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OREGON EDUCATION INVESTMENT BOARD

Planning Meeting

Tuesday August 12, 2014

9:30am – 5:00pm

Chemeketa Eola Viticulture Center
Riesling / Chardonnay Rooms
215 Doaks Ferry Road, NW
Salem, OR 97305

There will be a working lunch for board members.

AGENDA

- 1. Review the Charge of OEIB, Reflect on Successes and Articulate Areas of Improvement**
- 2. Achievement Compacts Recommendation**
Peter Tromba, Director of Policy and Research, OEIB
- BREAK - Working Lunch**
- 3. Review Progress on the Scorecard**
Peter Tromba, Director of Policy and Research, OEIB
- 4. Outcomes and Investment Strategic Investment Recap and Recommendations**
Whitney Grubbs, Chief of Staff, OEIB
- 5. Communicating the Unique Value and Impact of the OEIB**
Kristin Gimbel, Communications Director, OEIB
- 6. Logistics of Board**
Dr. Nancy Golden, Chief Education Officer, OEIB
- 7. Public Comment**
- 8. Adjournment**



Senate Bill 909

- Passed in 2011.
- Created the board and outlined specific charges.
- Creates an efficient and accountable zero-to-20 funding and governance system for public education, from early childhood services through post secondary education and training for career.
- Creates strategies for development of a unified public education system from early childhood through K-12 and post-secondary education.
- Includes the use of strategic investments to achieve the state's education outcomes. Outcomes include Senate Bill 253 (2011) as 40/40/20 goals for high school and college completion by 2025.
- Established the Early Learning Council as an entity to subordinate to the OEIB.

Role of Oregon Education Investment Board

SB 909:

- Established OEIB to help ensure all public school students in the state reach the education outcomes established for the state.
- Appointed a Chief Education Officer to oversee the unified public education system.
--CEO has direction and control over the positions related to the organization of the P-20 system.
- The board shall establish goals by overseeing a public education system that begins with early childhood services.
- Section 5 of Senate Bill 909 charged the Early Learning Council with formulating recommendations for the Oregon Education Investment Board (OEIB) to merge, redesign or improve the coordination of early childhood services.
- The Early Learning Council should engage in a joint planning process with the State Interagency Coordinating Council on Early Intervention/Early Childhood Special Education to consider the unique complexities of these services and make recommendations to the OEIB and legislature related to these services.
- Under the direction of OEIB, the Higher Education Coordinating Commission (HECC) will develop strategic plans for the achievement of state higher education goals.
- OEIB is charged with creation and maintenance of an integrated, student-based, statewide educational data system to monitor expenditures and outcomes to determine returns on statewide education investments.

Source:

http://www.oregonedccc.org/wp-content/uploads/pdf/Aug2011Retreat/sb909_enrolled.pdf

<http://www.ode.state.or.us/search/page/?id=4073>



Senate Bill 1581

- Passed in 2013.
- Identifies positions that will be under direction of the Chief Education Officer for matters related to design and organization of Oregon's education system.
- Describes some of the terms that must be included in the achievement compact.
- Includes a state and local accountability for education outcomes.
- Creates annual achievement compacts for K-12 schools and colleges to provide a measure of how Oregon schools are performing and how they intend to improve.
- Assists Oregon schools engage in goal setting to set clear, measurable objectives.
- Ensures that all students reach the education outcomes established for the state.
- Expanded and clarified the Higher Education Coordinating Commission's duties relative to the OEIB.
 - Advise OEIB on state goals and achievement compacts for public universities, community colleges, and the Oregon Student Access Commission.

Role of Oregon Education Investment Board SB 1581:

- Requires education entities to enter into achievement compacts with the OEIB.
- Appoint Chief Education Officer with authority to serve at the pleasure of the board to carry through goals and objectives.
 - Authorizes the Chief Education Officer to direct other state education officials in the design and organization of the state's unified public education system to streamline the P-20 system.
- Requires an agreement between the OEIB and the governing body of an education entity to reach the achievement compacts (terms established by board).
- Requires that all of the state's education entities enter into annual achievement compacts with OEIB beginning with the 2012-13 school year.

Sources:

<http://www.michaeldembrow.com/rep/misc/SB1581.pdf>

<http://stand.org/national/blog/2012/03/15/oregon-legislature-approves-achievement-compacts-adjourns-2012-session>



Board Members Roles

In order to achieve the 40-40-20 goal, the Oregon Education Investment Board (OEIB) was created to:

1. Build a seamless pathway of education for Oregon students from birth through college and career by:
 - a. Aligning early learning, K-12 and post-secondary agencies
 - b. Focusing on key student transitions (age 3 to grade three and high school to post-secondary/workforce)
 - c. Identifying and recommending policies and investments to help students overcome barriers to success particularly at the key transitions
2. Establish and monitor key outcomes for students that will ensure they are on track to move successfully along the educational pathway. These outcomes are articulated on the achievement compacts.
3. Recommend key investments to the Governor and legislators. These investments are based on a tight-loose system and designed to increase outcomes articulated on the achievement compacts. There are three types of investment, which are:
 - a. Policy investments (e.g. Equity lens)
 - b. Legislative investments (e.g. SB 1581 that established achievement compacts)
 - c. Financial investments
4. Play a key role in leading the policy and budget recommendation process by providing a thorough analysis of the investments that are recommended by subcommittee members and education agencies.
5. Use best practice data developed by the Research and Policy team to inform investment recommendations; and leverage data on investments made to analyze the effectiveness of the investments on driving improved student outcomes (e.g. research on the achievement compacts).
6. Create a longitudinal data system that provides data from birth through college and career.
7. Hire and evaluate the Chief Education Officer.



WE FOCUS ON REACHING 40-40-20 BY DRIVING COLLECTIVE RESPONSIBILITY

2013 - 2015 OBJECTIVES



OEIB PRIORITIES: What We Do

IMPORTANT THROUGHOUT:

Educational Equity • Poverty to Prosperity

KEY TRANSITION POINTS:

Early Literacy • High School Through College & Career

WHO WE ARE

- We are a new agency
- Our work is urgent
- We make a difference for all of Oregon's students

HOW WE WORK

- We build partnerships
- We look P-20
- Our work is public

OEIB SCORE CARD: Key Outcomes

Student Outcomes		System Outcomes		Equity Outcomes	Educator Outcomes
<ul style="list-style-type: none"> • Increase Children Ready for Kindergarten • Increase 3rd Grade Reading Proficiency • Increase 8th Grade Math Proficiency • Increase 9th Grade On Track w/Credits 	<ul style="list-style-type: none"> • Increase 5 Year Cohort Graduation Rate • Increase Certified Associates Degrees & Transfers • Increase Degrees Bachelors & Higher 	<ul style="list-style-type: none"> • Standards and Assessment Aligned P-20 • Functional P-20 Policy Data System • Achievement Compacts • Policy Barriers Reduced 	<ul style="list-style-type: none"> • Strong Partnerships & Accountability Across P-20 • Outcome-Based State Budget • Key Initiatives Analyzed for ROI • Stakeholders Informed 	<ul style="list-style-type: none"> • 5th Grade ELL Reading Proficiency • Decrease Achievement Gaps in All Metrics • Focus & Priority Schools • College Enrollment Rate for Underserved Students 	<ul style="list-style-type: none"> • Increase Non-White Hispanics or Non-Native English Educators • Increase Educator Satisfaction with Professional Support

Policy Recommendation Framework for Achievement Compacts: Maintaining Momentum and Creating Statewide Focus

Summary of Recommendations

1. Significantly reduce school district, community college, and public university reporting requirements and make the achievement compact process more integrated, meaningful, and actionable
 - a. Goal setting in 1 or 2 focus areas only
 - b. 3 year goals with theories of action
 - c. Timeline that fits with school district/institutional processes
 - d. Analyze how achievement compact work can replace other required reporting
2. Provide OEIB focus and investment to produce aligned efforts and increased results
 - a. K-12: 3rd grade reading and high school completion
 - b. Post-secondary: new productivity metric
 - c. Systemic: equity, chronic absenteeism, poverty
3. Maintain achievement compact metrics for measurement of statewide progress and accountability
 - a. Oregon Department of Education (ODE): Report cards and new district report card
 - b. Higher Education Coordinating Commission (HECC): New institutional report card

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Vision

The Achievement Compact process has been successful throughout Oregon in determining key metrics that show how school districts, community colleges, and public universities are performing with respect to statewide goals. Attention to improving performance on these metrics has caused school districts and institutions to gain better understandings and to change practices. The requirement to set goals for disaggregated groups has promoted discussions of the practices that lead to equitable outcomes.

Based on input from the field and an analysis of the how the Achievement Compact process aligns with local strategic goal setting and budgeting, the OEIB has the opportunity to improve. A more focused goal setting process that addresses primary outcome areas will allow for better alignment and coherent technical assistant and staff development. A longer term for the goals will support multi-year planning and sustained effort. And the embedding of the achievement compact metrics in the key performance measures for the Oregon Department of Education and the Higher Education Coordinating Commission will codify these evidence-based targets.

The Achievement Compact is a handshake between the OEIB and local institutions, a promise to exchange resources and investments for higher and more equitable outcomes. During the 2013-2014 academic year, the OEIB and its partner agencies have worked for improvement on all the outcome metrics and have concentrated effort in particular places. The vision for the revised Achievement Compact process is one where this type of laser focus activates more powerful responses statewide.

Background and Opportunities

A tension exists in educational systems between the benefits of an aligned system versus the benefits of local control. This is true in the context of a teacher in a school, a school in a district, institutions and districts managed by state agencies, and the states with respect to the federal government. The local and national historical contexts in the United States create unique dynamics; Oregon tends to favor more local systems. Reduced resources and increased expectations have revealed inefficiencies, barriers, and varyingly successful practices that can be improved with better systemic alignment. The OEIB was created in this context and the overall improvement of the state towards college and career readiness for all and the targets of 40/40/20 define its success.

OEIB has governance responsibilities over the Early Learning, the ODE and the HECC. This allows for high level coordination and the creation of seamless systems under the direct control of the state and provides for a single convener for critical conversations between the public

education system and other agencies and community organizations. Recent examples of this include: the coordination of Early Learning and the ODE with successful culturally specific providers to craft recommendations to achieve 3rd grade reading fluency for all students; the support for the work of the Accelerated Learning Committee which brings together the K-12 and post-secondary systems; the facilitation of the process to co-create an Oregon Assessment Model with the ODE and teachers from across the state; and the gathering of advocates for Science, Technology, Engineering, and Math from every educational level, a diverse set of employers, and community organizations with a similar mission. Perhaps the most powerful outcome from the OEIB with respect to state governance is helping to birth the Regional Achievement Collaboratives across the state, which has produced an array of collective impact strategies and immediate results driven from cross-sector public and private groups.

At its inception, the OEIB was also envisioned to have a relationship directly with K-12 districts, community colleges, and public universities. The Achievement Compact process is the realization of that goal. It is a statement of belief, intention, and shared commitment directly from the OEIB board to students, staff, families, and communities. The chosen metrics are supported by evidence and are directly connected to the long-term goals of 40/40/20. The process of local goal setting and reporting, in the context of strategic planning and budgeting, is the lever for the OEIB to raise performance with respect to these metrics.

The Fall 2013 analysis of the Achievement Compacts produced a valuable input on what is and is not working. Further discussion among stakeholders has helped to identify what is working and what needs to change. On the plus side, the metrics themselves have been a success on multiple levels. They are widely accepted as meaningful at the local level and the ODE and HECC have embedded the metrics into their accountability systems. In some cases, the metrics have provided new insights for school districts, community colleges, and universities into data on their students' success.

The key areas that need to be improved have to do with the goal setting and reporting process. Currently, the school districts, community colleges, and universities set yearly goals for every metric and for every disaggregated group. A thoughtful and meaningful approach to such a task is very difficult: setting a one year goal promotes thinking about a prediction rather than making a commitment; setting a hundred goals dissipates the meaning of any one goal; setting goals at times that are not aligned with budgeting activities misses the purpose.

Based on conversations with stakeholders, the OEIB staff believes an opportunity exists for the OEIB Board to respond to this situation and to create a powerful new Achievement Compact partnership with districts and institutions. Better goals, set for longer time periods, and in concert with the budgeting process is much more likely to be seen as meaningful locally and cause positive change. In addition, an OEIB focus is a good model for the system and it will allow for

professional organizations to adopt a similar focus in the professional development and technical assistance the deliver during a given year.

Beliefs

We believe the OEIB must have a handshake agreement with local school districts, community colleges and universities with respect to general fund support and accountability.

We believe this agreement should become incorporated as a motivating practice in the regular business and strategic planning operations; local systems must think about returns on investment.

We believe that the existing metrics are comprehensive and should be maintained, reported out on an annual basis, and used by the Oregon Department of Education and the Higher Education Coordinating Commission as part of the accountability frameworks.

We believe that the OEIB must prioritize a limited number of metrics and require that school districts, community colleges, and universities submit goals in these areas as well as their theory of action and budget commitment to show how they are budgeting towards their goals. This is a substantial reduction in reporting.

We believe that school districts, community colleges, and universities should set their goals and develop their attendant budgets for 3, or 4 years. This allows for more aspirational and less predictive goal setting.

We believe that the first prioritized goals for K-12 should be 3rd grade reading proficiency and 5-year high school completion rate.

We believe that the first prioritized goals for post-secondary should be made in consultation with the Higher Education Coordinating Commission

We believe that the OEIB staff must work to align state services to provide a diverse set of supports and resources to school districts, community colleges, universities, and community groups targeted to support these goals.

Strategic Recommendations

Oregon Education Investment Board

- Continue to measure and report on the State's progress on all metrics of the Achievement Compacts and present this scorecard on a quarterly basis to the OEIB and the public.

- Develop an OEIB State Longitudinal Data System to measure the effect of investments on all metrics of the Achievement Compact; to allow for research to better understand student pathways; to track equitable outcomes; to understand and mitigate the effects of poverty; and to improve the metrics over time.
- Create yearly local reports on all metrics of the Achievement Compacts for institutions, Regional Achievement Collaboratives, Early Learning Hubs, STEM Hubs, and any other collective impact organizations (see Appendix X for an example).
- From the set of metrics, prioritize two and direct school districts and institutions to set two, three, or four-year goals that are chosen as part of the yearly budgeting process and that include input from an Achievement Compact committee. The goals would be set to coincide with the local budgeting and strategic planning process. The goals would also include a model for how the local expenditures will support the goal (see Appendix 2).
- Starting in the 2014-2015 K-12 priority goals are 3rd grade reading proficiency and 5-year completion rate. These are also the educational focus areas from the Governor's office.
- The community college and university priority goals have not been set at this time.
- Continue to support the ODE and the HECC to integrate all of the achievement compact metrics into their accountability framework.
- Use data from the Achievement Compact metrics to identify strengths and weaknesses throughout the state and by region and use this information to direct OEIB staff activities and to align professional development offered by the Oregon Department of Education, the Confederation of School Administrators, and the Oregon School Boards Association.
- Reconsider focus metrics on a 2-year basis.
- Continue research and policy development in all of the areas defined by the Achievement Compact metrics (for example, chronic absenteeism).

