Report on the HB 4030 Education Staff Retention and Recruitment Grant

Ways & Means Subcommittee on Education

February 2, 2023

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Oregon Department of Education

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Educator Advancement Council

Education Staff Retention and Recruitment Grant

Purpose: Provide grant funding to support retention and recruitment of licensed and classified K-12 personnel in schools across Oregon.

Total Funds Appropriated: $78,162,971

Funds Awarded to School Districts, Charter Schools, and ESDs: $78,127,971

In addition, ODE provided a $35,000 grant to Oregon School Personnel Association for recruitment conferences/trainings.

Grantees:

Entity Type	# of Grantees
School Districts	181
Charter Schools	66
Education Service Districts	18
Total	**265**

Retention & Recruitment Grant Timeline

Grantees submitted applications
May – June 2022

Grantees begin submitting final reports
January 2023

Deadline for submission of final reports
May 1, 2023

Deadline to claim grant funds
July 31, 2023

June – Sept 2022
Grant agreements executed
Grantees eligible to claim 85% of grant award

January – July 2023
Grantees submit final reports and claim remaining grant funds

June 30, 2023
Deadline for expenditure of grant funds

Educator Advancement Council

The Educator Advancement Council (EAC) is **an innovative partnership** with the state that coordinates a **systemic approach** to continuously **assessing needs** as well as **coordinating priorities** for services and resources to support Oregon educators.

Our goal is to offer programs that create **long-lasting change** for our educators and students.

EDUCATOR ADVANCEMENT CONTINUUM

EDUCATOR PREPARATION

PROFESSIONAL GROWTH & DEVELEMENT

EDUCATOR RECRUITMENT PATHWAYS

SUPPORT FOR NOVICE EDUCATORS

CAREER ADVANCEMENT

EDUCATOR ADVANCEMENT COUNCIL

Retention & Recruitment Grant Application Process

EAC and ODE staff developed an application process **accessible to districts and schools of all sizes** across the state and that allowed applicants to easily select **high leverage strategies** aligned to common areas of improvement.

Applicants required to:
- Describe staff engagement
- Define Problem(s) of Practice
- Select Equity & Innovation Strategy from the menu or identify their own strategy
- Outline Key Action Steps

HB 4030 Education Staff Retention and Recruitment Grant Application

OREGON DEPARTMENT OF EDUCATION

Eligible Applicants are required to complete and submit this application to access grant funds from Section 7 of HB 4030, which provides funds to support retention and recruitment of education personnel in schools across Oregon for the period of April 15, 2022 through June 30, 2023.

UPDATED DEADLINE: This application is due no later than June 6, 2022 at 5:00pm.

Prior to completing this form, please review the following information:
- Once you begin filling out this form, you must finish it. **It is not possible to save your progress and come back to it.** To assist you in preparing your responses, the full list of the questions in this form can be found in the Grant Guidance document: https://bit.ly/4030guidance

- Information on **eligibility, allocations, and grant disbursement processes** are available in the Grant Parameters document: https://bit.ly/4030parameters

- **Guidance on completing this application,** including recommendations for high-leverage strategies, is available in the Grant Guidance Document: https://bit.ly/4030guidance

All documents linked here, as well as additional supporting documents, are available on the Grant webpage: https://bit.ly/4030EdStaffGrant

If you have questions or experience issues with this form, please email ODE.RetentionGrants@ode.oregon.gov.

Retention & Recruitment Grant Areas of Improvement

In support of the goals of HB 4030, the EAC developed guidance for grantees based on **five research-based areas of improvement** that impact recruitment and retention:

Improved Systems	Culture and Climate	Staff Preparation and Growth Opportunities	Differentiated Training and Staff Support	Flexible School Systems
• Policies, organization, management, and leadership systems to improve structural conditions (i.e. data driven budgets, collaborative structures, master schedules, inclusive decision-making and engagement, recruitment messages, strategic plans related to talent management or development of human capital)	• Building an inclusive culture where all personnel feel seen, valued, and respected through policies, approaches, and/or actions	• Ensuring personnel are prepared to meet the demands of their jobs and are supported to advance in their careers (i.e. opportunities to earn credentials or gain additional qualifications, develop new knowledge and skills, or towards building systems of professional learning)	• Ensuring equitable access to resources for differentiated training and professional development for personnel at various stages of their career, and tailored to specific roles in the system	• Adapting the use of resources such as personnel, space, and time to best support innovations that reduce burnout

