



Progress on Grant Consolidation

JOINT COMMITTEE ON WAYS AND MEANS
SUBCOMMITTEE ON EDUCATION

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May 24, 2023

Purpose

ODE's charge is rooted in a 2019 [Budget Note](#) in HB 5015. Today's presentation builds and extends [from a written report and meeting with this committee on February 7, 2022](#).

We aim to:

1. Refresh the **context** of this work effort
2. Share progress on **what's done** since our previous report
3. Describe work that's actively **in progress**
4. Name work that is on the **horizon** and where **partnership** is needed to accomplish the goal
5. What we are **learning**



ODE understands and accepts our charge to:

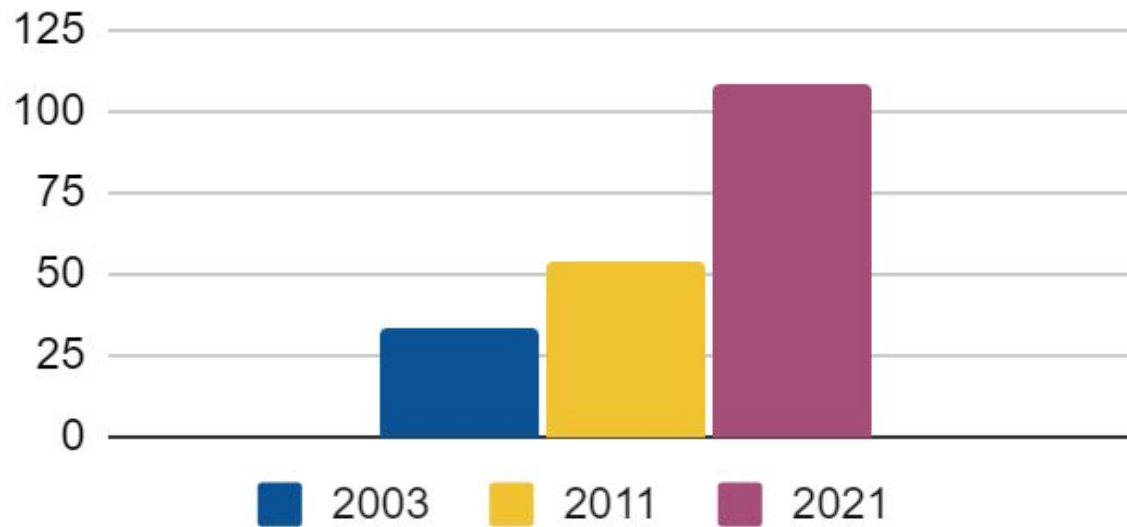
1. Reduce administrative burden and confusion
2. Support small and rural school districts, differentiating requirements where possible
3. Coordinate and integrate major grant programs and data collections
4. Support the Legislature in understanding the important role they can play towards these goals



