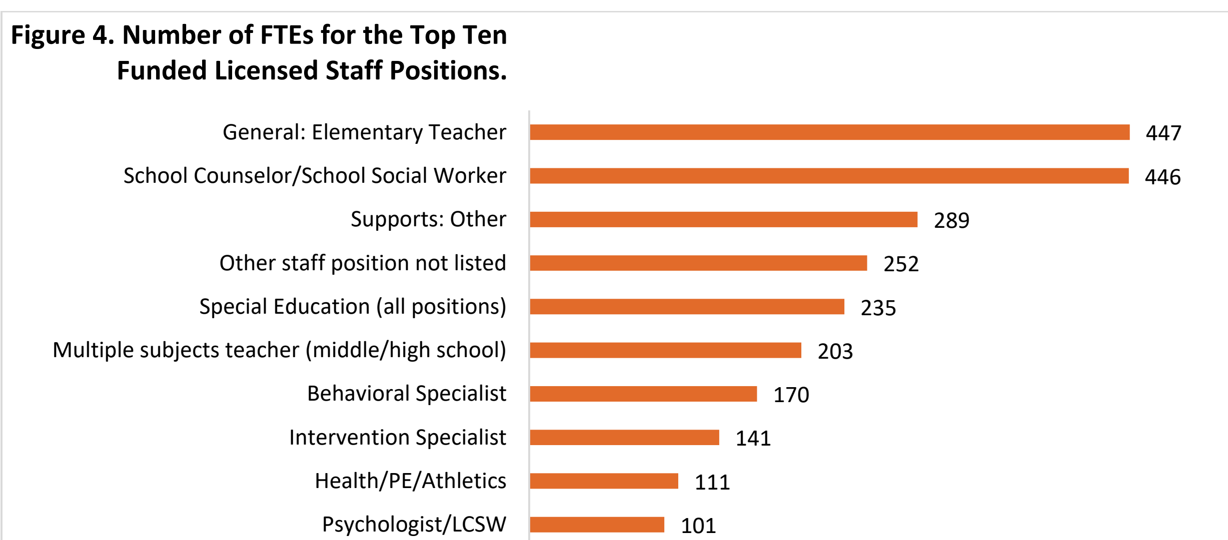
Figure 2. 2023-24 expenditures for salaries and benefits.



Considerably less money went towards other types of expenses (see Figure 3, below). For Supplies and Materials, the second largest type of expense after salaries and benefits, $30,382.920 (5.8%) was expended. Spending on Instructional, Professional, and Technical Services, largely for professional development and mental health service contracts, was $25,726,298 (4.9%). Capital Expenditures increased significantly over previous years with $13,261,480.445 (2.5%) spent on improvements such as campus safety and security projects, ADA restrooms, gym renovations to improve student safety and access to high-quality physical education classes, and HVAC updates. Another $11,461,747 went towards SIA grant administration through indirect costs. Other/Miscellaneous expenditures accounted for an additional $10,393,190, or 2.0% of the total expenditures through SIA during 2023-24. For the remaining portion, under .5% each, went towards Travel ($2,315,563; 0.4%), Dues and Fees ($1,480,934; 0.3%), and Uncategorized expenditures.

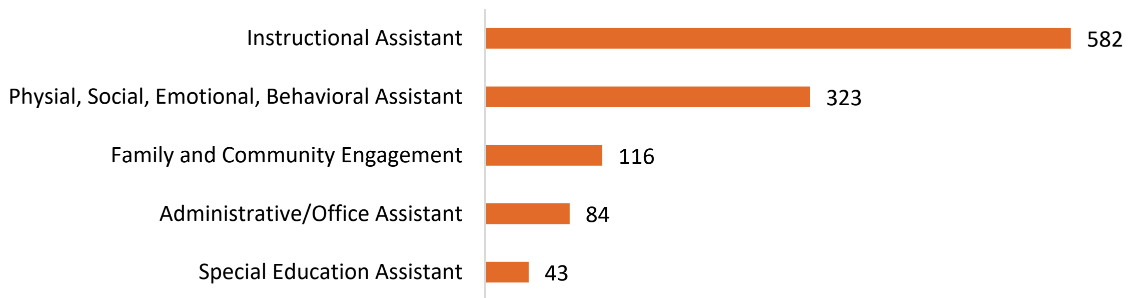


As mentioned above, SIA 2023-24 expenditures for Salaries and Benefits totaled $426,160,633. Further analysis indicated that this amount funded a total of 4,211 full time equivalent (FTE) staff positions: 3,062 Licensed positions and 1,149 Classified positions. The 3,061 FTE licensed staff positions were then categorized into one of 24 staff categories, with the ten most common positions appearing in Figure 4, below. The most common SIA funded licensed positions were General Elementary Teacher (447 FTEs), which accounted for 14.6% of the licensed staff positions, and School Counselor/School Social Worker (446 FTEs) which also accounted for 14.6% of licensed positions. Other Supports (289 FTEs; 9.4%), Other Staff (252 FTEs; 8.2%), and Special Education staff rounded out the top five licensed positions. The next five most common positions, each accounting for between 101 – 203 FTEs (3.3% – 6.6%) were Multiple Subject Teacher, Behavioral Specialist, Intervention Specialist, Health/PE/Athletics instructor, and Psychologist/LCSW.



Regarding funded classified positions, the 1,149 FTE were categorized into one of five categories. The most frequent type of funded classified position was an Instructional Assistant (582 FTEs), accounting for 50.6% of all SIA-funded classified staff. Classified staff assisting in Physical, Social-Emotional, and/or Behavioral issues totaled 323 FTE (28.1%), while those involved with Family and Community Engagement totaled 116 FTEs (10.1%). For the remaining two categories, 84 FTEs were for classified Administrative/Office staff (7.3%), and 43 FTEs were Special Education Assistants.

Figure 5. Number of FTEs for funded classified staff positions.



2023-24 SIA Annual Report

The 2023-24 SIA annual report consisted of two questions that asked grantees to consider their progress towards plan implementation relative to their plan Outcomes and Strategies and the LPGTs and LOMs set during co-development. The questions were:

1. As you review your progress markers/overall reflection responses and reflect on plan implementation, how do you see your progress contributing to the Outcomes and Strategies in your plan and your Longitudinal Performance Growth Targets (LPGT)/Local Optional Metrics (LOM)? Discuss at least one Outcome where you have seen **progress** in implementation.
2. Where have you experienced **barriers, challenges, or impediments** to progress toward your Outcomes and Strategies in your plan that you could use support with? Discuss at least one Outcome where you have seen challenges or barriers to implementation.

Out of 285 Grantees, 234 submitted responses to these annual report questions before analysis began. The research team coded responses under categories of progress and parallel categories of challenges reported by grantees. That coding across all respondents was then tabulated and is summarized below with a focus on the categories with the greatest degree of occurrence.

SIA Grantees Reported Impacts, 2023-24

The following themes reflect the changes that SIA grantees have described occurring over the course of the 2023-24 school year. This data was pulled from the narrative sections of SIA grantees' annual reporting submissions and analyzed into large themes. Grantees receiving SIA funds are required by legislation to complete annual reporting outlining successes and challenges alike. These reports also support ODE's efforts to improve accountability and transparency. Direct quotes from SIA grantees are included throughout to provide more context and background to each theme. Quotes provided are representative selections and do not represent all grantees. This section is broken into two subsections: progress themes and challenge themes.

