



## OREGON EDUCATION INVESTMENT BOARD

Tuesday, January 14, 2014

1pm – 5pm

Oregon State Fairgrounds

Cascade Hall, 2330 17th Street, NE, Salem, 97301

Video Streaming [HERE](#)

JOHN KITZHABER  
Governor of Oregon  
OEIB Chair

JULIA BRIM-  
EDWARDS

YVONNE CURTIS

MATTHEW DONEGAN

SAMUEL HENRY

NICHOLE JUNE  
MAHER

MARK MULVIHILL

DAVID RIVES

RON SAXTON

MARY SPILDE  
Chair-Designee

KAY TORAN

JOHANNA  
VAANDERING

DICK WITHNELL

*Chief Education Officer*  
NANCY GOLDEN

*Members of the public wanting to give public testimony must sign in.  
There will only be one speaker from each group.  
Each individual speaker or group spokesperson will have 3 minutes.*

### AGENDA

1. Board Welcome and Roll Call
2. Approval of Minutes from November board meeting  
*Action Item*
3. Chief Education Officer Update  
Dr. Nancy Golden, Chief Education Officer
4. Subcommittee Update  
Best Practices and Student Transitions – Dr. Yvonne Curtis, Chair  
Equity and Partnerships – Nichole June Maher, Chair  
Outcomes and Investments – Dick Withnell, Chair
5. 40-40-20 Presentation – Pipeline vs. adult population  
John Tapogna, ECONorthwest  
David Yaden, State Board of Higher Education
6. Higher Education Coordinating Commission observations and potential implications regarding 40-40-20 pipeline / population.  
Ben Cannon, Executive Director, HECC  
Tim Nesbitt, Chair, HECC
7. Longitudinal database business case report  
Peter Tromba, OEIB, Longitudinal Database Project Manager
8. Draft OEIB Communications and Engagement plan  
Kristin Gimbel, OEIB, Communications Director

9. Agency Update  
Oregon Department of Education, Rob Saxton  
Oregon University System, Dr. Melody Rose

10. Public testimony

11. Adjournment

***\*Times are approximate***

*All meetings of the Oregon Education Investment Board are open to the public and will conform to Oregon public meetings laws. The upcoming meeting schedule and materials from past meetings are posted [online](#). A request for an interpreter for the hearing impaired or for accommodations for people with disabilities should be made to Seth Allen at 503-378-8213 or by email at [Seth.Allen@state.or.us](mailto:Seth.Allen@state.or.us). Requests for accommodation should be made at least 48 hours in advance.*

**OREGON EDUCATION INVESTMENT BOARD**

November 12, 2013

1pm – 5pm

Portland State University

Smith Memorial Student Union

3rd floor, 327-9

1825 SW Broadway, Portland OR 97201

[LINK TO MEETING AUDIO](#)

[LINK TO MEETING MATERIALS](#)

**OEIB Members Present**

Gov. John Kitzhaber (arrived late); Mark Mulvihill, Johanna Vaandering; Nichole June Maher; Dick Withnell; David Rives (phone); Ron Saxton (phone); Samuel Henry; Mary Spilde, Julia Brim-Edwards

**Advisors Present**

Rob Saxton; Vikki Chamberlain; Gerald Hamilton; Melody Rose; Bob Brew

**Members/Advisors Excused**

Samuel Henry, Mathew Donegan, Kay Toran, Jada Rupley

**Staff/Other Participants**

Nancy Golden - OEIB Chief Education Officer

Ben Cannon -Governor's Office

Whitney Grubbs – OEIB Staff

Hilda Rosselli – OEIB Staff

Dr. Doris McEwen – OEIB Staff

Kristin Gimbel – OEIB Staff

Mark Lewis – OEIB Staff

Peter Tromba – OEIB Staff

Mark Lewis – OEIB Staff

David Edwards – OEIB Staff

Seth Allen – OEIB Staff

Governor John Kitzhaber arrived late to this meeting. Dr. Mary Spilde, the Chair Designee led the meeting until he arrived.

1. Joint Meeting with Early Learning Council

- *Joint Action* and Discussion by OEIB and ELC regarding Special Joint Subcommittee of the ELC / OEIB re: Kindergarten Partnership and Innovation Fund – Hanna Vaandering, OEIB  
The Early Learning Council joined the Oregon Education Investment Board in their meeting room. Joint Action and Discussion by the OEIB and ELC regarding special joint subcommittee.

[Kindergarten Partnership and Innovation Grant Ready for Success](#)

**MOTION: Dr. Yvonne Curtis motions to accept the proposal as presented. Pam Curtis seconds the motion. The motion passes.**

2. Board Welcome and Roll Call
3. Approval of Minutes from October board meeting  
*Action Item*

[DRAFT October Meeting Minutes](#)

**MOTION: Mark Mulvihill moves to accept the meeting minutes from the October meeting. Hanna Vaandering seconds the motion. The motion passes unanimously.**

4. Subcommittee Update
  - Best Practices and Student Transitions – Dr. Yvonne Curtis, Chair  
[Best Practices and Student Transitions subcommittee charge](#)  
[Best Practices and Student Transitions Revised Scope of work](#)
  - Equity and Partnerships – Nichole June Maher, Chair
  - Outcomes and Investments – Dick Withnell, Chair
5. Ceremonial Bill Signing HB 2013 (creating Early Learning Hubs)

Governor Kitzhaber arrives and chairs the rest of the meeting.

6. Youth Development Council Report  
Iris Bell, Executive Director, Youth Development Division  
[Youth and Gangs Report](#)  
Healing Hurt People Portland Program panel  
(Prevention/Intervention strategies for reducing youth violence)  
[Healing Hurt People presentation](#)
7. Chief Education Officer Update  
Dr. Nancy Golden, Chief Education Officer  
[Chief Education Officer October Update](#)
8. Achievement Compact Research Plan  
David Edwards, Director of Research and Policy, OEIB  
[Achievement Compact Research Plan](#)
9. Agency Updates

- Oregon Department of Education  
Rob Saxton, Deputy Superintendent of Public Instruction
- Department of Community Colleges and Workforce Development Gerald Hamilton, Interim Executive Director
- Higher Education Coordinating Commission  
Ben Cannon, Executive Director

10. Travel Reimbursement Training

Sandy Braden, Office Manager, OEIB

[Travel Reimbursement Training document](#)

11. Public testimony

12. Governor Kitzhaber adjourns the meeting at 4:30pm

DRAFT



# DECEMBER UPDATE

## A Progress Report on 6-Month Outcomes for Nancy Golden

### OBJECTIVE #1

#### DESIGN & IMPLEMENTATION OF BIRTH TO COLLEGE & CAREER STRUCTURE

##### *Ongoing Systems of Communication/Alignment Across Birth to College and Career*

- Met with Southern Oregon University (SOU) President Mary Cullinan to gather feedback and learn about current programs and challenges. Shared OEIB vision/strategies.
- Attended a briefing on kindergarten assessment data with representatives from the Early Learning Division and the Oregon Department of Education.

##### *Oversight of Development of Business Case*

- Worked with Peter Tromba to conceptualize and provide feedback on the Business Case for an OEIB Student Longitudinal Database System. Scheduled to present to legislators during the February short session.

### OBJECTIVE #2

#### ADOPT STRONG POLICY FRAMEWORK

##### *Coordinate OEIB Policy & Research Unit*

- Participated in a strategic planning meeting with staff members from the Center on Teaching and Learning to discuss how to get all students to meet or exceed third grade reading standards.

##### *Engage Regional Achievement Collaboratives in Identifying Policies to Support Student Success*

- Participated in a Southern Oregon Regional Achievement Collaborative meeting to learn about their partnership plans.

##### *Secure Adoption of Legislative/Administrative Policy Agenda*

- Met with Representative Buckley to discuss the needs, opportunities and concerns in Southern Oregon.
- Chaired the Accelerated Learning Committee meeting.

##### *Develop Strong Partnerships and Accountability Across Birth to College and Career*

- Participated as a speaker for the Oregon Leadership Network's Fall Institute on building evidence-based equity leadership.
- Presented at the Medford Rogue Rotary Club on the future of education in Oregon.
- Interviewed by KOB1-TV in Medford on the purpose of OEIB and strategies to meet the 40-40-20 goal.
- Met with Southern Oregon superintendents and educational leaders to discuss the direction of education in Oregon.
- Presented at the Springfield City Club as the keynote speaker to provide policy updates in education.