Local School Districts

- Empanel an Achievement Compact committee that must report and respond to the local School Board and the Budget Committee to receive and approve their proposals.
- Ask the committee to draft 3 year disaggregated goals for the two focus metrics, develop a plan that indicates the activities that will produce the result (a logic model) and recommend a set of local time and money investments to budget the plan.
- Submit the goals and the plan to the OEIB
- Report on activities and progress to the local board and budget committee.
- Continue to attend to the entire set of achievement compact metrics as part of the Oregon Department of Education school district and school report card process.

Oregon Department of Education

- Create a school district report card that shows progress on all the achievement compact metrics and uses those metrics as part of an accountability framework.
- Suggest changes to the entire set of metrics or to the focus areas as necessary

- Reduce reporting requirements for districts

Higher Education Coordinating Commission

- Create a community college and public university institutional scorecard that shows the institutions’ progress on the achievement compact metrics
- Create an accountability framework that incorporates the achievement compact metrics.
- Develop new metrics that measure a completion/productivity metric for community colleges and public universities
- Suggest changes to the entire set of metrics or focus areas as necessary

Community Colleges

- Empanel an Achievement Compact committee that must report and respond to the local board and budget committee to receive and approve their proposals.
- Ask the committee to draft a set of three year disaggregated goals for the two focus metrics, develop a plan that indicates the activities that will produce the result (a logic model) and recommend a set of time and money local investments to budget the plan.
- Submit the goals and the plan to the OEIB
- Report on activities and progress to the local board and budget committee.
- Continue to attend to the entire set of achievement compact metrics as part the Higher Education Coordinating Commission accountability framework.

Public Universities

- Empanel an Achievement Compact committee that must report and respond to the local board and budget committee to receive and approve their proposals.
- Ask the committee to draft a set of three year disaggregated goals for the two focus metrics, develop a plan that indicates the activities that will produce the result (a logic model) and recommend a set of local investments of time and money to budget the plan.
- Submit the goals and the plan to the OEIB
- Report on activities and progress to the local board and budget committee.
- Continue to attend to the entire set of achievement compact metrics as part the Higher Education Coordinating Commission accountability framework.

Summary of Proposed Changes

	Current	Proposed
Achievement compact metrics	<ul style="list-style-type: none"> • Kinder Assessment Participation • 3rd Grade Reading Proficiency • 5th Grade Math Proficiency • 6th Grade Not Chronically Absent • 8th Grade Math Proficiency 	<p>No change for K-12.</p> <p>Possible changes for higher education.</p> <p>All metrics to be tracked at the</p>

	<ul style="list-style-type: none"> • 9th Grade Credits Earned • 9th Grade Not Chronically Absent • 4 Year Graduation Rate • 5 Year Completion Rate • Completing 3+ College Level courses • K-12 Priority and Focus Schools (includes schools with lowest rating) • Adult HS Diplomas/GEDs • Certificates/Oregon Transfer Modules • Associate's Degrees • Transfers to 4-year Institutions • Completion of Dev. Ed. Math • Completion of Dev. Ed. English • Number who complete 15/30 Community College Credits • Number who Pass National Licensure Exam • Dual Enrollment in HS • Dual Enrollment in OUS • Transfers to OUS • Bachelor's Degrees to Oregonians • Bachelor's Degrees to Rural Oregonians • Advanced Degrees to Oregonians • Alumni Satisfaction • Newly Admitted Freshmen with College Credit • Bachelor's Degrees Awarded to Transfer Students from Oregon Community Colleges 	<p>student level in the OEIB Statewide Longitudinal Data System.</p> <p>All metrics incorporated into ODE and HECC Accountability Frameworks</p>
Reporting by OEIB	<p>Statewide aggregate reporting to OEIB Board and public.</p> <p>School district and higher education results reported to locals as pre-printed values on the achievement compact forms.</p>	<p>Add statewide analysis and begin to include longitudinal data.</p> <p>Produce regionalized reports on achievement compact metrics for RACs and Hubs.</p>
State Accountability	OEIB requires submission.	<p>OEIB will hold state accountability for progress on the key metrics.</p> <p>OEIB has directed ODE and HECC to include achievement compact metric data in accountability frameworks.</p>

<p>K-12 District Reporting</p>	<p>School districts set a yearly goal for every achievement compact for every disaggregated group. (see 2014 achievement compact in Appendix 1)</p> <p>School districts independently turn in required reports to the ODE.</p>	<p>OEIB identifies key metrics. For 2014-2015 those goals would be 3rd grade reading and 5-year high school completion</p> <p>School districts set a 3-year goal for the key metrics for every disaggregated group. School districts provide a rationale or theory of action that accompanies the goals (see example in Appendix 2)</p> <p>Reduction/elimination of required reports to ODE.</p>
<p>Higher Education Reporting</p>	<p>Institutions set a yearly goal for every achievement compact for every disaggregated group.</p>	<p>OEIB identifies key metrics.</p> <p>Institutions set a 2 or 3-year goal for the key metrics for every disaggregated group.</p>
<p>Timeline</p>	<p>Timelines are not aligned to local budget and strategic planning processes.</p>	<p>Align timelines to budget and strategic planning processes already in place in school districts and institutions.</p> <p>Requires changes in statute and administrative rules.</p>

Appendix 1 - Example Regional Report

Eastern Oregon Collaborative 2014

Suggested Goals:

- Articulate early learning program curricula to increase kindergarden readiness.
- Create a more streamlined mechanism for school staff to facilitate student access to dental and medical services and therefore increase attendance.
- Create more pathways for out of school youth to obtain their GED; include Oregon Youth Authority

Education <i>OEIB Achievement Compact Metrics</i>			Health <i>OHA Coordinated Care Organization Metrics</i>				
➔	Metric	Region*	State	➔	Metric	Region*	State
	K Ready	%	%	➔	Metric 1		
	3rd Reading	%	%	➔	Metric 2		
	6th Attendance	%	%		Metric 3		
	9th On Track	%	%		Metric 4		
➔	3+ College	%	%		Metric 5		
	Graduation	%	%	➔	Metric 6		
	2-year	%	%		Metric 7		
	4-year	%	%		Metric 8		
➔	STEM	%	%		Metric 9		

Safety <i>Maionsequi quatus parum quam</i>			Workforce <i>Natur, commitin cupatum ressi</i>		
Metric	Region*	State	Metric	Region*	State
Metric 1			Metric 1		
Metric 2			Metric 2		
Metric 3			Metric 3		
Metric 4			Metric 4		
Metric 5			Metric 5		
Metric 6			Metric 6		
Metric 7			Metric 7		
Metric 8			Metric 8		
Metric 9			Metric 9		

➔ = High Leverage ■ = Below State (95%) ■ = Below State (75%)
 * Region includes: Ique initibustia sed minciis simusam eos

Appendix 2 - Proposed K-12 District Achievement Compact Form

Goal Setting

Third Grade Reading

All Students 2011-12	Disadvantaged	All Students 2012-13	Disadvantaged	All Students 2013-14	Disadvantaged	2/3/4 year goal	Disadvantaged Goal
data	data	data	data	data	data		

	Economically Disadvantaged	Limited English Proficient	Students with Disabilities	Black (not of Hispanic origin)	Hispanic origin	American Indian / Alaska Native	Pacific Islander	Asian (not included in aggregate)	TAG (not included in aggregate)
2013-14	data	data	data	data	data	data	data	data	data
2/3/4 year goal									

5-Year Completion Rate

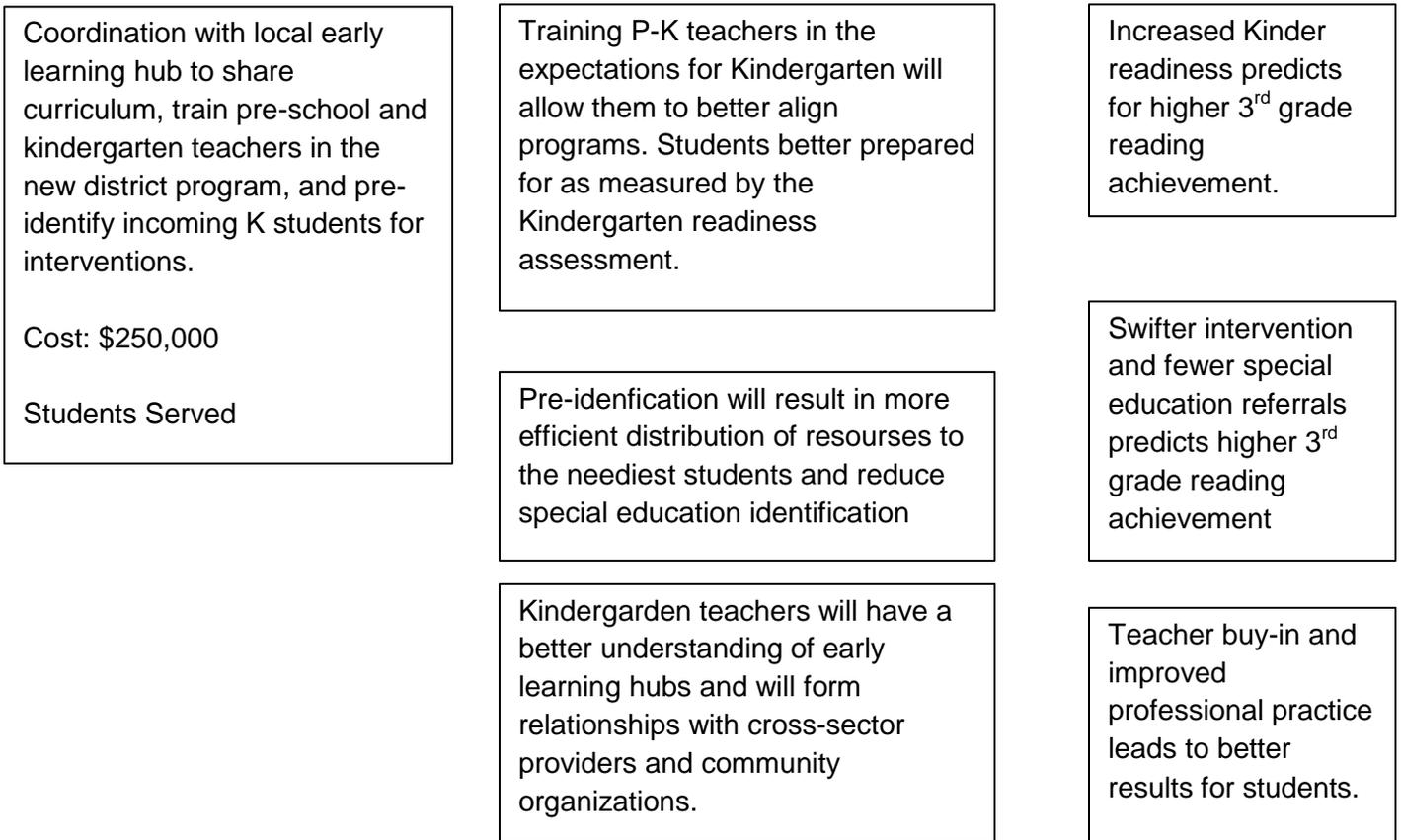
2008-09 Cohort	Disadvantaged	2009-10 Cohort	Disadvantaged	2010-11 Cohort	Disadvantaged	2/3/4 year goal	Disadvantaged Goal
data	data	data	data	data	data		

	Economically Disadvantaged	Limited English Proficient	Students with Disabilities	Black (not of Hispanic origin)	Hispanic origin	American Indian / Alaska Native	Pacific Islander	Asian (not included in aggregate)	TAG (not included in aggregate)
2013-14	data	data	data	data	data	data	data	data	data
2/3/4 year goal									

