Chief Education Office
2017-2019 Legislative Adopted Budget

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CERTIFICATION

I hereby certify that the accompanying summary and detailed statements are true and correct to the best of my knowledge and belief and that the accuracy of all numerical information has been verified.

Chief Education Office	775 Court Street NE, Salem, OR 97301
AGENCY NAME	**AGENCY ADDRESS**
[signature]	Chief Education Officer
SIGNATURE	**TITLE**

Notice: Requests of agencies headed by a board or commission must be approved by official action of those bodies and signed by the board or commission chairperson. The requests of other agencies must be approved and signed by the agency director or administrator.

XX Agency Request

_____ Governor's Budget

_____ Legislatively Adopted

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Seventy-Eighth Oregon Legislative Assembly - 2015 Regular Session **MEASURE: HB 5022**

BUDGET REPORT AND MEASURE SUMMARY

Joint Committee On Ways and Means

Action:
Action Date:
Vote:
Prepared By: Bill McGee, Department of Administrative Services
Reviewed By: Doug Wilson, Legislative Fiscal Office

Agency: Oregon Education Investment Board
Biennium: 2015-17

Budget Summary*

	2013-15 Legislatively Approved Budget[1]	2015-17 Current Service Level	2015-17 Committee Recommendation	Committee Change from 2013-15 Leg. Approved	
				$ Change	% Change
General Fund	$ 21,008,299	$ 12,912,353	$ 6,240,557	$ (14,767,742)	-70.3%

Position Summary

Authorized Positions	15	15	17	2
Full-time Equivalent (FTE) positions	15.00	5.25	14.64	-0.36

[1] Includes adjustments through December 2014

* Excludes Capital Construction expenditures

Revenue Summary

The Oregon Education Investment Board is entirely funded with General Fund.

Summary of Education Subcommittee Action

The Oregon Education Investment Board (OEIB) was established in 2011 to advise the Governor and the Legislature on education issues spanning pre-kindergarten through post-secondary education (P-20). The Board is chaired by the Governor. One of the Board's major responsibilities is to recommend strategic investments to ensure that the public education budget is integrated and targeted to achieve established outcomes. The Board appoints the Chief Education Officer (CEdO) who hires and manages agency staff.

For the 2011-13 biennium, the budget for the CEdO and staff was part of the Office of the Governor as was the budget for the Early Learning Council and the Youth Development Council. The OEIB and CEdO budgets were part of an appropriation of just under $3.0 million General Fund. The majority of the funding was used for compensation of employees and contractors, with most of the funds expended in the second year of the biennium. Additional funding was used for executive search contracts, board meeting costs, and projections authorized by the board. OEIB and the CEdO also relied on resources and loaned staff from the Oregon Department of Education, the Oregon University System, and other agencies.

In 2013-15, OEIB became an independent agency with its own budget. During the 2014 Legislative Session, funding for the Engineering Technology and Industry Council (ETIC) was transferred from the Oregon University System (OUS) Chancellor's Office to OEIB. These funds constituted the majority of the agency's funding during the biennium.

The statutory authority for OEIB and the CEdO are scheduled to sunset in March 2016. Senate Bill 215 extends the office and position of the CEdO until June 30, 2019, changing the name of the agency to Chief Education Office. The Board is dissolved on the bill's effective date. The purpose of the office is redefined as coordination with education stakeholders to establish a unified public education system, with statutory direction regarding office duties and entities with whom collaboration should take place. The CEdO is given authority for direction and control over the Deputy Superintendent for Public Instruction, the Executive Director of the Higher Education Coordination Commission, the Early Learning Systems Director, the Youth Development Director, and the Executive Director of the Teacher Standards and Practices Commission for matters related to design and organization of multi-agency planning. Statutory requirements related to achievement compacts are eliminated.

The Subcommittee approved a budget of $6,240,557 General Fund and 14.64 FTE, reduced from the 2013-15 Legislatively Approved Budget by 70.3 percent and 2.4 percent, respectively. The General Fund reduction reflects the transfer of funding for the Engineering and Technology Industry Council (ETIC) to other agencies.

The Subcommittee took the following actions:

- Approved the base budget and essential packages.

- Approved Package 101 that extends the sunset on OEIB for four years. Under current law OEIB is scheduled to sunset March 16, 2016. Senate Bill 215 extends the sunset until 2019, changes the responsibilities of the CEdO, and eliminates the OEIB board itself. This package assumes the passage of Senate Bill 215 and increases the budget for agency staffing and other costs to reflect the full 24 months of the biennium. This results in an increase in this package of $4.3 million General Fund and a restoration of 9.75 FTE.

  This package also redistributes the funds associated with the ETIC program. In 2014, the Legislature transferred the ETIC program from OUS to OEIB. Under the current plan, ETIC resources are to be divided into two parts: $24.45 million General Fund is transferred to HECC for distribution to public university engineering programs. The remaining $6.11 million General Fund will be used as funding elsewhere in the state budget. This package eliminates the ETIC funding entirely from the OEIB budget.

- Approved Package 801 that reduces OEIB's budget (adjusted for 24 months by Package 101) by making the following reductions or adjustments:

  - The Deputy Director position is eliminated, partially due to the changing role of the agency. The position has been vacant for five months.
  - The position that served as the OEIB board administrator and made arrangements for board and subcommittee meetings is funded for one year. A workgroup is meeting to examine the overall role of the agency and, if the work group finds that position is needed, a request can be made for continuing the position during the 2016 Legislative Session.
  - Services and Supplies resources are decreased by $83,147 General Fund, reflecting the reduced costs of board operations and the position eliminations above.