##### *Develop Strong Partnerships and Accountability Across Birth to College and Career (Continued)*

- Led discussions at the Oregon Leadership Summit, provided an update on policy and shared information regarding initiatives that will shape education.
- Participated in the Southern Oregon Education Summit with Klamath Community College; discussed their successful collaboration with a Texas school district that has experienced substantial increases in test scores and students attending college.
- Attended the Western Interstate Commission for Higher Education to discuss a database which would allow us to track our students after postsecondary graduation.
- Met with Heidi Moawad, the Policy Advisor on Public Safety, to discuss her development of the School Crisis Response Plan.
- Met with the Executive Director of the Oregon Community College Association (OCCA), Andrea Henderson, to discuss key issues.

### OBJECTIVE #3

#### CREATE OUTCOMES-BASED BUDGET, ALIGNED TO INITIATIVES

##### *Create Recommendations for Outcomes-Based Budget, Specifically Tied to Strategic Initiatives and Key Outcomes*

- Met with Michael Jordon, Ben Cannon, Whitney Grubbs to develop a budgeting process with short and long term goals articulated so we can budget our plan instead of planning our budget.

### OBJECTIVE #4

#### WORK TO BUILD AN ENGAGED & MOTIVATED PUBLIC

##### *Engage and activate diverse communities, parents and students*

- Met with members of federally recognized tribes to discuss educational issues and share our initiatives.
- Met with the OEIB Equity & Partnership subcommittee to discuss issues of equity.
- Visited the Native American Youth Association (NAYA) to learn about their programs and successes.
- Attended the Government-to-Government Education Cluster with state agencies to share our direction and discuss educational needs and challenges.
- Toured SEI (Self Enhancement Incorporated) to learn about their programs, successes and initiatives.
- Attended a meeting with the Portland African American Leadership Forum to hear their concerns and enhance our partnership.

**40-40-20**

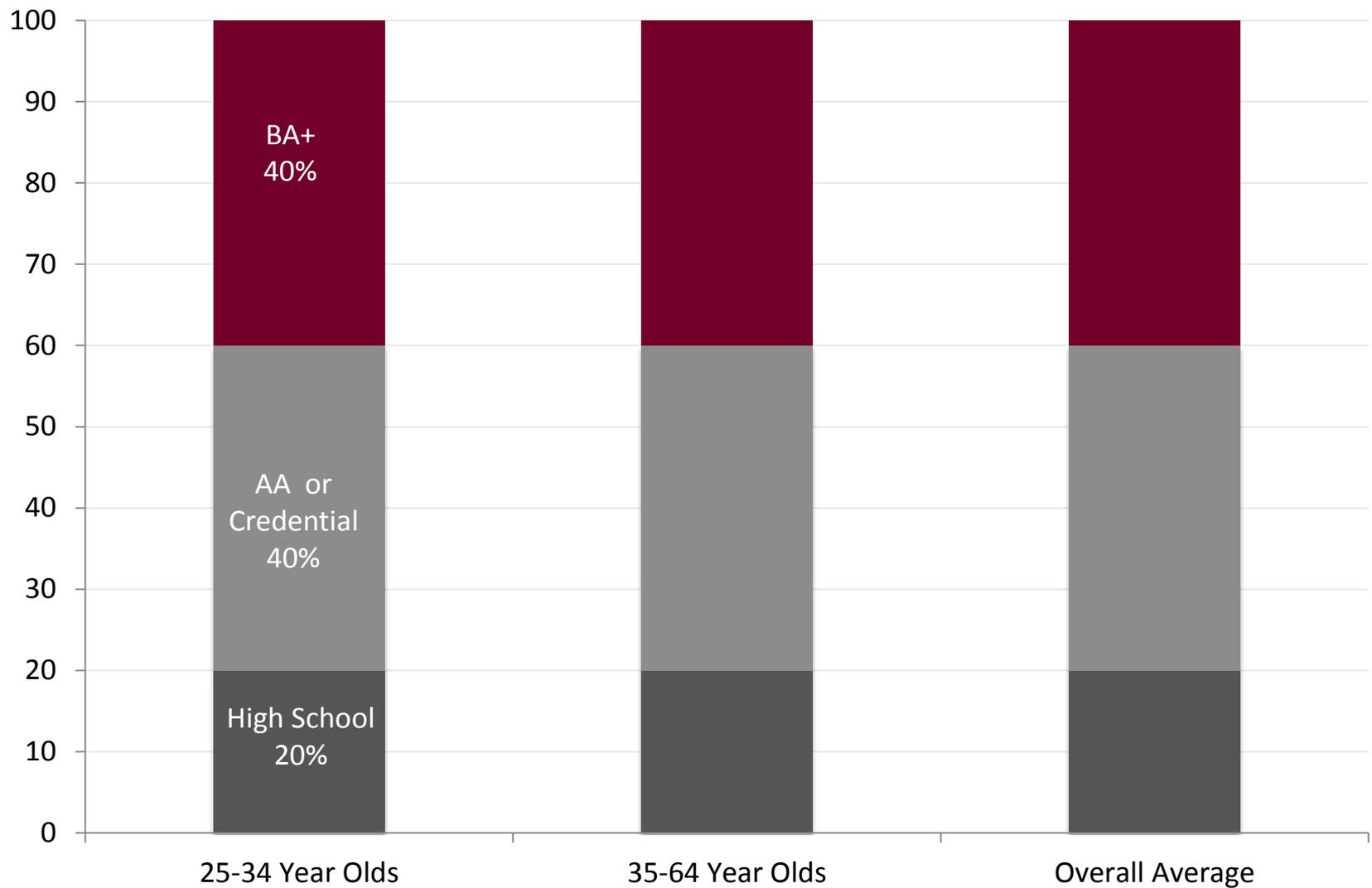
Education Beyond High School

# How does the goal apply to the stock and flow of working-age Oregonians?



**The Flow** = Oregonians who transition into the labor force

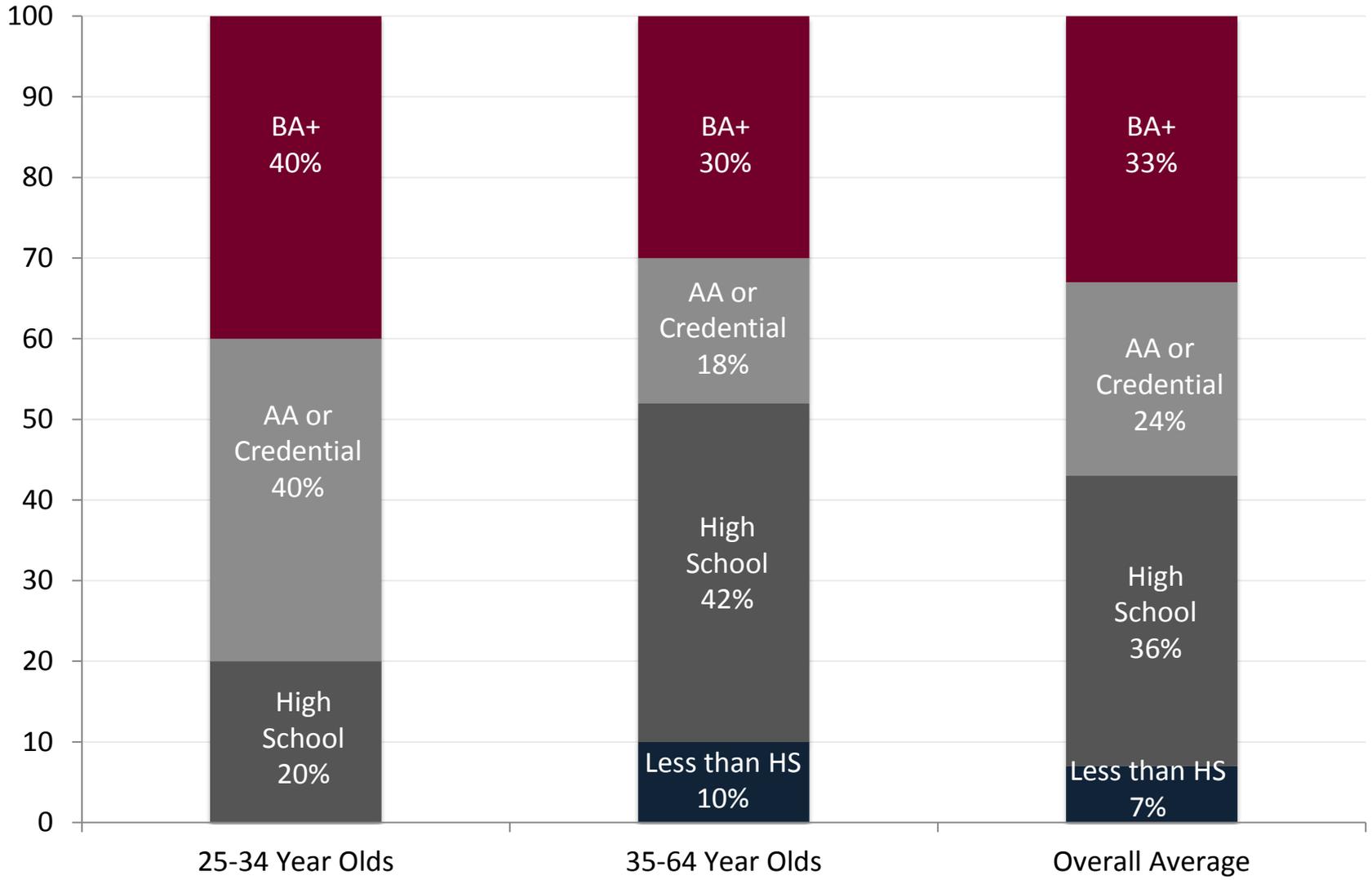
**The Stock** = The population working age adults