Key Strategies - Example 1

Early Learning Outreach

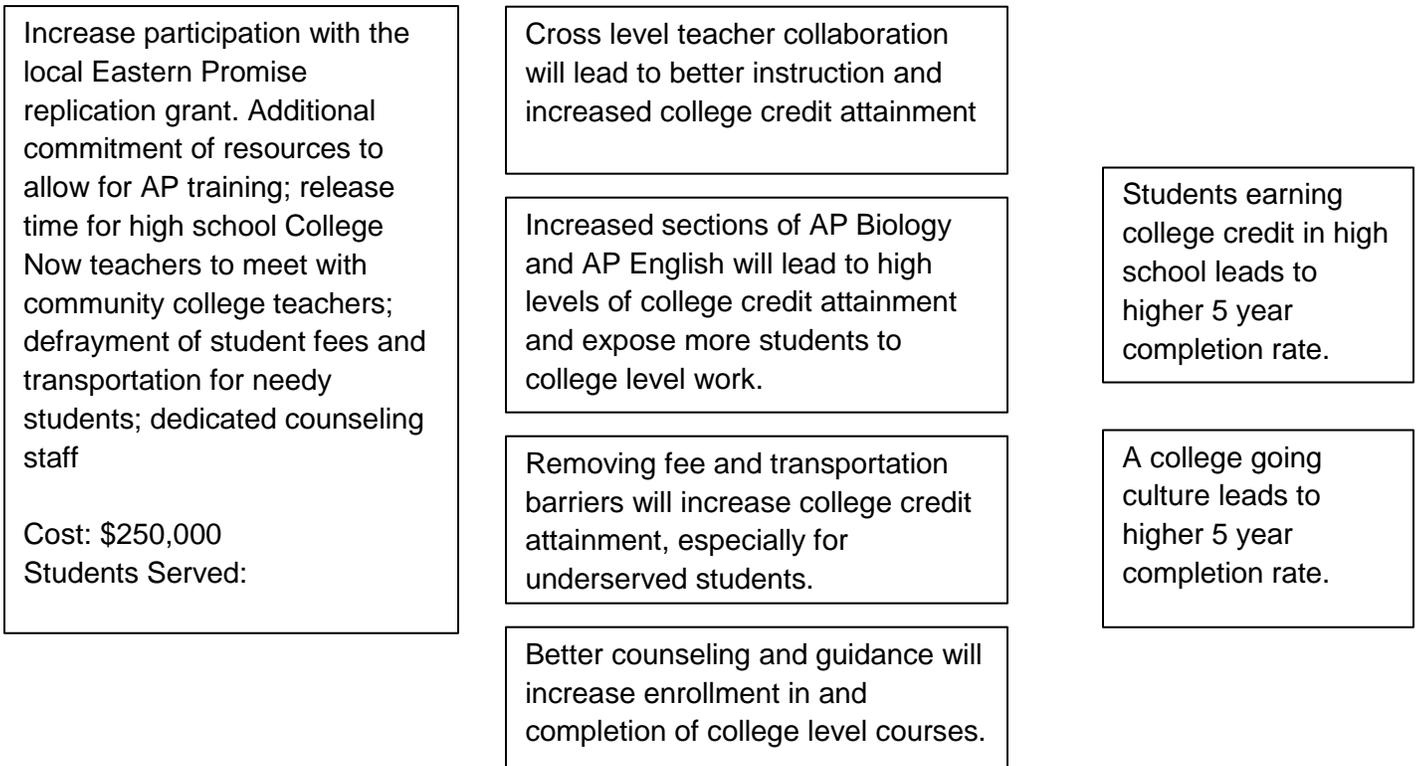
4 year goal



Key Strategies - Example 2

Accelerated Learning

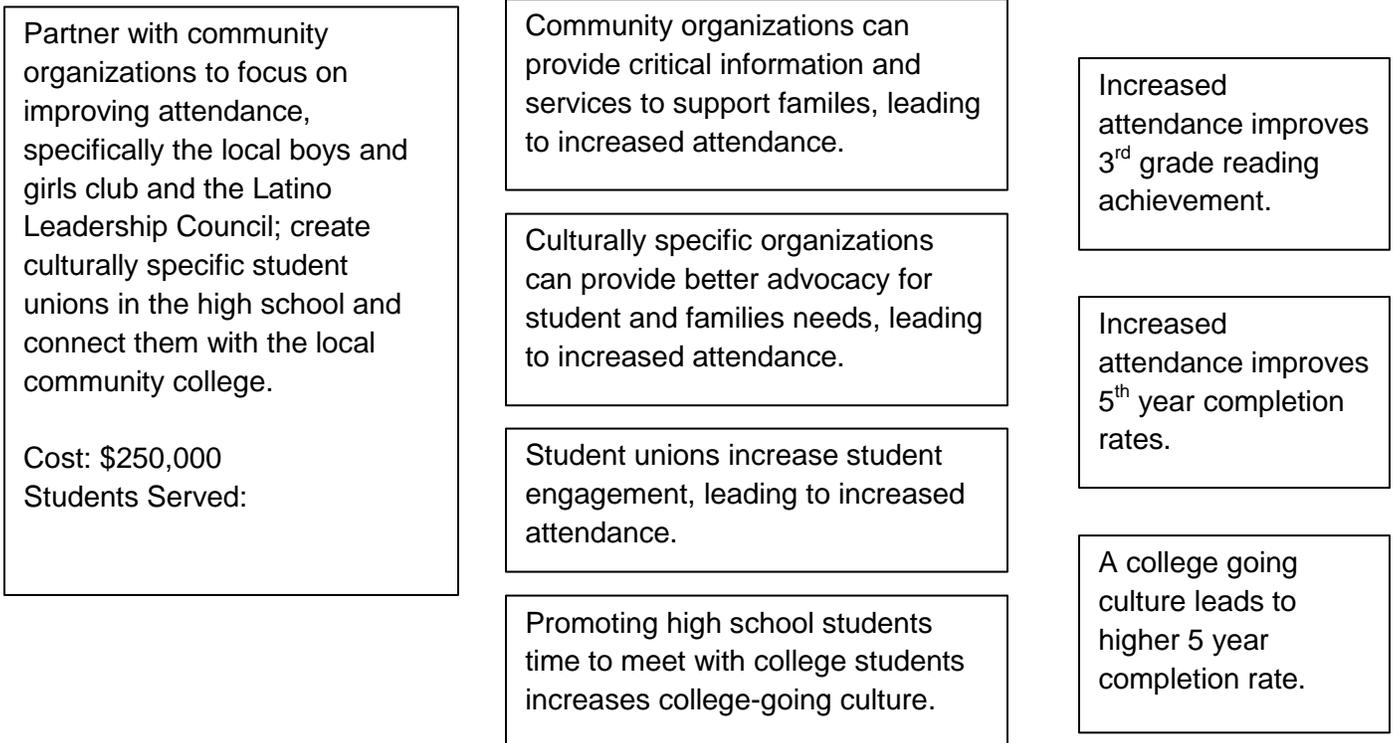
2 year goal



Key Strategies - Example 3

Community Attendance Campaign

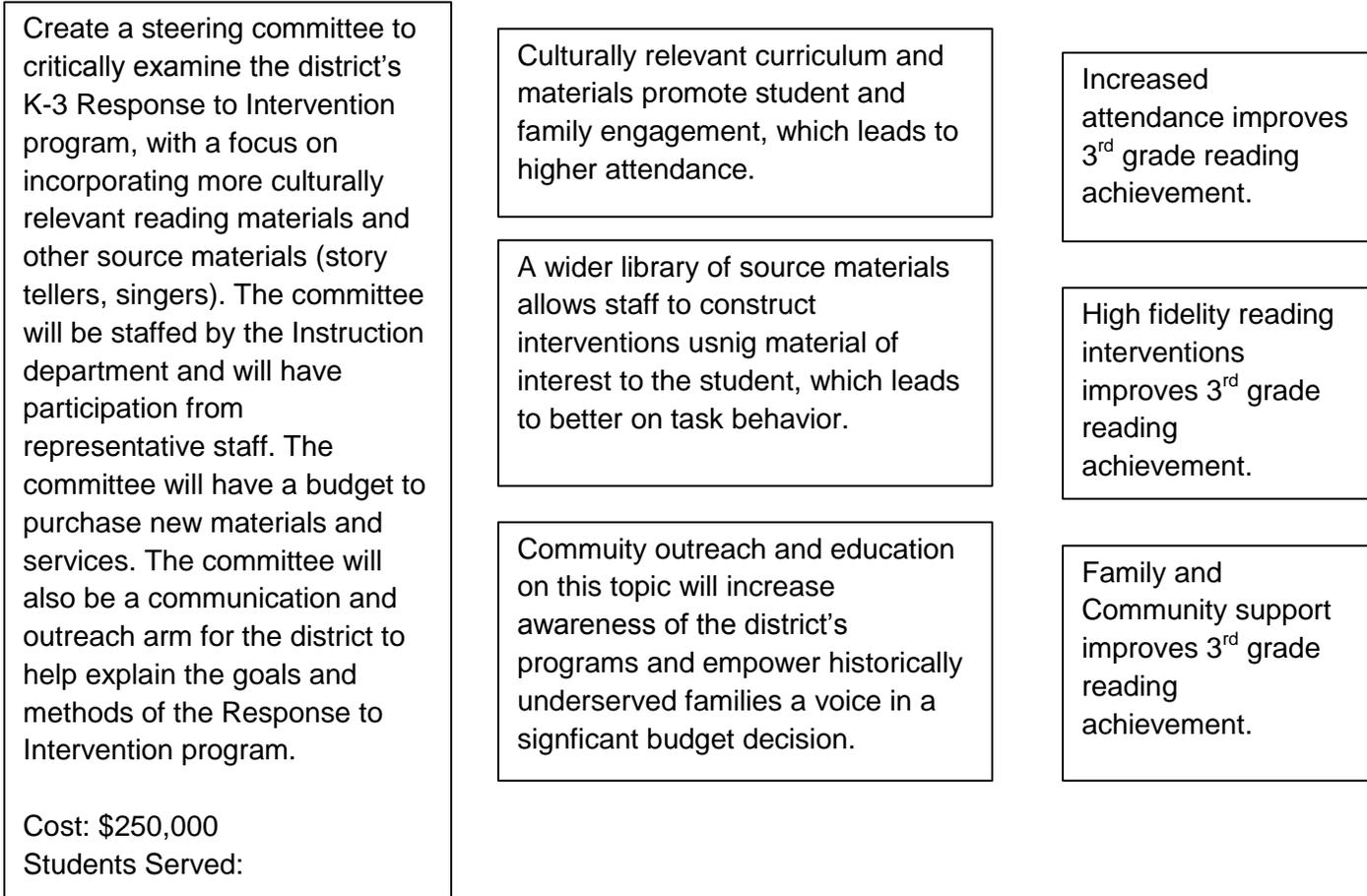
2 year goal



Key Strategies - Example 4

Culturally Centered Response to Intervention

2 year goal



Appendix 3 - Current K-12 District Achievement Compact Form

College and Career Ready: Are students completing high school ready for college or career?								
	2008-09 Cohort	Disadvantaged	2009-10 Cohort	Disadvantaged	2010-11 Cohort Goal	Disadvantaged Goal	2011-12 Cohort Goal	Disadvantaged Goal
4-Year Graduation Rate								
5-Year Completion Rate			NA	NA				
Completing 3+ College Level Courses	NA	NA	NA	NA	NA	NA		
Post-Secondary Enrollment			NA	NA				
Progression: Are students making sufficient progress toward college and career readiness?								
	All Students 2011-12	Disadvantaged	All Students 2012-13	Disadvantaged	All Students 2013-14	Disadvantaged	Goal (All) 2014-15	Disadvantaged
Kinder Assessment Participation	NA	NA	NA	NA				
3rd Grade Reading Proficiency								
5th Grade Math Proficiency								
6th Grade Not Chronically Absent								
8th Grade Math Proficiency								
9th Grade Credits Earned	NA	NA	NA	NA				
9th Grade Not Chronically Absent								
Equity: Are students succeeding across all buildings and populations?								
	2012-13		2013-14		2014-15		2015-16 Goal	
Priority & Focus Schools (includes schools with lowest overall rating on Oregon Report Card)								
Local Priorities: What other measures reflect key priorities in the district? (optional, up to 3)								
	All 2011-12	Disadvantaged	All 2012-13	Disadvantaged	All 2013-14	Disadvantaged	All 1-Year Goal	Disadvantaged

Investment: What is the public investment in the district? (does not include capital investments)				
	2012-13	2013-14	2014-15	2014-15 QEM calculation of district share
Formula Revenue				
Local Revenue not passed through formula				
Federal Revenue				
State Grants not passed through formula				

KEY for 2014-2015 ACHIEVEMENT COMPACT
Italics Bold = District provided goal
Bold = ODE provided outcome
Italics = District provided optional field
 White = Populated by ODE
 Blue = Populated by District
 Grey = District provided optional field
 NA = Not Available

Equity: Are students succeeding across all buildings and populations?									
2008-09 Cohort									
	Economically Disadvantaged	Limited English Proficient	Students with Disabilities	Black (not of Hispanic origin)	Hispanic origin	American Indian / Alaska Native	Pacific Islander	Asian (not included in aggregate)	TAG (not included in aggregate)
4-Year Graduation Rate									
5-Year Completion Rate									
Completing 3+ College Level Courses	NA	NA	NA	NA	NA	NA	NA	NA	NA
Post-Secondary Enrollment									
2011-12 Sub-group Outcomes									
Kinder Assessment Participation	NA	NA	NA	NA	NA	NA	NA	NA	NA
3rd Grade Reading Proficiency									
5th Grade Math Proficiency									
6th Grade Not Chronically Absent									
8th Grade Math Proficiency									
9th Grade Credits Earned	NA	NA	NA	NA	NA	NA	NA	NA	NA

9th Grade Not Chronically Absent									
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2009-10 Cohort									
	Economically Disadvantaged	Limited English Proficient	Students with Disabilities	Black (not of Hispanic origin)	Hispanic origin	American Indian / Alaska Native	Pacific Islander	Asian (not included in aggregate)	TAG (not included in aggregate)
4-Year Graduation Rate									
5-Year Completion Rate	NA	NA	NA	NA	NA	NA	NA	NA	NA
Completing 3+ College Level Courses	NA	NA	NA	NA	NA	NA	NA	NA	NA
Post-Secondary Enrollment	NA	NA	NA	NA	NA	NA	NA	NA	NA
2012-13 Sub-group Outcomes									
Kinder Assessment Participation	NA	NA	NA	NA	NA	NA	NA	NA	NA
3rd Grade Reading Proficiency									
5th Grade Math Proficiency									
6th Grade Not Chronically Absent									
8th Grade Math Proficiency									
9th Grade Credits Earned	NA	NA	NA	NA	NA	NA	NA	NA	NA
9th Grade Not Chronically Absent									

2010-11 Cohort									
	Economically Disadvantaged	Limited English Proficient	Students with Disabilities	Black (not of Hispanic origin)	Hispanic origin	American Indian / Alaska Native	Pacific Islander	Asian (not included in aggregate)	TAG (not included in aggregate)
4-Year Graduation Rate									
5-Year Completion Rate									
Completing 3+ College Level Courses	NA	NA	NA	NA	NA	NA	NA	NA	NA
Post-Secondary Enrollment									
2013-14 Sub-group Outcomes									
Kinder Assessment Participation									
3rd Grade Reading Proficiency									
5th Grade Math Proficiency									
6th Grade Not Chronically Absent									

8th Grade Math Proficiency									
9th Grade Credits Earned									
9th Grade Not Chronically Absent									

2011-12 Cohort									
	Economically Disadvantaged	Limited English Proficient	Students with Disabilities	Black (not of Hispanic origin)	Hispanic origin	American Indian / Alaska Native	Pacific Islander	Asian (not included in aggregate)	TAG (not included in aggregate)
4-Year Graduation Rate									
5-Year Completion Rate									
Completing 3+ College Level Courses									
Post-Secondary Enrollment									
2014-15 Sub-group Outcomes									
Kinder Assessment Participation									
3rd Grade Reading Proficiency									
5th Grade Math Proficiency									
6th Grade Not Chronically Absent									
8th Grade Math Proficiency									
9th Grade Credits Earned									
9th Grade Not Chronically Absent									

2014-15 Cohort Goals									
	Economically Disadvantaged	Limited English Proficient	Students with Disabilities	Black (not of Hispanic origin)	Hispanic origin	American Indian / Alaska Native	Pacific Islander	Asian (not included in aggregate)	TAG (not included in aggregate)
4-Year Graduation Rate									
5-Year Completion Rate									
Completing 3+ College Level Courses									
Post-Secondary Enrollment									
2017-18 Sub-group Goals									
Kinder Assessment Participation									

3rd Grade Reading Proficiency									
5th Grade Math Proficiency									
6th Grade Not Chronically Absent									
8th Grade Math Proficiency									
9th Grade Credits Earned									
9th Grade Not Chronically Absent									