- Pay differentials that are included in the current service level but no longer required are eliminated.
- The Office Manager position is reclassed from an Supervising Executive Assistant to a Principal Executive Manager D to better reflect the responsibilities currently being performed.

- Approved Package 802 that provides $550,000 General Fund and three limited duration positions (1.14 FTE) to continue development of the P-20 Statewide Longitudinal Data System (SLDS). Current law requires OEIB to deliver a data system to measure outcomes from educational investments across the P-20 continuum (early learning through post-secondary). The SLDS, once developed, will combine data from multiple agencies (primarily the Department of Education and the Higher Education Coordinating Commission) to evaluate the effectiveness of education investments.

  The funding in this package will provide resources to continue the development of the necessary project planning and management documents though March 2016. The package includes three limited duration positions that make up the current project staff. Two of these positions had been filled with Oregon Department of Education employees who will transfer to the OEIB. During the February 2016 Legislative Session, the agency should provide a cost estimate for the overall package so the legislature can then determine whether to fund the system. In developing the SLDS, the agency must follow the necessary due diligence, project management, and oversight following:

  - Continue to work closely with and regularly report project status to the Office of the State Chief Information Officer (CIO) and the Legislative Fiscal Officer (LFO) throughout the project's lifecycle.
  - Continue to follow the Joint CIO and LFO Stage Gate Review Process.
  - Retain, hire, appoint or contract for qualified project management services who have experience in planning and managing projects of this type, scope and magnitude.
  - Update the business case and other foundational project management documents as required by the CIO.
  - Work with the CIO to contract with an independent quality management services firm to conduct an initial risk assessment, perform quality control reviews of foundational project documents as appropriate, and perform ongoing, independent quality management services as directed by the CIO.
  - Submit the updated business case, other project management documents, initial risk assessment, and quality control reviews to the CIO and LFO for Stage Gate Review.
  - Report back to the legislature on project status during the 2016 Annual Legislative Session and/or to other legislative committee as required.
  - Request legislative approval to proceed with the project prior to initiating project execution activities.
  - Utilize the CIO's Enterprise Project and Portfolio Management System as it is deployed for all project review, approval, and project status and quality assurance reporting activities throughout the life of the project.

Summary of Performance Measure Action

See attached Legislatively Adopted 2015-17 Key Performance Measures form.

DETAIL OF JOINT COMMITTEE ON WAYS AND MEANS ACTION

HB 5022-A

Oregon Education Investment Board
Bill McGee 503-378-2078

DESCRIPTION	GENERAL FUND	LOTTERY FUNDS	OTHER FUNDS LIMITED	OTHER FUNDS NONLIMITED	FEDERAL FUNDS LIMITED	FEDERAL FUNDS NONLIMITED	TOTAL ALL FUNDS	POS	FTE
2013-15 Legislatively Approved Budget at Dec 2014 *	$ 21,008,299	$ -	$ -	$ -	$ -	$ -	$ 21,008,299	15	15.00
2015-17 Current Service Level (CSL)*	$ 12,912,353	$ -	$ -	$ -	$ -	$ -	$ 12,912,353	15	5.25
SUBCOMMITTEE ADJUSTMENTS (from CSL)									
SCR 001 OEIB									
Package 101 Removal of OEIB Sunset									
Personal Services	$ 2,896,633	$ -	$ -	$ -	$ -	$ -	$ 2,896,633	0	9.75
Services and Supplies	$ 1,362,476	$ -	$ -	$ -	$ -	$ -	$ 1,362,476		
Special Payments	$ (10,819,689)						$ (10,819,689)		
Package 801: LFO Analyst Adjustments									
Personal Services	$ (578,069)	$ -	$ -	$ -	$ -	$ -	$ (578,069)	-1	-1.50
Services and Supplies	$ (83,147)	$ -	$ -	$ -	$ -	$ -	$ (83,147)		
Package 802: Statewide Longitudinal Data System									
Personal Services	$ 272,168	$ -	$ -	$ -	$ -	$ -	$ 272,168	3	1.14
Services and Supplies (Instate Travel)	$ 277,832	$ -	$ -	$ -	$ -	$ -	$ 277,832		
TOTAL ADJUSTMENTS	$ (6,671,796)	$ -	$ -	$ -	$ -	$ -	$ (6,671,796)	2	9.39
SUBCOMMITTEE RECOMMENDATION *	$ 6,240,557	$ -	$ -	$ -	$ -	$ -	$ 6,240,557	17	14.64
% Change from 2013-15 Leg Approved Budget	-70.3%	0.0%	0.0%	0.0%	0.0%	0.0%	-70.3%		
% Change from 2015-17 Current Service Level	-51.7%	0.0%	0.0%	0.0%	0.0%	0.0%	-51.7%		

*Excludes Capital Construction Expenditures

Legislatively Approved 2015-2017 Key Performance Measures

Agency: OREGON EDUCATION INVESTMENT BOARD

Mission: OEIB's vision is to advise and support the building, implementation and investment in a unified public education system in Oregon that meets the diverse learning needs of every pre-K through post-secondary student, and provides boundless opportunities that support success. By doing so, we ensure 100% high school graduation by 2025 and ensure that Oregon students are college and career ready. 40-40-20 Goal: 40% completing 2-year degree, 40% completing 4-year degree and 20% career ready