Equity & Innovation Menu

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|	Improved Systems	Culture and Climate	Staff Preparation & Growth Opportunities	Differentiated Training & Support	Flexible School Systems
Attract	Engage in Disciplined Inquiry to Understand Root Causes of Burnout	Building a Thriving Organizational Culture	Develop a Data Driven Recruitment Process	Tiered Bonus Compensation Program	Establish a Transparent & Equitable Rewards Program
Prepare	Expand/Connect to Career Pathways	Move from Evaluations to Professional Growth Plans	District-Post Secondary Partnerships	Personalized Professional Learning (contract-extension hours, including for after-school and/or summer programs)	Personalized Professional Learning (multi-modal, ongoing to build capacity for flexible schools/ districts)
Retain & Sustain	Networked Learning Across Districts	Build a culture of Collaborative Leadership Among Instructional Leadership Team	Induction and Mentoring Programs for Novice Educators	Mentoring Programs for Licensed Educators, Instructional Aides, Paraprofessionals	Cross-office Partnerships and Contract Extensions for Career Advancement

Retention & Recruitment Applications

395 Problems of Practice were identified

87% Eligible institutions that applied for and are receiving a grant

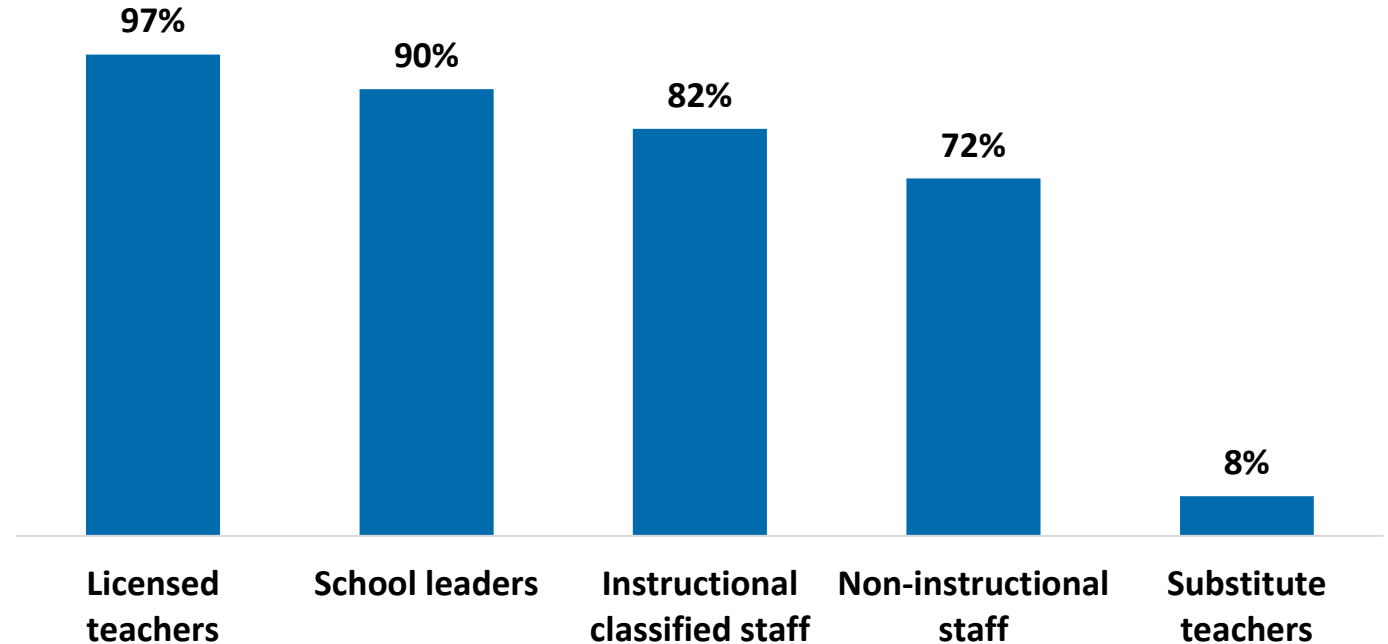**80%** Eligible small institutions that applied (<1,000 students)