Progress Themes

When analyzing grantees' documentation of areas of progress, ODE noted a variety of thematic areas that were frequently mentioned. Given space constraints, we chose to highlight the top themes comprising those mentioned 25 times or more. The thirteen key progress themes, listed in descending order of saturation, were: literacy; attendance; professional development; 9th grade on-track, credit recovery, and graduation; data; community engagement; well-rounded education and career technical education; strengthened systems of support; educational equity; increased capacity; mental/behavioral health and social emotional learning; academics; and school and career counseling.

Literacy

54 grantees reported seeing progress in students' literacy skills and knowledge. While grantees use SIA funds for literacy-focused activities, the high number of grantees noting literacy improvements is likely due to the integration of the Early Literacy Success School District Grants into the Integrated Programs in 2023-24. Grantees used Early Literacy Success funds on research-aligned literacy strategies within the following allowable use areas: adoption and implementation of curricula, employment of literacy specialists, coaches, or interventionists, professional development and coaching, extended learning programs, and high-dosage tutoring.

> *"Our efforts in enhancing literacy instruction and providing students with individualized additional learning time provided us the opportunity to meaningfully assess each child's reading abilities and difficulties. This data can now be used to tailor instruction to the specific needs of each student in each grade level. It has set the stage for us to continually assess and monitor more accurately students' reading abilities."*

Attendance

50 grantees named attendance as an area of progress. Grantees noted that SIA investments that expand well-rounded education, support students' well-being, and create a more welcoming school environment contribute to higher attendance rates.

> *"We met our district-wide LPGT for attendance for the 23-24 school year. Importantly, we also have fewer students missing more than 25% of the school days and have closed the gap in attendance rates for students from focal groups. We attribute this to the investments we are making in social-emotional supports for our students, well-rounded educational opportunities (including access to art, band, PE, project-based learning, and CTE) and flexible learning opportunities. These investments are now braided with REN grant funds that emphasize equipping our staff to more fully support students and their families."*

Professional Development

47 grantees cited progress in implementing educator professional development. Grantees used SIA funding to increase their professional development capacity, hire instructional coaches, and improve systems to make professional development more impactful. Grantees noted that better equipping and supporting educators contributes to progress in a wide variety of academic indicators.

> *"In 2023-24 we gained significant traction around increasing academic achievement and reducing disparities for focal groups across the district (Outcome C), which we credit to the addition of instructional coaches at all grade bands and changing up our strategy for planning professional development to be more teacher-driven. The result of these strategies is a teaching staff with significantly more support and agency. They also have more time and tools to collaborate with each other, specialists and caregivers to identify academic and/or behavioral needs, develop interventions and monitor progress. The result of this work is more attention focused on students who need it the most, helping us address opportunity gaps. However, all students benefit from building cultures that value and pursue professional learning."*

9th Grade On-Track, Credit Recovery, and Graduation

45 grantees reported progress on their 9th grade on-track metric. This early warning indicator helps grantees assess if first-year high school students are on-track to graduate within four years. Additionally, 42 grantees reported progress on graduation rates. Grantees noted that dedicated staff time and improved systems supported 9th grade on-track. Investments in

student supports, increased access, culturally responsive pedagogy, and reduced class size contributed to improvements in graduation rates for all students and focal groups.

> “*Having a dedicated, full-time staff member in this role has allowed us to more effectively track student progress toward meeting graduation requirements and academic success. As a result, our 9th Grade On-Track metric has improved significantly, rising from 61.5% in the 2022-2023 school year to 100% in 2023-2024. The consistent, daily support provided by this position has been instrumental in achieving this positive outcome.”*

> *“Our District-wide Graduation rate is 95.8% which is up and above Pre-COVID number overall. It’s especially exciting to see that some of our Focal Groups have increased graduation rates by 10%. The district-wide graduation rate has risen to 95.8%, surpassing pre-COVID levels and reflecting a 1% increase from the previous year. This is a significant achievement, particularly in the post-pandemic educational landscape. Moreover, the 10% increase in graduation rates for some focal groups highlights the impact of targeted interventions and supports, underscoring our commitment to equity and student success. This progress aligns closely with Strategy 1, which emphasizes implementing comprehensive SEL programs and student success teams to address the needs of all learners. Additionally, Strategy 2, focusing on culturally responsive teaching and reducing class sizes, likely contributed to this improvement by creating more inclusive and supportive learning environments.”*

Data

45 grantees named progress in collecting, analyzing, and utilizing data. Grantees use data in several different ways to inform SIA programmatic areas such as attendance, literacy, engagement, graduation, and more. Grantees across the state maintain a wide spectrum of data supports that vary based on district size, with larger, more well-funded districts having more capacity. Improvements in implementing data systems are an important contributor to progress in many other areas.

> *“The district continues to improve at our data teams processes at the building and district level. Staff are provided time to meet regularly to review disaggregated student data in multiple categories including but not limited to: attendance, behavior/discipline, common formative assessments, universal screener data, etc. The district has a robust data portal (Educlimber) where staff can access this data daily, weekly, etc.”*

Community Engagement

41 grantees cited progress with their community engagement efforts in annual reporting. Many of these grantees described successful efforts at engaging students, families, community members, and community-based organizations such as nonprofits and businesses. Related to these areas of growth, 20 grantees described ongoing progress with cultivating relationships with community-based organizations, and 12 indicated ongoing collaboration and communication as an area of progress. Strong community engagement is vital to the full spectrum of activities that make up the Integrated Programs. The frequent mention of community engagement in progress reporting is an important sign that grantees are rising to the challenge of creating a more equitable and engaged educational environment.

> *"One area of success has been in family and community engagement. Initiatives such as the Todos Juntos program, translation services, and literacy nights have strengthened the relationship between families and schools, particularly for Latino families. These efforts, along with the establishment of the Equity Advisory Committee and the implementation of the Student Six initiative, have empowered student voices and fostered an inclusive school culture."*

Well-Rounded Education and Career Technical Education

38 grantees noted progress in expanding Well-Rounded Education opportunities. Common Well-Rounded Education investments include expanding electives, dual-credit opportunities, art and music education, and interactive, project-based, or applied learning. A key aspect to a Well-Rounded Education is access to high quality Career and Technical Education Programs of Study, Career Connected Learning, and Work-Based Learning opportunities. 32 grantees noted progress in improving access to CTE Programs of Study or improving Career Connected Learning and Work-Based Learning experiences. Culturally relevant learning experiences contribute to a Well-Rounded Education by ensuring students are known and seen in their learning and school experiences.

> *"We have been able to offer students opportunities for extended learning, peer connections, high quality electives, arts education and health and safety improvements."*

> *"We have aggressively implemented real-world learning and application courses to improve student learning experiences. Our daily 8-12 Career Readiness class has been in place for several years and has helped our students develop their post-high school plans and options."*

> *"A focus on providing enrichment activities has helped the district make progress in providing well-rounded and meaningful opportunities for all students. Through thoughtful planning, these activities have contributed to the culture of belonging in our schools by creating partnerships with the community and parents and offering students and staff insight into the tribal legacy and traditions of our region."*

Strengthened Systems of Support

36 grantees noted progress in strengthening systems of support. Strengthened systems of support include improvements to grantees' use of Multi-Tiered Systems of Support (MTSS), building data-informed systems, and ensuring systems are in place to meet student needs and support students' well-being.