Legislatively Proposed KPMs	Customer Service Category	Agency Request	Most Current Result	Target 2016	Target 2017
1 - Increase reading readiness for students entering kindergarten		Approved KPM		20.00	25.00
2 - Percentage of students not chronically absent - 6th grade.		Approved KPM		90.00	92.00
3 - Percentage of students not chronically absent - 9th grade		Approved KPM		85.00	87.00
4 - Increase the number of high schools offering college credit		Approved KPM		200.00	220.00
5 - Increase the number of systemic educational barriers identified and addressed		Approved KPM		12.00	15.00
6 - Increase the percentage of college and university graduates employed within 1 year		Approved KPM		75.00	77.00
7 - Increase the percentage of educators who are culturally and linguistically diverse		Approved KPM		20.00	22.00
8 - CUSTOMER SERVICE - Increase the percentage of stakeholders who rate the quality of the research and policy service as "great" or "excellent"	Accuracy	Approved KPM		90.00	90.00
8 - CUSTOMER SERVICE - Increase the percentage of stakeholders who rate the quality of the research and policy service as "great" or "excellent"	Availability of Information	Approved KPM		90.00	90.00
8 - CUSTOMER SERVICE - Increase the percentage of stakeholders who rate the quality of the research and policy service as "great" or "excellent"	Expertise	Approved KPM		90.00	90.00
8 - CUSTOMER SERVICE - Increase the percentage of stakeholders who rate the quality of the research and policy service as "great" or "excellent"	Helpfulness	Approved KPM		90.00	90.00
8 - CUSTOMER SERVICE - Increase the percentage of stakeholders who rate the quality of the research and policy service as "great" or "excellent"	Overall	Approved KPM		90.00	90.00

Print Date: 6/22/2015

Agency: OREGON EDUCATION INVESTMENT BOARD

Mission: OEIB's vision is to advise and support the building, implementation and investment in a unified public education system in Oregon that meets the diverse learning needs of every pre-K through post-secondary student, and provides boundless opportunities that support success. By doing so, we ensure 100% high school graduation by 2025 and ensure that Oregon students are college and career ready. 40-40-20 Goal: 40% completing 2-year degree, 40% completing 4-year degree and 20% career ready

Legislatively Proposed KPMs	Customer Service Category	Agency Request	Most Current Result	Target 2016	Target 2017
8 - CUSTOMER SERVICE - Increase the percentage of stakeholders who rate the quality of the research and policy service as "great" or "excellent"	Timeliness	Approved KPM		90.00	90.00
9 - BEST PRACTICES -- Total best practices met by the OEIB		Approved KPM			

LFO Recommendation:

All of the KPMs are proposed as new since this is the first set proposed by the agency. For the 2013-15 biennium, the agency did not have KPMs.These proposed KPMs generally measure overall goals of the education system ranging from measuring whether a student is ready for kindergarten to the employment potential of college graduates. Some of the measures are similar, but more general in nature, than KPMs found in the Oregon Department of Education (kindergarten readiness) and the Higher Education Coordinating Commission (number of high schools offering college credit). The Board should examine whether these duplicate those other measures and see whether they are necessary. SB 215 changes the duties and responsibilities of the agency including eliminating the Board itself while retaining the staff. There is also the understanding that an interim group will begin meeting after the session to look at the long term role of the agency. This examination could result in further changing the role of the agency. For this reason, LFO recommends acceptance of these measures for the near term; but suggests the agency review their KPMs based on the workgroup's recommendations and any legislative changes that might occur during the 2016 legislative session and propose new KPMs if necessary.

Sub-Committee Action:

Accept the LFO recommendation.

Print Date: 6/22/2015

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Legislative Fiscal Office

900 Court St. NE, Rm. H-178
Salem, OR 97301
503-986-1828

Ken Rocco
Legislative Fiscal Officer

Daron Hill
Deputy Legislative Fiscal Officer

Summary of Emergency Board Action

May 2016

The Legislative Emergency Board met on May 25, 2016 and considered an agenda of 62 items. The Emergency Board approved allocations from the general purpose Emergency Fund in response to eight separate requests, totaling $2.6 million. Another four requests were allocated funds from special purpose appropriations made to the Emergency Board that totaled $11.5 million. Additional details on these allocations are described below. After the Emergency Board actions, the balance in the general purpose Emergency Fund is $29.6 million. An additional $51.8 million remains in various special purpose appropriations, including $40 million for caseload costs or other unbudgeted expenses of the Oregon Health Authority and the Department of Human Services. Unused special purpose appropriations become available for any lawful use by the Emergency Board on December 1, 2016.

The agenda included 17 items that requested additional 2015-17 biennium authority to spend Lottery Funds, Other Funds, and Federal Funds. The Emergency Board approved expenditure limitation increases of approximately $95,628 Lottery Funds, $55 million Other Funds (including $27.6 million for the Department of Transportation) and $4.8 million Federal Funds (including $2.5 million for the Department of Justice). The Emergency Board also authorized the establishment of 64 positions (33.1 FTE) and the extension of six currently existing positions through the end of the biennium (4.29 FTE).

The agenda also included 15 agency reports which the Emergency Board acknowledged receiving. The Emergency Board heard 22 requests for the submission of federal grant applications (13 of which were on a consent agenda). The Emergency Board also deferred taking action on two requests for allocations from the Emergency Fund.

The following is a summary of significant Emergency Board actions taken at the May 2016 meeting:

EDUCATION

- Acknowledged receipt of a report by the Department of Education on the implementation of the mixed delivery preschool program.
- Allocated $273,062 from the Emergency Fund to the Department of Education for grants to school districts to improve internet connectivity and access.
- Acknowledged receipt of reports by the Higher Education Coordinating Commission on 2016-17 academic year University tuition and mandatory fee increases for resident undergraduates and on the distribution of funding for Community College academic counselors.
- Approved the submission of a federal grant application by the Department of Education for child care related implementation research and evaluation planning.