Percent of Eligible Institutions Receiving a Grant by County

Percent of institutions
50% — 100%
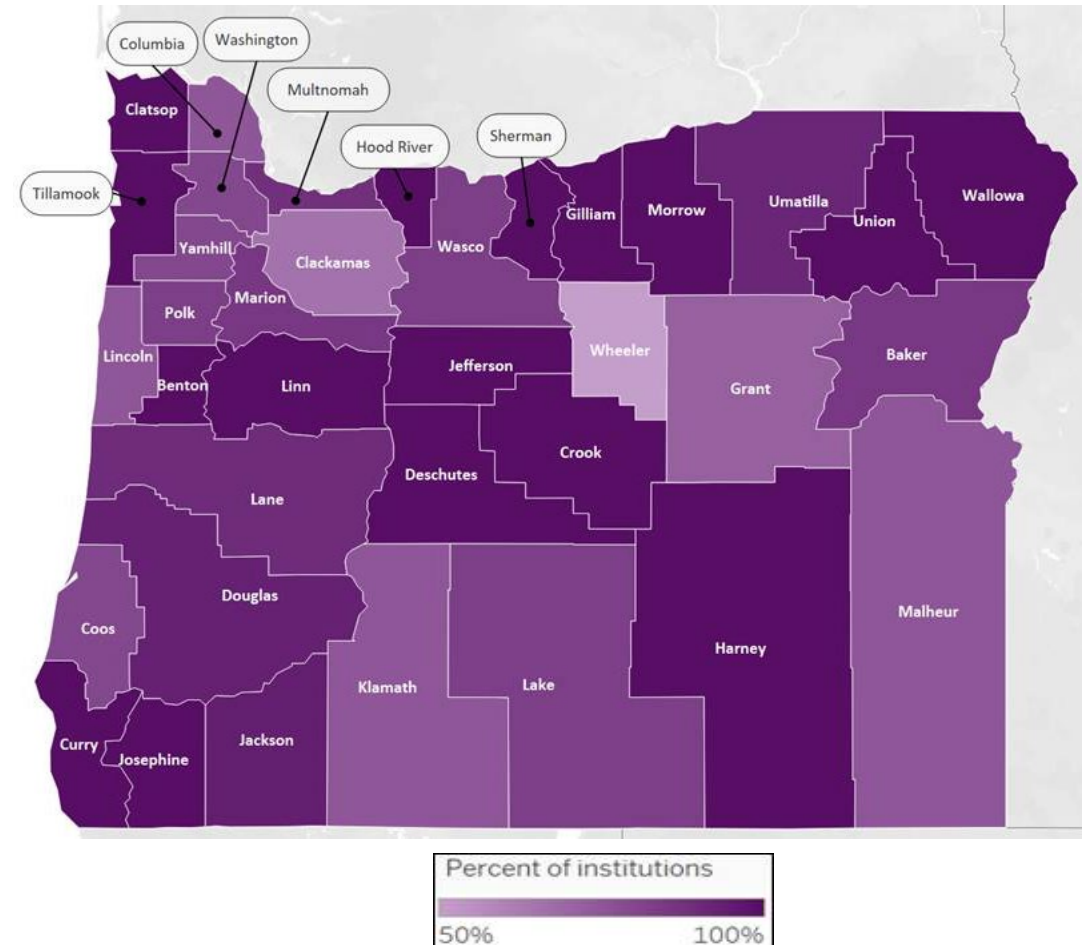
Retention & Recruitment Staff Engagement

- Grantees engaged school staff in identifying problems of practice and strategies to be funded

- 97% of grantees involved licensed teachers in developing their application

- Other groups included students, families, community members, school boards, union representatives, consultants, and ESD partners

- Engagement strategies included meetings, surveys, and interviews

Percent of Grantees by Staff Category

Category	Percent
Licensed teachers	97%
School leaders	90%
Instructional classified staff	82%
Non-instructional staff	72%
Substitute teachers	8%