KEY for 2014-2015 ACHIEVEMENT COMPACT
Italics Bold = District provided goal
Bold = ODE provided outcome
Italics = District provided optional field
White = Populated by
ODE
Blue = Populated by
District
Grey = District provided optional field
NA = Not Available

Appendix 4 - Current Community College Achievement Compact

Outcome Measures	2012-13 Actual		2013-14 Projected		2014-15 Target	
Are students completing their courses of study and earning certificates and degrees?						
<i>Number of students completing:</i>	All	Underrepresented	All	Underrepresented	All	Underrepresented
Adult HS diplomas/GEDs						
Certificates/Oregon Transfer Modules						
Associate degrees						
Transfers to four-year institutions						
Programs of study (under development)						
Are students making progress at the college?						
<i>Number (&/or % where indicated) of students:</i>	All	Underrepresented	All	Underrepresented	All	Underrepresented
Enrolled Dev. Ed. Writing who complete (%)						
Enrolled in Dev. Ed. Math who complete (%)						
Who earn 15/30 college credits in the year (#)						
Who pass a national licensure exam (#/%)						
Are students making connections to and from the college?						
<i>Number of students who:</i>	All	Underrepresented	All	Underrepresented	All	Underrepresented
Are dual enrolled in Oregon high schools						
Are dual enrolled in OUS						
Who transfer to OUS						
Employment (under development)						
Local Priorities (Optional for each district)						
<i>Number and/or percentage of students who:</i>	All	Underrepresented	All	Underrepresented	All	Underrepresented
What is the level of public investment in the district?						
	2012-13 Actual		2013-14 Projected		2014-15 Target	
<i>State funds</i>						
<i>Local Property tax revenue</i>						
<i>Total state and local operating funds</i>						

Outcome Measures Actual for 2021-13	African- American	Hispanic/ Latino	Native Amer. or Alaskan Native	Pacific Islander	Multi-Racial Multi-Ethnic	Economically Disadvantaged
Are students completing their courses of study and earning certificates and degrees?						
<i>Number of students completing:</i>						
Adult HS diplomas/GEDs	N/A	N/A	N/A	N/A	N/A	N/A
Certificates/Oregon Transfer Modules						
Associate degrees						
Transfers to four-year institutions						
Programs of study (under development)						
Are students making progress at the college?						
<i>Number (&/or % where indicated) of students:</i>						
Enrolled Dev. Ed. Writing who complete (%)						
Enrolled in Dev. Ed. Math who complete (%)						
Who earn 15/30 college credits in the year (#)						
Who pass a national licensure exam (#/%)	N/A	N/A	N/A	N/A	N/A	N/A
Are students making connections to and from the college?						
<i>Number of students who:</i>						
Are dual enrolled in Oregon high schools						
Are dual enrolled in OUS						
Who transfer to OUS						
Employment (under development)						
Local Priorities (Optional for each district)						
<i>Number and/or percentage of students who:</i>						

Outcome Measures Projected for 2012-13	African- American	Hispanic/ Latino	Native Amer. or Alaskan Native	Pacific Islander	Multi-Racial Multi-Ethnic	Economically Disadvantaged
<i>Are students completing their courses of study and earning certificates and degrees?</i>						
<i>Number of students completing:</i>						
Adult HS diplomas/GEDs	N/A	N/A	N/A	N/A	N/A	N/A
Certificates/Oregon Transfer Modules						
Associate degrees						
Transfers to four-year institutions						
Programs of study (under development)						
<i>Are students making progress at the college?</i>						
<i>Number (&/or % where indicated) of students:</i>						
Enrolled Dev. Ed. Writing who complete (%)						
Enrolled in Dev. Ed. Math who complete (%)						
Who earn 15/30 college credits in the year (#)						
Who pass a national licensure exam (#/%)	N/A	N/A	N/A	N/A	N/A	N/A
<i>Are students making connections to and from the college?</i>						
<i>Number of students who:</i>						
Are dual enrolled in Oregon high schools						
Are dual enrolled in OUS						
Who transfer to OUS						
Employment (under development)						
<i>Local Priorities (Optional for each district)</i>						
<i>Number and/or percentage of students who:</i>						

Outcome Measures Targets for 2014-15	African- American	Hispanic/ Latino	Native Amer. or Alaskan Native	Pacific Islander	Multi-Racial Multi-Ethnic	Economically Disadvantaged
Are students completing their courses of study and earning certificates and degrees?						
<i>Number of students completing:</i>						
Adult HS diplomas/GEDs	N/A	N/A	N/A	N/A	N/A	N/A
Certificates/Oregon Transfer Modules						
Associate degrees						
Transfers to four-year institutions						
Programs of study (under development)						
Are students making progress at the college?						
<i>Number (&/or % where indicated) of students:</i>						
Enrolled Dev. Ed. Writing who complete (%)						
Enrolled in Dev. Ed. Math who complete (%)						
Who earn 15/30 college credits in the year (#)						
Who pass a national licensure exam (#/%)	N/A	N/A	N/A	N/A	N/A	N/A
Are students making connections to and from the college?						
<i>Number of students who:</i>						
Are dual enrolled in Oregon high schools						
Are dual enrolled in OUS						
Who transfer to OUS						
Employment (under development)						
Local Priorities (Optional for each district)						
<i>Number and/or percentage of students who:</i>						

Appendix 5 - Current Public University Achievement Compact

<u>Outcome Measures</u>	2011-12			2012-13 Projected			2013-14 Targets			
	All Oregonians	Disadvantaged Students*		All Oregonians	Disadvantaged Students*		All Oregonians	Disadvantaged Students*		
		URM	Pell Eligible		URM	Pell Eligible		URM	Pell Eligible	
Completion										
# of bachelor's degrees awarded to Oregonians	2,896	256	1,197	2,879	255	1,190	2,929	259	1,211	
# of bachelor's degrees awarded to rural Oregonians	243	27	128	235	27	124	239	27	126	
# of advanced degrees awarded to Oregonians	520	43	n/a	496	42	n/a	497	42	n/a	
Quality										
	Percent of engineering, computer science, and technology employers reporting they were "Very or Extremely Satisfied" and they were at least "Somewhat Satisfied" with recent graduates' knowledge or abilities in the following areas:***									
	<i>Very or Extremely Satisfied</i>					<i>Very or Extremely Satisfied</i>				
Written Communication	25/76 (33%)					61/76 (80%)				
Verbal Communication	35/75 (47%)					63/75 (84%)				
Critical Thinking	42/77 (55%)					68/77 (88%)				
Knowledge in employee's field of study or major	53/77 (69%)					73/77 (95%)				
	Engineering, computer science, and technology employer satisfaction with the general knowledge and skills of the majority of recent college graduates (overall)***									
% very or extremely satisfied	55/83 (66%)									
% at least somewhat satisfied	76/83 (92%)									
Alumni Satisfaction	Data Available 2014									

<u>Outcome Measures</u>	2011-12			2012-13 Projected			2013-14 Targets		
	All Oregonians	Disadvantaged Students*		All Oregonians	Disadvantaged Students*		All Oregonians	Disadvantaged Students*	
		URM	Pell Eligible		URM	Pell Eligible		URM	Pell Eligible
Connections									
# and % of newly admitted Oregon freshmen entering with HS dual credit or other early college credit	1,144	183	399	1,140	199	398	1,140	199	398
	53%	47%	50%	57%	54%	54%	57%	54%	54%
# of bachelor's degrees awarded to transfer students from Oregon community colleges	485	49	289	520	53	310	529	53	315
Local Priorities (optional for each institution)									

Education and General	2009-10	2010-11	2011-12	2012-13
UO	\$ 64,919,432	\$ 64,598,538	\$ 43,728,691	\$ 46,885,124

<u>Outcome Measures</u> <u>Actual for 2011-12</u>	Disadvantaged Students*					
	African-American	Hispanic/Latino	Native Amer. or Alaskan Native	Pacific Islander	Multi-Racial or Multi-Ethnic	Pell Eligible
Completion						
# of bachelor's degrees awarded to Oregonians	45	113	39	13	46	1,197
# of bachelor's degrees awarded to rural Oregonians	**	12	10	0	**	128
# of advanced degrees awarded to Oregonians	7	19	10	**	6	n/a
Quality						
Alumni satisfaction	Data Available 2014					
Connections						
# and % of newly admitted Oregon freshmen entering with HS dual credit or other early college credit	16	79	7	**	76	399
	33%	47%	47%	**	52%	50%
# of bachelor's degrees awarded to transfer students from Oregon community colleges	**	25	10	0	10	289
Local Priorities (optional for each institution)						

<u>Outcome Measures</u> <u>2012-13 Projections</u>	Disadvantaged Students*					
	African-American	Hispanic/Latino	Native Amer. or Alaskan Native	Pacific Islander	Multi-Racial or Multi-Ethnic	Pell Eligible
Completion						
# of bachelor's degrees awarded to Oregonians	45	112	39	13	46	1,190
# of bachelor's degrees awarded to rural Oregonians	**	12	10	0	**	124
# of advanced degrees awarded to Oregonians	7	18	10	**	6	n/a
Quality						
Alumni satisfaction	Data Available 2014					
Connections						
# and % of newly admitted Oregon freshmen entering with HS dual credit or other early college credit	10	97	10	**	79	398
	31%	59%	59%	**	52%	54%
# of bachelor's degrees awarded to transfer students from Oregon community colleges	**	27	11	0	11	310
Local Priorities (optional for each institution)						

<u>Outcome Measures</u> <u>2013-14 Targets</u>	Disadvantaged Students*					
	African-American	Hispanic/Latino	Native Amer. or Alaskan Native	Pacific Islander	Multi-Racial or Multi-Ethnic	Pell Eligible
Completion						
# of bachelor's degrees awarded to Oregonians	46	114	39	13	47	1,211
# of bachelor's degrees awarded to rural Oregonians	**	12	10	0	**	126
# of advanced degrees awarded to Oregonians	7	18	10	**	6	n/a
Quality						
Alumni satisfaction	Data Available 2014					
Connections						
# and % of newly admitted Oregon freshmen entering with HS dual credit or other early college credit	10	97	10	**	79	398
	31%	59%	59%	**	52%	54%
# of bachelor's degrees awarded to transfer students from Oregon community colleges	**	27	11	0	11	315
Local Priorities (optional for each institution)						



Oregon Education
Investment Board

Scorecard on Key Outcomes

- Student Outcomes ●
- Equity Outcomes ●
- Educator Outcomes ●
- Systems Outcomes ●

This scorecard reflects annual progress on outcomes adopted by the Oregon Education Investment Board, and provides quarterly status updates on key strategies.

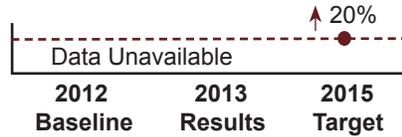
August 2014

KEY STUDENT OUTCOMES

STATUS

GOAL: Increase Children Ready for Kindergarten

Increase the number of children ready for kindergarten.



ON TRACK

Strategy 1: Create Early Learning Hub System On Track →

Round 2 Hubs selected & notice of intent to award, continued work to get them to contract. Round 1 Hubs continue work, held July 2014 learning collaborative meeting focused on developmental screening.

Strategy 2: Align with Health Care System On Track →

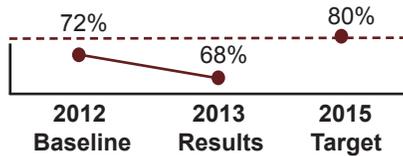
ELC and Health Policy Board completed initial recommendations for alignment.

Strategy 3: Increase Access to Quality Early Learning Environments On Track →

Quality Rating Improvement System has 86 star-rated providers, 684 at "commitment to quality" level, serving 27,142 children.

GOAL: Increase 3rd Grade Reading Proficiency

Increase the number of 3rd graders demonstrating reading proficiency.



Gap
 Native Hawaiian (18)
 Black (24)
 Hispanic (29)
 American Indian (19)
 English Learners (42)

ATTENTION NEEDED

Strategy 1: Statewide Literacy Campaign/Reading Investments On Track →

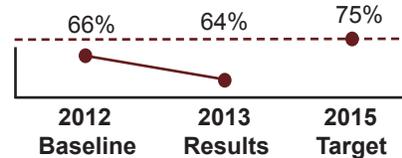
Reading campaign set to launch in fall. Logo, messaging, strategies and tactics developed-currently being vetted with five focus communities and aligned with all literacy investments and initiatives.

Strategy 2: Strengthen Partnerships Between Early Learning & K-12/Launch Quality Full-Day K On Track →

COSA/ODE Statewide Full Day Kindergarten Summit in May with attendance of 300+ educational leaders and community partners; provided full day Kindergarten policy, research & resources to support district implementation.

GOAL: 8th Grade Math Proficiency

Increase the number of 8th graders demonstrating proficiency in Math.



ATTENTION NEEDED

Strategy 1: STEM Hubs On Track →

Regional partnership plans drafts submitted, feedback provided; final submission nearing for release of funds; site visits conducted/technical assistance needs assessed; RFP for common evaluation framework developed.

GOAL: On Track with Credits by End of 9th Grade

Increase the number of students on track with credits by end of 9th grade.



TARGET ATTAINABLE

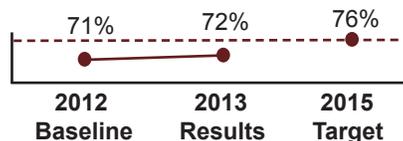
Strategy 1: Mentoring, Monitoring & Support Investment On Track →

Strategic Investment money for students to take AP/IB exams awarded; New 9th grade on track data collection is ready for Fall data release.

Strategy 2: Align Youth Development Division Investments Target Attainable →

Funding decisions made; Outcomes measurements negotiated with awardees; Funds in communities.

GOAL: Increase 5-Year Cohort Graduation Rate



Gap
 Native Hawaiian (7)
 Black (16)
 Hispanic (13)
 American Indian (18)
 English Learners (25)

TARGET ATTAINABLE

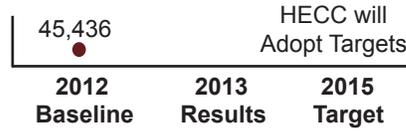
Strategy 1: Accelerated Learning Opportunities and 11-14 Initiatives On Track →

Five replications sites convened as they move forward with implementation; Legislative Concept being drafted.

KEY STUDENT OUTCOMES (Continued)

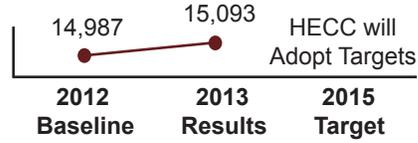
STATUS

GOAL: Certificates, Associates Degrees & Transfers
 Increase certificates, associates degrees and transfers.



