



OREGON EDUCATION INVESTMENT BOARD Outcomes and Investments Subcommittee

Oregon University System
Chancellor's Office at Portland State University
Board Room Suite 515
1800 SW 6th Avenue
Portland, OR 97201

Thursday, February 27, 2014
9:00am – 11:00am

Meeting will be streamed [HERE](#)

Members: Dick Withnell, Chair, Pam Curtis, Ron Saxton,
Hanna Vaandering, Duncan Wyse

JOHN KITZHABER
Governor of Oregon
OEIB Chair

JULIA BRIM-
EDWARDS

YVONNE CURTIS

MATTHEW DONEGAN

SAMUEL HENRY

NICHOLE JUNE
MAHER

MARK MULVIHILL

DAVID RIVES

RON SAXTON

MARY SPILDE
Chair-Designee

KAY TORAN

JOHANNA
VAANDERING

DICK WITHNELL

Chief Education Officer
NANCY GOLDEN

AGENDA

- 1.0 Subcommittee Welcome & Roll Call
- 2.0 Approval of January Meeting Notes
- 3.0 Deliver Achievement Compact Implementation Report
Whitney Grubbs, OEIB Chief of Staff
- 4.0 Discussion of 2015-17 Budget Strategies and Initial Priorities
Whitney Grubbs, OEIB Chief of Staff
- 5.0 Update on Accountability Charge
Dr. Nancy Golden, Chief Education Officer
- 6.0 Public Comment
- 7.0 Review of Tasks and Details on Next Meeting
Meeting adjourns

***Times are approximate**

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

**Oregon Education Investment Board
Subcommittee on Outcomes & Investments
January 23, 2014 DRAFT Meeting Notes**

Key Tasks from Meeting

- The revised scorecard will be introduced at February's OEIB meeting as part of the Subcommittee's report
- Staff will draft budget priorities and parameters to guide future discussions and recommendations re: strategic investments
- Dr. Golden will send letters charging the Early Learning Council, the Oregon Department of Education, and the Higher Education Coordinating Commission with developing accountability frameworks; these letters will reflect some of the advice and principals the Subcommittee discussed

1.0 Welcome and roll call

Members in attendance: Dick Withnell, Chair; Pam Curtis, Ron Saxton, Hanna Vaandering, and Duncan Wyse.

Invited guests: Dr. Nancy Golden and Sarah Pope, Chief of Staff to the Deputy Superintendent of Public Instruction.

Staff in attendance: David Edwards and Whitney Grubbs.

2.0 Approval of December Meeting Notes

Ron moved the approval of the meeting notes; they were approved unanimously.

3.0 OEIB Scorecard: Final Review & Discussion

Whitney introduced the document for the second time, noting that some changes will be made to the format prior to its debut at the next OEIB meeting. She reiterated that the document is intended to serve as an accountability tool for OEIB (as opposed to educators) and as a guide to potential supports and investments.

Hanna asked about ODE's plans for handling the transition from OAKS to SBAC (standardized test) scores and the consequent impacts on the scorecard. Dr. Golden explained that the department is currently reviewing its options, including converting SBAC scores to their OAKS equivalents.

Pam suggested that the scorecard reflect the Early Learning Council's pre-K work. She wants to ensure ELC is accountable for the relevant outcomes.

Dick and Hanna agreed that it was important to present the student achievement results in the context of economic and other influential external factors.

4.0 Discussion of Strategic Investment Budgeting Process

Dr. Golden introduced this topic by emphasizing that OEIB's recommended strategic investments should be both systemic and transformative. In other words, strategic investments are not intended to supplement resources for current activities; rather, they are intended to fund sustainable transformational changes.

Ron agreed, noting that discussions should involve the first dollar, i.e., base-level funding, not just the strategic investment fund.

Dr. Golden agreed that the Subcommittee should ask how existing resources could be better deployed.

Hanna observed that it's important to consider skill-based outcomes, not just academic ones. This comment sparked additional comments about the need to ensure standardized tests don't have an inordinate impact on course offerings and extracurricular programs.

Hanna then asked what OEIB can do to ensure educators and parents have the opportunity to provide meaningful input on the state's vision and budget priorities.

Dr. Golden agreed that it's important to solicit feedback from key stakeholders. She opined that the current education system is the result of "piecemeal" efforts over the years on the part of the federal government as well as the state. Duncan and others echoed these sentiments.