**40/40/20 for all Working-Age Adults**

# Focus on population in 2025?

- Strong emphasis on adult education to reach target
- Depends on migration and educational level of migrants as much as educating Oregonians
  - Migration patterns are variable
- Inadequacy of forecasting models
  - For setting institutional targets, requires estimating future residence of graduates
- Can lead to emphasis on capacity rather than performance
- How to set interim targets?



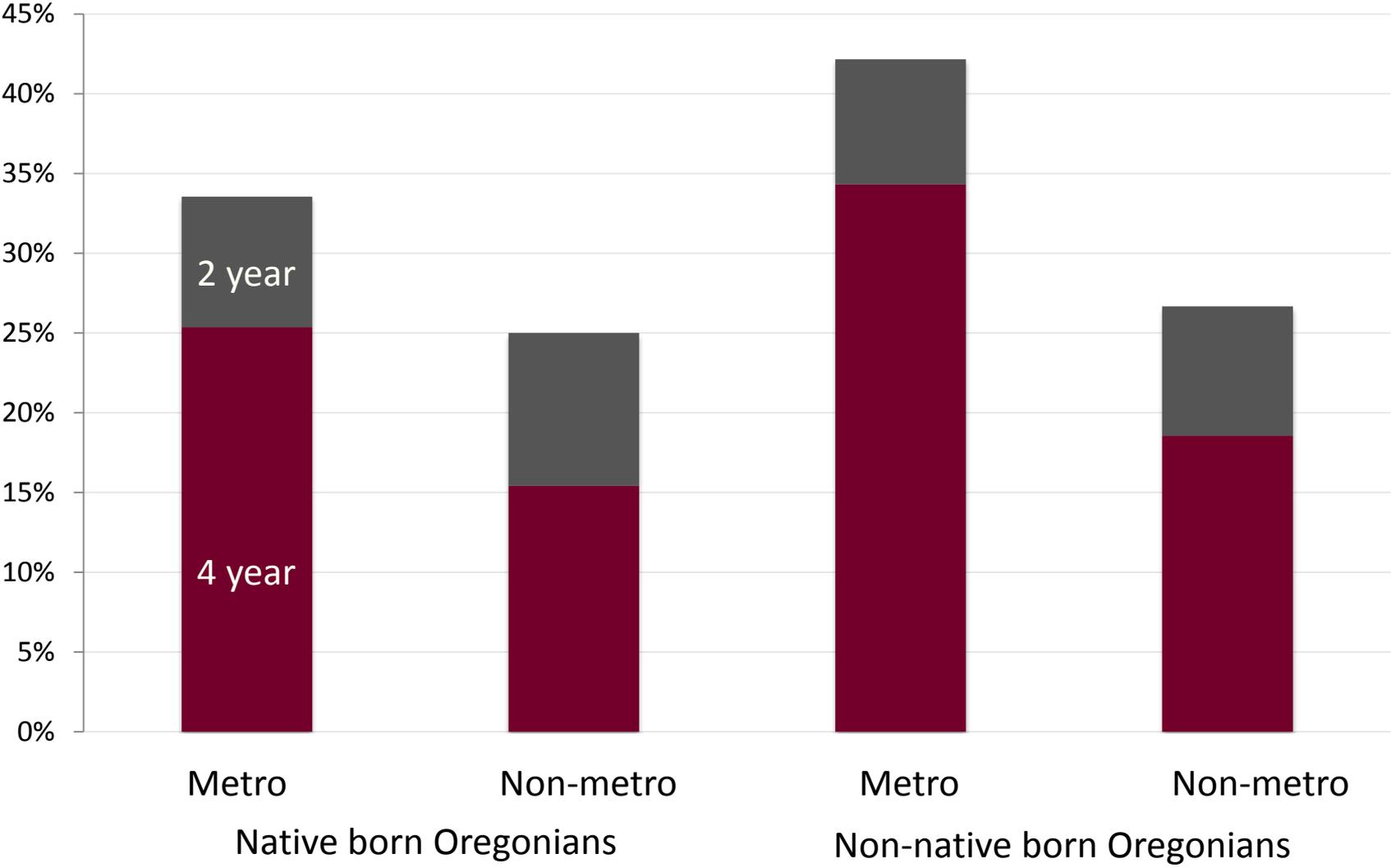
# 40/40/20 Focused on the Pipeline

# Cohort or “flow” target?

- Puts emphasis on performance of educational system for Oregonians
- Example:
  - Annually, approximately 50,000 9th-graders, so need 20,000 4-year and 20,000 2-year degrees annually
- But, hard and slow to track individual achievement, so settle for overall numbers of degrees granted?