Context

Rapid Growth in Grants and Theories of Change

of Grants



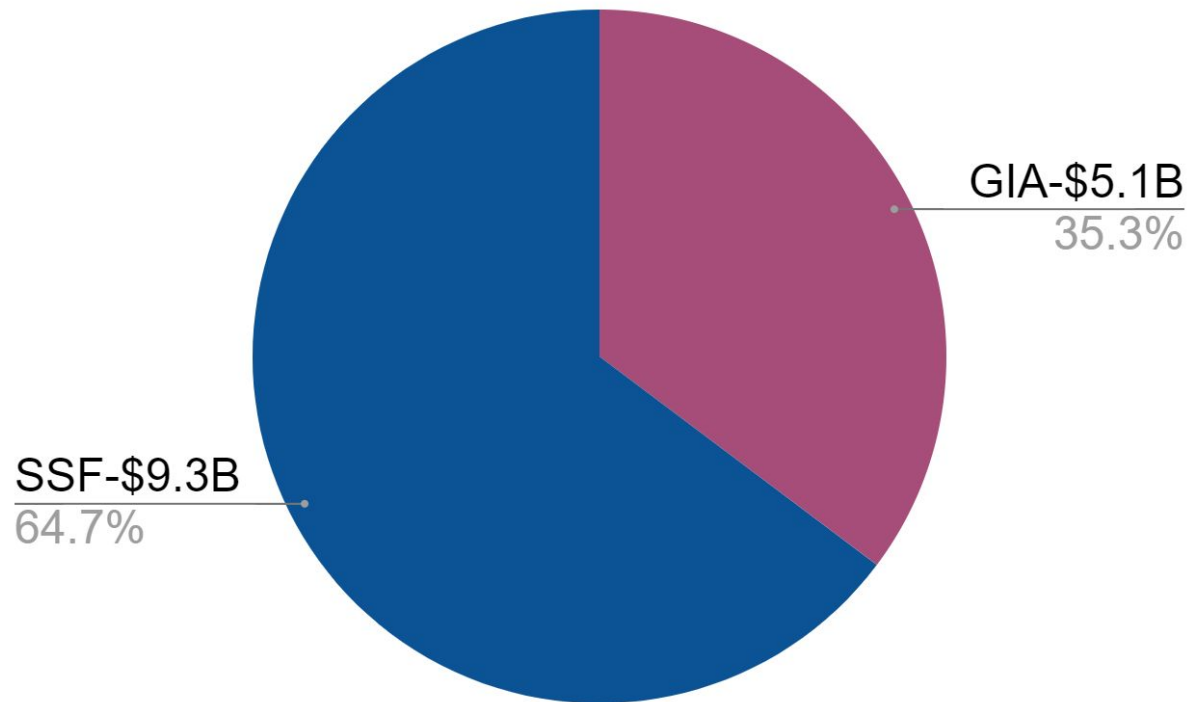
- Grant programs expanded rapidly without coherent systems in place to administer them - from **34 grants in 2003 to over 108 grants by 2021**
- State grants **shifted from mostly competitive to mostly formula allocation**

2021-2023	Districts	ESDs
# Grants	61	29
# Requiring Comm Eng	33	20
# Requiring a Plan	26	19

Forty (40) other grants are distributed to a broad range of recipients

- CBOs
- Tribes
- Post-secondary
- Cities/counties
- Youth correction programs
- Early learning providers

2021-23: State School Fund Compared to Grant-In-Aid



- Approximately **\$5.1*** billion in **2021-2023**
- From 2011 to 2021, ODE's GIA portfolio shifted from:
 - About 1/3 state grants in 2011 to about 2/3 state grants in 2021
 - **State grants shifted in design from mostly competitive to mostly formula-based allocation**

** Includes \$1.2B in federal emergency relief funds*

Big Transition in Oregon School Leadership

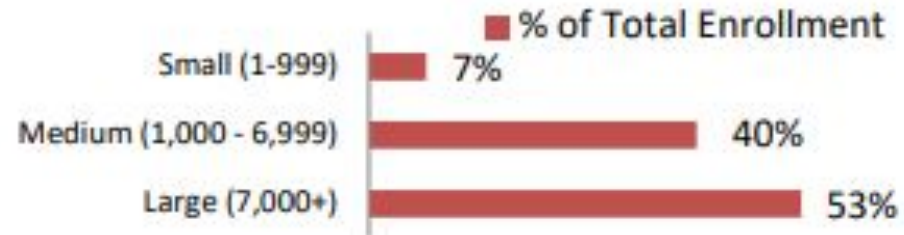
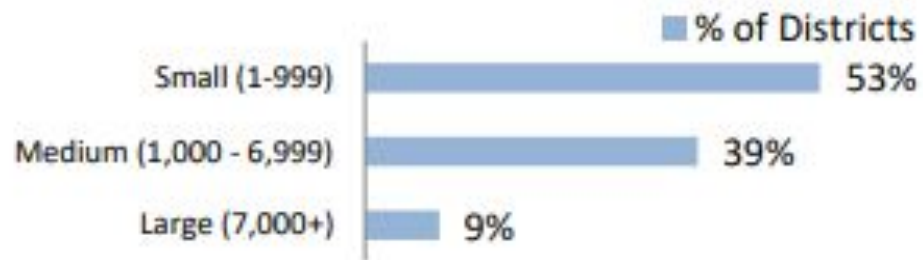
64% turnover

In the last three years, Oregon has seen new superintendents in 127 of 197 school districts.