HUMAN SERVICES

- Acknowledged receipt of a report by the Department of Human Services on program sustainability options and actions.
- Acknowledged receipt of reports by the Oregon Health Authority on the Oregon Health Plan 1115 waiver renewal for 2017-22 and on the Medicaid Management Information System and related systems and interfaces.
- Approved the submission of federal grant applications by the Department of Human Services for the enhancement of adult protective services and for enhancing the state's system for

providing information on and access to long term services and supports.

- Approved the submission of federal grant applications by the Oregon Health Authority for epidemiology and laboratory capacity for infectious diseases, chronic disease and oral health, emerging infections, and prescription drug and opioid addiction/overdose prevention.
- Increased the Other Funds expenditure limitation for the Board of Nursing by $244,452 for the establishment of two permanent positions (1.58 FTE) and the reclassification of six other positions to address workload increases.

PUBLIC SAFETY and JUDICIAL BRANCH

- Acknowledged receipt of a report by the Department of Corrections on female and male population trends and system bed capacity.
- Allocated $3 million from a special purpose appropriation made to the Emergency Board to the Department of Corrections to continue activating minimum security prison beds at the Deer Ridge Correctional Institution, authorized the establishment of 33 positions (18.64 FTE), and indicated that remaining unfunded prison capacity needs would be addressed at a future Emergency Board meeting this interim or during the 2017 session.
- Allocated $1 million from the Emergency Fund to the Department of Corrections and increased the agency's Other Funds expenditure limitation by $100,000 to begin preparing the Oregon State Penitentiary-Minimum to house women offenders in the 2015-17 biennium.
- Acknowledged receipt of a report by the Department of Justice on the Child Support Enforcement Automated System (CSEAS) and increased the Federal Funds expenditure limitation by $2,538,107 for the project to cover expenditures through October 2016.
- Increased the Other Funds expenditure limitation for the Department of Public Safety Standards and Training by $100,000 for additional training of 911 tele-communicators and by $337,000 for crisis intervention training for first responders.
- Approved the submission of a federal grant application by the Department of State Police for a grant in the amount of $9.4 million to replace the CrimeVue criminal history database and messaging system.
- Allocated $2 million from a special purpose appropriation made to the Emergency Board for state and local government costs associated with the takeover of the Malheur National Wildlife Refuge in Harney County, allocated $73,053 from the Emergency Fund for the same purpose, and increased the Other Funds expenditure limitation for the Department of State Police by $874,188 in order for the agency to receive reimbursement for its costs. The allocations were made to the Department of Administrative Services for distribution to eligible state and local government units.
- Allocated $170,000 from the Emergency Fund to the Military Department for roof repairs at the Forest Grove and Kliever-Portland armories and directed the agency to use $500,000 of one-time General Fund savings available in the current budget to match the federal funding to complete the roof repairs.
- Increased the Other Funds expenditure limitation for the Military Department by $256,000 and the Federal Funds expenditure limitation for the Military Department by $518,000 for the Oregon Youth Challenge Program.
- Increased the Federal Funds expenditure limitation for the Military Department by $270,000 for the STARBASE Program.
- Approved the submission of federal grant applications by the Criminal Justice Commission for the Justice Reinvestment program and by the Department of State Police for SAFE kit inventory, tracking, and reporting.
- Acknowledged receipt of a report by the Commission on Judicial Fitness and Disability on compensation plan changes.
- Deferred taking action on a request by the Public Defense Services Commission to fund proposed salary increases.

NATURAL RESOURCES

- Allocated $5,000 from the Emergency Fund for the Columbia River Gorge Commission to match the 2015-17 budget provided by the State of Washington for Commission operations as required by interstate compact.
- Acknowledged receipt of a report by the Department of Geology and Mineral Industries on the progress of the tactical IT remediation plan, allocated $554,808 from the Emergency Fund for the plan, authorized the establishment of two positions (1.00 FTE), and increased the Other

Funds expenditure limitation for the Department by $64,754 for the Mined Land Reclamation and Regulation program.

- Allocated $225,000 from the Emergency Fund for the Department of Environmental Quality to acquire metals and particulate monitoring equipment.
- Allocated $2,176,549 from a special purpose appropriation made to the Emergency Board for fire severity resources to the Department of Forestry for the purchase of catastrophic fire insurance for the 2016 fire season.
- Allocated $250,000 from the Emergency Fund for the Department of Forestry to augment and add to existing resources for the treatment of Sudden Oak Death.
- Increased the Other Funds expenditure limitation for the Parks and Recreation Department by $615,500 for grants received from the Marine Board.
- Increased the Federal Funds expenditure limitation for the Parks and Recreation Department by $29,214 to correct a technical error in personal services from the 2016 session.
- Approved the submission of a federal grant application by the Parks and Recreation Department for purchase of land by the Southern Oregon Land Conservancy for habitat conservation.
- Approved the submission of federal grant applications by the Department of Fish and Wildlife for the acquisition of a conservation easement on 1,751 acres near Ashland, by the Department of Environmental Quality for pollution prevention, and by the Department of Agriculture for Food Safety Modernization Act implementation.

ECONOMIC and COMMUNITY DEVELOPMENT

- Acknowledged receipt of a report by the Oregon Business Development Department and the Higher Education Coordinating Commission on a business plan for the American Manufacturing Innovation District, increased the Other Funds expenditure limitation for the Oregon Business Development Department by $2,499,999 for the project, increased the Other Funds Capital Construction expenditure limitation for the Higher Education Coordinating Commission by $4,999,999 for the project, and increased the Other Funds expenditure limitation for the Higher Education Coordinating Commission by $70,000 for the development of the Oregon Manufacturing Innovation Center.
- Approved the submission of a federal grant application by the Oregon Department of Business Development for the State Trade Expansion Program and authorized the agency to submit future grants for the same program under certain specified conditions.
- Approved the submission of two federal grant applications by the Housing and Community Services Department totaling $94.5 million under the Hardest Hit program to assist Oregonians at risk of experiencing mortgage foreclosure.
- Approved the submission of a federal grant application by the Employment Department to support expansion and diversification of registered apprenticeship.