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Retention & Recruitment Problems Identified

The most common types of recruitment and retention challenges described in the applications included (from most common to least common):

1. **Difficulty finding and retaining qualified candidates to fill open positions** across most licensed and classified staff categories, including for specialized positions such as special education teachers, counselors, nurses, mental health counselors, and bus drivers

2. **Need for improved preparation and staff support,** including additional training, professional learning, and mentoring opportunities, particularly for classified staff, new staff, as well as in areas of high-need (special education, social emotional learning, and meeting the growing diversity of student needs)

3. **Burnout of current staff caused by lack of time and space for staff collaboration**, planning, and connection, as well as chronic understaffing in specialized and substitute positions, leading to staff feeling isolated, disconnected, and overwhelmed

4. **Increasing cost of living, low wages, and affordable housing shortages** across the state, and in particular affecting classified staff and staff in rural communities with long commutes and few housing options
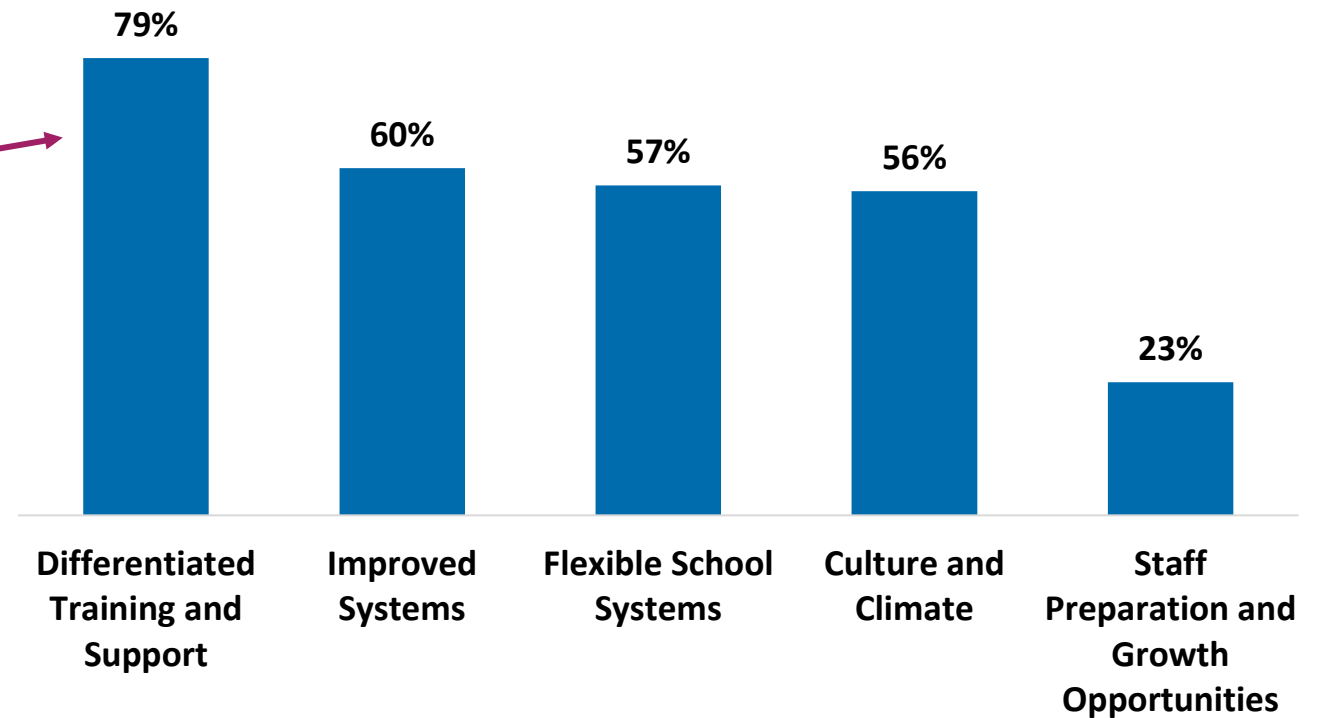
Retention & Recruitment Strategies