Most of Oregon's School Districts are Small

Percent of Oregon School Districts by Size of Student Enrollment

There are 197 School Districts in Oregon. The majority are small districts, comprised of less than 1,000 students total. However, the majority of students in Oregon attend large school districts, comprised of 7,000 or more students total.



We know districts are frustrated

- **Communication, information collections, and interpretation vary by ODE staff**
 - Difficult to get on all the “right” ODE email lists for all the different programs
 - Have everything together in one spot. Easy-access to information for each grant. Consolidate information.
 - Communication circles! We need a better way to pass the baton to new superintendents -- for months emails were being sent to my predecessor so lots was missed.
 - I get so many emails about grants. It’s hard to find basic information to administer them.
 - Reporting requirements are not made clear from the start
- **ODE uses a lot of different tools, smartsheets, google, excel, etc.**
 - Need to standardize into 1 or 2 tools
 - Turn in same way, same spot
- **Coordinate reports and be thoughtful about when you are asking for in depth information**
 - I have to do the reporting by hand because of the way the request is structured. For example we asked for ODE to generate data, and it said that they can’t do that because too much on the ODE plate. But districts don’t have that choice - they have to turn it in.
 - End of fiscal year is crazy for school districts, especially in small and medium
 - Is there some way to differentiate reporting requirements -based on size of districts?
 - Stop asking districts for data that you already have
- **Can we have one community engagement request and cover all the areas throughout the years?**
- ***Time, time, time!***

Grant Consolidation - Starting Points

Fulfill the 2019 Legislative Budget Notes

Budget Note 1: Study the K-12 Grant-in-Aid programs to determine if any grant programs can be combined or eliminated; and make a recommendation to the legislature of areas that can be consolidated and identify any hurdles to the consolidations.

Budget Note 2: Explore the potential for combining grant applications, grant agreements, grant monitoring, and reporting for the School District Investment grants established in HB 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.

Address the 2019 SOS Audit #7 Recommendation

The recommendation states:

Coordinate with the Governor's Office, the State Board of Education, the Legislature, and districts to develop a plan to align education investments for the long-term.

The plan should include steps to reduce and consolidate initiatives, and measure investment results, particularly for state efforts aimed at improving struggling high-poverty schools.

Reduce ODE Administrative Burden on School Districts

The goal is to align and coordinate ODE requirements, data requests, and internal processes to ease administrative burden and confusion on districts to increase capacity to serve students, especially those in our smaller districts.

Three Project Phases

✓ Phase 1: Grant data collection and analysis (May 2021 to Aug 2021)

- Quantitative data review and longitudinal analysis for all current grants
- Focus groups with small, medium, and large school districts
- Surveys, interviews, and feedback sessions with ODE leadership and grant managers

✓ Phase 2: Develop recommendations and the legislative report (Sept 2021 to Feb 2022)