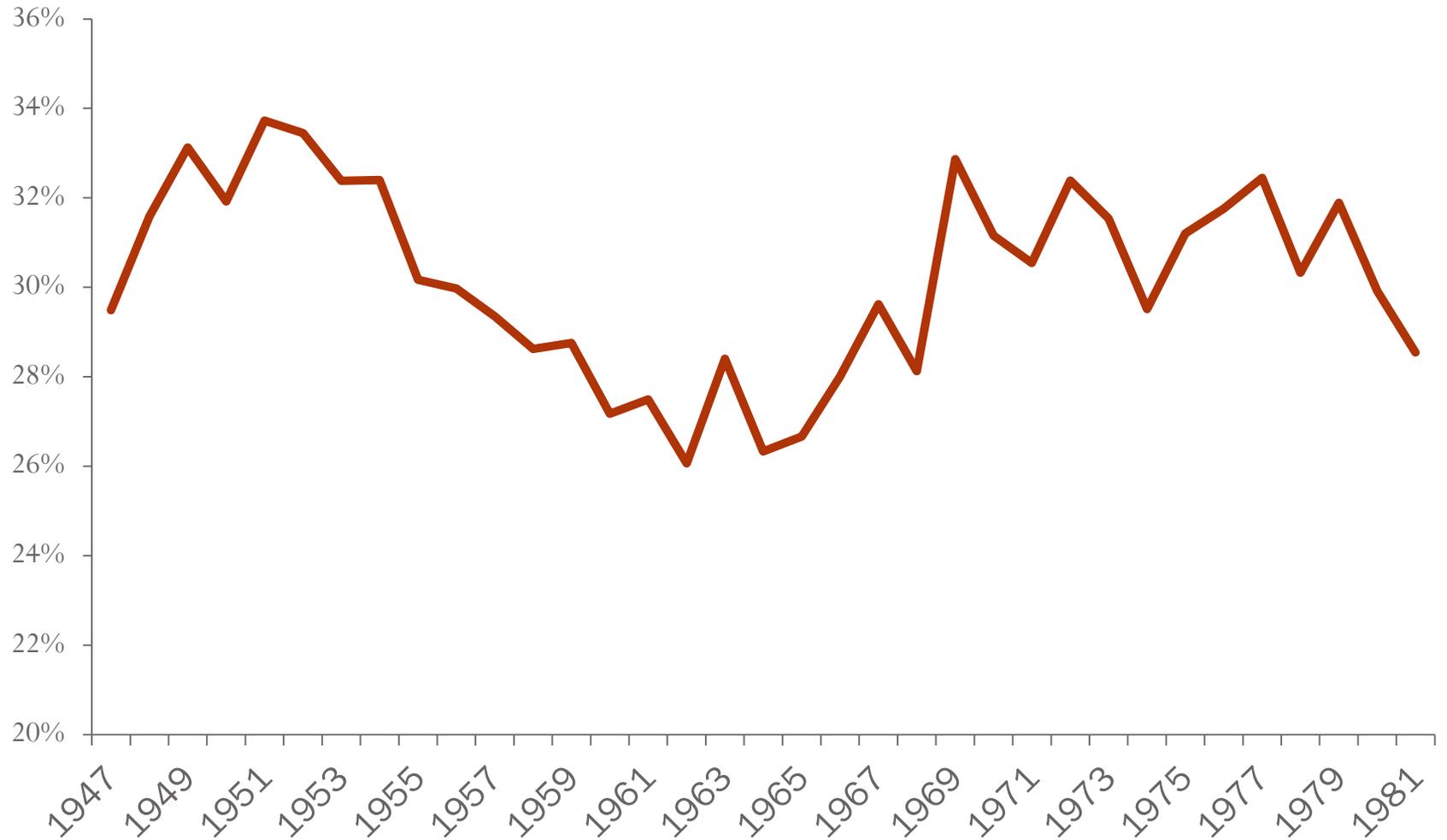
**Where does Oregon stand?**

# Educational attainment of Oregonians 25 and older



Source: ECO analysis of US Census ACS 2009-11 file

# 4-Year Degree Attainment of Oregon Residents, By Year of Birth



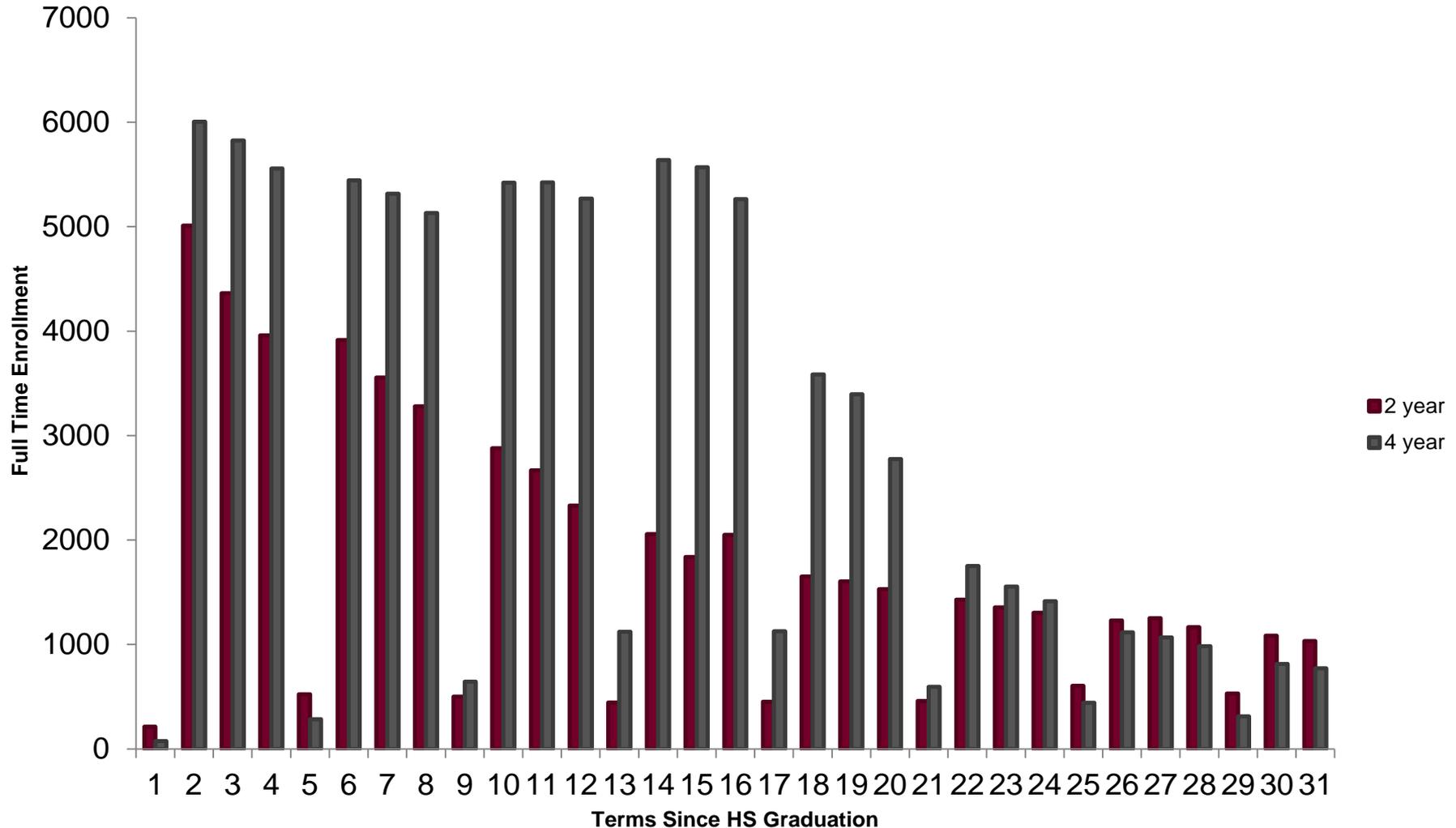
Source: US Census, ACS, 2005-2009 PUMS

# What we'd like to know

For the High School Class of 2005

- How many students enrolled in private institutions or left the state to pursue postsecondary education?
- How many ever enrolled in Oregon public institutions? And how many terms have they used?
- How many earned degrees or credentials?

# Class of 2005: Post-Secondary Enrollment Since HS Graduation



# Parting Thoughts

# Other Considerations

- Distribution of degrees across subpopulations
- Distribution of degrees across geography
- Types of degrees
- Link between degree targets and financing

## Refining 40-40-20 – suggestions for moving forward

Oregon's 40-40-20 goal, adopted into law in 2011,<sup>1</sup> has become shorthand for the efforts of the Legislature, Governor, the OEIB, and other state education boards, commissions, and agencies to significantly improve the education achievement levels and prosperity of Oregonians by 2025. While the concept may not be on the tips of the tongues of Oregonians generally, it has become a remarkably familiar one to most state policymakers and many education leaders. Still, two-and-a-half years have passed since its adoption, and it may be useful to reflect on and clarify its meaning and purpose. Particularly as the OEIB and the new Higher Education Coordinating Commission (HECC) begin to develop strategic plans for 2015-17 and beyond, they require a clearer sense of the ultimate outcome to which they are aspiring.

### The Purpose and Vision

The 40-40-20 goal intends to provide a clear target – a “North Star” aligned with Oregonians’ economic, civic, and social aspirations -- against which to generally gauge the state’s educational progress. A major purpose of this document is to help ensure that the goal is clear enough to help shape policy decisions, as well as permit the measurement of our progress against it.

We believe that 40-40-20 is equally significant for the distinct point of view it expresses about the capacity of learners and the responsibility of education system to support them. Fundamentally, 40-40-20 says that *every Oregonian* is capable of earning at least a high school diploma -- and that the job of policymakers, educators, and community members is to adopt the policies and practices to ensure they do so. If taken seriously, and not just as political rhetoric, these are powerful statements that represent significant departures from the implicit assumptions of the past. They imply the need for equally significant departures in educational policy and practice.