Whitney provided an overview of the 2013-15 budgeting process. As part of this overview, she clarified that the Subcommittee would essentially serve the same function as the Governor's education funding team from that cycle. (Two of the Subcommittee's members—Pam and Duncan—served on that team.) She tasked the Subcommittee with developing a budgeting brief by late-spring. This document will describe the critical budget parameters, the desired outcomes and prioritized recommendations (without specific dollar amounts).

A number of Subcommittee members highlighted the need to do as much pre-planning as possible. They expect staff to circulate draft documents as early in the cycle as practicable and potentially, arrange a few conference calls between regularly-scheduled in-person meetings.

Sarah Pope gave a brief presentation on the current round of strategic investments. To date, this round has focused mainly on issuing RFPs, selecting grant recipients and distributing funds. The main takeaways or lessons involve the following:

- The original RFP response deadline of two weeks was extended from four to six weeks so districts had enough time to prepare thoughtful applications.
- The more partners providing feedback on the RFPs the better, e.g., communities of color provided strong feedback on the need for some RFPs to have a wraparound services component.
- The investments should produce a good mix of short- and long-term results.
- For multiple reasons, it would be best to craft a short list of investment priorities. The current round of strategic investments involves thirty-three (33) separate initiatives. It's been challenging for ODE to manage and for grant recipients to respond to this number of opportunities.

One important question Sarah raised for the Subcommittee is: Where should investments go deep? And where should they go broad? She also noted that grant recipients are expected to evaluate and report on their activities, though most of these reports will arrive too late to inform the Subcommittee's decisions for the 2015-17 budget cycle.

Duncan spotlighted the need to define 'strategic investments' and to have clear outcomes associated with each line item (to be owned by Dr. Golden).

Pam asked whether the Subcommittee should consider using strategic investments as incentives. That led to a broader discussion about how to best encourage structural change not just tinkering at the margins.

5.0 Discussion of Accountability Frameworks

Dr. Golden prefaced the discussion by reminding Subcommittee members of OEIB's 'tight-loose-tight' governing philosophy: tight on goals, loose on strategy for attaining them, and tight on support and if necessary, intervention if results fall short.

These comments spurred a broader discussion about how to identify, assess and help failing schools. The collective advice from the Subcommittee in developing accountability frameworks included:

- Interventions should be progressive, that is, begin with support (as in the case of Priority and Focus schools) and include measures like reconstitution only as a last resort.
- Consult with stakeholders to identify the root causes of any prevailing issues;
- Include providers of wraparound services in crafting transformational strategies;
- Ensure interventions are well within existing law (Oregon statute) or rule (Oregon administrative rule).

Dr. Golden will take these points into account when drafting her letters charging the Early Learning Council, the Oregon Department of Education, and the Higher Education Coordinating Commission with developing accountability frameworks.

6.0 Public Comment

Five guests commented on various aspects of the meeting. These comments included:

- The need to emphasize early learning due to its lasting impacts; more specifically, the need to pay attention to the home learning environment.
- An undue emphasis on standardized testing has led to the elimination of many so-called non-core classes. There's an alchemy that occurs in education that can't be measured, so be cautious of over-emphasizing outcomes.
- Counsel to consider the unique needs of students with disabilities in recommending policy and budget changes.
- An appreciation of the Subcommittee's discussion of a 'whole child' approach to education and the inclusion of health care in the conversation.

Meeting was adjourned at 10:58 am.

###



Oregon Education Investment Board



Achievement Compact Implementation

Findings and Recommendations

Office of the Chief Education Officer
February 28, 2014

Background

The Oregon Education Investment Board (OEIB) was created in 2011 for the express purpose of ensuring equitable outcomes for all public school students in the state (Senate Bill 909). That same year, Oregon set an ambitious goal for educational attainment to better ensure all Oregonians are prepared for lifelong learning, rewarding work and engaged citizenship. This aspirational goal, which has come to be known as the “40-40-20 Goal,” targets the year 2025 for all students to earn a meaningful high school diploma or equivalent, for 40% of students to earn a certificate or associate’s degree, and for another 40% to receive a bachelor’s or advanced degree.

Since its establishment, 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. These compacts are entered into annually with each of the state’s K-12 school districts, Education Service Districts (ESDs), community colleges and public universities.

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.

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. In exchange, the OEIB, along with the Governor, the State Legislature and its partner agencies, is responsible for helping institutions through changes in policy or other support. The achievement compacts represent a public handshake between the state and its partner institutions with responsibilities on both sides. While the institutions set their own goals, OEIB is equally invested in their attainment.

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.