> *"One of our largest Outcomes to show great progress is through our MTSS work with students, staff, and community around behavior expectations. The work we have done to build this system has taken some time, but with our implementation this Fall, and data work through our SWIS program, has opened the doors for further district-wide growth. We are now working with student behavioral data, which has moved us into working together on data teams. This has also opened the door to working on identification processes for Tier 2 and Tier 3 development. Overall, this work is transforming our district into becoming a more data informed district."*

> *"By prioritizing the health and well-being of our students and fostering stronger connections through SEL curriculum and advisory periods, we are witnessing measurable improvements in student outcomes: Ninth Grade on Track has reached an impressive 95%, signifying that nearly all of our freshmen are building a solid foundation for high school success and are on a clear path toward graduation. This reflects the effectiveness of our targeted interventions and support systems. ELA achievement for 3rd grade now stands at 38%, demonstrating growth in foundational literacy skills that are critical for long-term academic success. This achievement far surpasses our longitudinal growth goals, affirming the impact of our instructional strategies. 70% of our students are Regular Attenders, highlighting the success of our engagement strategies in creating a school environment where students feel supported and motivated to attend regularly. These outcomes are not just numbers—they represent the tangible benefits of our dedication to student-centered practices. Our focus on holistic development is helping students feel more connected, supported, and prepared to achieve their full potential."*

Educational Equity

33 grantees identified progress in equity in their annual reporting; relatedly, 22 grantees specifically named improvements in student focal group achievement and outcomes. Educational equity is one of the two key focus areas of the Student Investment Account. Many grantees specifically named improvements among focal groups on the five common metrics used for Longitudinal Performance Growth Targets.

> *"[O]ur focus on DEI has had many positive effects on both student engagement (increased "voice") and overall staff comfort level and skill in working with ESL students. Additional administrative staff meant more capacity to meet with groups of focal students (Latino, African-American, LGBTQ+) and parents and more opportunities for engagement by our underrepresented populations. Continued efforts for equity-focused training remained in place and specific trainings for staff supporting multilingual students increased."*

Increased Capacity

31 grantees named increased capacity as an area of progress. Grantees often report increased capacity associated with hiring classified and certified staff. This hiring often leads to reduced class size and increased instructional time. These investments positively impact students by allowing educators to provide more one-on-one instruction and to tailor lessons and interventions to students' needs. Additional staffing also increases grantees' capacity to add additional courses and electives. Grantees also noted an increased capacity to implement strategic areas of focus such as professional development or Career and Technical Education.

> *"Funding from the Integrated Programs have helped us as a school district to think differently, try new approaches, and scale up pilot projects to the next level. For example, we have long had a focus on using instructional coaches to deliver the bulk of our professional development, but IP funding allowed us to add even more coaches and increase personalized attention. We believe this has aided teacher retention even at a time of increased turnover due to COVID burnout and heightened behavior challenges in the classroom. Another area where we have made significant progress is continued advancement on CTE initiatives within our schools. [Our] Director of College and Career Readiness was able to help develop and improve CTE pathways. We added a full program of study in Education. We added computer science, and added partial programs of study in Education and Criminal Justice."*

Mental/Behavioral Health and Social Emotional Learning

28 grantees identified mental and behavioral health as an area of improvement; 37 identified social emotional learning (SEL). SEL is a core component of mental and behavioral health for many grantees and is a frequently named strategy aimed at improving mental health outcomes. Alongside educational equity, mental and behavioral health is one of the two key focus areas of the Student Investment Account. Many grantees named improvements in hiring mental and behavioral health professionals or contracting with community-based organizations to provide these services. Some grantees cited software or professional development purchases as making a significant contribution to this area.

> *"[W]e have increased mental and behavioral health support across the district. Through the Behavioral Health Coaching and Training Academy, we are equipping staff to support students' social-emotional learning needs and provide comprehensive, trauma-informed care. Partnerships with community-based mental health clinicians have enabled over 150 students to access free, tiered mental health services, enhancing support and fostering equitable access to resources in an inclusive learning environment."*

Academics

25 grantees named improvements in academics as an area of progress. Grantees named such improvements as being able to offer more advanced courses or a wider variety of electives and CTE options, improved academic supports for students, and improvements in academic performance among students. The progress in academics was often tied to other areas of progress named in this report.

> *"The addition of a dedicated STEM room will give access to our rural remote students through a much needed and interactive program to promote and encourage 21st century skills and opportunities."*

School and Career Counseling

25 grantees named school and career counseling as a progress area. Expanded opportunities to provide students with academic and career counseling was tied to progress in multiple areas, particularly CTE and progress on the five common metrics. This differs from the identified progress in mental and behavioral health supports in that school and career counseling focuses on students' academic and related career planning needs. Overall, grantees reported being able to fund more of these sorts of positions, which in turn has led to increases in student support and achievement.

> *"[Our] School District hired a part time academic counselor using HSS allocations. This counselor has tremendously helped students navigate class schedules while attending High School and also assisted in preparing them to be successful post secondary school. Our academic counselor helps students determine strengths and interests for career paths. Students are then given hands-on class (CTE) opportunity or college level course options in order to determine if this path would be a great fit post secondary school."*

Challenge Themes

When analyzing grantees' documentation of areas of challenges, ODE noted a variety of thematic areas frequently mentioned. Many of these parallel the themes in the above progress section. Overall, grantees devoted less space to discussing challenges, indicating continued improvements in the Integrated Program process. In this report, ODE has highlighted the top themes, which includes themes mentioned 11 times or more. The fifteen key challenge themes, listed in descending order of saturation, were: attendance; finances; literacy; mental and behavioral health; hiring and staffing; professional development; SIA administration; community engagement; systematic change takes time; data; meeting outcomes; student engagement; 9th grade on-track, credit recovery, and graduation; emergent needs; and academics.

Attendance

39 grantees reported student attendance as a challenge. Grantees discussed student engagement and belonging, attendance expectations, and evolving remote access to classwork as challenges to increasing attendance rates. Grantees described how chronic absenteeism disrupts continuity of learning, causes setbacks, and impacts progress toward academic and social-emotional goals.

> *"Despite implementing action research, professional learning, data teams, and intervention systems, we are still struggling to reach all students with chronic absenteeism. Through empathy interviews, high school students shared that they don't always feel the need to attend school in person because of access to Canvas. While our district's focus on evidence- and skill-based grading aligns well with our instructional practice and beliefs about learning. We have experienced some challenges on Canvas: For example, students can access learning materials from home, which may reduce their perceived need to attend class…On the flip side, Canvas benefits students who are sick or on vacation by keeping them connected to learning. This year, we are adding to our strategies listed above by focusing on increasing in-class engagement. Our theory of*

action is: If students are more engaged in onsite learning, they will be more motivated to attend school regularly."

Finances

34 grantees named finances as a challenge. Grantees reported that funding levels and rising costs may make it difficult to sustain SIA investments or implement their SIA plans to their full potential. Declining enrollment caused a financial challenge among some grantees. Grantees feel hesitant to commit to funding staff or large initiatives due to funding uncertainty. Grantees also reported that uncertainty around other grant funding sources makes it more difficult to effectively plan SIA investments because they may need to use SIA to make up for a loss of funding elsewhere.