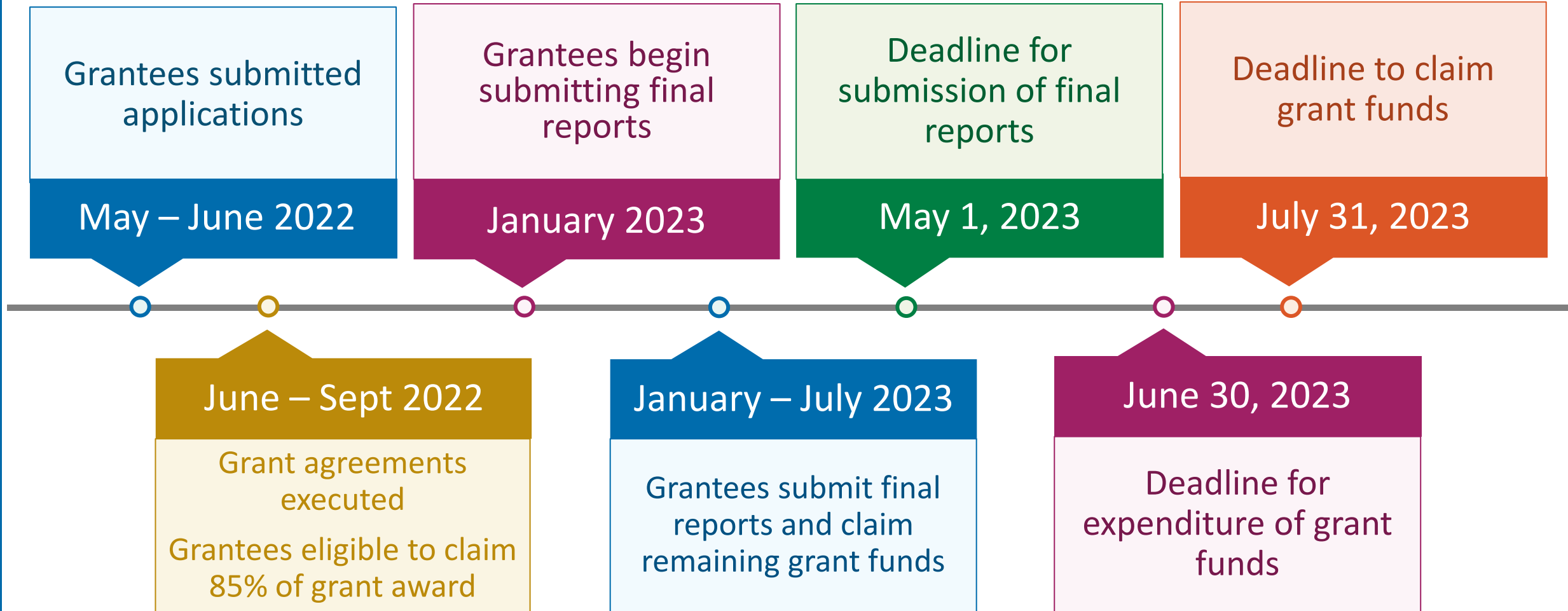**83% of Grantees selected research-based strategies from the Equity and Innovation Menu**

Menu strategies in this area:
- *Designing a tiered, bonus compensation package aligned to performance goals (28%)*
- *Establishing in-district or regional mentorship programming/support (27%)*
- *Supporting personalized professional learning opportunities through contract extension opportunities (25%)*

Strategies Selected by Improvement Area

79%	60%	57%	56%	23%
Differentiated Training and Support	Improved Systems	Flexible School Systems	Culture and Climate	Staff Preparation and Growth Opportunities

Retention & Recruitment Grant Timeline

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January 2023

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May 1, 2023

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Oregon Department of Education

Retention & Recruitment Grant Fund Distribution

Disbursement of Funds

Unlike most grant programs, distributions are not reimbursement-based. Grantees are allowed to claim **up to 85%** of their grant award upon grant agreement. This allows grantees to have the funds they need to immediately execute their planned retention and recruitment strategies.