A note of caution: as we improve the rigor and clarity of 40-40-20, we recognize a risk that policymakers, the press, and/or the public would attempt to convert the goal into something that would drive rigid and arbitrary funding and accountability measures. We note that 40-40-20 alone – even with refinements along the lines of what is proposed here – will remain a rough yardstick.

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<sup>1</sup> As a result of SB 253 (2011), ORS 351.009 reads as follows: “The Legislative Assembly declares that the mission of all education beyond high school in Oregon includes achievement of the following by 2025:

- (1) Ensure that at least 40 percent of adult Oregonians have earned a bachelor’s degree or higher;
- (2) Ensure that at least 40 percent of adult Oregonians have earned an associate’s degree or post-secondary credential as their highest level of educational attainment;
- (3) Ensure that the remaining 20 percent or less of all adult Oregonians have earned a high school diploma, an extended or modified high school diploma or the equivalent of a high school diploma as their highest level of educational attainment.”

## **Why 40 and 40?**

The ambitiousness of the “upper” and “middle” 40 reflect a balancing of at least four sets of considerations: (a) projections about actual labor market demands; (b) a theory about education’s role in catalyzing widespread economic transformation and uplift; (c) intrinsic as well as indirect benefits of advanced education; and (d) what may be realistic given the experience of other states and countries.

The first consideration is a demand-side perspective that takes into account projections the Oregon Employment Department makes about the educational qualifications that will be necessary for actual jobs likely to be available in Oregon, using employer-reported data. In its December 2011 report to the Legislature, the OEIB noted that Oregon’s economy is shifting, with “dwindling numbers of well-paid jobs that require only a high school diploma – the millwork or manufacturing jobs of the past,” and “new jobs in this information age that increasingly demand post-secondary education.” This economic and demographic transition – one that economists actually observe in real and expected job openings – helps to justify ambitious targets for increasing the level of post-secondary educational attainment.

Still, as some critics have noted, a demand-side perspective alone would probably not justify targets quite as lofty as 40-40. At least under current economic models, it appears unlikely that 80% of job openings in Oregon will require a post-secondary credential or degree by 2025. Settling on 40-40 signifies the view of Oregon leaders that the state’s goals for education should not merely attempt to reflect the labor market we expect to have under current trends and conditions. Rather, they should reflect the economy and conditions of life that we wish to help create. 40-40-20 borrows heavily from the premise that significantly increasing the education levels of Oregonians will help to fuel an economic transformation for the state. This “supply-side” understanding of 40-40-20 predicts that higher levels of educational attainment will lead to job growth and income increases that today’s employers simply cannot predict.

Similarly, the ambitious targets expressed by 40-40-20 reflect an appreciation for all of the intrinsic and indirect benefits of education beyond a high school diploma, including better health, longer lives, greater family stability, less need for social services, lower likelihood of involvement with the criminal justice system, greater likelihood of effectively competing for employment in an unpredictable economy, and increased civic participation.

Finally, 40-40 is roughly aligned with the achievement rates of the highest performing states in the US today, suggesting that while the goal is ambitious, it is also attainable by 2025.

## **Definitional Issues**

Practically since its inception, 40-40-20 has raised a host of definitional issues/questions. In keeping with the spirit of 40-40-20 as a rough-hewn yardstick and not a laser-guided measuring tool, we intend for this document to provide more of a sense of direction than it does a dictionary of definitions.

### *Demography and Equity*

In keeping with what we believe has been the Legislature's, the Governor's, and the OEIB's intent – but not something that has been written into law or policy – we propose that 40-40-20 should be understood as applying equally to all demographics in Oregon. We are particularly concerned to ensure that historically underserved racial/ethnic groups, as well as rural Oregonians, are equally represented in each of the upper-40s.

### *All adults vs. the pipeline*

By the letter of the law, 40-40-20 applies to all adult Oregonians. As OEIB noted in its December, 2011 report, however: “While a rigid interpretation of the legislation would imply a massive effort in adult education, we do not believe it was the law’s intent. We would have to push even older adults, perhaps at the end of their working careers, into retraining, whether or not it benefited them or the state.” The OEIB also acknowledged that 40-40-20 should not apply strictly to the “pipeline” of young Oregonians who are scheduled to be in the high school graduating classes of 2025 and beyond; rather, “our efforts must address both current students who are moving along the education pathway and those who return to traditional and non-traditional pathways to complete or update their educations.”

We propose to understand 40-40-20 as a goal that applies to both, but with a few refinements and distinctions.

As a “pipeline” goal, we propose that 40-40-20 express our aspirations for students scheduled to be in the high school graduating class of 2025 (most of whom started kindergarten in Fall, 2012) and beyond. We propose that 40-40-20 express our aspiration that they complete high school or its equivalent, and that 80% of them earn a post-secondary credential or degree within a reasonable period of time of completing high school. Our goals for students scheduled to graduate from high school before 2025 should be based on a trajectory that will lead to 40-40-20 by 2025.

As a goal for the adult population, we propose that our focus should be adults between the ages of 25 and 60 who are residents of Oregon, regardless of where they received any formal education. We propose that by 2025, the level of post-secondary credentials and degrees obtained by this population should roughly reflect actual and projected labor market demands.

It should be noted that while we believe that the pipeline goal should continue to borrow heavily from the supply-side and intrinsic rationales for 40-40-20, our goals for educational attainment for working-age adults should be continually refined in light of actual and reasonably-projected job market opportunities. As a result, our post-secondary goals for this population are likely to evolve over time (in contrast to our “fixed” pipeline goal of 40-40-20).

### *The Middle 40*

It is well-understood that while two-year associates’ degrees are an important part of the middle 40, they do not represent its totality. But there is much less consensus about what else should “count.” While we are not prepared today to establish a definitive list of every credential that should be understood as part of the middle 40 – much less keep precise track of how many Oregonians have

obtained them – we can at least provide some guidance about the types of credentials that we believe are worthy of attention and support from Oregon policymakers and educators. Generally speaking, we believe that the Middle 40 should be construed broadly, and should include many credentials that are earned by completing courses at a conventional institution of higher education, as well as some credentials that may be achieved through workplace or other non-conventional education experiences. We believe that judgments about what count towards the middle 40 should be strongly informed by what employers value, and that as a result the list will require continual updating.

At present, we are prepared to recommend that the following certificates/degrees be cited as illustrative examples of what is intended with the middle 40:

- Two-year associates' degrees (AS, AGS, AAS, AAOT, etc.)
- A variety of certificates and certifications which meet certain criteria that may include (but not be limited to) third-party validation and/or the completion of an appropriate end-of-program assessment. These may include:
  - Career Pathways Certificates: typically less than six months in length and designed to break longer-term course work into a series of certificates that can be stacked to advance the individual along a career pathways. These are issued by the colleges, and based on employer input and labor market data.
  - One year certificates or diplomas issued by colleges
  - Competency-based AA degrees and certifications achieved in less than two years through approaches like credit for prior learning.
  - Registered apprenticeships whether delivered by organized labor or colleges
  - Industry-based nationally-recognized certificates and certifications. Examples include: Certifications issued by the National Association of Manufacturers; the National Institute for Metalworking Skills; the American Welding Society; CICSO certifications; Professional in Human Resources certifications issued by the Society for Human Resources Management; certificates issued by the National Automotive Technicians Education Foundation; Microsoft Certification, etc.
  - State licensure for medical professionals, etc.

## **Recommendations**

1. After a period of consultation with stakeholders, legislators, and the public, the OEIB should provide guidance that helps to clarify 40-40-20. In particular, it should focus on clarifying (a) its application to the adult working population, and (b) what constitutes the Middle 40.
2. For every credential that is understood as contributing to 40-40-20, staff should establish what attainment data is available to the state of Oregon and what is not in order to support the development of the longitudinal data system and achievement compacts.
3. The OEIB should instruct the HECC to develop recommendations for adult population educational attainment goals linked to workforce needs and opportunities. The HECC's recommendations should be developed in consultation with OWIB, CCWD, and the Department of Employment.