"Our previous needs assessment, which involved feedback from students, staff, families, and community members, indicated a strong interest in expanded learning options, tutoring and more enrichment opportunities for students. However, due to past enrollment decline and increases in operational costs, we have not been able to expand and grow these options for students and families."

"[T]he district is faced with the reality of reduced budgets in the coming years, requiring us to plan for a foundation that can be maintained with fewer resources, both in terms of Full-Time Equivalents (FTEs) and financial support for programming."

Literacy

33 grantees reported challenges making progress in students' literacy skills and knowledge and meeting their Longitudinal Performance Growth Target for achievement on the 3rd grade English Language Arts assessment. Grantees noted that their young students had the start of their K-12 education disrupted by the COVID-19 pandemic. While some grantees noted that they did not see an immediate improvement to assessment scores, they are improving literacy instruction and systems and expect to see the impact of these improvements in the coming years.

"We learned a lot about the importance of smaller class sizes - [we had] 28 third graders in one classroom with students who were in PK-K through the pandemic, distance learning era. These lessons led to the decision to invest in more teaching FTE to reduce class sizes, having teaching teams to review data about students under the guidance of early literacy specialist from a partnership with the ESD and embed writing routines in

everyday curriculum. We look forward to these investments producing growth over the next year."

"We recognized the need to increase professional learning in ELA. Looking deeper into identifying core standards, curriculum mapping, pacing, instructional strategies and analyzing state three year trend data focused the work on ensuring that ELA materials are being implemented. Our teachers meet in PLC teams to share student work and discuss results of data gathered from daily and formative work. Another area of need we looked at was the process by which our families are included in learning strategies that might work for home activities and support."

Mental/Behavioral Health and Social Emotional Learning

31 grantees reported that mental and behavioral health remain a challenge; 10 also reported barriers to implementing social emotional learning practices to support students. While this was also one of the key themes for progress, it is important to recognize that not all grantees experience their progress and challenges uniformly, and many grantees continue to struggle with implementing systems of support in these areas. Many grantees reporting challenges in this area are small, rural districts, where there are fewer mental health providers. Some grantees have also experienced challenges in hiring.

"Access to qualified mental health professionals is still very limited, resulting in students with mental health needs experiencing a lack of services. Our lack of services is partly due to our remote location, but our students still require these services."

"Despite progress in SEL and equity practices, maintaining consistent implementation across schools is a challenge. Ensuring all staff members utilize SEL practices with fidelity remains a focus, as varying degrees of buy-in impact the overall climate and student engagement."

Hiring and Staffing

30 grantees cited difficulty hiring and retaining staff. Grantees named that it was particularly difficult to fill positions in mental and behavioral health, reading and literacy, and substitute positions. Grantees who cannot fill current openings are reluctant to include activities that would require additional staff in their SIA plan. This limits what grantees can do to expand opportunities and support for students.

"Our most significant challenge during the 2023-2024 school year remains the lack of applicants for many posted positions. It continues to impact our ability to be fully staffed

> *on a daily basis. We also have staff members handling multiple jobs at the same time. Furthermore, we are challenged by onerous requirements that have led staff members to consider retirement or leaving the profession. Lack of qualified staff has made it difficult to fully implement our plan."*

> *"The biggest barrier we have faced has been being unable to fill positions for mental and behavior support. Our students' social and emotional needs are greater than ever before, and resources are very limited. We have had positions posted with zero applicants. We look into creative solutions, but each day that goes by without students and staff getting the support they need is one day too many."*

> *"We wanted to hire a reading specialist to reinforce our reading intervention designs. It was posted for five months without a single applicant, so we reassigned a strong LA instructor to the role."*

Professional Development

25 grantees reported challenges implementing planned professional development. Grantees named lack of time and capacity as the main challenges to increasing training and opportunities for educators to collaborate with each other. Particularly, a lack of substitutes has made it difficult for grantees to implement their plans to expand professional development with SIA funds.

> *"While all staff received one training during inservice week, finding a way to provide more training during the school day necessitating substitutes became a challenge since we do not have a large pool of available substitutes."*

> *"[W]e face significant obstacles due to a shortage of substitute teachers, making it difficult to pull staff out of their buildings for committee meetings or to lead professional development. This can be a barrier to fostering leadership development and implementing initiatives consistently across the district."*

SIA Administration

21 grantees named challenges related to the administration of the SIA grant. Much of the challenge grantees describe focuses on the amount of time required to complete required reporting across numerous grants. Grantees also recognize that it takes time and capacity to engage their community and complete the application process with fidelity. The unpredictability of needs, the ability for contractors to deliver goods and services on time, and changes in final allocations create challenges in the budgeting process and can make it difficult

for grantees to spend all of their SIA funds by the annual deadline. While many grantees named this challenge, small and rural grantees particularly feel this administrative burden. Smaller administrative and teaching staffs limit small grantees' administrative capacity and rural grantees face additional challenges related to partnerships, transportation, on-time delivery of goods and services, and availability of resources.

> *"[Our] rural setting has been one of the greatest impediments in meeting one of our goals…The rural location results in increased travel costs to bring trainers to our school. This has resulted in travel costs that sometimes amount to more than the cost of the professional development session itself. Another hardship faced by our district is the small number of staff and a single district administrator. The number of grants, mandates, directives and reports continues to grow, while the number of staff remains the same. With only one district administrator, the district lacks the staff needed to adequately develop, research, develop, evaluate, monitor and complete required progress monitoring. The district has one, full-time, administrator that performs the duties of both principal and superintendent, as well as many other duties vital to the day-to-day operations of the school. The growing number of grants and state reporting mandates has only increased the workload on single administrator districts."*

Community Engagement

21 grantees cited ongoing challenges with community engagement. Frequently, this appeared as problems engaging families specifically, especially around attendance and discipline. While many grantees are finding their footing with regards to the SIA's community engagement requirements, others are struggling to catch up. Issues with community engagement tend to have an impact on other areas, particularly attendance. Engaging focal group populations is especially challenging for small grantees.

> *"Our district will also at times have families move into the District, and are not familiar with our school culture, and for some it takes time to be acclimated to our small, rural school culture…especially for some students who come from much larger school districts. The challenge is to not only have the student invested in their own education, but also to have the parent(s) invested in their child's education as well."*

Systemic Change Takes Time

19 grantees named the long timespan it can take to implement systemic change as a key barrier. The SIA is an ambitious and novel program whose goal is to fundamentally restructure how education is practiced in Oregon. These changes can take time periods longer than a single

year to bear fruit, but the timelines for accountability may not be so generous. It may feel frustrating to some members of school communities when such substantial changes are required and do not feel as if they are transforming outcomes quickly. Time, patience, and additional data and support are needed to help the progress of systemic change, particularly in small school districts.

> *"The greatest challenge the district has experienced in achieving our goals is managing an implementation process that is incremental. We have identified outcomes to create comprehensive intervention systems; however, realizing those goals with a broad base of personnel is difficult. Creating a clear vision that resonates with staff to all work collaboratively with a common purpose and consistent operating procedures is crucial to success."*

Data

13 grantees identified ongoing challenges with data collection, storage, analysis, and use as a core challenge. Grantees noted a challenge to fund full time positions for data specialists, and those that do may face issues recruiting qualified candidates. Often, this results in data tracking being tacked onto existing position descriptions. Because data is an integral part of the SIA, grantees may require additional supports from their ESD partners and ODE in order to set and track Longitudinal Performance Growth Targets.