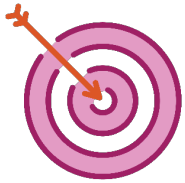Grantees may claim the **remaining 15%** after their final reports have been reviewed and approved by ODE.

Retention and Recruitment Grant Status

As of 01/30/2023

179 Grantees (over 2/3)

have claimed **$41.7 million** of grant funds

Oregon Department of Education

Retention & Recruitment Grant - Strategies Used

Bonuses and Rewards

Career Pathways and Preparation

Community and Culture

Data-Driven Inquiry

Mentoring

Professional Learning

Staff and Family Assistance

Other

Grantees are using these categories of Strategies to report on the Problem(s) of Practice they identified in their applications

Retention & Recruitment Grant Reporting

In order to claim the remaining 15% of their grant award, Grantees have to submit required reports:

Narrative – Multiple choice and open-ended responses providing specific and insightful information about use of the grant funds

Financial – Line item reporting, based on in the Strategies identified in their application and Function and Object Codes per the Program Budgeting and Accounting Manual (PBAM)

Retention & Recruitment - Final Narrative Report

Grantees are reporting:

- Changes from their original application
- The high-need specialties and workforce shortage areas targeted
- Support for immediate solutions
- Support for long-term solutions
- Measureable outcomes
- Potential for sustaining these efforts

And, the Strategies they used:

Bonuses and Hiring	Professional Learning	Culture and Community
Staff Support and Assistance	Data-Driven Inquiry	Mentoring

Retention & Recruitment - Final Financial Report

Grantees are reporting expenditures categorized by:

- Specific Strategies identified in their application

- PBAM Function Codes to describe the expenditure activities (e.g. Elementary, Middle/Junior High, High School)

- PBAM Object Codes to describe the service or commodity (e.g. salaries, supplies, capital)

Questions?

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[Education Staff Retention and Recruitment Grant Program](#)

Report on HB 4030 Substitute and Instructional Assistant Training Reimbursement Grant

Ways & Means Subcommittee on Education

February 2, 2023

Michael Elliott, School Facilities & Special Projects Director

Substitute and Instructional Assistant Training Reimbursement Grant

Purpose: Provide grant funding to reimburse substitute teachers and instructional assistants for out of pocket training costs required to maintain professional licenses, trainings required by a district or ESD or other professional development.

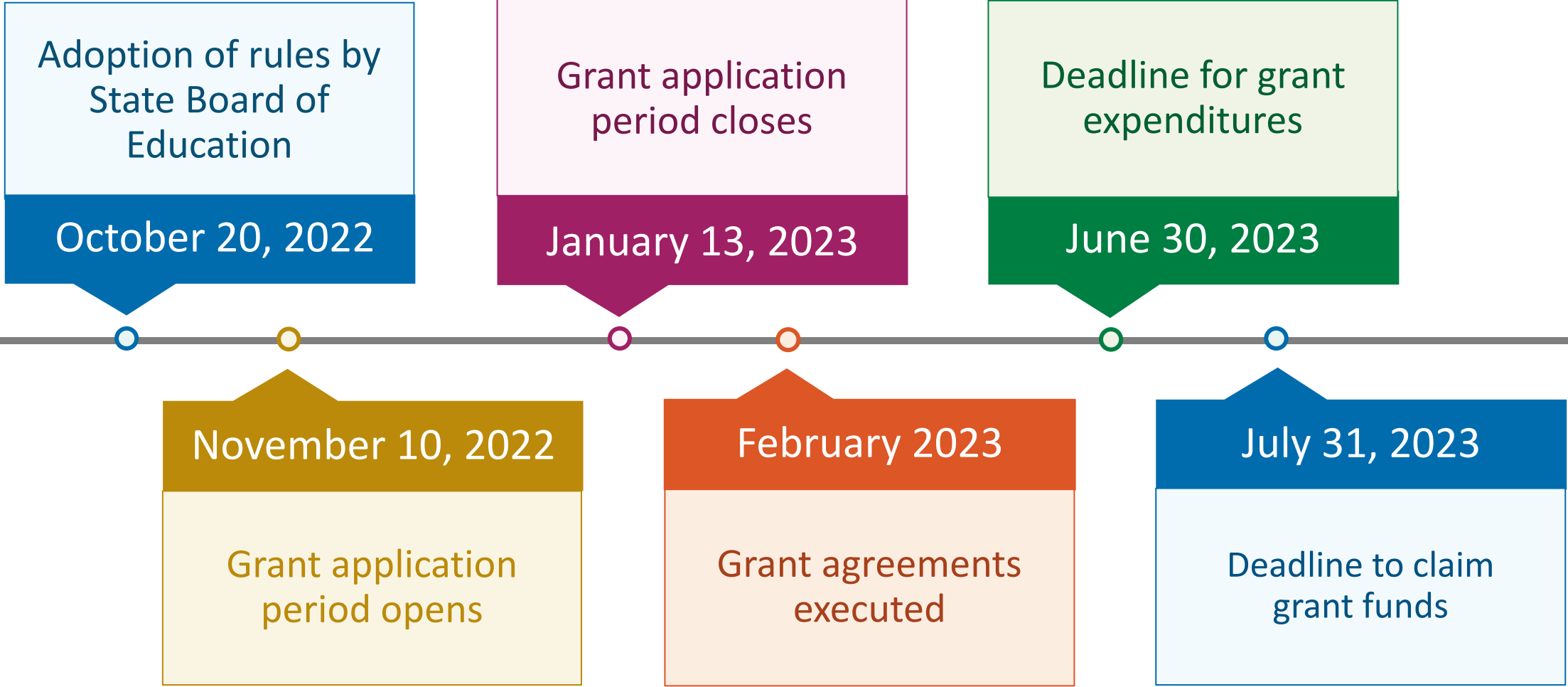**Total Funds Appropriated:** $19,540,743