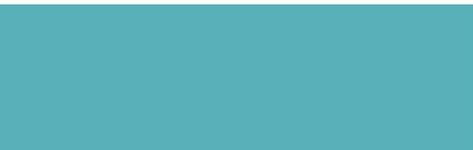
# OREGON'S 40-40-20 GOAL

## POSSIBLE DIRECTIONS FORWARD

Ben Cannon and Tim Nesbitt

Higher Education Coordinating Commission – January 9, 2014

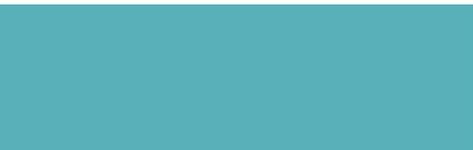
# PURPOSE AND VISION



# Purpose and Vision

- **40-40-20 is a “North Star” against which generally to gauge Oregon’s educational progress.**
- **40-40-20 is a statement of belief about student capacity and the imperative for system change.**

# LEGAL DEFINITION

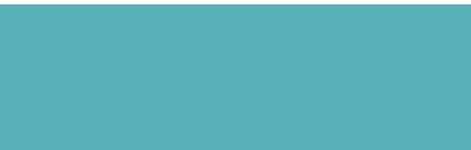


# ORS 351.009 (SB 253, 2011)

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**WHY 40-40?**



# Why 40-40? Four considerations



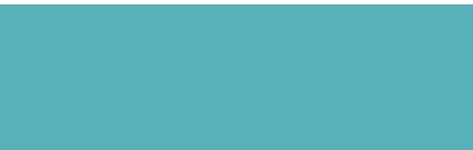
**Projections about economic demand**

**Education's role as an economic driver**

**Education's intrinsic and indirect  
benefits**

**The experience of other states**

# DEFINITIONAL ISSUES



# Demography and Equity



**40-40-20 should be understood as applying equally to all demographics in Oregon, with no populations significantly over- or under-represented at any level**

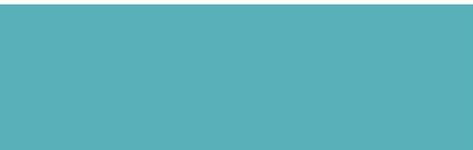
# Adults versus the Pipeline

- **As a “pipeline” goal, applying to the expected high school class of 2025 (and beyond).**
- **As a goal for the adult population, applying to working-age adults in 2025 (and beyond).**
- **The latter goal should be continually refined based on actual labor market needs and valuable certificates, and may not be 40-40.**

# The Middle 40

- **A broad conception of credentials that “count,” strongly informed by what employers value.**
- **Examples:**
  - **Two-year associates degrees**
  - **Career pathways certificates**
  - **Industry-recognized certificates**
  - **Registered apprenticeships**

# RECOMMENDATIONS



# Recommendations

- 1. The OEIB should provide guidance that clarifies 40-40-20: especially its relationship to the adult population and what constitutes the middle 40.**
- 2. The OEIB should instruct the HECC to develop recommendations for adult population educational goals linked to labor market demands.**
- 3. Staff should develop a compendium of Middle-40 credentials, including whether or not attainment data is available (or might be approximated) for each.**



Oregon Education Investment Board

**Statewide Longitudinal Database  
System for P-20W**

# Presentation Overview

- Longitudinal Data
- Problems and Opportunities
- The Consequence of Doing Nothing
- Alternative Solutions
- Recommended Solution
- High Level Project Plan
- Questions

# Longitudinal Data

Data Over Time

*What has happened and where am I going?*

	Retrospective	Prospective
Students	What have I achieved?	How do my goals shape my educational pathway?
Schools and Agencies	What is our success rate for students in their next steps?	How can we improve our programs?
Policy Makers	What is our return on investments with respect to 40/40/20 goals?	What new investments should we make? What policies changes should we pursue?

# Problems

- Policy makers cannot measure the effect of strategic investments on 40/40/20 goals
- Data systems across the P-20W continuum are disconnected
- Students and families do not have access to their own record of achievements

# Opportunities

- Policy makers can use an Oregon longitudinal database to research, identify best practices, and construct better policy recommendations
- The achievement compact process could be improved over time; funding could be tied to outcomes
- Common or aligned systems increase efficiency and support equitable outcomes
- When students are agents in their own learning and goal setting, they perform at a higher level

# The Consequence of Doing Nothing

- Failure to meet the statutory requirement from Senate Bill 909
- The Legislature, the OEIB, HECC, and other boards and commissions continue to make investments and consider policy with insufficient outcome data
- P-20W systems remain disconnected and incompatible
- No equitable access for students and families; no transformative effects

# Alternative Solutions

- Consolidated solutions – OEIB creates a new statewide data warehouse and longitudinal database to solve all of the three problems. Could involve new systems in K-12 and post-secondary schools
- Federated solutions – the OEIB builds on existing systems and provides support to ODE and HECC

# Selection Criteria

- Alignment to OEIB goals – 30%
- Cost – 15%
- Risks – 25%
- Security – 20%
- Future Opportunities – 10%

# Recommended Solution

- A federated solution with a new governance structure
- ODE will maintain a P-12 data warehouse and longitudinal database, including early learning data
- HECC will maintain a post-secondary data warehouse and a longitudinal database that shares education and workforce data
- OEIB will get data from ODE and HECC to create a de-identified longitudinal database and Personal Education Record

# High Level Project Plan

- Year One:
  - Deploy de-identified longitudinal database for outcomes and investments and policy work
  - Support ODE and HECC
  - Convene stakeholder groups to design Personal Education Record (PER)
- Year Two:
  - Support ODE and HECC
  - Draft PER design and requests for proposals
- Year Three:
  - End support for ODE and HECC
  - Develop and deploy PER

# Questions

- Problems and opportunities?
- Equity lens?
- Transformation?
- Will it work? How?
- Timeline?
- Risks?
- Privacy?
- Impact? Governance?
- Costs? Burden on educators?
- Expected return on this investment?



## Executive Summary

### Draft Communications and Engagement Plan

#### + Goals:

- Build a framework to guide the articulation of our vision to dramatically improve student outcomes
- Devise engagement strategies to galvanize communities around the state to share collective responsibility for student success

#### + Timeframe:

The plan is intended to span February 1, 2014-June 30, 2015

#### + Target Audiences:

##### Primary Audiences:

- Legislators
- Education Leaders
- Teachers & Faculty
- Parents, Families & Students

##### Key Influencers:

- Business & Community Leaders
- Media
- Advocacy organizations and non-profit partners

#### + Approach:

- **Plotted statewide engagement** from August-December 2013 by region of the state, group and subject matter to understand where gaps currently exist that should inform engagement priorities for inclusion in this plan.
- **Conducting nearly 50 interviews** with representatives from the education continuum, parents, students and community based organizations from across the state to understand current perspectives, key issues, and opportunities to align communication and engagement efforts.
- **Incorporated key dates and communications opportunities from ongoing efforts** such as the Statewide Reading Campaign, OEIB Strategic Investments, Regional Achievement Collaboratives, and the Early Learning Hubs.

#### + Important Takeaways:

- There is widespread and universal respect for Nancy and her approach to leadership. Stakeholders believe that Nancy is *the right person at the right time* to activate this important work on behalf of students. This is important to capitalize on.
- Though we've made progress on describing the role of the Chief Education Officer and the OEIB in Dr. Golden's short tenure, there is still confusion about what exactly the Chief Education Officer *can and will* do to impact education in Oregon. This is particularly true the further individuals get from a leadership position in education (i.e. teachers, parents).



- Interviewees felt strongly that one of Nancy's biggest assets is her ability to engage people, even more so than public speaking. This presents an opportunity to strategically leverage her time, to create high value face-to-face engagement in communities around the state.