In addition to the institutional achievement compacts, the OEIB has also launched a “Regional Achievement Collaborative” pilot, 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, parents, and thereby broadening responsibility for students’ learning and success beyond school walls.

Guiding Concepts

The following concepts guided the development of the Achievement Compacts:

1. **“Tight-Loose-Tight” Accountability.**
The Achievement Compacts are premised, in part, on a “tight-loose-tight” governance model. In this model, the state is “tight” on the key outcomes it seeks to achieve (as captured in the compacts), but “loose” on the local strategies implemented to meet the associated goals. In the case of struggling institutions, the state may adopt a “tight” accountability framework, taking a more active role in determining the supports and/or interventions necessary to meet our shared goals.
2. **Collaboration and Shared Accountability.**
The Achievement Compacts are intended to foster collaboration among school administration, boards, associations and staff in identifying challenging but attainable goals and adopting the strategies to achieve them. While traditional forms of education accountability are primarily punitive in nature, and focused on individual buildings or institutions, the Achievement Compact is meant to be a tool that promotes shared accountability. The process of convening an Advisory Committee made up of educators and advised by parents and communities is intended to foster input, innovation and a sense of shared responsibility among and across all sectors.
3. **Impact on Local Budgeting.** 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 a 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.”
4. **Evidence-Based Outcomes.** To develop the Achievement Compact indicators, the OEIB engaged in a process of research, expert review and extensive public input. The original criteria for selecting the metrics currently on the compact were: 1) they are student outcomes (as opposed to process outcomes or inputs); 2) they are

OEIB recognizes that setting goals around key outcomes alone isn’t enough to foster lasting, positive change institutions...must have the courage to change their strategies, practices and funding priorities to achieve these goals. In exchange, the OEIB, along with the Governor, the State Legislature and its partner agencies, is responsible for helping institutions through changes in policy or other support.

highly predictive of whether a student will earn a diploma or degree; and 3) they are evidence-based. In year two, a set of recommendations from the Confederated Association of School Administrators (COSA) led to the addition of two indicators for which evidence is less clear: 5th and 8th grade math.

5. **Focus on Equity.** As adopted, the Achievement Compacts contain numerous pages of cells, leading many to question whether the compacts are as focused as they should be. The number of cells reflects the many unique student groups the state has an obligation to monitor. The OEIB heard from a wide variety of stakeholders who urged it to require that goals be set for each student group on each metric. The result is a format that's admittedly difficult to complete and digest; however, in a state with persistent achievement gaps, the OEIB opted for equity over simplicity.
6. **Alignment with OEIB Strategic Investments.** The OEIB's 2013-15 investment strategy was two-fold: 1) advocate for increasing base funding for all levels of education—using the Achievement Compact to shape local decisions about how to use those dollars; and 2) accelerate transformational change through additional strategic investments. In the 2013-15 budget cycle, the State Legislature increased base funding at all levels of education (about \$1 billion more than in the previous biennium in the case of K-12) and provided an additional \$74 million in strategic investments in student success and educator support. The strategic investments in student success were specifically designed to directly impact key Achievement Compact indicators, namely, ready for Kindergarten, 3rd grade reading, 9th grade on track and college credits earned in high school.



Purpose and Methodology

Districts, ESDs, community colleges and public universities have completed two rounds of achievement Compacts, offering many lessons to be learned by both the OEIB and its partner institutions. Oregon’s Chief Education Officer, Dr. Nancy Golden, committed to a systematic process of collecting feedback from educators and other stakeholders, reviewing individual Achievement Compacts and formulating recommendations for improvement. This report presents the key findings of this research process and the suggested next steps for maximizing the value of the compacts.