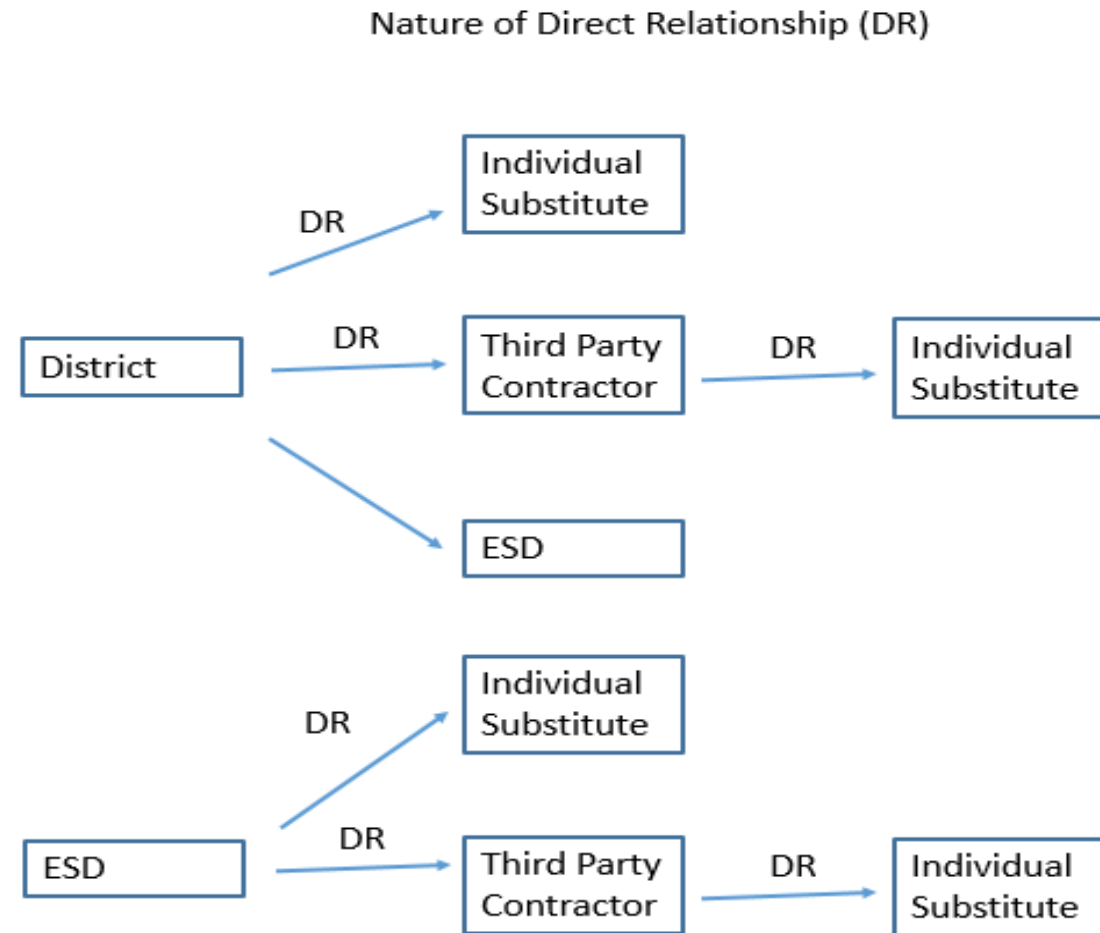**Funds Awarded to School Districts and ESDs:** $18,508,000