#### ✚ Legislators

##### ➤ Recommendations:

- Develop materials to visually articulate OEIB's vision and theory of change
- Provide research briefs and case studies to support legislators in evidence-based decision-making
- Targeted meetings with legislators
- Strategically engage legislators in community forums and school visits in their region

#### ✚ Education Leaders

##### ➤ Recommendations:

- Seek deeper engagement opportunities (ex. dialogue and Q & A) in addition to continuing to attend larger conferences and gatherings
- To extend reach, create targeted videos with a message from Nancy that can be shared detailing the vision and inspiring leaders to drive change in support of students
- Use collateral materials and OEIB Bulletin to equip leaders with key information about the vision, priorities and the role they can play
- Set strategic visits based on locale, population served and link to target outcomes

#### ✚ Teachers & Faculty

##### ➤ Recommendations:

- Convene an Educator Round Table group including K-12 & higher education leaders
- Seek deeper engagement opportunities (ex. dialogue and Q & A) in addition to general appearances at events geared toward teachers and faculty
- Contribute to existing communication targeting educators (OEA Magazine etc.)
- Create a video message and discussion guide to provide clarity and inspire that can be played during an in-service to start the fall 2014 school year and combined it with time for discussion

#### ✚ Parents & Families of Students

##### ➤ Recommendations:

- Community-based forums around the state targeted towards parents from: Communities of Color; ELL communities; rural communities; students experiencing disabilities
- The Statewide Reading Campaign
  - Leverage the PTA and other traditional parent engagement groups and encourage their focus on literacy
  - Deeply leverage community based and culturally specific organizations to engage and mobilize parents in efforts to read to their children. This should include both materials to raise awareness for the importance of reading and tools for parents to use to effectively support their student(s) in reading.



- Participation in annual PTA conference (this year focused on literacy) and strategic submissions in the PTA newsletter

## + Students

### ➤ Recommendations:

- Convene a Student Advisory Group comprised of high school, college and university students from across Oregon
- Participate in key forums designed to engage students (NW Student Leadership Conference, Cesar Chavez Leadership Conference, Oregon Students of Color Conference)
- Attend a Board Meeting with OSA members and pair it with a tour of the local campus
- Engage students in the Statewide Reading Campaign both with service projects related to reading and via social media channels

## + Communications and Engagement Mechanisms:

Due to the timeline, number of key constituents and sheer size of the state, leveraging existing efforts both by the OEIB and those of partnering organizations to deliver key messages will be critical. Likewise, it is important to strategically prioritize Dr. Golden's time and to deploy all staff and agency leaders to share in delivery of the key messages. In addition, it will be critical for OEIB Board Members to represent OEIB in their networks and communities around the state. The following tools will be used to compliment the specific targeted strategies already mentioned:

- **Face-to-Face Communication** (legislative briefings, speaking engagements and conferences)
- **Targeted Visits** (education institutions, non-profits etc.)
  - Includes coordinating locations of Board Meetings for the birth-college & career continuum to ensure state-wide presence
- **Events** (targeted participation in community events & OEIB led forums)
- **Traditional Media**
- **OEIB Website & Weekly Bulletin** (targeted videos, translation to multiple languages, integration of all birth-college & career partners on OEIB website)
- **New Media** (Twitter, online forums etc.)
- **Collateral Development** (talking points, fact sheets, power point slides etc.)
- **Mobilization of Stakeholder Messengers** (leveraging existing efforts of core stakeholders and trusted messengers to extend reach and frequency of communication. These messengers will include, among others, the OEIB Board and those interviewed as part of putting the plan together.)
- **Development of a Communications Cabinet** comprised of a lead communication staff each agency from the birth to college and career continuum, the Governor's office and Workforce Development.

## + Key Messages:

Draft and working messages to be developed in alignment with Governor's key messaging

## + Specific Targeted Communications Goals by Medium:

To be driven by key messages

The logo features the acronym 'OEIB' in a bold, green, sans-serif font. The letters are contained within a white, irregular shape that resembles a torn piece of paper, set against a solid green background.

**OEIB**

Oregon Education Investment Board

**Draft Communications &  
Engagement Plan**



**STATEWIDE ENGAGEMENT AUGUST-DECEMBER 2013**



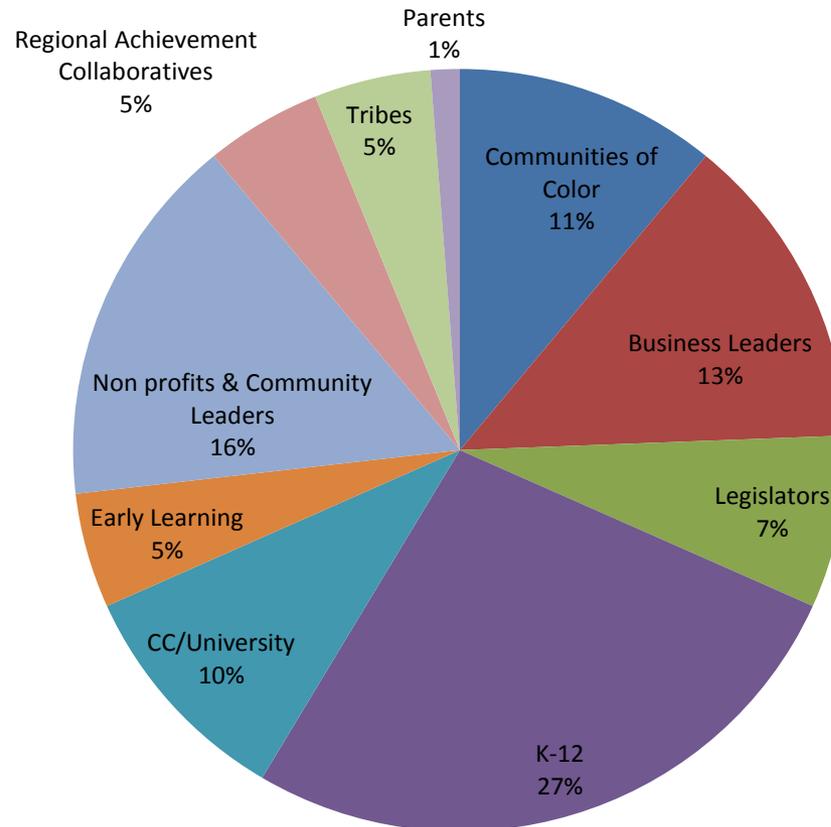


**STATEWIDE ENGAGEMENT BY FREQUENCY AUGUST-DECEMBER 2013**



# Engagement by Group

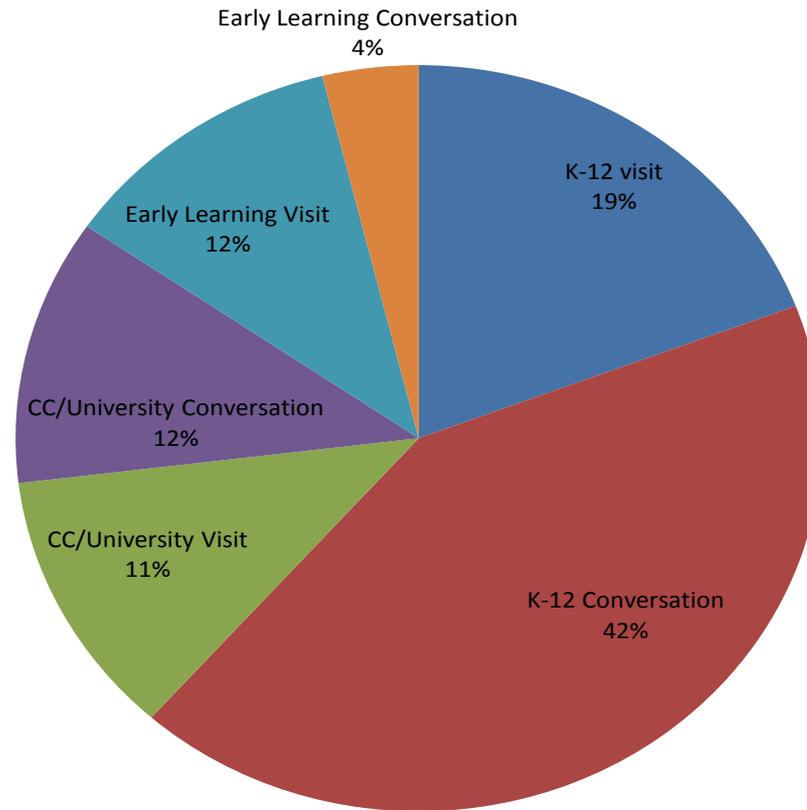
August-December 2013



Percentages calculated by tracking all conferences, events and visits by Dr. Golden between August and December 2013 where five or more representative members from a group were present. Many were attended by multiple groups. This is intended to show ALL interactions both “light” and those intended to involve deeper engagement.