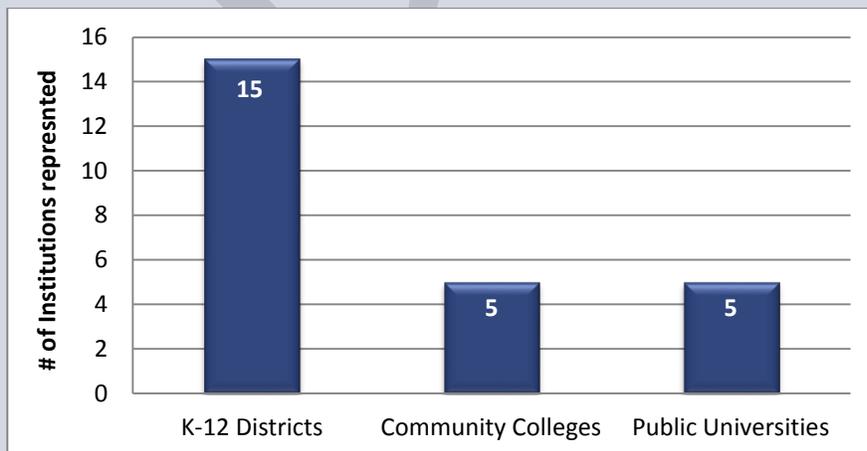
This study entailed a series of in-depth interviews (IDIs) conducted by the Office of the Chief Education Officer with a representative group of education professionals who participated in the Achievement Compact goal-setting process. The approach allowed for understanding the perceived use and effectiveness of the Achievement Compacts in a holistic way. IDIs were conducted with one to three key players per educational institution and conducted in-person where possible. K-12 district interviewees included superintendents, assistant superintendents, assessment and curriculum directors and faculty members, while post-secondary interviewees included college and university vice-presidents, provosts and directors, along with institutional researchers. Given the number of educational institutions involved, a representative sample was selected as part of this study. More

interviews were conducted among K-12 districts than among higher education institutions due to their greater number and variety.

A total of twenty-five (25) educational entities were profiled in relation to the Achievement Compacts. More specifically, these interviews included fifteen (15) K-12 districts; five (5) community colleges; and five (5) public universities. The exact identity of the districts and post-secondary institutions included in this research have been suppressed to ensure anonymity, which was considered essential for the purposes of eliciting open and honest responses. K-12 districts were selected on the basis of geographic diversity (across seven distinct regions of the state); enrollment; and diversity of achievement compact goals. Similarly, the post-secondary institutions targeted for this study included some of the largest institutions with an eye toward ensuring a measure of geographic diversity. A total of fifty-two (52) individuals were interviewed, with most institutions being represented by multiple interviewees.

Additional interviews were conducted with key individuals who contributed to the early development of the Achievement Compacts, namely Whitney Grubbs, Chief of Staff to the OEIB, Ben Cannon, Executive Director of the Higher Education Coordinating Commission (former Education Policy Advisor to the Governor) and Tim Nesbitt, Chair of the Higher Education Coordinating Commission (former Project Manager for the OEIB).

Breakdown of Educational Institutions Profiled



A total of twenty-five (25) educational entities were profiled in relation to the Achievement Compacts, with a total of fifty-two (52) individuals interviewed. Most institutions were represented by multiple interviewees.

Key Findings

The following represent the key findings from this research.

1. **Lack of Clarity Around Purpose of Achievement Compact**

Many, if not most, of the educators interviewed for this report support the state's need to track progress toward its 40-40-20 Goal, but question whether the Achievement Compacts, in their present form, represent the best way to track this information. Critical concerns from K-12 educators were around perceived redundancy with other mandatory reports, such as district improvement plans and the state's annual report cards, and ways in which the compacts are being used to shape education policy or funding decisions at the state level. As one assistant superintendent said, "The problem with the compact is that there isn't anything tied to it. Other than needing to check the box and complete the form, it doesn't have any impact... Except that if the newspaper reports that some school had to redo their Achievement Compact if it wasn't good enough. So the [public] perception is that the purpose [of the compact] is for public shaming, not for any substantive improvement."

2. **Lack of Clarity Around Purpose of OEIB**

While many K-12 professionals generally associate the agency with the state's 40-40-20 Goal, there's still considerable confusion about OEIB's mission and scope. Many, if not most, still regard the agency as primarily serving an accountability or audit function. Others tend to characterize the role of OEIB as a "barrier buster." As one superintendent put it, "When I first heard about OEIB, I thought of it as a P-20 council that would help break down barriers...[By] barriers, I mean those around pre-K and the transition into the K-12 system, and just as importantly, the transition from K-12 to community college, university and the world of work." An assistant superintendent said, "The purpose of OEIB is to serve as the umbrella [agency] for P-20 education... We need some greater vertical articulation and greater accountability [for collaboration]." But, as one university administrator noted, "I have to admit, on a personal level, that I'm still not clear on how the different pieces of the puzzle ultimately fit together. I know what the different entities are, but don't know how OEIB, HECC [the Higher Education Coordinating Commission] and the institutional boards come together at the end of the day."