5% Reserve: $977,037

Grantees:

Entity Type	# of Grantees
School Districts	84
Education Service Districts	9
Total	**93**

Substitute and Instructional Assistant Training Reimbursement Grant Timeline

Adoption of rules by State Board of Education

October 20, 2022

Grant application period closes

January 13, 2023

Deadline for grant expenditures

June 30, 2023

November 10, 2022

Grant application period opens

February 2023

Grant agreements executed

July 31, 2023

Deadline to claim grant funds

Substitutes and Districts have complex relationships

Nature of Direct Relationship (DR)

Disbursement of Grant Funds on Reimbursement Basis

Substitute or IA submits request to District/ESD	→	District/ESD submits request to ODE	→	ODE Reimburses District/ESD	→	District/ESD pays Substitute or IA
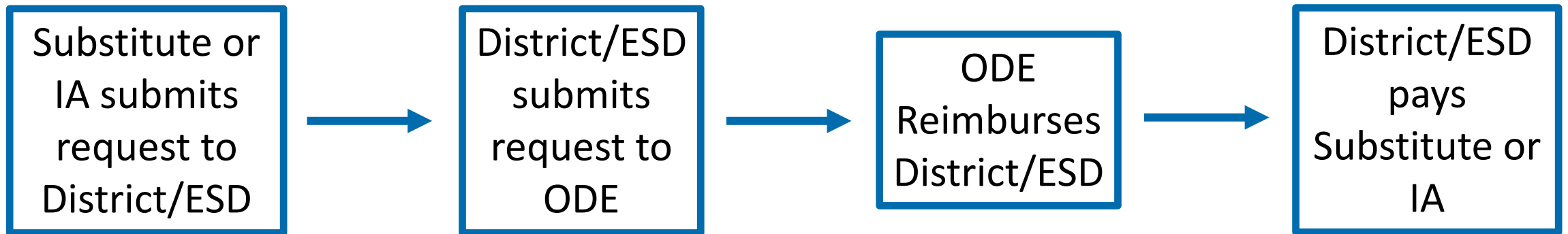
Districts and ESDs applied for a total of **21,152 substitutes and instructional assistants** for a **per person allocation of $750**.

Required Trainings and Eligible Expenses

Required Trainings
• State requirements • District requirements • Other training approved by ODE

Eligible Expenses
• Tuition • Costs of training • Travel expenses for trainings outside of district • Time spent to complete the trainings • Conference fees
• **Districts and ESDs may cover their costs to provide training to individual substitute teachers and instructional assistants for required training.** • **No Admin Costs**

Substitute and Instructional Assistant Training Reimbursement Grant

Final Reporting
Goal is to collect all data through reimbursement process and reduce burden on districts.

Substitute and Instructional Assistant Training Reimbursement Grant

Feedback from Districts and ESDs regarding grant:

- Difficult for school districts to implement a grant mid-year. Need to be aware of it prior to school year starting.

- Work load issue for managing the grant and a lack of funding for administrative costs.

Thank You

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Education Staff Retention and Recruitment Grant Program

Substitute Teacher and Instructional Assistant Training Reimbursement Grant