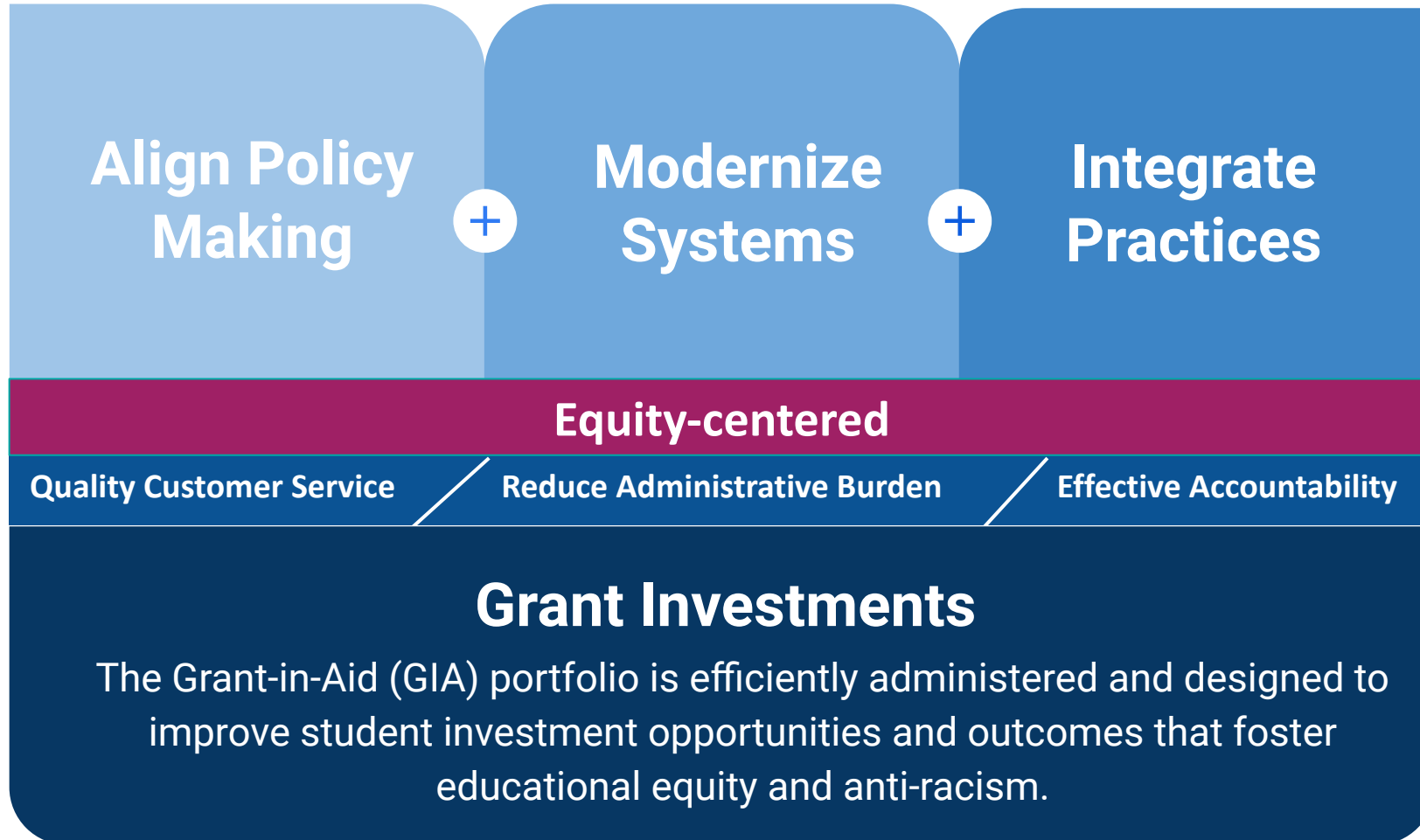
- Iterative process drafting and revising recommendations based on feedback from education partners and ODE leadership
- [ODE's Grant Consolidation Report](#) presented to and accepted by the JWM Subcommittee on Education on February 7, 2022

IN PROCESS: Phase 3: Implement recommendations (2021* to 2026)

- Formal implementation underway with five year project plan
- Updating legislature and Governor's Office, as requested

* Where ODE had the authority to do so, we began work in 2021.

Grant Consolidation Project Framework



Nineteen workstreams represent the Grant Consolidation work. They **span policy, systems, and practice.**



What's Done?