3. **Challenges with Select Outcomes**

Some outcomes have been poorly defined and/or entail significant data collection issues. The three outcomes in the district compacts often mentioned in this regard are 9th grade on track, 9+ college credits and the number of students who enroll in post-secondary. Other outcomes are generally regarded as not particularly useful or reflective of the highest leverage points. For instance, community college administrators felt that some of the outcomes are outside the institutions' scope of influence, such as enrollment, GED attainment and transfers to public universities. On the public university side, most administrators don't consider the three outcomes under 'quality' as true measures of that dimension.

While many K-12 professionals generally associate the agency with the state's 40-40-20 Goal, there's still considerable confusion about OEIB's mission and scope.

4. **Challenges with Goal-Setting**

Three main challenges associated with goal-setting were identified: 1) the compacts are perceived to have too many metrics to encourage focused and properly ambitious goals; 2) the one-year horizon for goals has led institutions to make predictions rather than set ambitious but attainable goals; and 3) the lack of clear guidance about the most appropriate goal-setting method has sometimes produced arbitrary targets. In addition, K-12 educators reported receiving conflicting advice from OEIB and Oregon Department of Education (ODE) and felt that neither agency was providing sufficient technical assistance in the goal-setting processes. While many educators acknowledged the critical need for the state to focus on equity, the requirement that goals be set for multiple populations is described by some as burdensome.

5. **Impact on Local Strategy and Budget**

From the perspective of educators, the value of the Achievement Compacts lies in generating informed discussions about strategy and budget. Several of those interviewed indicated that the compacts have influenced new policy or budget decisions. One superintendent shared that the data point on which students are chronically absent—something which the district had not previously tracked—helped identify a growing truancy issue and led to the development of a family court to help support students and families. Another superintendent relayed that he used the Achievement Compact’s status as a “public accountability report” as a way to communicate with his school board the importance of dedicating additional resources to ensuring students are reading by grade 3. Another administrator described, “In the beginning, we didn’t know whether it was for accountability or focused on student achievement. But we knew it was something we had to do...And at this point, it’s been aligned all the way through the system...school board goals and building-level goals. Our professional learning community groups are focusing on making that happen as they look at data and set their goals.”

“In the beginning, we didn’t know whether it was for accountability or focused on student achievement. But we knew it was something we had to do...And at this point, it’s been aligned all the way through the system...school board goals and building-level goals. Our professional learning community groups are focusing on making that happen as they look at data and set their goals.”

Key Recommendations

As a result of this study, nine general recommendations emerged, as well as two that are specific to K-12 and three that are specific to post-secondary institutions.

1. The Chief Education Officer should provide timely and targeted feedback on the Achievement Compacts. This feedback may take the form of a letter, which highlights specific outcomes of interest and cites related policy and budget recommendations. It may also take the form of in-person meetings with select institutions and/or their boards for the purpose of spotlighting successes or alternately, better understanding areas for support and/or intervention.
2. The Chief Education Officer should provide annual aggregated data showing statewide patterns of Achievement Compact goal setting and outcomes.
3. The Chief Education Officer should implement a comprehensive communications strategy to ensure educators, board members, and other stakeholders better understand the OEIB's mission and scope of responsibilities, along with the purpose of the Achievement Compacts.
4. The Chief Education Officer should continue efforts to align the missions and communications of the Oregon Department of Education, Community College & Workforce Development (CCWD) and Higher Education Coordinating Commission in order to provide the field with consistent and clear communication around the Achievement Compact.
5. OEIB should consider revising the timeframe for which institutions are setting targets from 1 year to 4 years, in order to shift the emphasis from accountability/data reporting to incenting real impact on local strategic planning and budget development.
6. The OEIB should continue supporting the Regional Achievement Collaboratives, and examine ways in which OEIB could assist the participating regions in mutually supporting and/or aligning their individual Achievement Compacts.
7. The OEIB should coordinate research and policy functions across agencies and institutions to provide common longitudinal outcome data, best practices recommendations, technical assistance, and policy recommendations to support achievement of the Achievement Compact goals.
8. The OEIB should continue linking policy and investment strategies to the Achievement Compact outcomes, and should clearly communicate those linkages to stakeholders.
9. The Chief Education Officer should direct each level of the education system to develop well-defined accountability frameworks to ensure accountability for progress on the Achievement Compact outcomes. These new frameworks should either replace or coordinate with any existing frameworks so as to avoid creating multiple and conflicting systems.

The following two (2) recommendations apply specifically to the K-12 Achievement Compacts.