TRANSPORTATION

- Increased the Other Funds expenditure limitation for the Department of Transportation by $16,966,375 for the Maintenance and Emergency Relief programs and by $10,732,666 for the Local Government program for costs associated with repairing highways due to 2015-16 winter storm damage.
- Approved the submission of a federal grant application by the Department of Transportation in the amount of $75.7 million under the federal FASTLANE program for three interstate highway projects.
- Approved the submission of federal grant applications by the Department of Transportation for bus facilities, positive train control, railroad best practices, utility solutions, and bridge and tunnel testing.

CONSUMER and BUSINESS SERVICES

- Acknowledged receipt of a report by the Department of Consumer and Business Services on the Oregon Health Insurance Marketplace program and increased the Other Funds expenditure limitation for the Department by $558,617 to correct a double counted reduction from the 2016 session.

ADMINISTRATION

- Acknowledged receipt of a report by the Office of the Governor on its organizational structure and Key Performance Measures.

- Increased the Other Funds expenditure limitation for the Department of Administrative Services, Chief Human Resources Office by $6,520,731; authorized the establishment of 22 limited duration positions (9.17 FTE) and the extension of six existing limited duration positions through the end of the current biennium (4.29 FTE); and adjusted state agency budgets by allocating $4,292,256 from a special purpose appropriation made to the Emergency Board for Department of Administrative Services' assessment increases, increased the Lottery Funds expenditure limitation of state agencies by $95,628, the Other Funds expenditure limitations by $3,357,479, and the Federal Funds expenditure limitations by $1,489,374 for assessment increases related to continuation of the Human Resources Information System project and other adjustments related to previously approved Department IT reorganization effects.
- Established an Other Funds Capital Construction expenditure limitation in the amount of $2,336,040 for the Department of Administrative Services for a roof replacement at the Department of Environmental Quality and Public Health laboratory and established an Other Funds Capital Construction expenditure limitation in the amount of $4,000,000 for the Department of Administrative Services for tenant improvements at the 550 Building.
- Acknowledged receipt of a report by the Department of Administrative Services on compensation plan changes.
- Acknowledged receipt of a report by the Department of Administrative Services on uniform rent rates for the 2017-19 biennium and to recommend to the next Legislative Assembly that agency budgets include sufficient spending authority to cover the rent costs as required by ORS 276.390.
- Increased the Other Funds expenditure limitation for the Department of Revenue by $379,481, authorized the establishment of five permanent positions (2.71 FTE), and authorized the movement of and existing manager position from limited duration to permanent status for the recreational marijuana tax cash management program.
- Deferred taking action on a request by the Department of Revenue to allocate funds from the Emergency Fund for the Property Valuation System.
- Acknowledged receipt of a report by the Department of Revenue on GenTax data availability for research purposes.

Emergency Fund Balance Summary			
		Agency Requests	Emergency Board Action
General Purpose Emergency Fund			
	Appropriation (after 2016 Session adjustments)	32,000,000	32,000,000
	Allocations to date		
Unallocated Balance		32,000,000	32,000,000
#	***May 2016 Requests - General Purpose***		
2	Public Defense Services Commission - Proposed Salary Increases	(541,014)	0
6	Department of Education - School Fiber Optic Broadband	(500,000)	(273,062)
25	Military Department - Armory Roof Repair	(670,000)	(170,000)
28	Oregon State Police - Malheur National Wildlife Refuge Occupation Costs (see SPA Section below)	(2,487,914)	(73,053)
31	Department of Corrections - Deer Ridge Correctional Institution Male Capacity (see SPA Section below)	(6,899,109)	0
32	Department of Corrections - Oregon State Penetentiary Minimum Women Capacity	(10,569,266)	(1,000,000)
38	Columbia River Gorge Commission - Operational Expense Washington Match	(5,000)	(5,000)
40	Department of Geology and Mineral Industries - Information Technology Remediation Plan	(713,907)	(554,808)
43	Department of Environmental Quality - Air Toxics Monitoring	(225,000)	(225,000)
44	Department of Forestry - Catastrophic Wildfire Insurance Policy (see SPA Section below)	(2,176,549)	0
46	Department of Forestry - Sudden Oak Death Eradication	(250,000)	(250,000)
65	Department of Revenue - Property Valuation System Project	(1,500,000)	0
	Total Requests - General Purpose	(26,537,759)	(2,550,923)
General Purpose Unallocated Balance after 05/2016		5,462,241	29,449,077
Special Purpose Appropriations - Agency Specific (after 2016 Session actions)		63,255,445	63,255,445
	Allocations/Transfers to Date		
Unallocated Balance		63,255,445	63,255,445
#	***May 2016 Requests - Special Purpose Appropriations - Agency Specific***		
28	Oregon State Police - Malheur National Wildlife Refuge Occupation Costs (see above)	0	(2,000,000)
31	Department of Corrections - Deer Ridge Correctional Institution Male Capacity (see above)	0	(3,000,000)
44	Department of Forestry - Catastrophic Wildfire Insurance Policy (see above)	0	(2,176,549)
61	Department of Administrative Services - Rates/Assessment Adjustments	(4,292,784)	(4,292,256)
	Total Requests - Special Purpose - Agency Specific	(4,292,784)	(11,468,805)
Special Purpose - Agency Specific - Unallocated Balance after 05/2016		58,962,661	51,786,640

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CHIEF EDUCATION OFFICE

Agency Summary

Education is critical to ensuring every Oregonian is prepared for lifelong learning, a rewarding career, and engaged citizenship. Education promotes shared values, enriches culture and expands the vitality of individuals and communities. When delivered equitably, education provides opportunity for every Oregonian, no matter their race, home language, disability, family income or zip code. Never before has a high-quality education been more important to the lives and wellbeing of Oregonians and our communities.