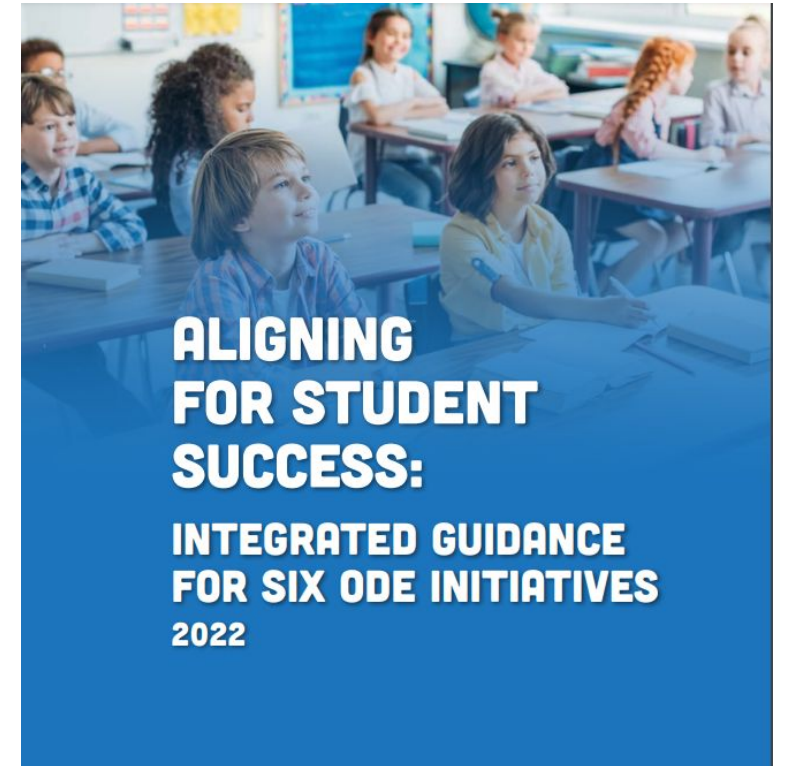
Progress in last 15 months

Aligning for Student Success

ODE has operationally integrated **six aligned programs and district responsibilities:**

- High School Success (HSS)
- Student Investment Account (SIA)
- Continuous Improvement Planning (CIP)
- Career and Technical Education - Perkins V (CTE)
- Every Day Matters (EDM)
- Early Indicator and Intervention Systems (EIS)

Guidance released February 8, 2022



Aligning ESD TA and Investing in Small and Rural School District Support

2019 ESDs funded to play core technical assistance role for SSA/SIA implementation.

2020 ESDs asked to play a pivotal role in COVID-19 supports.

2021 A “floor” was set for Oregon’s smallest ESDs.

2022 OEII operationally aligned funding to all 19 ESDs to get them in advance of Integrated Guidance.

2022 Federal GEER dollars were used to follow a grant consolidation recommendation creating dedicated support for Small and Rural Schools in each ESD and with a full-time coordinator at ODE.

ODE proposes HB 2275 (2023)

- Adds “or equal to” in the description of what would make a public charter school eligible to apply independently from their sponsoring district for the Student Investment Account (SIA).
- Clarifies and makes explicit the allowance for funds to be disbursed by grant or contract for the American Indian/Alaska Native statewide education plan.
- Requires applicants for SIA funds to consider the recommendations from student success plan advisory groups.
- Would establish that each site of the Youth Corrections Education Program and the Juvenile Detention Education Program receives a grant amount that is no less than the minimum grant amount provided to a school district. That amount is \$33,685 for 2022-23.