Strategy 1: STEM and CTE Investments **On Track** ↑
STEM grant programs in implementation phase; Student impact survey being developed; Site visits to CTE complete; CTE Revitalization 2.0 being discussed.

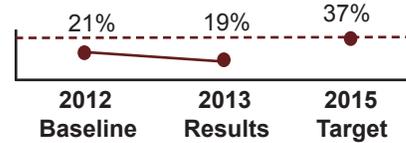
GOAL: Increase Degrees (Bachelors & Higher)



Strategy 1: Oregon Opportunity Grant Redesign **On Track** →
Workgroup recommendations endorsed by HECC & presented to OEIB; will form basis of HECC funding and policy request for 2015-17.

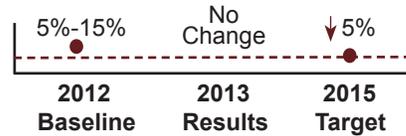
KEY EQUITY OUTCOMES

GOAL: 5th Grade ELL Reading Proficiency
 Increase the number of 5th grade ELLS demonstrating reading proficiency.



Strategy 1: Implement State ELL Plan **On Track** ↑
Best Practices subcommittee has reviewed progress reports submitted by ODE and made recommendations.

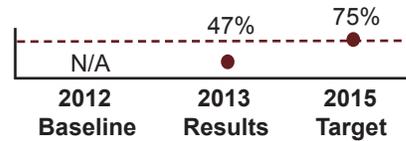
GOAL: Decrease Achievement Gaps in All Metrics



Strategy 1: Implement Equity Lens **Strategy Attainable** →
Analysis tool based on Equity Lens used to analyze/evaluate investment requests presented to OEIB.

Strategy 2: Closing the Achievement Gap Investments **On Track** ↑
Consultant has been hired to work with each grant awardee.

GOAL: Focus and Priority Schools
 Increase achievement growth at Focus & Priority Schools.



Strategy 1: Support Improvement in Focus and Priority Schools **On Track** →
50% of 93 Focus & Priority Schools made enough progress to exit status if reidentified; on track to reach 75% by next Summer.

GOAL: College Enrollment Rate for Underserved
 Increase college enrollment rate for underserved students.



Strategy 1: Implement Post-Secondary Aspirations Investments **On Track** →
Eastern Promise Summit being planned for August 2014; Additional ASPIRE sites up and running.

KEY EDUCATOR OUTCOMES

STATUS

GOAL: Non-White, Hispanic or Non-Native English Educators

Increase non-white, Hispanic, or non-Native English educators.

Baseline data being collected

2012 Baseline	2013 Results	2015 Target
------------------	-----------------	----------------

Strategy 1: Create and Implement Statewide Plan for Recruitment and Retention **On Track** →
2014 Oregon Minority Teacher Act Status Report completed and submitted to the Legislature.

N/A	N/A
-----	-----

GOAL: Educator Satisfaction/Professional Support

Increase educator satisfaction with professional support.

2012 Baseline	2013 Results	2015 Target
------------------	-----------------	----------------

Strategy 1: Develop and Invest in Network for Quality Teaching & Learning **Target Attainable** →
Network Advisory Committee convened; Web portal specs development; Portal staff positions posted and candidates interviewed.

KEY EQUITY OUTCOMES

Key System Outcomes	2015 Target	August 2014 - Update	Status
Standards & Assessment Aligned Across P-20	Complete	→ Math & Writing HS/College Alignment projects underway.	Target Attainable →
Functional P-20 Policy Data System	Complete	Independent Quality Assurance vendor has been contracted and has completed a set of deliverables required by the eBoard; ODE's ALDER project.	Target Attainable →
Achievement Compacts Track Key Outcomes & Drive Local Budgeting	Annual Analysis of Trajectory/Recommendation Complete	Comprehensive redesign of the Achievement Compact process presented to OEIB Board.	On Track ↑
Policy Barriers to Student Success Removed/Mandates Reduced	Legislative Agenda Passed	2015 Legislative concepts submitted for preliminary drafting.	On Track ↑
Develop Strong Partnerships and Accountability Across P-20	Effective Accountability System	K-12 District and School Improvement and Accountability Taskforce was convened and on track to deliver recommendations.	On Track →
Outcome-based State Budget	Developed & Passed	Budget process on track; final budget recommendations to be presented to OEIB in September.	On Track →
Key Initiatives are Analyzed for Impact and Return on Investment	ROI Model Built & Key Initiatives Analyzed	Scope of work and RFP developed.	On Track →
Stakeholders Adequately Informed with Adequate Opportunities to Provide Input	85% Key Stakeholders Informed & Engaged	Survey & website Phase 2 in development; legislative communications tools developed; ongoing engagement with key stakeholders via communication initiatives and forums, conferences and events.	Target Attainable →

STATUS INDICATORS: ↑ = Progress Improvement

→ = Progress Maintained

↓ = Progress Slipped

STATUS COLOR KEY: On Track = On track to reach target
 Target/Strategic Attainable = Target attainable with continued efforts
 Attention Needed = Attention needed



2015-17 Budget Strategies and Initial Priorities

*Oregonians are prepared for lifelong learning, rewarding work, and engaged citizenship.*¹

Background

The Need

Never before has education been more critical to the lives of Oregonians and to our ability to prosper as a state. In an ever-changing economy, we know Oregon's workforce needs higher levels of knowledge and skills than ever before. With a population that is becoming increasingly diverse, we know improving educational outcomes for our historically underserved students represents our biggest opportunity for growth, as well as the only way to reach our goals. To ensure a strong and vibrant state, Oregonians must commit to a shared sense of responsibility for moving all Oregon students along their educational pathway to lifelong learning, rewarding work and engaged citizenship.

Oregon's cohort graduation rate tells us the percentage of students who entered high schools – as freshman or as later arrivals – that graduated with a regular diploma in four or five years. From that measure, in 2012, only 68 percent of Oregon students graduated on-time in four years, and only a total of 72 percent graduated within five years. Looking at a more expansive measure of students who earned a regular diploma, modified diploma or GED, one in five students (20 percent) still does not complete within five years. And far too many Oregon students don't even get captured in the cohort graduation or federal dropout rates because they leave school even before the ninth-grade starting point for those calculations.

Each year, well-paid jobs requiring only a high school diploma – the millwork or manufacturing jobs of the past – are replaced with new jobs that increasingly demand post-secondary education, technology skills and advanced training above the high school level. The shift is happening quickly. Over the next decade, 61 percent of all Oregon jobs will require a technical certificate, associate's degree or higher level of education. This proportion will only accelerate by 2025. Today, Oregonians with associate's degrees earn at least \$5,000 per year more than those with high school diplomas. Those with bachelor's degrees earn approximately \$17,000 more per year. Eighty-nine percent of family wage jobs, jobs paying more than \$18 per hour, will require a technical certificate/associate's degree or higher level of education. Students

¹ Governor's 10-Year Education Outcome

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emerging into this market need skills and education to compete and therefore need to complete a post-secondary education.

As we know, education is not just about improving personal income and job security. Higher levels of education are associated with better health, longer lives, greater family stability, less need for social services, lower likelihood of involvement with the criminal justice system, and increased civic participation. All are benefits to not only the educated individual and their family, but also help support healthy, thriving communities across Oregon.

Oregon's Equity Imperative

Perhaps the most pressing issue faced by Oregon is that, on nearly all measures, the achievement rates for low-income learners, English language learners, special education students and students of color are significant as compared to the general student population. Our first year of data from the statewide Kindergarten assessment shows a substantial gap in the number of letters and letter sounds that low income or children of color can identify when they enter Kindergarten. This early gap does not close as children progress through school. Last year, the 3rd grade proficiency rate for white students was 74 percent, but for Hispanic students was 45%, for black students was 50%, and for American Indian/Alaska Natives was 55%. While our state 5-year cohort graduation rate is 72.5%, only 60% of English language learners do, and only 67% of students in poverty graduate within 5 years. Low-income high school graduates are roughly one-third less likely to enroll in college immediately after graduation than their higher income peers (38 percent of low -income students vs. 59 percent of students with higher family incomes).

Oregon's next generation, those of school and preschool ages, include greater proportions of students of color, students who are not native English speakers, and students from economically disadvantaged households. It is vital to ensure student success among all populations across the continuum through focus on Oregon's changing demographics and demonstrated ability to well-serve the needs of all student populations and the growing percentage of Oregon's high school graduates needing basic skills upon entry into community college.

Improving performance in every corner of the state while also addressing the disparity in student achievement results that exists for underserved student populations will not only greatly accelerate progress toward the 40-40-20 Goal, but will determine our success in reaching it. Thus, **Oregon must act immediately and courageously to address and overcome the barriers that too often deter students, particularly our students of color and from economically disadvantaged backgrounds, from achieving success in the education system.**

The 40-40-20 Goal

Recognizing the urgency and pressing need to improve educational attainment for its citizens, Oregon has committed not only to improving, but to becoming one of the best-educated populations in the world. In 2011, the Oregon Legislature adopted an ambitious goal to ensure that by 2025:

- 40 percent of adult Oregonians have earned a bachelor's degree or higher.

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- 40 percent of adult Oregonians have earned an associate's degree or post-secondary credential as their highest level of educational attainment.
- 20 percent of all adult Oregonians have earned at least 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.

The goal, known as “the 40-40-20 Goal,” adopted into law in 2011, 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. **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.** The OEIB and Governor are united in the belief that in order for the 40-40-20 Goal to be meaningful, it must be accompanied by the clear understanding that increased levels of attainment of diplomas, degrees and certificates must be achieved equitably, with Oregon’s diversity – of race, ethnicity, gender, home language, socioeconomic status and geography – equally well-represented in each stage.

Building the OEIB

The Oregon Education Investment Board (OEIB) was created in 2011 for the purpose of overseeing a unified system of public education from birth to college & career (SB 909). The legislation specifically charges the OEIB with recommending strategic investments “targeted to achieve the education outcomes established for the state.” Based on these statutory charges, the OEIB developed a strategic plan in 2012, aimed at ensuring the state reaches the 40-40-20 Goal. The OEIB strategic plan is built on three key strategies:

Strategy 1: Create a coordinated, student-centered education system, from birth through college and career readiness

Strategy 2: Focus state investment on achieving key student outcomes

Strategy 3: Build statewide support systems

The three strategies are overlapping, driven by student learning outcomes, and aimed at transforming – rather than simply adjusting – the state’s education system. The strategies represent, for the student, a promise of educational excellence at all levels; for the educator, an invitation to lead and commitment to improving student achievement; for the taxpayer, a return on investment; and to parents, community leaders, employers, policymakers, and educational organizations, a new partnership to strengthen education for every student across Oregon.

In 2012, the legislature approved the establishment of achievement compacts between OEIB and each school district, ESD, community college and public university in the state. A primary purpose of the achievement compacts is to focus all parties on key outcomes, and memorialize a shared responsibility between and among the state, educational institutions and communities to achieve those outcomes. Through the achievement compacts, institutions set goals around critical educational outcomes, chosen because research and evidence have shown them to be highly predictive of student success. The outcomes adopted by the OEIB include:

- More children entering Kindergarten ready to learn

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- More 3rd graders reading at or above grade level
- Fewer 6th graders who are chronically absent
- More 9th graders finishing on track with credits and strong attendance records
- Increased numbers of students getting college credit in high school
- Increased high school completion rates and college enrollment rates
- Increased certificate & degree attainment
- Closing achievement gaps that exist on all outcomes for underserved students (students of color, economically disadvantaged students, students receiving special education services, and non-native English speakers)

In 2013-15, for the first time, the Governor's Recommended Budget was built by examining what investments were likely to achieve this set of key outcomes rather than by simply adjusting "current services levels." Working together, the Governor and Legislature were able to significantly increase funding for education at all levels (INSERT dollar amount), to support our youngest Oregonians by advancing the early learning hub system, and to agree on changes to post-secondary governance that will allow increased autonomy while promoting improved access and outcomes for Oregon's students.

The 2013-15 Legislatively Approved Budget (LAB) for education also included a set of strategic investments developed by the OEIB and Chief Education Officer. This \$74 million in investments – in strategies to improve early literacy, support 9th graders to be on track, ensure students have opportunities for STEM, STEAM and CTE, and support educators – were selected to rapidly improve performance on the compact outcomes, close achievement gaps, encourage collaboration, leverage resources, and provide the state a platform through which to replicate best practices across the state.

Lastly, the 2013-15 LAB provided for the development of a Regional Achievement Collaborative pilot. The purpose of the pilot is to examine the feasibility and impact of having representatives from across the Birth to College and Career continuum engage collectively around the compact outcomes. The twelve (12) regions engaged in the pilot are also building collective responsibility, by engaging community leaders, businesses, social service providers and parents, thereby broadening responsibility for student learning and success beyond school walls.

OEIB Strategies & Priorities

Strategy 1: Create a seamless public education system from Birth to College & Career

In the past two and a half years, the Governor and legislature have made significant progress in transforming the state agency system to be more seamless – from creating the OEIB and appointing a Chief Education Officer charged with direction and control of the P-20 system, to establishing the Early Learning and Youth Development Divisions within the Oregon Department of Education, to creating a Higher Education Coordinating Commission that will, for the first time in Oregon's history, oversee community college, public universities, and need-based aid within one agency.

However, to truly create a seamless public education system, focus for the next biennium must be on the student experience – forcing the question of how our state can move from a

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segmented system focused on institutions, to individual pathways that lead all students to successful learning experiences, productive careers and lifelong contributions to the community. To begin building that seamless, student-centered system, OEIB believes focus must be on the following:

- Critical Student Transitions
- Supporting Out-of-School Youth
- A Coordinated Post-Secondary System that Connects with the Workforce
- Invest in Regional Collaboration and Collective Responsibility

Section 1.1 Critical Student Transitions

In order to ensure a coordinated system from birth to college & career, specific attention must be paid to the transition points between educational experiences. Compelling evidence suggests that it is in these transition points – into Kindergarten, middle school, high school, community college and university – that most students fall behind, get disengaged, pushed out, or simply fail to complete. **First and foremost, attention must be paid to strategies that are preventative in nature – investing in early learning, building strong foundations for school attendance and college-going culture, and creating incentives for systems to work together in collective responsibility models.** Second, it is crucial for Oregon to research and examine the factors leading to risk of failure, identify students who have been put at risk, deliver evidence-based interventional strategies, and continuously monitor progress of children and students to ensure they remain on track.