> *"The biggest challenges we face as [a] small rural education system is our lack of student population and the effect that has on data. Each year our numbers vary and sometimes do not meet the minimum requirement for data to be given. This produces large gaps in data and make it hard to track consecutively. This lack of quantitative data each year makes tracking LPGTs in a small school difficult. The small school population is also a challenge when tracking LPGTs like 3rd Grade ELA. Each class is significantly different in size and academic strength which can skew data from year to year immensely."*

Meeting Outcomes

13 grantees reported general challenges meeting their outcomes. Grantees described how specific challenges impeded progress toward their outcomes. Many of these challenges are captured within other themes. Grantees also named that state assessment scores alone may not capture the impact of their SIA investments and the progress they are making toward meeting their outcomes.

"Our local assessments show our students are performing above state averages but this does not translate to state assessments where many of our students are opting out…Our local assessments show student achievement improving, but it is not being captured on SBAC with the number of opt outs we are receiving."

"[W]e are grateful that we have been able to put the resources and tools we do have in place and these have most definitely helped our buildings manage the transitory and constantly changing population of students we are serving. However, it is discouraging to reduce this fluid reality to a set of accountability targets that don't articulate to our stakeholders the individual progress that our staff are effectively making with students."

Student Engagement

12 grantees identified ongoing challenges with student engagement. As with community and family engagement, narratives surrounding this challenge frequently involved attendance.

"An ongoing challenge is continuing to identify barriers that disconnect students from their educational goals, engagement and attendance. While surveys and focal groups shed some light, as well as the work of our attendance teams at each school and counselors, engagement has improved over the past year but we realize bigger gains need to be made with our Tier 3 students."

9th Grade On-Track, Credit Recovery, and Graduation

11 grantees reported challenges with 9th grade-on track and graduation rates. Grantees discussed ongoing credit recovery efforts, and that the severity of credit deficiencies made it difficult to reach 9th grade on track and graduation targets. When naming this challenge, grantees often discussed ways that they were improving their 9th grade on-track and credit recovery systems moving forward.

"Credit recovery systems were engaged and helped identified freshmen to get credits but did not change [our 9th grade on-track] rate as many went from 0 to 3 credits or from 6 to 7 credits. Administration and counselors worked hard to track at-risk freshmen and visited with them regularly. We implemented study labs after school and formal 0/8 periods outside the school day for students to work on credit recovery courses or get more help in their current classes. Administration also realigned the freshmen Success 101 class to better meet the needs of students. Administration also adjusted parent-teacher conference schedule to provide several times for communication to happen prior to finalized semester grades."

Emergent Needs

11 grantees identified emergent needs as a challenge. Emergent needs refer to unforeseen, novel needs that may arise throughout the course of the year. This is ambiguous and challenging to define. An example of an emergent need in education is when new legislation is passed that brings new investments or programs. Even when positive, new programs can require a shift in focus for education leadership, creating new processes in schools, changing school or staff schedules, or significant purchases, like curriculum or other materials. These can be complicated and multi-faceted needs that take time to incorporate into existing systems. Other examples of emergent needs include changing community needs, shifts in student populations, or events outside of a grantee's control that impact schools, like natural disasters or other similar occurrences that are hard to predict and classify.

> *"Sustaining and growing the systems and staffing to respond to the ever-growing needs of our students make Outcomes A and B moving targets… We are concerned that the needs of our community are growing faster than the services we will be able to fund."*

Longitudinal Performance Growth Targets and Local Optional Metrics

Longitudinal Performance Growth Targets (LPGTs) and Local Optional Metrics (LOMs) are strategy-driven targets co-developed by grantees and ODE staff and funded by the Student Investment Account portion of the Integrated Programs, as required in statute. Grantees with at least 80 students (80 ADMr) are required to set targets for each of the five common metrics (4 Year Cohort Graduation Rate, 5 Year Cohort Completion Rate, 9th Grade On-Track to Graduate Rate, Regular Attendance Rate, and 3rd Grade English Language Arts Proficiency Rate) where there are at least 10 students in the denominator. LOMs may be set by grantees alongside the changes in the five common metrics and represent the pursuit of meaningful and allowable investments that do not directly or immediately correspond to changes in the five common metrics but are critical to demonstrating evidence for the effectiveness and expected outcomes of submitted plans.

When co-developing the first set of targets in 2023, grantees and ODE staff met either virtually or in person and reviewed the ODE-provided historical data; talked through the Outcomes, Strategies, and Activities of the grantee's plan; and considered the top growth seen historically for each of the metrics. Co-developed targets then had a final review by ODE staff and were put into SIA grant agreements and approved by the grantee's governing board. More detail on the LPGT and LOM targets set can be found in the Targets and Reports for LPGTs and LOMs, the primary source for the following summary.

LPGTs and LOMs are set following the odd-year application cycle for the Integrated Programs. Grantees developed the first set of targets in the spring of 2023 as a part of the 2023-25 Integrated Program application.

For LPGTs, Baseline Data/Targets and Stretch Data/Targets include all students for that metric. Gap-closing data/targets uses an aggregated student group called the Combined Focal Student group. Students are included in this group if they are a member of any of the following: Students Navigating Poverty (as newly defined using the State Board of Education adoption in December 2022 in OAR 581-014-001 using SNAP or TANF participation, Students Navigating Homelessness, Students Navigating Foster Care, and Migrant Students), Students with Disabilities, Emerging Bilingual Students, American Indian/ Alaska Native Students, Black/ African American Students, Hispanic/Latina/o/x Students, Native Hawaiian /Pacific Islander Students, Asian Students, Multiracial Students, Nonbinary Students, Students Recently Arrived, and Students with Experience of Incarceration or Detention.

The 2023-2028 LPGTs and LOMs: Grantee Targets spreadsheet details all approved Integrated Program grantee LPGTs and optional LOMs set in 2023 for the 2023-24 through 2027-28 academic years during the 2023 application cycle. It is worth noting that a small number (21) of LOMs were set by a small number of grantees (12) in that application cycle. An overview of LPGTs set for the 2023-28 biennium analyzed patterns in target setting and includes a summary of LOMs set. Considerable variation existed among grantees in their baseline data and the five years of LPGT targets. That variation was associated with grantee student population size and grantees with smaller populations had the greatest variation in their data. The tables in the overview present detailed information regarding Baseline, Gap-Closing, and Stretch targets for the five common metrics and the projected increases across those targets.

Currently a high-level overview on target achievement is available for three metrics (3rd Grade ELA, 9th Grade On-Track, and Regular Attenders). It reviews grantee targets on these metrics versus their actual rates for the 2023-24 school year. For these three of five metrics, with a single year of data, a majority of grantees met their first year of targets. The one exception are the baseline targets for Grade 3 ELA Proficiency. Of note is the higher rate of positive change seen for the combined focal student group than for all students, suggesting a decrease in disproportionality for this metric. Finally, the largest increases were seen in the Regular Attendance rate, with 52 grantees surpassing their 2027-28 targets in the first year of reviewing LPGTs. Validated data for the remaining two metrics -- 4 Year Cohort Graduation Rate and 5 Year Cohort Completion Rate – is released each year in late January or early February and the timing of those releases does not allow for their inclusion in this legislative report. The 2026 report will include target achievement for all five metrics for the 2023-24 school year, and preliminary data for the 2024-25 school year.