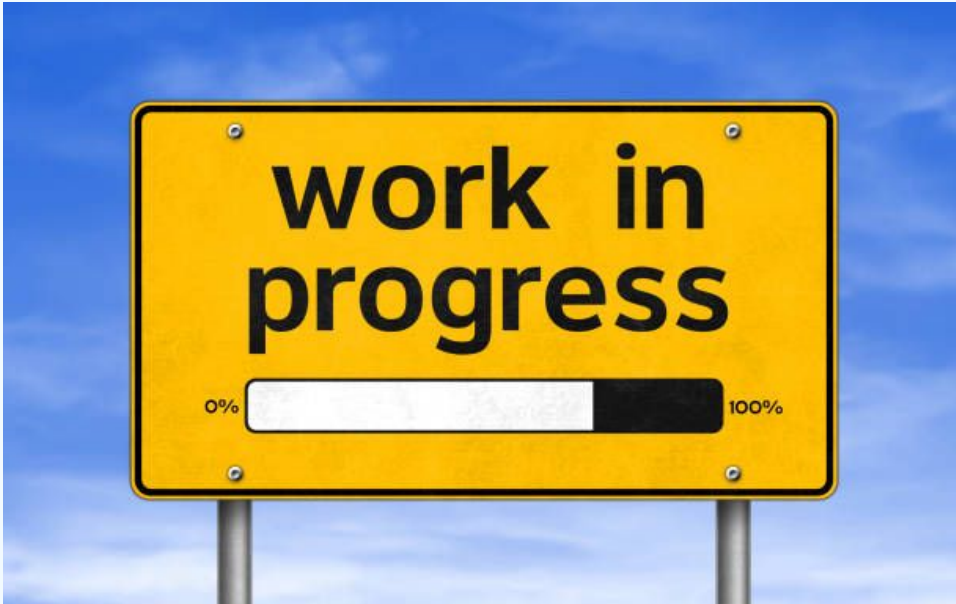
Project Team and Traction

- Five-year agency-wide plan (2021-2026) ([Smartsheet](#), [DARCI](#))
- Teaming structure for implementation
 - **Deputy Director** is executive sponsor
 - **Director's Cabinet:** providing input and direction, as needed
 - **Core team** coordinating and monitoring work across the agency
 - **Policy:** Jill Vogt, Ian Hornbaker, Tamara Dykeman
 - **Small District Support:** Raeshelle Meyer
 - **Project Manager:** Wendy McClain
 - **Project Manager-Grant Management System:** Jordan Heide
 - **Workstream leads** managing key bodies of work
- Project monitoring and accountability
 - Weekly progress monitoring on GC project
 - Quarterly E-Team Status Updates
 - Annual progress review and reporting
 - Progress updates to Legislature and Governor's Office, as requested

Activated Recommendations into 19 Workstreams

1. Agency-wide Project Coordination and Progress Monitoring
2. Grant alignment one-pager guide for policymakers
3. New internal request forms for POPs, LCs, and rules changes
4. A “grand” Legislative Concept for significant statutory grant alignment for 2025 session
5. Easy-to-read, month by month, district reporting schedule
6. Data Visualization System
7. Develop and teach agency-wide approach to a Contact Management System
8. Create District Communication Template/Create “master news” list on webpage to house ODE emails sent to districts
9. New Grant Management System
10. ESSA Federal grants: consolidating application, timelines, and requirements
11. Grant integration OELL: Aligning for Student for Success (6 ODE initiatives)
12. Summer Programs: Common budget and program templates
13. Differentiate supports and requirements for small districts
14. District “map” for all community engagement requirements
15. Grant manager training and manuals
16. Align schedule for grant reporting
17. Proposal for ODE framework for performance monitoring and evaluating
18. Modernizing and streamlining special ed program and reporting platform (SPR&I)
19. Summer Programs consolidated budget and program plan

What's happening now?



What	Estimated Date of Completion
Easy-to-read, Month-by-Month, district grant reporting schedule in one place	July 2023
Common template and reporting for Summer Programs	Summer 2023 and 2024
Proposal developed for a shared performance, monitoring, and evaluation framework	August 2023
New Grant Management System	Fall 2023
New internal POP and LC forms to support alignment	Fall 2023
Grant alignment one-pager guide for policymakers	Fall 2023
Develop solution for integrated Contact Management System	Jan 2024
Consistent approach set on data visualization	Jan 2024

What's on the horizon?



Oregon Department of Education

What	Horizon Date
Grant manager training and manuals	Winter 2023
Further align schedules for grant reporting	Winter 2023
Universal archive of all communications from the agency to partners	Winter 2023
Aligning Early Literacy Success Initiative with Integrated Guidance update	Spring 2023
Map all district community engagement requirements	Summer 2024
A “grand” Legislative Concept for significant statutory grant alignment for 2025 session	Summer 2024
Modernizing and streamlining special ed program and reporting platform (SPR&I)	Summer 2025
Consolidating Federal Systems Grant Applications	2025-27



What are we learning?