1.1.1: Increased Alignment for Age 3 to Grade 3

To support the 40-40-20 Goal, OEIB is focused on several early milestones in the lives of young learners – that every child is ready for school when they enter Kindergarten and that they are reading at grade level by third grade. In order to meet these goals, we must ensure that every child is put on a trajectory to success as early as possible to prevent achievement gaps from ever forming, and create a seamless transition into Kindergarten to ensure the gains from early support are lasting. Creating this seamless connection between early learning and K-12, from “Age Three to Grade” as the efforts has been called, is a key OEIB priority. In addition to the early learning transformation described more specifically in Section 2.2, priority initiatives in this area include:

- Kindergarten Readiness Partnership & Innovation Fund: The OEIB and the ELC have identified this fund, created by HB 2013, as a key vehicle for linking pre-K and K-12 systems by identifying local practices and programs that serve as models for broader best practices dissemination and continued investment.
- Kindergarten Assessment: Oregon’s Kindergarten Assessment, which provides a snapshot of children’s literacy, numeracy and approaches to learning upon kindergarten entry, has recently concluded its first year of statewide implementation, and data have been released publicly. Assessment data provide a valuable “look forward and look back” for both K-12 districts and early learning practitioners. Critical priorities for the KA include analyzing the data mapped to income & language to make recommendations for early learning and early grades; connecting to other early learning assessments; and continuing to refine and improve this assessment.

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- Implementation of Full Day Kindergarten: Increasing access to free full day kindergarten is a key strategy for eliminating achievement and opportunity gaps in the early elementary years. Starting in 2015, school districts will receive full funding for each student they choose to enroll in full-day Kindergarten. A critical priority should be ensuring that districts are supported to offer high-quality Kindergarten programs, using best practices and high leverage strategies, and provide adequate professional development and support to K and 1st grade teachers in order to ensure the state's increased investment yields results.
- Enhanced Assessment Grant (EAG) Consortium: Oregon is part of a nine state consortium that will develop a common K-3 formative assessment system that will provide teachers with snapshots of individual student learning and development, and use the data to inform teaching and learning. While this work will initially be grant-funded, it should be leveraged among these other strategies to support an aligned system.

A coordinated and collaborative state-level approach to these initiatives will strengthen each initiative individually, while also laying the foundation for increased alignment between Pre-K and K-12 and helping Oregon's communities identify and implement appropriate solutions to meet local needs.

1.1.2: Redesign of Grades 11-14

Oregon's 40-40-20 Goal has focused needed attention on increasing access for Oregon students to college-bearing credits while still in high school. The research is clear that early college access contributes to articulation, success and retention in postsecondary education, and can reduce students' time to a degree or certificate, financial burdens, and the need for remedial/developmental education courses.

Despite steady increases in Advanced Placement and dual credit/dual enrollment courses, offerings in Oregon are still fragmented, confusing to students and their families, and often vary substantially by district and school, creating inequitable access particularly for under-represented students.

Senate Bill 222 tasked an Accelerated Learning Committee with examining methods to encourage and enable more students to obtain college credits while still in high school. The recommendations they are bringing forward will:

- Better align state funding, assessments, and procedures between high schools and post-secondary institutions
- Encourage efficiencies for students and remove unintended barriers;
- Ensure that credits are high-quality, and ultimately lead to degrees; and
- Create more equitable access and affordable postsecondary options for all eligible Oregon students

State funding models for the programs will be proposed that keep costs to students and their families at a minimum and that support the contributions of both high school and postsecondary partners. The course offerings will need to contribute to meaningful course sequences (meeting general education or career and technical pathway requirements) and transfer cleanly across Oregon public postsecondary institutions. More efficient use of students' senior year, early

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advising, and remediation supports for students in high school will be needed to create a more seamless transition for students from high school to postsecondary institutions.

1.2 Supporting Out of School Youth

Each year, more than ten thousand high school students drop out, are pushed out, or simply fail to complete high school – this unacceptable number does not even capture those students whose journey to 40-40-20 ended in middle school or before. These students experience a variety of risk-producing conditions that can be barriers to school and work. Barriers can present themselves as environmental conditions in neighborhoods, families, and peer groups, as well as personally as individual factors such as poverty, teenage pregnancy, community violence, substance abuse, poor quality schools, criminal activity, disability, caregiver responsibilities, and institutional residence.

Overall, of the estimated 465,000 youth age 16 to 24 in the state, nearly 66,500 are not in school and not working. While the reasons for disconnection are unique for each youth, one theme is common among all — it is increasingly difficult to navigate the path from school to work. The economic cost of not having youth engaged in the education system and labor force is too great for our state to ignore.

The OEIB's responsibilities for creating a seamless "Birth to College and Career" system, and managing student transitions for the purpose of ensuring outcomes are achieved, necessitate that it also pay close attention to those students and young adults who don't fit neatly into one category or another. We must ensure the populations of youth who have, or are at risk of, dropping out do not inadvertently fall through the cracks that heretofore may have existed between education agencies. Further, states that have rapidly increased their rates of diploma and degree attainment have done so by an intentional focus on students who have been pushed out or put at risk, who are being served in alternative settings, or who could benefit from alternative pathways such as GED. The 2015-17 biennium should include an investment in strategies and policies aimed at state funding policy that supports community-based efforts to address barriers to education and career success for these populations.

1.3 A Coordinated Post-Secondary System that Connects with the Workforce

As a result of legislation passed in 2011, 2012, and 2013, a single entity – the Higher Education Coordinating Commission (HECC) – is now responsible for ensuring smooth pathways for students between Oregon's private and public colleges, universities, career schools, and financial aid programs. During 2015-17, students should benefit from education innovations pioneered by increasingly autonomous institutions while securing additional advantages from the HECC's broad authorities and responsibilities for coordination across the full higher education system. During 2015-17, the state should complete the transition set in motion by the 2011-13 legislation, ensuring that the HECC is able to fully realize Governor and Legislature's vision for a highly coordinated higher education system using the authorities provided for it under law. In particular, the HECC must:

- Ensure that funding allocations to community colleges, public universities, and state need-based financial aid programs maximize student success;
- Ensure that academic programs at community colleges and public universities are designed and implemented in coordination with each other in order to maximize the state's return on investment and students' opportunity for success;
- Convene and lead higher education institutions to develop common learning outcomes, assessments, and transfer policies in order to ensure "portability" within Oregon's higher education system;
- Succeed with the transition of responsibility for system-wide higher education data and research from silos (CCWD, OUS, ODE, OSAC) to a single agency (HECC).

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Of equal importance to ensuring that higher education contains well-coordinated pathways for students, however, is the need to build better connections from colleges, universities, and career schools to the workforce. In particular, the state must build better systems of support for the “Middle 40” apprenticeships, certificates, degrees, and other credentials that represent such a clear opportunity to better-prepare Oregonians to employment. Under the Governor’s leadership, the HECC and the Oregon Workforce Investment Board (OWIB) have created a 2014 Task Force to more clearly define the opportunities and barriers for more clearly articulating the state’s approach to supporting efforts around the Middle 40. Recommendations for how to share and divide these responsibilities between the HECC, the OWIB, and their associated state agencies must be considered for 2015-17.

Section 1.4 Invest in Regional Collaboration and Collective Responsibility

Every year, 40,000 children are born in Oregon. Of those, roughly 40 percent are exposed to a well-recognized set of socio-economic, physical or relational risk factors that adversely affect their ability to develop the foundations of school success. These risk factors include poverty, unstable family backgrounds, substance abuse, criminal records and negative peer associations. Oregon Department of Human Services data for November 2011 indicates that 116,218 children ages five and under received Supplemental Nutrition Assistance Program (SNAP) food assistance, ADD MEDICAID data, and a 2011 US Census report shows that 183,859 children in Oregon live in poverty. If not addressed, these risk factors have an almost linear correlation with school failure, school dropout, substance abuse, social dependency and involvement in the criminal justice system. They also set lifestyle patterns that lead to the chronic conditions that account for most of the costs in the health and criminal system. These factors, known as social indicators, are set during the early years of a child’s life. Ultimately, these social indicators produce a workforce that struggles to compete successfully in a global economy and citizenry that is a liability rather than an asset to Oregon’s future.

Faced with such deep, pervasive and systemic poverty issues, Oregon must acknowledge that investments in education must be leveraged by investments in whole communities. Teachers, parents, businesses, colleges, nonprofits, social services, local governments, and students themselves – all more powerful when aligned and focused on the same outcomes.

Through the Regional Achievement Collaborative (RAC) pilot, OEIB has seen the fruits of collective responsibility across the birth to college & career continuum. In 12 regions across the state – from Multnomah County to Lane County to Southern & Eastern Oregon – education leaders from all levels are joined by business, nonprofit and other leaders to making a shared commitment to improving the achievement compact outcomes for all children and students in a region.

Further, as communities begin to dig in to the root causes of educational disparities and poor achievement, the interconnected nature of education with health, workforce, housing, transportation and other key areas becomes clear. Through the Governor’s leadership, RAC’s are beginning to leverage opportunities across other community-based transformation efforts – such as early learning hubs, Coordinated Care Organizations, Poverty to Prosperity projects and Regional Solutions Centers – sharing resources and aligning outcomes across multiple sectors in the name of achieving regional prosperity.

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OEIB recommends examining innovative regional models of investment and infrastructure to support expansion of Regional Achievement Collaboratives, as well as to incent innovative cross-sector approaches across other policy areas.

Strategy 2: Focus investments on achieving student outcomes

Since its appointment, the OEIB has engaged in deep thinking around the significance of Oregon's 40/40/20 Goal – what policies, partnerships, strategies and investments are necessary to achieve the goal, and what the trajectory to 40/40/20 could be in the context of Oregon's current student demographics and achievement levels. Acknowledging Oregon's long history of local control, and the failure of top-down accountability systems such as No Child Left Behind, the OEIB sought an instrument that incented shared responsibility and harnessed local involvement to create effective and sustained change. Formal recognition of this approach came in 2012 (Senate Bill 1581), with the OEIB's adoption of achievement compacts.

Through the compacts, institutions set ambitious but attainable goals for student success around key outcomes considered critical for student success in college and in the workforce. The key outcomes for K-12 districts include 3rd grade reading & math proficiency, 5th grade math proficiency, 6th grade on track, 9th grade on track, college credits earned in high school, high school completion, and post-secondary enrollment. Key outcomes for colleges and universities include enrollment, persistence (15/30 credits earned) and certificates and degrees awarded. Each of these outcomes is predictive in some critical way of student achievement and career readiness; together, they comprise a compelling snapshot of our collective progress toward the 40-40-20 Goal.

While the achievement compacts have prompted critical conversations, OEIB recognizes that setting goals around key outcomes alone isn't enough to foster lasting, positive change. Institutions, in conjunction with their boards and community leaders, must have the courage to change their strategies, practices and funding priorities to achieve these goals. At all levels, the education system must commit to a laser-like focus on improving the key outcomes, using best practices, and creating high-quality continuous learning environments that will support and motivate students and educators alike. For its part, the OEIB, along with the Governor, the State Legislature and its partner agencies, must put in place policies, systems and supports that can help institutions reach their goals. The state should tackle its issues with unstable and inadequate revenue, continue efforts to contain costs such as health care and prison costs, and use a variety of budget and accountability tools to drive investment toward achieving these outcomes.

The following are critical to achieving the state's 40-40-20 Goal:

- Increasing Investment at All Levels
- Continue Prioritizing Oregon's Early Learning System
- Focus Base Funding for K-12 and Post-Secondary on Improving Key Outcomes
- Make Transformational, Innovative and Effective Strategic Investments

Section 2.1 Increasing Investment at all Levels

It is widely accepted that education in Oregon is underfunded at all levels and fluctuates wildly from biennium to biennium in ways that make reinvestment difficult. From 2009-2013, the Great Recession had a great toll on K-12 education – forcing school districts to cut millions from their budgets, laying off valued teachers and staff, reducing school days, and shutting down schools and programs against the wishes of the community. In post-secondary, Oregon's disinvestment

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has resulted in the loss of valued programs and faculty, as well as an unacceptable shift in costs to students and families through rising tuition.

The tide turned significantly in the 2013-15 LAB when education funding increased significantly across all levels. In addition, 2013-15 yielded significant success in terms of controlling costs that had begun to far outpace general inflation, hitting all public education institution budgets hard and shifting resources out of the classroom.

The Governor's 10-year budget strategy for education is based on two important ideas: invest more strategically and invest more. To allow for increased investment in education, the State must move forward on strategies to bend the cost curves of health services and prisons, which are taking up an ever-larger percentage of Oregonians' personal income. Without relieving these cost pressures, investment in education – as a share of Oregonians' personal income, and as a share of the state discretionary budget – is likely to continue to decline. Ultimately, the state strategy must be to continue working to bring the costs of health care and corrections down in order to increase the overall investment in the education system. The state must work to ensure a stable and sustainable base of funding is available to educational institutions, including the early learning system.

Section 2.2 Continue Prioritizing Oregon's Early Learning System

Decades of research confirm early investments are key to later educational success. In a state where nearly half of our children are born on Medicaid, 33% of children entering Kindergarten could name five or fewer letters, and only a quarter of our entering kindergartners did not regularly demonstrate skills such as completing tasks and following directions, the importance of an effective, coordinated system that identifies the needs of children and families at risk, and offers useful assistance quickly, as soon as possible cannot be overstated.

While the state has made significant progress toward building a better coordinated system for early care and education, there is a continued need to focus on and invest in efforts to build the system and improve outcomes for our youngest learners.

Our continued investments should focus on identifying risk factors early and coordinating services and supports that enable learning, ensuring that children enter the education system with the skills and developmental assets needed sets the trajectory for the child complete their high school education.

Specifically, to improve outcomes for children, there is a need for increased focus on and investment in the following core areas:

- Continue to support the implementation of Early Learning Hubs and a deeper level of investment of flexible funds in core strategic areas – in particular supporting infrastructure for service referral and family resource management, strong kindergarten transitions and deepening work with families to support early literacy. In addition to on the ground investments to support Hub strategies and incentivize outcomes, Early Learning Hubs will benefit tremendously from the implementation supports provided through both on the ground coaches and barrier busters, and professionally facilitated learning collaboratives.

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- Support early screenings and intervention efforts, aligned with health care system: Thanks to a strong partnership with the Oregon Health Authority, the state has met its five year goals for increased developmental screening for children ages birth through 3. To continue this momentum, further investment is needed to support coordination of developmental screening across health care and early learning settings and providers.
- Increase access to high-quality early learning programs: Through continued support for the Quality Rating Improvement System (QRIS) the state will continue to increase the supply for formal (licensed) early learning and care providers across the state. Supports should include continued training for providers to move up the quality pipeline as well as supports to increase education levels of early care and education providers and for evidence based professional development strategies. Additionally, an increased focus on quality care for families receiving child care subsidies and other state-funded work support/self sufficiency benefits, is needed.
- Increase support for evidence based services, including home visiting and respite services, that engage and support families as partners in their children's education.
- Leveraging childcare subsidies to support and incent families in choosing high-quality childcare settings.