Monitoring and Evaluation of LPGTs and LOMS

ODE recognizes that one year of data is not a trend and sustainable change takes time. With the finalization of the first year of actual data to compare to targets, ODE will continually review these data as detailed in the outline below. The emphasis of these reviews will be bright spots of improvement as well as places for support. ODE plans many touch points to gather information about strategies that are going well, pivots that are happening as grantees review their data with communities, and new approaches to the work undertaken by grantees before corrective action is initiated. ODE recommend that grantees review Section 7 of the Updated Integrated Guidance for a reminder of the continuum of supports and improvement opportunities.

The timeline below details grantee and ODE actions as well as meetings between grantees and ODE prior to initiation of formal corrective action based on LPGTs and LOMs.

- Annual Reporting Window 2023-24 (Sept 1, 2024- Nov 30, 2024):
    - Grantees provide an assurance that they have reviewed progress toward meeting their established LPGTs/LOMs.
    - Grantees will also reflect and share in their Annual Reflection questions how they see plan implementation progress contributing to their Outcomes, Strategies, and LPGTs/LOMs.
- Fall 2024 and Winter 2025:
    - November 2024: ODE updates grantee's LPGT Smartsheet with 2022-23 and 2023-24 actuals for 3rd Grade ELA proficiency, Regular Attender rates, and 9th Grade On Track rates.
    - February 2025: ODE updates grantee's LPGT Smartsheet with 2022-23 and 2023-24 actuals for 4 Year Cohort Graduation and 5 Year Cohort Completion rates.
    - February 2025: ODE provides 5 years of data for the five common metrics via data sheets.
- Spring/Summer 2025:
    - Grantees input 2023-24 actuals for any LOMs into their Smartsheet ahead of co-development.
    - Grantees co-develop an additional two years of targets (2028-29 and 2029-30) with ODE following the approval of their Integrated Application. Part of the co-development process includes conversations about progress toward meeting goals. ODE staff will take notes on progress, shifts in strategies, and how grantees are addressing any challenges in meeting targets.

- Annual Reporting Window 2024-25 (July 1-August 15, 2025):
    - Grantees review actual metric rates compared to previously created LPGTs and LOMs and share reflection on progress. Grantees will describe how activities are supporting progress towards targets and if any shifts in strategy implementation are planned for the future based upon that current progress. This includes specific metrics and target types in the reflection.
- Fall 2025 and Winter 2026:
    - ODE provides the 2024-25 data for the five common metrics, with built-in indicators for actuals being above or below targets in their LPGT Smartsheet.
    - ODE also reviews the data available (two years of LPGT/LOM actuals compared to targets, notes from 2025 co-development, narrative questions in annual reporting in 2023-24 and 2024-25) and reaches out to grantees for further conversations, if needed, to discuss not meeting targets. Per statute[2], actions could include requiring the grantee to enter into a coaching program or directed expenditure of grant funds.

2023-24 Progress Markers

At the time of analysis, 288 grantees had submitted ratings for the 15 progress marker ratings across quarters 1 through 3. These submissions resulted in a maximum of 45 ratings per grantee (if they ranked all the progress markers) across the three quarters. Starting in October 2023, all grantees were required to report on progress markers quarterly. As detailed in this framework, progress markers name some of the kinds of changes that ODE is hoping investments and integration cause over time with the understanding that they show the pathway of changes that eventually lead to changes in the five common metrics via the Longitudinal Performance Growth Targets and integration with the four common goals.

Recipients are not expected or required to meet all progress markers, only to track changes when investments create or contribute to the changes outlined (as determined by the recipient). Reporting on progress markers is required under this guidance but attainment or accomplishing each marker is not expected or anticipated. The information provided from progress marker reporting informs us of the technical assistance and coaching ODE provides throughout the year. The information also supports ODE to keep the educational field, the public, and the legislature informed about the important kinds of progress being made with significant taxpayer investments that might not otherwise be illuminated as quickly by slower moving metrics. ODE offers these progress markers to partner with applicants in determining and assessing where changes are occurring. They may also be used, eventually, to inform ODE

[2] ORS 327.201 https://www.oregonlegislature.gov/bills_laws/ors/ors327.html

considerations on requiring grantees to participate in the continuum of supports outlined in Section 7 of the Integrated Guidance and earlier in this report.

Not all grantees responded to every progress marker every quarter. Therefore, the response rate per quarter, per progress marker fluctuates from a maximum of 288 grantees responding, to a minimum of 268 grantees responding. Although the entirety of the 15 progress markers is not linear, when grantees focus on a particular progress marker, a timeline of implementation is associated with their reporting and is divided into three different time points[3]. "Start to See: Early Signs of Progress" represents initial, easy to achieve changes that would likely occur in the first three to six months of implementation of the programs put forward in the Integrated Plan. "Gaining Traction: Intermediate Changes" represents the kinds of changes that would occur within six to eighteen months of implementation and indicate more significant changes in engagement and student and educator learning conditions. "Profound Progress: Substantial and Significant Changes" describes the kinds of profound changes that would occur in the first 18-months to four-years of implementation. A full summary of each progress marker can be found in this *Progress Marker Summary* which not only fully describes each progress marker but also links it to the relevant Longitudinal Performance Growth Targets. To guide the review of progress marker data, the table below lists the progress markers and short descriptors, but review of their full explanation is again encompassed in the summary document linked above.

Table 1. Summary *of the 15 Progress Markers within the three major timepoints. Please see the Progress Marker Summary for greater detail.*

Start To See (3-6 months)	**Gaining Traction (6-18 months)**	**Profound Progress (18+ months)**
PM 1: Community engagement	PM 5: Two-way communication	PM 11: Strengthen partnerships
PM2: Equity tools	PM6: Student agency	PM12: Financial stewardship
PM3: Data Teams	PM7: Action research	PM 13: Balanced use of assessment systems
PM4: Inventory of literacy	PM8: Literacy plans	PM 14: Address systemic barriers
	PM 9: 9th grade course scheduling	PM 15: Schools create places and learning conditions
	PM 10: Foundational learning practices	

[3] See Aligning for Student Success: Integrated Guidance Update 2025-27, Section 5: Evaluation and Performance Framework, p. 49.