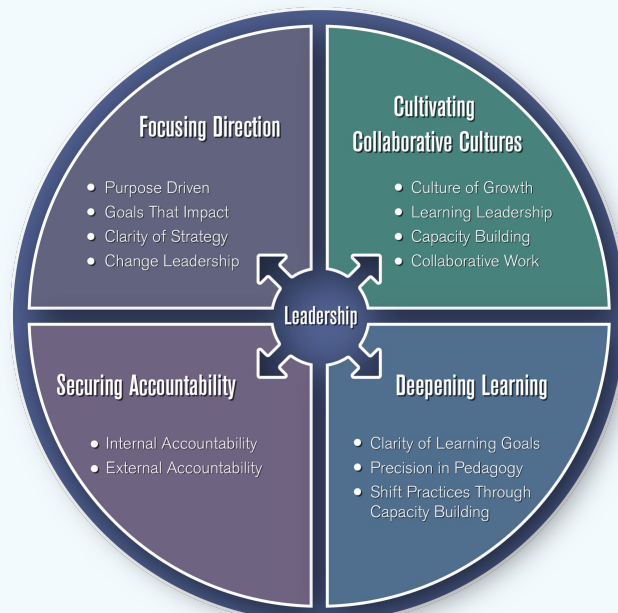
Lesson 1: Permission to Operationalize



Statutes, rules, grant agreements, and guidance direct and shape agency grant programs. Agency leaders have struggled to incorporate and design (or re-design) new initiatives alongside prior efforts.

This process has supported ODE to “ring the bell” and take stock of what’s unfolded and to begin to sort out what truly requires changes in statute and rule from what can be improved through changed operational practices.

Lesson 2: Effectiveness requires coherence



Oregon Department of Education

The scholarship and practical applied writings of Michael Fullan have been recognized for over a decade across Oregon and the US as it relates to identifying the “right drivers” for long-term educational success.

If these efforts can continue, Oregon could put a dent in long-pattern of administrative burden and confusion.

Any new K-12 education initiative will benefit from understanding this effort, Oregon’s current context, and to alignment with a shared direction.

Lesson 3: Accountability is a two-way street



If accountability is synonymous with integrity, transparency, and responsibility, this effort has put a bright light on ways ODE can improve as learning organization.

ODE's employees are talented and sincere. The ways new legislation has been developed, landed, and accelerated over the last decade did not create the conditions for easy operational alignment and needed coordination. This is not a new insight - but the details matter.

This work has gotten to enough depth and clarity of focus that real traction can be made, if supported.

Lesson 4: Legislative partnership is essential



Oregon Department of Education

Several of you helped initiate these efforts by giving voice to the needs in the state through the use of a budget note. You've consistently asked for updates and reports. Thank you!

We need your deep engagement in this effort to keep momentum and to ensure this remains a priority across changes in agency leadership.

This effort is highly aligned with Governor Kotek's vision for ODE and focus on customer service.

We need you to understand this work and help us help you in the design of any new programs or legislation.

What Success Looks Like....

- Reducing administrative burden “lens” is applied and integrated throughout ODE’s work
- Small school districts feel well-supported & measures are taken to differentiate requirements
- Major grant programs, data collections and reporting are coordinated and integrated
- ODE policy guidance encourages the Legislature to align new programs from the outset
- Districts’ administrative burden is actually reduced

- ODE grant managers are well-trained and deliver high-quality customer service to districts and other grantees
- New grant management system provides “one stop shopping” for applications, reporting, budgeting, and payments
- Districts only need to update their contact information once with ODE to receive all communications
- ODE has a common framework for progress monitoring and accountability
- ODE never asks districts for information it already has

Oregon is more effective in serving students, families, and communities.



Questions/Discussion

Additional Resources

- Jan 2022 - [ODE Grant Consolidation Report](#) sent to Legislature
- Feb 7, 2022 - Report Presentation to the JWM Education Subcommittee
 - [Video ODE Presentation](#)
 - [ODE JWM-Ed Sub Presentation Slide deck](#)
 - [LFO Request and Analysis of Report](#)