Section 2.3 Focus Base Funding for K-12 and Post-Secondary on Improving Key Outcomes

Billions of dollars of the state's general fund are invested in education each biennium, with 98 percent of that amount flowing through the hundreds of entities delivering education. For those entities, Oregon's education funding is centered on inputs and enrollments across the education continuum. How many students are served plays a much larger role in an institution's fiscal position than how effectively students are educated. Funding levels for school districts, colleges and universities are based on existing staffing ratios and inflation expectations for salaries, benefits, materials and supplies. Contracts with Oregon Pre-Kindergarten programs are based on the number of children served, not how well those children progress in their readiness for school. Moreover, budgets are too frequently developed, both at the state and local levels, based on current service levels without consideration or prioritization of the outcomes sought to be achieved.

While outcomes-based budgeting has been ascribed various meanings, the critical feature is the intentional focus of dollars to achieve the desired results – setting budget priorities and aligning spending to deliver the specific outcomes desired for students. At the local level, institutions set goals around key outcomes through the achievement compact process. However, the process of setting goals around critical indicators, and defining strategies to achieve these goals, is somewhat meaningless unless it is used to directly inform an institution's budgeting process. While performance on the Achievement Compact is not currently related to the level of funding institutions receive, compact goals should drive budget priorities. Achievement Compacts should incent educational entities to “budget the plan, not plan the budget.”

In early learning, OEIB should ensure that we are differentiating support – targeting the most underserved populations of children and families – and coordinate services to ensure investments are making a difference.

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To truly leverage base funding for achievement of traditionally K-12 outcomes, OEIB should commit to providing additional support and communication to school districts in completion of the achievement compacts. In addition, the OEIB should engage deeply in examining the system for potential for formula redesigns, such as in the 11-14 system redesign described in Section 1.1.2 or funding for English Language Learners, as well as particular outcomes for which some level of “incentive” funding could serve to more rapidly lead to improve, such as closing the achievement gap for 3rd grade reading, or ensuring 9th graders are on track with attendance and credits.

In post-secondary, HECC has committed to working with community colleges and 4-year universities to recommend models for the distribution of budgeted funds to institutions, paying attention to: (1) what is not working well under the current formulas; (2) rewarding the desired outcomes and eliminating barriers to effective achievement; and (3) providing enough lead time for institutions to respond to changes. This model must ensure that costs are not simply redistributed to students and families, but rather incent reduced costs, achieve new efficiencies and/or accelerate completion.

Section 2.3: Transformational, Innovative and Effective Strategic Investments

The current strategic investments have successfully mobilized school districts and community-based organizations in many corners of the state: focusing the conversation on best practices, incenting partnerships and collaboration, and accelerating improvements in key outcomes in places where the investments were more deeply felt. However, as OEIB embarks on the 2nd round of strategic investments, some considerations must be: (1) how to streamline and focus the investments; (2) how to ensure they incent change at all levels, not just K-12; (3) whether tools other than Requests for Proposals (RFPs) can help make the process more effective and less burdensome; (4) how to ensure investment flows to successful nonprofit and community-based organizations and other culturally specific providers; and (5) how we differentiate the purposes of base funding – which the state passes to education institutions specifically for the purpose of achieving key education outcomes – with strategic investments.

2.3.1 Strategic Investment Criteria

Strategic investments must be transformational, innovative and effective, designed to radically redesign the education system such that the promise of the 40-40-20 Goal can be achieved for each and every Oregonian. Identifying some key criteria, or more aptly characteristics, of strategic investments will provide OEIB a framework from which to prioritize strategic investment concepts for the Governor’s, and legislature’s, ultimate consideration. Education agencies, institutions, stakeholders and partners should consider the following:

- Models that are highly transformative, leading the state toward a new vision for education, and that promote flexibility and innovation
- Preventative models that will reduce costs and improve outcomes further along the pathway, and models that have a significant return on investment (high yield for low cost)
- Models that have a strong possibility for scaling across the larger system or a multiplier effect
- Models that produce powerful results, such that communities will be strongly compelled to continue funding the activities over time

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- Models that leverage other state and private investments

2.3.2 Leverage Points for Consideration

All sections of this Budget Priority paper identify key priorities and strategies for which investment should be considered. In addition, there are several key leverage points that the OEIB believes are critical for strategic investments:

- Implement Evidence-Based K-3rd Grade Reading Strategies, Particularly in Struggling Schools & Districts: Karen to add content
- Post-Secondary Access and Affordability: Even after taking financial aid into account, it costs Oregon students and their families approximately twice what it did a decade ago to attend in-state public colleges and universities. This financial toll – which is significant even for students that fully qualify for federal and state need-based grants – represents perhaps the single greatest barrier to student success in Oregon higher education. To significantly deepen the college-going culture across the education continuum, Oregon must ensure that post-secondary education is accessible, affordable, and represents a clear return on investment for all learners who earn a high school diploma. To meet the access and affordability challenge requires the OEIB and HECC to (a) work with institutions, including K-12 districts, to straighten certificate/degree pathways and reduce time-to-completion; (b) develop state investment strategies, including potential targeted investments for outside-the-classroom supports such as enhanced counseling/advising, that help students efficiently navigate post-secondary education; and (c) refine and enhance the state’s investment in institutions and need-based aid in order to increase affordability, especially for those most at-risk of being priced out of higher education.
- Science, Technology, Engineering & Math (STEM), Career and Technical Education (CTE) and the Arts: Expand the development and support for statewide network of Regional STEM Hubs to create a collaborative network that will foster greater communication, exchange of ideas and intellectual resources, and more effective implementation of evidence-based practices to enact local solutions to local needs; consider investment in the STEM Investment Fund and CTE Revitalization Grant Fund to increase access to evidence-based STEM and CTE programs during and beyond the school day—particularly for students of color and high-needs communities and incentivize the design, implementation, and evaluation of high-probability, emerging approaches and practices.

Strategy 3: Build State Systems of Support and Accountability

The state’s role is not to deliver education, but rather to invest in and support the thousands of institutions and providers across the state that do. To succeed, Oregon must engage educators and leaders, students and families, communities, and employers to achieve the educational excellence envisioned for Oregonian students. The state will continue to set standards, provide guidance, and conduct assessments, coordinated along the education pathway. In addition, critical state support must come through further developing the Network for Quality Teaching, providing an accountability to support continuous improvement in schools and institutions, and a

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policy database and research consortium to research and disseminate information about best practices and the effectiveness of key investments.

- Network for Quality Teaching & Learning
- Support for School and Institutional Improvement
- P-20W Policy Database
- Research and dissemination of best practices

Section 3.1 Network for Quality Teaching & Learning

Of all the in-school factors influencing a student's success, effective teaching is the most significant. Oregon's investment in education must prioritize supporting early learning educators, teachers, administrators, school personnel specialists, and post-secondary faculty in doing their best work to improve student achievement, at every stage of public school education. Oregon needs a strong pipeline of instructional leaders who can positively impact teaching and learning and who mirror our schools' culturally and linguistically diverse learners. Oregon is moving in the right direction with its initial \$45 million investment in high quality educator preparation models, mentoring for new hires, ongoing and meaningful performance evaluations and professional development.

The creation of a Network for Quality Teaching and Learning has just begun now to support professional learning that is ongoing, collaborative in nature, and aligned to the needs of educators to better serve students. Full implementation of the Network is needed to:

- Enhance educators' ability to innovate and enquire into one's practice
- Improve access to instructional expertise and resources
- Promote the scaling up of the most effective practices across the state
- Support and structure more effective professional development opportunities
- Link to other community-based efforts such as Regional Achievement Collaboratives, Early learning Hubs, and STEM Networks
- Develop stronger connections with postsecondary partners preparing educators and conducting research on key issues in education

Efforts to build capacity, enhance the collaborative professionalism of educators to support student learning will change the culture of schools and districts across Oregon and put us on a clear path to the 40-40-20 Goal.

Full implementation must include professional development for educators across the system designed to support them in meeting the needs of all learners at all ages, including those living in poverty, earning with disabilities, learning English as a second language learners and students of color. With that focus, efforts to build capacity, enhance the collaborative professionalism of educators, promote the learner as individual will change the culture of schools and districts across Oregon and put us on a clear path to the 40-40-20 Goal.

Section 3.2 Support for School and Institutional Improvement

A key strategy of the OEIB is to create a Birth to College and Career system that supports and motivates students, teachers and communities. The collective responsibility for educating each

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and every Oregon student rests not only with educators and leaders at all levels, but also with parents, community organizations, business leaders, education agencies, policymakers and students themselves. The OEIB's obligation is both to promote shared responsibility and inspire communities across the state to act with urgency to improve outcomes, and to ensure that our state has in place a system to support and intervene where the needs of children and students are not being adequately met.

Oregon is committed to advancing an accountability system that includes broader measures, motivates and supports improvement rather than simply demands it, and requires communities to become active participants in improvement and accountability. In addition, the system as a whole must be prepared to offer support and, where necessary, an increasing level of prescriptive intervention for those institutions who are not meeting their obligations to Oregon's learners. In the past two years, the OEIB has entered into an Achievement Compact with each K-12 district, community college, and post-secondary institution, which represents a shared commitment to achieve key outcomes considered critical for student success in college and in the workforce. The purpose of the Achievement Compacts is to drive educators, governing boards and communities to set ambitious but achievable goals and then shift resources and develop strategies to achieve those goals. For the state, the compacts represent a commitment to enact strong policies, remove barriers and provide investment and support.

The OEIB is committed to providing increased flexibility and room for innovation for those that demonstrate success. However, for districts and institutions that consistently fail to make progress on key outcomes, particularly where our most vulnerable children and students are concerned, the Chief Education Officer has charged each level of the system with creating an accountability framework that is clear and aligned.

In K-12, the Chief Education Officer has asked ODE and the State Board of Education to work with stakeholders to:

- (a) Design and implement an accountability system of progressive interventions for schools and school districts that do not demonstrate improvement; and
- (b) Provide technical assistance to schools and school districts that do not demonstrate improvement.

Students of color, English language learners and students in poverty are vastly overrepresented in the lowest performing schools and districts. For that reason, investing in a strong system of K-12 accountability aimed at supporting continuous improvement, is an OEIB priority.

Section 3.2 P-20W Policy Database

The state should continue to invest in creating a statewide, longitudinal database to ensure (1) that longitudinal student information and outcome data is available at the provider and policy-maker level; and (2) and to support the dissemination of best practices across outcomes.

Existing federal investments are supporting the Oregon Department of Education, with support from all other education agencies, in creating a statewide longitudinal data system and research function that will compile longitudinal student data (without student identities attached) from every level of education. The database will provide return on investment calculations to provide a useful diagnostic tool, one that allows educators and the state to better identify the

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investments that are both cost effective and effective for replication or expansion: what works for students, and how best to invest limited public dollars.

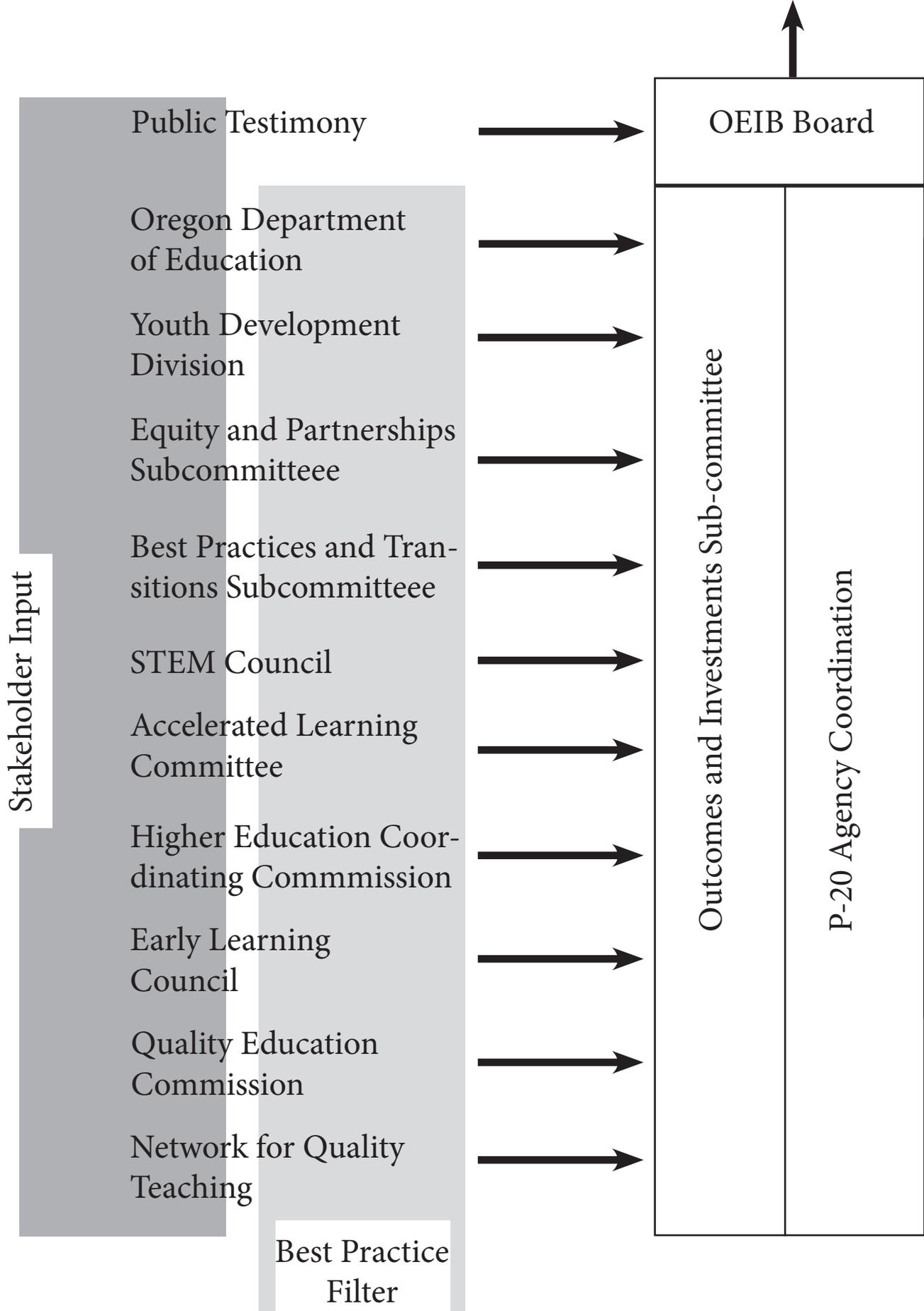
The early childhood system is charged with developing an integrated data system that brings together data from early learning, health, and human services at the level of the child, provider, and community to streamline services, guide resource allocation, and provide accountability for early childhood investments. The data system will interface with the statewide longitudinal data system, thus providing robust data on children from birth through higher education.