# Birth to College & Career

## Type of Engagement August-December 2013



# Stakeholder Interviews

- Conducted interviews with nearly 50 stakeholders
  - Birth to College & Career Continuum
  - Educators, Administrators
  - Students & Parents
  - Communities of Color
  - Urban & Rural
  - Member Organizations Representing Educators & Education Leaders
  - Community Based Organizations

# Important Takeaways

- Widespread and universal respect for Nancy and her approach to leadership. A belief that Nancy is *the right person at the right time* to activate this important work on behalf of students.
- Confusion about what exactly the Chief Education Officer *can and will* do to impact education in Oregon. This is particularly true the further individuals get from a leadership position in education (i.e. teachers, parents).
- One of Nancy's biggest assets is her ability to engage people, even more so than public speaking. This presents an opportunity to strategically leverage her time, to create high value face-to-face engagement in communities around the state.

# Incorporate Existing & Ongoing Efforts

- Key dates and communications opportunities from ongoing efforts such as the Statewide Reading Campaign, OEIB Strategic Investments, Regional Achievement Collaboratives, and the Early Learning Hubs, among others to determine opportunities to best leverage and align existing work.

# Communications & Engagement Recommendations

- **Legislators**
  - Develop materials to visually articulate OEIB's vision and theory of change
  - Provide research briefs and case studies to support legislators in evidence-based decision-making
  - Targeted meetings with legislators
  - Strategically engage legislators in community forums and school visits in their region

# Communications & Engagement Recommendations cont.

- **Education Leaders**

- Seek deeper engagement opportunities (ex. dialogue and Q & A) in addition to continuing to attend larger conferences and gatherings
- To extend reach, create targeted videos with a message from Nancy that can be shared detailing the vision and inspiring leaders to drive change in support of students
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# Communications & Engagement Recommendations cont.

- **Students**

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- Attend a Board Meeting with OSA members and pair it with a tour of the local campus
- Engage students in the Statewide Reading Campaign both with service projects related to reading and via social media channels

# Additional Tools for Outreach

- **Face-to-Face Communication** (legislative briefings, speaking engagements and conferences)
- **Targeted Visits** (education institutions, non-profits etc.)
  - Includes coordinating locations of Board Meetings for the birth-college & career continuum to ensure state-wide presence
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- **Mobilization of Stakeholder Messengers** (leveraging existing efforts of core stakeholders and trusted messengers to extend reach and frequency of communication. These messengers will include, among others, the OEIB Board and those interviewed as part of putting the plan together.)
- **Development of a Communications Cabinet**

# Next Steps

- Insert key messages
- Set specific communication & engagement goals
- Activate the plan and work to build momentum and engagement towards each and every student in Oregon receiving a high quality education that prepares them for the future!

# Discussion

- Feedback or Questions
- What tools do you, as Board Members need to be effective ambassadors of Oregon's vision for education in your communities?



Oregon Education Investment Board



# Oregon Department of Education Strategic Plan Progress Report to OEIB

*January 14, 2014*

**Rob Saxton**

Deputy Superintendent of Public Instruction

# ODE Goals

## Learners

Every student graduates from high school and is ready for college, career, and civic life.

## Educators

Every P-12 organization is led by an effective administrator, and every student is taught by an effective teacher.

## Schools & Districts

Increase performance for all schools and districts in order to create systems of excellence across the state.

## Communities

ODE meaningfully engages parents, stakeholders, and the larger community to help make Oregon's schools the best in the country.

## ODE

Make ODE the best place to work.

# Learners

Every student graduates from high school and is ready for college, career, and civic life.

1. Integrate early learning programs and providers across the relevant state agencies so every student enters kindergarten ready to learn.
2. Implement statewide literacy programs so all students read by third grade.
3. Design and implement an integrated and comprehensive system to ensure every student graduates ready for college, career, and civic life.
4. Help districts implement effective practices in order to close achievement gaps.
5. Improve quality of special education services to close achievement gaps.

- ✓ Approximately 42,000 students participated in the kindergarten assessment
- ✓ \$9.6 million CTE funds awarded to 20-25 district programs that are geographically diverse
- ✓ Strategic Investment's Phase 1 and 2 are completed and Phase 3 is on track
- ✓ English Language Proficiency standards are adopted
- ✓ Equity Unit organized to support progress for traditionally underserved students across the state
- ✓ 60% of Special Education professional development offerings and trainings are integrated and coordinated across the agency

# Educators

Every P-12 organization is led by an effective administrator, and every student is taught by an effective teacher.

1. Help all districts implement the new educator evaluation system across the state for all educators and start to connect evaluation results to meaningful professional development.
2. Launch Teaching and Learning Network focused on developing exceptional educators and implementing effective practices.
3. Close the educator equity gap to ensure equitable distribution of the most effective educators in high poverty schools, bi-lingual educators where needed, and educator diversity reflects the student population of school.
4. Work with OEIB and TSPC to improve the preparation, licensure, retention, and effectiveness of new educators.

- ✓ 100% of Educator Evaluation System assurances submitted
- ✓ Hosted 12 regional workshops on educator evaluation systems with our partners
- ✓ Educator Effectiveness Implementation Plan with staff hired and mobilized
- ✓ Regional Peer Review Panel guidelines and training in progress for fall 2014 implementation

Network for Quality Teaching and Learning  
Portal Staff hired

## Schools & Districts

Increase performance for all schools and districts in order to create systems of excellence across the state.

1. Systematically help districts implement Common Core, Next Generation Standards, and new statewide assessments.
  2. Identify and improve Oregon's chronically underperforming schools
  3. Measure, analyze, and report out Oregon's progress to 40/40/20.
  4. Ensure districts provide healthy and safe learning environments for students.
  5. Conduct all federal compliance and on-site monitoring visits in a positive and respectful way that leads to improved outcomes for students.
- ✓ Next Generation Science Standards presented to State Board
  - ✓ 100% of Focus and Priority Schools have begun implementing prescribed Corrective Action Plan (CAP) indicators
  - ✓ Common Core State Standards Implementation scaling up integration underway
  - ✓ Smarter Balanced field test developed, test blueprints received, and accommodations manual and policies received for comment
  - ✓ Define the progress measures and develop the methodology for measuring progress toward 40-40-20

# Communities

ODE meaningfully engages parents, stakeholders, and the larger community to help make Oregon's schools the best in the country.

1. Prioritize building and maintaining partnerships with historically underserved communities.
2. Provide clear and timely information to customers and stakeholders.
3. Proactively inform and engage the Legislature and implement 2013 legislation.
4. Proactively and strategically work with relevant state agencies to deliver services to support students' and families' overall well-being, so schools can attend to students' educational needs.

- ✓ Increased overall customer service rating to 71% and increase timeliness to 64%
- ✓ Released new School Report Card
- ✓ 100% of bills for which ODE has responsibility for implementation are assigned to staff member and priority 1 bills have a work plan in place
- ✓ 80% of 2013-14 funding for 3232 and 3233 is distributed to the field
- ✓ 100 percent of reports due to Legislature are delivered on or prior to deadline
- ✓ 4.0 FTE Transition Specialist and 1.0 FTE Secondary Transition Coordinator hired for Executive Order
- ✓ 3 high schools selected for integration of Foster Youth work (Stability Matters)

Decision made on Website Improvements

1. Attract, retain, and develop top talent to ODE..
2. Increase diversity of ODE's workforce .
3. Reorganize ODE in order to ensure integration and collaboration across all offices.
4. Deliver excellent internal customer service and improve communication and efficiency within ODE..

- ✓ Contractor secured to review agency's policies, procedures, processes, and goals and make recommendations
- ✓ 72% of applicants are qualified
- ✓ Reorganization fully implemented
- ✓ Two surveys administered to obtain feedback on staff satisfaction
- ✓ 75% of staff report being more integrated
- ✓ Centralization of back-office functions
- ✓ ODE's workforce surpasses the state's affirmative action goals

# Next Steps for June 2014

-  Review interim metrics to ensure alignment with June 2015 metrics and progress toward goals
-  Goal Leaders monitor progress toward June 2014 metrics with key staff
-  Goal Leaders formally report on progress and identify areas for additional support
-  Align agency Key Performance Measures with strategic plan for 2015-17 biennium