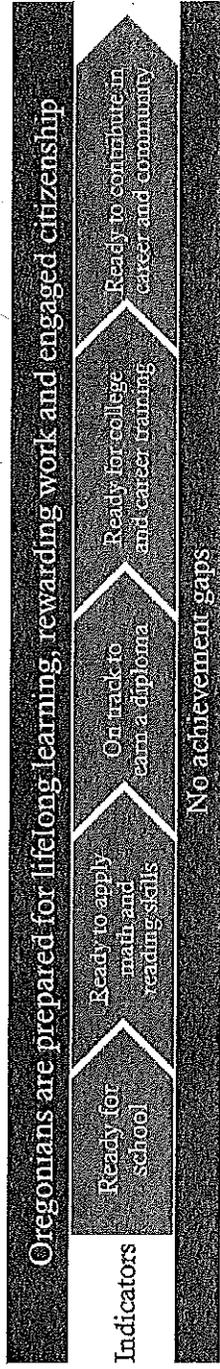
1. The Chief Education Officer should work with Oregon Department of Education to revise the Achievement Compact technical manual, to ensure alignment with the Oregon report card data and resolve definitional and data collection issues associated with metrics not contained in the report card.
2. OEIB should issue guidance clarifying the role of educational service districts (ESDs) in helping districts complete their Achievement Compacts and the purpose of the ESD Achievement Compacts.

The following three (3) recommendations apply specifically to the post-secondary Achievement Compacts.

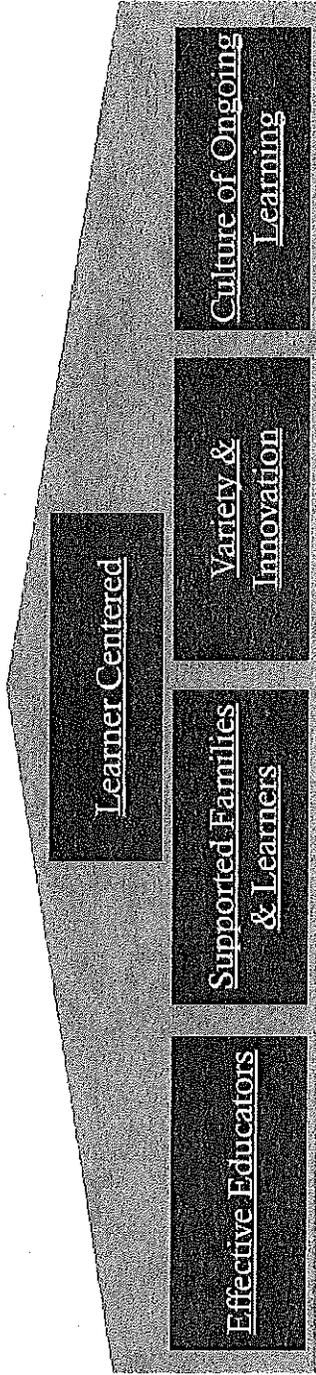
1. The OEIB should charge the HECC with evaluating the post-secondary Achievement Compacts and making recommendations aimed at ensuring the compact and goal-setting process impacts institutional decision-making and is aligned with any proposed funding allocation models.
2. OEIB should consider the utility of a uniform student enrollment/exit survey for community colleges to capture students' diverse goals, in order to better understand the population being served and add context to quantitative data on degree and certificate attainment.
3. The OEIB should support replacing the February 1 deadline by which post-secondary Achievement Compact Advisory Committees must complete recommendations with language such as "within a reasonable time prior to submission." This revision would allow the committees more time in which to analyze previous year's data and engage in the process.