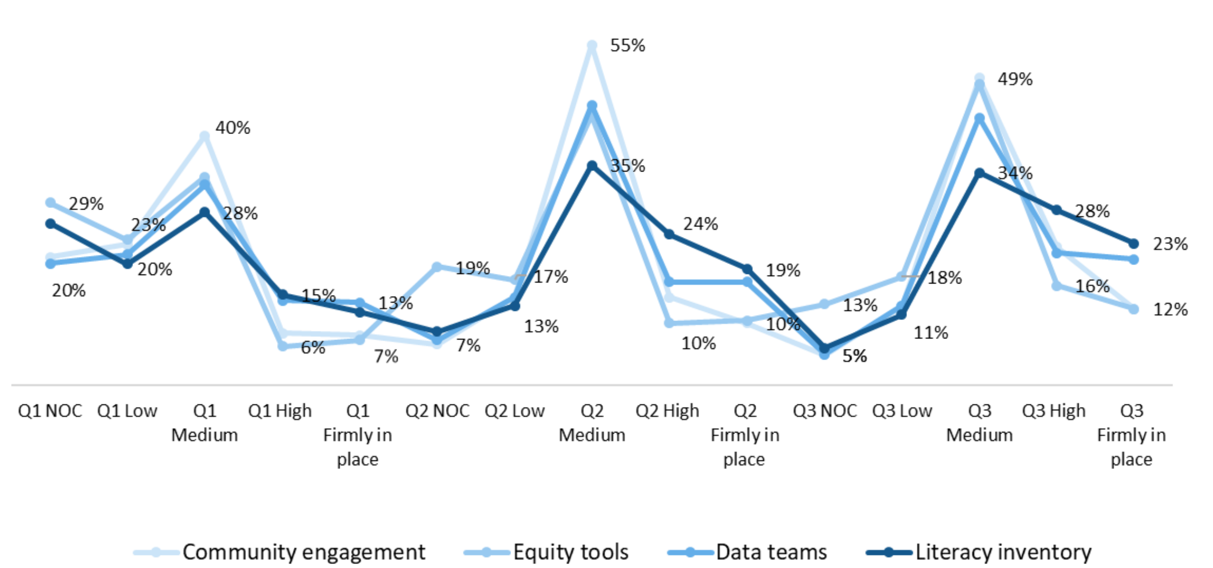
For each progress marker within each quarter, we examined how many grantees who ranked that progress marker were at each level of that marker. These levels ranged from low to high as follows:

- NOC (No Observable Change)
- Low = small, incremental changes have been observed
- Medium = bigger changes observed, but still work to be done
- High = significant change observed, but not yet fully in place
- Firmly in Place = no additional work needs to occur in this area

Data from grantee responses are summarized by each of the three time points. Start to See contains progress markers 1-4, Gaining Traction contains progress markers 5-10 and Profound Progress contains progress markers 11-15. However, although some progress markers are grouped together, their progression patterns vary across quarters from being in alignment, to diverging considerably. Thus, each progress marker has its own context in addition to being aligned with other progress markers. No Observable Change may not always indicate a lack of progress or challenges but could also indicate a grantee is not focusing efforts or investments toward a particular progress marker.

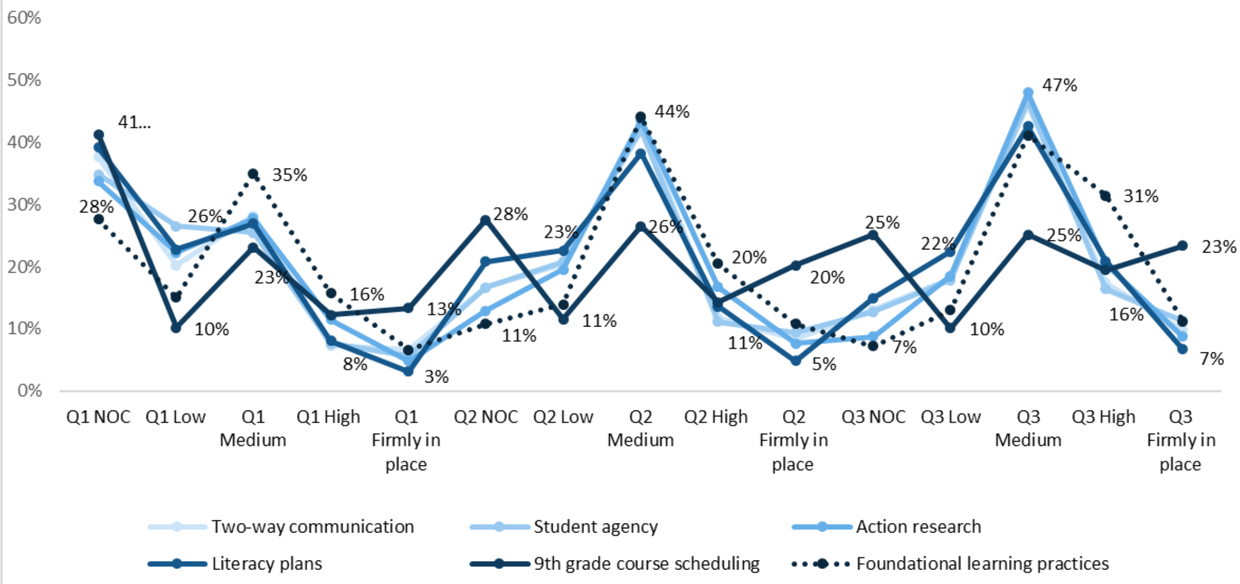
In the Start to See progress markers (Figure 1), the examination of the first four progress markers (see Table 1) shows that the highest responses within quarters are at the Medium level, with quarter two having the highest level of Medium responses overall. No Observable Change was the highest in Quarter 1 and lowest by Quarter 3 and Firmly in Place steadily rose each quarter. Of the four markers, community engagement showed the greatest gains between quarters one and two, but both equity tools and data teams also showed progress across the three quarters, catching up to community engagement in quarter three at the Medium level. Interestingly, literacy inventories had the highest level of Firmly in Place of any of the progress markers in this category by quarter 3.

Figure 1. Start to See: Early signs of progress
In the first 3-6 months of implementation. *NOC: No observable change



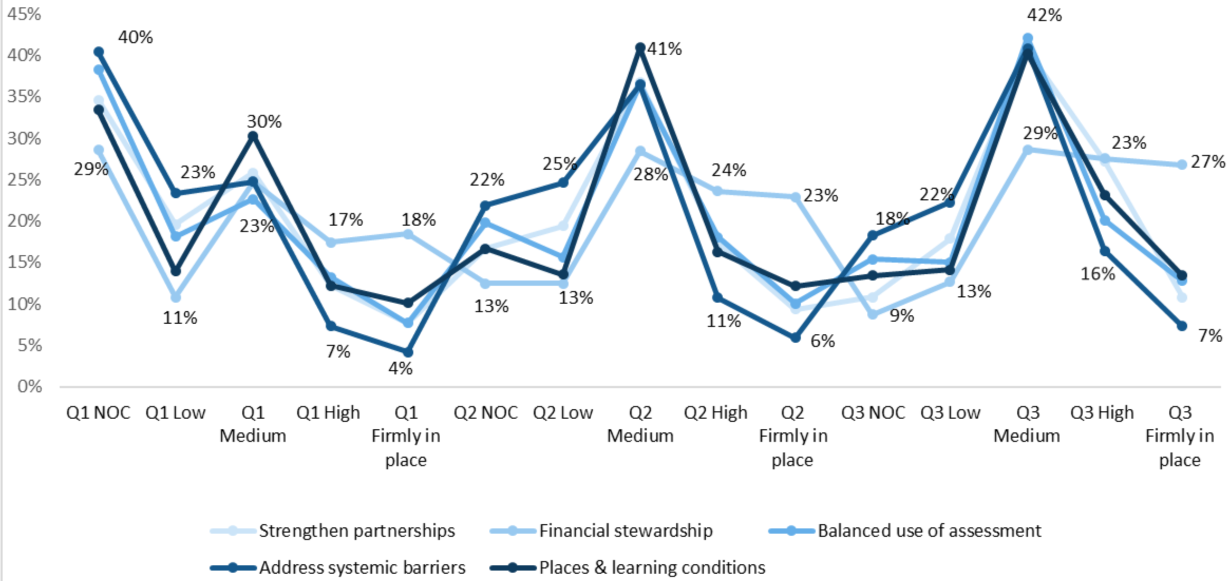
The six Gaining Traction (Figure 2) progress markers examination showed that the Medium ranking rose steadily from quarter to quarter across most (but not all) of the progress markers, while No Observable Change tended to drop across quarters. Low also dropped, but at a reduced rate, and High and Firmly in place rose, but again at a slow rate. In this category, it is also possible to see the diverse nature of the progress markers. Of the six, five have similar patterns of implementation ranking across the three quarters with the primary differentiation being magnitude. However, 9th grade course scheduling shows a somewhat different pattern of progression across the quarters starting quarter one with the highest incidence of No Observable Change at 41% with No Observable Change still highest at quarter three for this progress marker at 25%, but with a discernible increase to Firmly in Place at 23% in quarter three, higher than all of the other progress markers in this category.