Section 3.3 Research and dissemination of best practices

To ensure that decisions and budgets are built around outcomes, the state must invest in the capacity to not only collect data, but to research that data and provide much deeper analysis of what is working across the continuum. Research and data will allow educators to become more rigorous about predicting the likelihood of dropping out on a student-by-student basis and understanding which conditions—inside and outside the school—raise the odds of graduation. Teachers need reliable and vetted resources proven effective with the learners in their classrooms, particularly those that are at risk for low achievement.

Further, the state must build a viable and effective strategy for disseminating research and best practices to all educators and communities. For too long, educators in Oregon have been left without a central way to collaborate with other educators across the state facing common challenges. The collection and distribution of a high quality, comprehensive body of knowledge, expertise and research on proven or promising practices is essential to support an education system that continually improves itself.

Governor's Budget





2015-17 BUDGET STRATEGIES & PRIORITIES

EQUITABLE PROGRESS TOWARD 40-40-20 GOAL

Strategy 1:

Coordinated, student-centered education system, from birth through college and career readiness.

- ❖ Age 3 to Grade 3 Success
- ❖ “11-14”: Transition from High School to Post-Secondary
- ❖ Supporting Out-of-School Youth and Youth at Risk
- ❖ Post-Secondary Governance & Coordination / Alignment to Workforce
- ❖ Regional Collaboration

Strategy 2:

Focus state investment on achieving key student outcomes.

- ❖ Increasing, Targeting and Leveraging Investment
- ❖ Build Strong Early Learning System and Target Supports
- ❖ Focus Base Funding for K-12 and Post-Secondary on Achievement of Outcomes
- ❖ Transformational, Innovative and Effective Strategic Investments, such as:
 - Early Literacy
 - CTE / STEM / Arts
 - Post-Secondary Access, Affordability & Support

Strategy 3:

Build statewide support systems.

- ❖ Network for Quality Teaching & Learning
- ❖ Support for School and Institutional Improvement
- ❖ P-20W Policy Database
- ❖ Research and Dissemination of Best Practices/Policies

V2: Outcomes & Investments Subcommittee Schedule 2014

May 29: Outcomes & Investments Subcommittee (Salem, 2-4 p.m.)

- Presentation from QEC
- Presentation from ODE / Supt. Saxton
- Presentation from Youth Development Division

June 12: Outcomes & Investments Subcommittee (Portland, 9-11 a.m.)

- Presentation from Network Advisory
- Presentation from Accelerated Learning Committee
- Presentation from Early Learning Council

July 24: Outcomes & Investments Subcommittee (Portland, 2-4:30 p.m.)

- Presentation from HECC
- Presentation from STEM Council / CTE / ETIC
- Presentation from Best Practices Subcommittee

August 6: Outcomes & Investments Subcommittee (Portland, 8:30-10:30 a.m.)

- Work session – joined by Equity Subcommittee

August 12: OEIB Full Board Retreat – Work Session on Budget

August 21: Outcomes & Investments Subcommittee

- Second Work Session

August – early September: Potential Public Outreach / Input Event(s)

September 9: Full Board adoption of Recommendations



The Questions

How do we ensure our education investments drive student success?
How do we support, find and keep our state's dedicated teaching professionals?
How do we identify, measure and replicate strategies that deliver transformative innovation to our entire education system?

The Answers

In 2011, Gov. John Kitzhaber proposed an unprecedented approach: a nimble, independent “think-and-do-tank” to diagnose weaknesses in our education system, develop targeted strategies, make catalytic investments, measure return on investment, and then scale up the best ideas.

During the 2011 Oregon Legislative Session, a bipartisan supermajority – recognizing the need for an all-hands-on-deck game plan, passed two milestone pieces of legislation:

- SB 253, which defined the goal: by 2025, 40 percent of adult Oregonians have earned a bachelor's degree or higher; 40 percent have earned an associate's degree or post-secondary credential; and the remaining 20 percent or less have earned a high school diploma or its equivalent. [We refer to these targets as our “40/40/20” goal.](#)
- Senate Bill 909, which called for the creation of a unified, student-centered system of public education from preschool through to career. That approach would come into being through the creation of the [Oregon Education Investment Board, or OEIB.](#)

With strong bipartisan support and leadership from Oregon's legislators, community leaders and the Governor, the 2013 Legislative Session delivered on two more education-transformation bills:

- House Bill 3233 ¹, which established the Network for Quality Teaching and Learning. The initiative has strategically invested \$45 million to create and coordinate an integrated network throughout the state to get even more return on our public investments in our state's committed, passionate, professional educators; and
- House Bill 3232, which directed OEIB to design and implement strategic investments in education tied to key levers proven to improve student success.

[OEIB's mandate is as clear as it is urgent:](#) Dissolve the long-standing barriers and “silos” – among education jurisdictions, and between education and the multi-faceted communities that our schools serve, in order to take full advantage of the shared talent, knowledge, relationships and resources present in each community, which will fundamentally transform the quality and equity of Oregon's public education.

Strategic Initiative

Mini Case Study: Network for Quality Teaching and Learning

The research is clear: the classroom teacher has the most significant in school impact on student learning. Yet, until very recently, there was no coordinated statewide educator recruitment plan that forecast – and planned for – teacher supply and demand, incentives to diversify the workforce, teacher recruitment, preparation, induction, and professional development.

Recognizing the urgent needs and the long-term value of a strategic approach to teacher recruitment, training and advancement, OEIB in 2013 secured overwhelming bipartisan support for initial investments made in mentoring programs designed to retain high quality educators, collaboration grants that created time for teachers to share their practice with peers, and professional development resources to support educators' implementation of the Common Core and Educator Effectiveness models in their local communities.

¹ <http://gov.oregonlive.com/bill/2013/HB3233/>; Bill passed by a 53-5-1 margin in the House, and a 26-4 margin in the Senate.



The Stakes

Though education is more important now to the lives and prosperity of Oregonians, Oregon is falling behind:

- 33% of entering Oregon kindergarteners could name only five or fewer letters and 14% couldn't name a single letter.
- Graduation rate for Oregon is 68.5% and for students of color it is less than 60%. As of 2012, just 8.44% of teachers and administrators employed at Oregon public schools was minorities while 37% of our students are from communities of color or English Language Learners.
- Our current generation of young adults—ages 25-34—is less educated than their parents' generation, with fewer earning a certificate or degree beyond high school.

These are troubling trends. While the challenge is formidable, the reality is that Oregon has never been better positioned or more prepared to meet and overcome these challenges. Here's how we're going to do it.

The Playbook

OEIB's overall plan of transformation is built on four core strategies:

- 1. Invest early:** Students reading proficiently by 3rd grade are four times more likely to graduate high school ². OEIB focuses on early learning, from birth through elementary school, making sure kids are on track and on pace long before high school.
- 2. Find the best levers of change:** Concentrate on assessing, growing and supporting those programs that demonstrate results and ROI (where I=investment of time, money and energy).
- 3. Catalyze community-driven innovations:** Tap into, support and replicate the many incredible community-led strategies and programs (see 'Accelerated Learning' sidebar for one example.)
- 4. Be the backstop:** Through tools like achievement compacts, set clear expectations, engage unconditionally, and hold all partners accountable.

² Hernandez, Donald J. "Double Jeopardy Overview: How Third-Grade Reading Skills and Poverty Influence High School Graduation." (<http://www.aecf.org/~media/Pubs/Topics/Education/Other/DoubleJeopardyHowThirdGradeReadingSkillsandPoverty/DoubleJeopardyReport030812forweb.pdf>)

Strategic Initiative

Accelerated Learning as a Lever of Change

We know college is a major expense for most families, ranging from barely affordable to unacceptably unaffordable. We also know that higher education is the best pathway out of poverty and into security and prosperity. So, OEIB is dedicating a portion of its strategic investment funds to expanding the number, reach and efficacy of Accelerated Learning programs.

Accelerated learning means providing early college-credit opportunities for high school students. Accelerated learning (whether it be in the form of Advanced Placement, International Baccalaureate, or dual credit coursework) does three important things that have long-term positive impacts:

1. It bolsters a student's confidence that they will be able to succeed in college.
2. It saves families money on higher education.
3. It smoothenes the transition between high school and college.

Investments in accelerated learning are just one set of examples of OEIB's focus on making Oregon students' transitions from one level of education to the next as seamless as possible. One great example comes from the sun-drenched communities of Eastern Oregon.

Thanks to the 'many hands make light work' culture in Eastern Oregon, teachers, parents, administrators and advocates from Blue Mountain Community College, Eastern Oregon University, Treasure Valley Community College, and the InterMountain Education Service District came together to create Eastern Promise, a program aimed at providing early college-credit opportunities for high school students and bolstering the college/university-going culture of rural Oregon.

Recognizing the smart, collaborative, student-centered practice the community was implementing, OEIB stepped in to support the Eastern Promise, and to establish and award replication grants so that other Oregon local leaders could learn from and create or improve coordinated approaches to accelerated learning in their communities ³.

³ In April 2014, OEIB awarded a first round of "Eastern Promise" replication grants, awarding \$3.96 million to five consortia across the State of Oregon.



The Principles

Underpinning OEIB's work are three guiding principles:

- **Equity:** Oregon is a diverse state geographically and an increasingly diverse state demographically. To meet each of our students' desired outcomes, each must have equal access to great teachers, great schools and leaders fostering their senses of curiosity and drive.
- **Coordination:** Students who start kindergarten behind play a losing game of catch-up their entire lives. Learners who get a taste of college while still in high school are more likely to go to college. These transitions must be seamless. Like a relay-race team, the performance of the team requires being great at managing the hand-offs. And the responsibility for managing those hand-offs rests on the coaches (and teachers, administrators and parents).
- **Measurement:** Recognizing the need for unprecedented coordination, OEIB has identified critical milestones and transitions in a students' experience that predict long-term success. We've prioritized making investments in and eliminating barriers towards ensuring:
 - More students are ready to learn when they enter school
 - Less chronic absenteeism, more of our students in class and engaged
 - More third graders are reading at or above grade level
 - More ninth graders are on track with credits and strong attendance records
 - High school graduation rates increase
 - More Oregonians earn degrees and certificates that lead to rewarding jobs

Up Next

Over the next three to five years, OEIB will be ramping up first-generation programs, policies and investments and deepening the commitment to successful existing initiatives. Here's a look at just a fraction of those initiatives/products:

Fall 2014 through 2017:

- System-wide focus on increasing the number of students reading proficiently in third grade including: statewide full-day Kindergarten in 2015 (as a result of Senate Bill 248), a K-3 initiative to focus on closing the gap between students before Kindergarten, strategic investments in proven community-driven strategies to improve literacy, and the launch of the Statewide Literacy Campaign.
- Expansion of Oregon Network for Quality Teaching and Learning via an online peer-to-peer professional educators' community in July 2015.
- Development of specific policy and investment recommendations designed to curb high absenteeism rates.
- Deepening the connection of education and workforce through science, technology, engineering and math (STEM) and Career Technical Education (CTE) investments to ensure students are equipped with the skills to adapt and thrive in the world of work.
- 2nd Oregon Minority Teacher Report in 2017 to update the legislature on progress made to increase the number of teachers and education leaders who represent Oregon students.
- Production of a comprehensive Biennial Accelerated Learning Statewide Report in 2017 designed to highlight the number of students earning college credit in high school, show the change in high school graduation and post-secondary enrollment, and demonstrate the elimination of gaps between students in college-going rates.



Oregon Education Investment Board Member Terms of Office

- The term of office for each member shall be for no more than four years (Article 15, section 2, Oregon Constitution).¹ A person appointed under this paragraph may not be appointed to serve consecutively more than two full terms as a board member.²
- Members serve at the Governor's pleasure and may be removed at any time.^{3,4}

Attendance

- Regular attendance at meetings is expected of each board member. A member should notify the chair or board staff at least 24 hours in advance of a meeting if the member is unable to attend. In an emergency, the Member shall contact the chairperson or board staff as soon as reasonably possible.⁵

Other Participants (Ex-Officio)

- The Superintendent of Public Instruction, the Commissioner of Community Colleges, the Chancellor of the Oregon University System and the Executive Director of the Oregon Student Assistance Commission shall be invited to attend all meetings of the Board and to advise the board regarding matters within their scope of expertise.⁶

¹ SB 909 does not include terms of office: length of term, starting terms

² This language reflects current restrictions on board members serving on the State Board of Education (ORS 326.021) and State Board of Higher Education (ORS 351.040).

³SB 909, Section 1, (B)

⁴ Oregon Education Investment Board, Policies and Procedures, Adopted November 21, 2011.

⁵ Oregon Education Investment Board, Policies and Procedures, Adopted November 21, 2011.

⁶ Oregon Education Investment Board, Policies and Procedures, Adopted November 21, 2011.



Other Participants (Ex-Officio) to the Oregon Education Investment Board

- Senate Bill 909 does not speak to the invitation of other participants, or Ex-Officio members, to the Oregon Education Investment Board to act as advisors.
- According to the Oregon Education Investment Board, Policies and Procedures, (*Adopted November 21, 2011*):

“ The Superintendent of Public Instruction, the Commissioner of Community Colleges, the Chancellor of the Oregon University System and the Executive Director of the Oregon Student Assistance Commission shall be invited to attend all meetings of the Board and to advise the board regarding matters within their scope of expertise.”

- The current restructuring of the Oregon education system creates a direct conflict with the language from the Oregon Education Investment Board, Policies and Procedures manual. A change in language to the Oregon Education Investment Board, Policies and Procedures manual and the roster of invited advisors is recommend.

(*Note: The manual was not updated with the decision to add the Executive Director of the Teachers Standards and Practices Commission to the roster of advisors.)

- Recommended language:

“ The Executive Director of the Higher Education Coordinating Commission, Director of the Early Learning Division, The Director of the Youth Development Council, the Executive Director of the Teachers Standards and Practices Commission and the Deputy Superintendent of Public Instruction shall be invited to attend all meetings of the Board and to advise the board regarding matters within their scope of expertise.”

- **Current roster of Ex-Officio members:**

Iris Bell, Director, Youth Development Division

Ben Cannon, Executive Director, Higher Education Coordinating Commission

Victoria Chamberlain, Executive Director, Teachers Standards and Practices Commission

Jada Rupley, Executive Director, Early Learning Division

Rob Saxton, Deputy Superintendent of Public Instruction, Oregon Department of Education