Education Funding Results Map

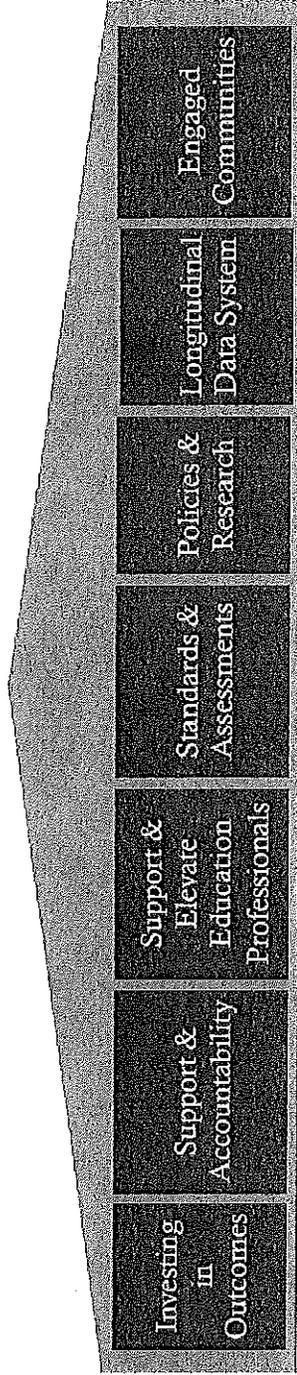
LEARNER LEVEL
Outcomes



COMMUNITY LEVEL
Creating Conditions for Teaching & Learning



STATE LEVEL
Steering the System





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 2011, only 67 percent of Oregon students graduated on-time in four years, and only a total of 70 percent graduated in five years. Looking at a more expansive measure of students who earned a regular diploma, modified diploma or GED, one in five students (21 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

OEIB: 2015-17 Budget Strategies & Initial Priorities

March 2014

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

However, 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. According to the November 2011 NAEP, Oregon is one of few states where the achievement gap is not closing. Additionally, low-income students in Oregon rank among the lowest performing in the nation, having lost ground since 2003. 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). NEED UPDATED DATA

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. The stark increase in tuition rates (and decreasing access) in post-secondary over the past two decades are signals that a significant, intentional and focused review of current policy and investment is needed in Oregon.

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

OEIB: 2015-17 Budget Strategies & Initial Priorities

March 2014

- 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
- 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

OEIB: 2015-17 Budget Strategies & Initial Priorities

March 2014

- 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 appointment of 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 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:

OEIB: 2015-17 Budget Strategies & Initial Priorities

March 2014

- Critical Student Transitions
- Supporting Out-of-School Youth
- Post-Secondary Governance & Alignment with Workforce Redesign

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.

1.1.2: 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 (See Section 2.2), and create a seamless transition into Kindergarten. 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. Current initiatives in this area include:

- Early Learning/Kindergarten Readiness Partnership & Innovation Fund: The OEIB and the ELC have identified this fund, created by HB2013, as a key vehicle for linking pre-K and K-12 systems. The practices and programs that are developed through this fund could serve as models for broader best practices dissemination and 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.
- 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 ADM if they choose to offer 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, 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

OEIB: 2015-17 Budget Strategies & Initial Priorities

March 2014

provide teachers with snapshots of individual student learning and development, and use the data to inform teaching and learning.

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; 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 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.

1.1.3 Supporting Out of School Youth

Each year, thousands (get more exact number) of high school students drop out, are pushed out, or simply fail to complete high school – this shocking number does not even capture those students whose journey to 40-40-20 ended in middle school or before. 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. 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

OEIB: 2015-17 Budget Strategies & Initial Priorities

March 2014

pathways such as GED. (ODE to provide research). The 2015-17 biennium should include an investment in strategies and policies aimed at ensuring 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.

Ask Iris for language

1.1.4 Post-Secondary Governance & Alignment with Workforce Redesign

Ben & Agnes will provide content

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
- Invest in Regional Collaboration and Collective Responsibility

OEIB: 2015-17 Budget Strategies & Initial Priorities

March 2014

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 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. **Need correct figures.**

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. **Need specifics**

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.

In addition

Section 2.2 Continue Prioritizing Oregon’s Early Learning System

??

Decades of research confirm early investments are key to later educational success. A well-functioning coordinated system identifies the needs of at-risk children and families as soon as possible, and offers useful assistance quickly, effectively and efficiently. This includes 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.

- Continue to support the development of the early learning hub system
- Support early screenings and intervention efforts, aligned with health care system
- Increase high-quality early learning programs

Public and private child care and early learning programs play a critical role in ensuring every Oregon child enters kindergarten ready to learn, and should receive increasing level of

OEIB: 2015-17 Budget Strategies & Initial Priorities

March 2014

investment. In addition, an even broader view of the term “early learning” is required, one that encompasses more than traditional pre-school environments, but also includes settings such as childcare and health and human services. Investing in universal screening, a child care quality and rating improvement system for early learning programs, and other key strategies recommended by the Early Learning Council.

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.”

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.