Senate Bill 253 (2011) established the mission of Oregon's education system to achieve key goals for high school and college completion and career readiness. Under these goals, known as "40-40-20", Oregon aspires to achieve the following by 2025: 40 percent of adult Oregonians will have earned a bachelor's degree or higher; 40 percent of adult Oregonians will have earned an associate's degree or postsecondary credential as their highest level of education attainment; and 20 percent of all adult Oregonians will 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 education attainment. These goals reflect a shared commitment by the State and education entities to create the conditions to ensure each young person has the access and opportunities throughout their education to thrive, and ultimately pursue an education and career path meaningful to them.

Senate Bill 215 (2015) created the Chief Education Office (CEdO) for the purpose of building a seamless system of education from birth to college and career. The Chief Education Office is charged with leveraging both directing authority and coordinating capacity to lead cross sector, multi-agency planning and stakeholder convening to eliminate barriers impeding student success, ensuring educational equity and opportunity within all education settings, and achieving statewide goals and student learning outcomes.

The Chief Education Office brings strategic leadership and coordination to key student transition points and other critical areas across the education continuum to improve outcomes for Oregon students, grow the capacity of systems to serve student success, expand pathways of learning, ensure a well-supported, culturally responsive early leaning and K-12 education workforce, and elevate policies and practices to accelerate student learning outcomes through convening, research, and partnerships with educational entities and communities.

The focus of the Chief Education Office is to foster stronger connections and alignment from early learning to K-12 education, and K-12 education to higher education and the workforce. In doing so, the agency expands student access and opportunity, and provides each individual a seamless pathway of learning, with a particular focus on traditionally underserved students and students in poverty. Sustained leadership across the education continuum to close existing gaps in access, opportunity and achievement for students of color, students in poverty and students who are not native English speakers is critical to Oregon's future, and as education entities at all levels must more effectively serve these growing populations of students.

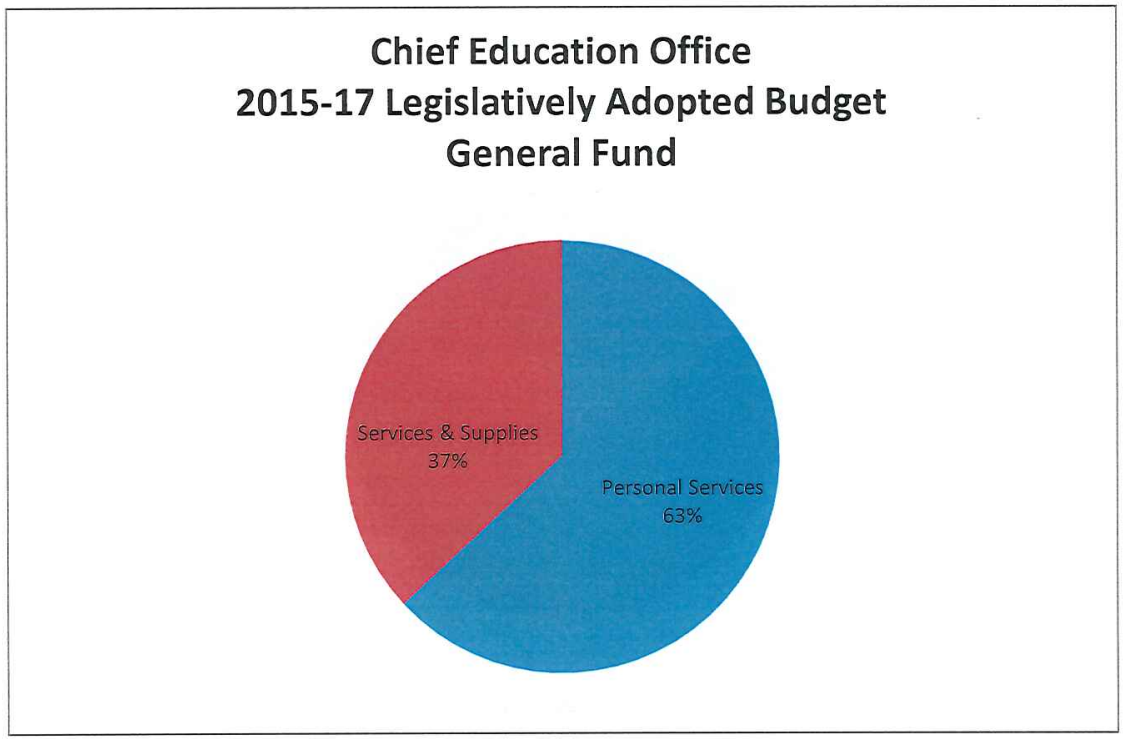
The Chief Education Office serves to expand coordination and collaboration between the education sector and leadership within other sectors serving student success. Every year, 40,000 children are born in Oregon. Of those, roughly 40 percent are exposed to a well-recognized set of socio-economic, physical or relational risk factors that have adverse affects on students and impose barriers to learning. Through support for regional cross-sector partnerships focused on collective impact initiatives across communities to improve student outcomes, community-informed research focused on identifying factors and solutions to chronic absenteeism, and ongoing research into trauma-informed practices in schools, the Chief Education Office is working to foster stronger alignment of supports for student success beginning from birth.