Figure 2. Gaining Traction: Intermediate progress
6-18 months of implementation. *NOC: No observable change



The five Profound progress (Figure 3) progress markers had a high rate of No Observable Change in quarter one and as other progress markers, dropped steadily across the quarters. The Low ranking remained constant, while the Medium ranking rose quickly and High along with Firmly in Place rose slowly. Again, there are shared patterns of rank change among progress markers across quarters, but there are also divergences, and these speak to the unique nature of each progress marker. In this category for instance, it is interesting to note that the Financial Stewardship progress marker had the highest level of rankings at Firmly in Place across all three quarters, in stark contrast to the remaining four markers.

Figure 3. Profound Progress: Substantial and Significant Changes
18+ months of implementation. *NOC: No observable change



CONTINUING TO OPERATIONALIZE THE SIA THROUGH THE INTEGRATION OF PROGRAMS

This section provides a brief update on efforts of staff to implement the SIA from an operational standpoint.

ODE Staff

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. Additionally, the limited duration Small District Support Program Manager position, focused on providing rural and small school support to districts and ESDs, was sustained and made permanent with state funding[4] given the Governor's Emergency Education Relief funds sunset in September 2024. That position was filled December 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 Plans in the future.

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

Definitions for Student Investment Account

The State Board of Education adopted temporary rules for the Student Investment Account in fall of 2019 with permanent adoption in the spring of 2020. Following the initial implementation of the Student Investment Account, it was determined that there were three distinct needs for definitions for focal groups (1 - determination of charter school eligibility, 2 - community engagement, and 3 - Longitudinal Performance Growth Targets). At the time, only

[4] While the GEER funding ended 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.

one of those functions was defined in rule. The department proposed an expanded set of rules adding additional focal groups to the definitions as well as establishing the three structural areas in which the definitions are used. These definitions were adopted in late 2022. Following the adoption of those rules the department continued to review the focal group definitions for further alignment with the Student Success Act (SSA) statewide Student Success Plans (SSPs) and equity-based language. These rules - Definitions for Student Investment Account (581-014-0001) – were adopted by the State Board on April 18, 2024.

This rule change better aligned the focal groups named in the Student Investment Account with the SSA Statewide Student Success Plans, and added 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 was presented to the ODE Rules Advisory Committee (RAC) in November 2023 and January 2024. ODE gathered feedback on this proposed change again in March 2024.

The revised definitions are:

- Economically disadvantaged students, which includes students who meet one or more of the following:
    - participation in SNAP or TNAF programs
    - foster students
    - migratory student
    - students who are homeless
- Foster students
- Justice involved youth
- LGBTQ2SIA+ students
- Migratory students
- Students recently arrived
- Students from racial or ethnic groups that have historically experienced academic disparities, includes but is not limited to, American Indian and Alaska Native (AI/AN and AI/AN+) students, Black and African American students, Hispanic and Latino students, Asian students, Native Hawaiian and Pacific Islander students, and multiracial students, and any other racial or ethnic group identify by the school district as historically experienced academic disparities.
- Students who are homeless
- Students who are pregnant, parenting, and/or students who experience any pregnancy-related condition

- Students with disabilities

Research Projects

As part of the department's ongoing efforts to advance the two intended purposes of the Student Investment Account – addressing historic disparities in student achievement and supporting students' mental and behavioral health – the research team in the Office of Education Innovation and Improvement undertook a research study on students navigating homelessness, one of the focal student groups named in the SIA. Through examination of existing data sources and site visits to partner school districts, three briefs and a summary were produced from this significant research project.

Students Navigating Housing Instability: Research Summary and Resources provides an overview of all three briefs in the series and includes resources for supporting Students Navigating Housing Instability.

Brief 1: Students Navigating Housing Instability: Education Overview takes a look at the big picture of Students Navigating Housing Instability (SNHI) in Oregon. The rate of SNHI for the state is relatively stable at around 3% of Oregon students being identified for McKinney-Vento support each year; however, more than 10% of Oregon public school students are identified at least once in their K-12 educational career. There are demographic disparities among SNHI, with the highest rates among Native Hawaiian and Pacific Islander students, Black and African American Students, and Hispanic, Latino, Latina, and Latinx students. We also looked at high address instability as an indicator for students potentially needing additional support, even if not formally identified for McKinney-Vento services. Students formally identified for McKinney-Vento services or navigating high address instability are less likely to be on track to graduate at the end of their ninth grade year, as well as attend school regularly at lower rates than their peers with stable housing.

Brief 2: Understanding the Formal Identification of Houselessness as a Culmination of Stressors is a longitudinal view of houselessness and housing instability and its effects on Oregon's impacted students. Houselessness and housing instability should be considered a culmination of a series of domestic and economic stressors over the course of multiple years, rather than an isolated calamity, for many students and while re-housing students and families is important and necessary, it is likely not sufficient to address the full scope of these stressors. When looking longitudinally, multi-year economic and domestic stressors may be tracked well before the formal identification of housing instability in assessment, attendance, and on-track data.

Brief 3: "Whatever we need to do for them": A case study of McKinney-Vento service providers at four Oregon school districts took a deeper look at currently provided supports, and existing barriers, by surveying and interviewing key personnel in districts across the state to understand what supports were typically provided to SNHI, how those supports were accessed, and what barriers continued to exist that made it difficult to support students effectively.

ON THE HORIZON

The publication of this report comes at the midway point of the 2024-25 school year and many efforts to support SIA grantees and student outcomes are underway. This section includes areas of work ODE expects to report on in the 2026 legislative report.

SIA grantees are working on applications for the 2025-27 Integrated Programs application and will submit applications between March 1-April 30, 2025. This application included numerous improvements based on grantee feedback from the previous cycle. Additionally, the ODE office is now fully staffed and better able to respond to grantees in a more timely manner. Following approval of these applications, grantees will enter into co-development of an additional two years of LGPTs for the 2028-29 and 2029-20 school years.

ODE will expand the Customized Coaching and Professional Learning program, growing from five focal areas to 12 focal areas. At the time of this report submission, ODE staff are screening and reviewing vendors who will provide these supports to grantees.

With the release of 2023-24 graduation data, ODE can complete the first year of review of all grantee LPGTs and engage in conversations on how SIA investments are helping districts move toward meeting those goals, where strategies and activities may need to be adjusted, and identify promising practices from grantees already meeting goals to share around the state.

Lastly, ODE completed the first mandated performance reviews of grantees in Fall 2024, a mandate required within the original legislation. ODE staff will review these reports and prepare an analysis to include in the 2026 report among other forms of communication.