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

OEIB: 2015-17 Budget Strategies & Initial Priorities

March 2014

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 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
- Preventative models that will reduce costs and improve outcomes further along the pathway
- Models that have a strong possibility for scaling across the larger system
- Models that produce powerful results, such that communities will be strongly compelled to continue funding the activities over time
- Models that leverage other state and private investments
- Models that have a significant return on investment (high yield for low cost) or multiplier effect
- Models that promote flexibility, student empowerment & individualized learning

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:

- Systems for Ensuring All Students Are Reading at Level by 3rd Grade. Add narrative and reference to ODE.
- Post-secondary access and affordability: To reach our 40/40/20 Goal, the state must be strategic in instilling a college-going culture across the continuum, and in making, and honoring, a promise that post-secondary education will be within reach for all learners who achieve the important outcome of earning a high school diploma. We must persuade a much larger share of learners that a post-secondary degree brings returns in

OEIB: 2015-17 Budget Strategies & Initial Priorities

March 2014

the job market, and create a clear state policy on affordability that ensures increases in tuition are matched by increases in aid to protect those least able to afford higher education. Reference to the HECC here.

- Science, Technology, Engineering & Math (STEM): Currently Oregon's education system is producing only about one-third of the STEM graduates employers will need to satisfy new openings and replace the positions of retiring baby boomers. Investments in STEM education are required to lift the math and science skills of younger learners, expose students to exciting STEM careers, and ensure access and affordability of degree attainment. These investments must include a review of the depth of STEM preparation for Oregon educators, particularly in the early grades, reviewing the depth of STEM curriculum across the PK-20 system, and incentives for obtaining STEM related degrees, certificates or other related post-secondary achievements. Reference to the STEM Council here

Section 2.4 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

OEIB: 2015-17 Budget Strategies & Initial Priorities

March 2014

and Regional Solutions Centers – sharing resources and aligning outcomes across multiple sectors in the name of achieving regional prosperity.

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 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 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

OEIB: 2015-17 Budget Strategies & Initial Priorities

March 2014

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

Need intro

- Develop a framework for accountability at each level of the Birth to College & Career System
- Invest in a strong system of improvement for Oregon's lowest performing schools & districts

3.2.1: Develop a framework for accountability at each level of the Birth to College & Career System

Oregon, along with the rest of the nation, learned valuable lessons from No Child Left Behind about the perverse incentives of a system that rates buildings (and students) as failing without providing a path to success, and about the limits of a system that does not require local districts and their communities to actively participate in setting expectations and developing solutions. From these lessons, Oregon is committed to advancing a 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.

To be effective, OEIB believes that a system of accountability must tap the intrinsic motivation of students and educators. Oregon cannot rely on a system of sanctions, punishments, and threats to reach the 40/40/20 Goal. Oregon must insist on policies and systems that build capacity, enhance the collaborative professionalism of educators, promote the learner as individual, focus on ambitious but attainable outcomes, and change the culture of schools and districts across Oregon.

For school districts that demonstrate success, the OEIB is committed to providing increased flexibility and room for innovation to the extent possible, in the form of freedom from state mandates and reporting requirements. However, for districts and institutions that consistently fail to make progress on key outcomes, particularly where our most vulnerable children and students are concerned, OEIB has asked the agencies under its direction and control to develop an accountability framework. 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.

OEIB: 2015-17 Budget Strategies & Initial Priorities

March 2014

The charge from Chief Education Officer Nancy Golden to the Early Learning Council, State Board of Education and Higher Education Coordinating Commission issued in February 2014 asked each entity to develop a framework for accountability is designed to create systemic change based on the following premises:

- Oregon's 40/40/20 Goal requires a strong system of continuous improvement for all schools and institutions, not just those that are most struggling or that receive Title I funding.
- Accountability and assistance should be delivered through the district or institution, not just focused on an individual building, in order to build system capacity and support broad and sustained improvement
- Support and interventions must be developed in response to deeper diagnoses and tailored to the specific needs of the community.

OEIB should monitor and recommend investment in ensuring systems of accountability across levels are developed and implemented.

3.2.2 Invest in a strong system of improvement for Oregon's lowest performing schools & districts

While Oregon's 40/40/20 Goal requires a strong system of continuous improvement for all schools, the state must make a strong commitment to supported and sustained efforts at improving the performance in Oregon's lowest performing schools, districts and post-secondary institutions. Support and interventions for schools and districts that appear to be struggling must be developed in response to deeper diagnoses and tailored to the specific needs of the community. Diagnosis and assistance should be delivered through individuals and systems that have experience and significant success in supporting improvement efforts. In K-12, these efforts should be delivered through the district, not just focused on changes within a school building, in order to ensure system change and build districts' capacity to support and guide improvement in all schools. OEIB recommends investing more deeply in the ability to support a robust K-12 accountability and support system.

Section 3.3 P-20W Policy Database

Ask PETER to help

Section 3.4 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

OEIB: 2015-17 Budget Strategies & Initial Priorities

March 2014

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.

DRAFT