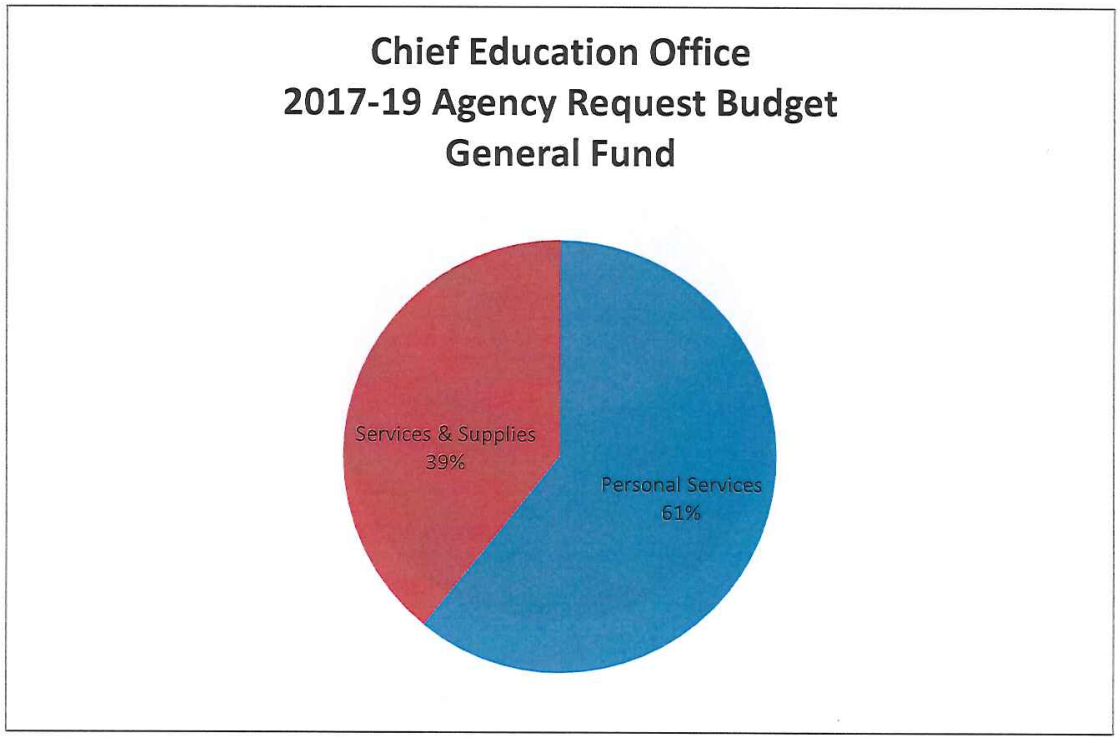
Over the next decade, 61 percent of all Oregon jobs will require a technical certificate, associate's degree or higher level of education beyond high school. This proportion will only accelerate by 2025. With a four-year high school graduation rate of 74 percent, the Governor has identified improving graduation outcomes for Oregonians as a key education priority. The Governor established the Education Innovation Officer, a new position within the Chief Education Office, to engage with school districts and communities to identify and scale up effective practices and make policy recommendations to ensure more students graduate high school with a plan for their future.

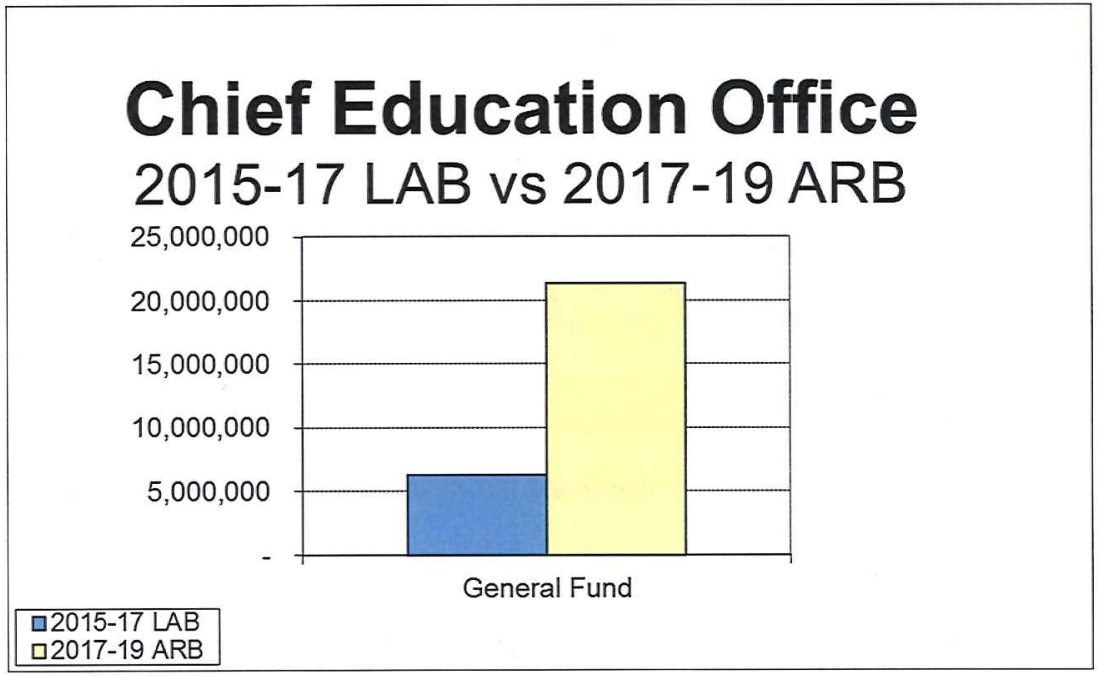
In tandem with scaling up effective practices to improve graduation outcomes, the Chief Education Office is working to align pathways of learning and supports to help more Oregon students transition from early learning to kindergarten, and from high school to pursue a postsecondary degree or enter the workforce ready for a career. As knowledge and innovation become the prime capital in this global economy, providing students expanded opportunities for applied, hands on learning that sharpens their critical thinking skills, creativity and collaboration will foster the 21st Century skills students will need to be successful. Toward this end, the Chief Education Office is working to expand student pathways for science, technology, engineering, arts and mathematics and career technical education across K-12 and higher education. This opportunity to expand the knowledge and skills of students in high school while increasing the number of students graduating high school and completing a postsecondary degree is further advanced by partnerships being fostered by the Chief Education Office between K-12 schools and higher education to expand college-level coursework and advanced career training opportunities in high school.

Through coordinating and aligning these integrated goals and cross-sector, interagency strategies, the Chief Education Office, through the coordinating and planning authority of the Chief Education Officer, provides guidance and recommendations to the Governor and Legislature on a unified education budget from early learning to higher education.

Budget Summary Graphics




Chief Education Office
2017-19 Agency Request Budget
General Fund
Services & Supplies
39%
Personal Services
61%


Chief Education Office
2015-17 LAB vs 2017-19 ARB
25,000,000
20,000,000
15,000,000
10,000,000
5,000,000
-
General Fund
2015-17 LAB
2017-19 ARB

Mission Statement

Build and coordinate a seamless system of education that meets the diverse learning needs of every Oregonian from cradle to career.

Statutory Authority

Pursuant to Chapter 519, Oregon laws 2011, Sec. 1 & 2 (SB 909), the authority of the Chief Education Officer to create a unified system of education was established by Chapter 26, Oregon laws, Section 14 (SB 1581). In 2013, the Legislature appropriated dollars to create a stand-alone agency.

In Senate Bill 215 (2015), the Legislature changed the name of the agency to the Chief Education Office (formerly Oregon Education Investment Board), and extended the agency's sunset to June 30, 2019. The agency's purpose was clarified in SB 215 and defined as: coordinating with education stakeholders to establish a unified public education system that ensures that all public school students in Oregon reach the educational goals established for Oregon.

The duties assigned to the Chief Education Office under Senate Bill 215 include:

- Coordinating with education agencies and stakeholders and communities across the state to streamline and connect early childhood services to public education from kindergarten through grade 12 and to streamline and connect public education from kindergarten through grade 12 to postsecondary education.
    - Collaborating with the Early Learning Council, the State Board of Education, the Higher Education Coordinating Commission, the Teacher Standards and Practices Commission and the Youth Development Council to develop policies and strategies to improve outcomes for students from cradle to career.
- Coordinating with education stakeholders to provide a seamless education system that:
    - Eliminates systemic barriers;
    - Provides educational equity, opportunity and access; and
    - Meets educational goals established for Oregon by:
        - Being culturally responsive and sustaining; and
        - Identifying and leveraging existing assets among collaborating partners
- Providing an integrated, statewide data system that contains student-level outcomes from all public education institutions in order to allow for longitudinal analysis and research.
- Working with the Quality Education Commission to identify promising practices for schools and the costs and benefits of the adoption of those practices.
- Collaborating with education stakeholders to develop and review the educational goals established for Oregon.

- Monitoring and reporting on state progress toward achieving the educational goals established for this Oregon, as measured by targets and outcomes.

Agency Strategic Plan

Mission

The mission of the Chief Education Office is to build and coordinate a seamless system of education that meets the diverse learning needs of every Oregonian from cradle to career.

Vision

Each and every Oregon student is ready to learn, on-track, and prepared for their future with the support and opportunities they need to thrive.

Goals and Strategies

The Chief Education Office leads the development of policy, planning and budget recommendations between state agencies, and with partners across the state, that are sustainable, asset-based, culturally responsive, and grounded in Oregon's Equity Lens. To achieve statewide goals, the Chief Education Office has prioritized planning and policy to:

Goal 1: Coordinate Cross-Sector[1] Planning and Policy Development to Achieve Statewide Goals for Student Learning Outcomes

Strategies

A. Develop student learning outcomes across Early Learning, K-12, Higher Education and Workforce.
B. Expand student access to personalized pathways of learning, especially for historically underserved and rural communities.
C. Strengthen student and family engagement, school readiness, attendance, and completion through collaborative, cross-sector initiatives that build systems of support for students.
D. Improve student high school graduation outcomes and college and career readiness by identifying and scaling up effective practices, interventions and partnerships in regions across the state.
E. Research and evaluate effective practices, interventions, and strategies to support policy development for student success and completion across the learning continuum.

[1] Cross-sector systems refer to collaborations or partnerships that are inclusive of the education sectors and entities beyond education which provide opportunities, support and holistic services to students, families and the larger community.

F. Provide an integrated, statewide, student-centered longitudinal data system that monitors educational outcomes.

Performance Measure: We will be modifying the following existing Key Performance Measures of attendance to being on-track measures.
Key Performance Measure 1 – Percentage of students not chronically absent – 6th grade
Key Performance Measure 2 – Percentage of students not chronically absent – 9th grade

Goal 2: Coordinate Integrated, Cross-Sector Systems that Support Student Success

Strategies

A. Coordinate alignment of learning outcomes across Early Learning, K-12, Higher Education, and Workforce.
B. Promote consistent, aligned, and effective practices across the transition from Early Learning to early elementary (K-3).
C. Coordinate alignment of learning outcomes and expectations amongst K-12, Higher Education, and Workforce.
D. Foster regional coordination and cross-sector collaboration to align institutional and community-based services, supports, and interventions for students and families cradle to career.
E. Develop a coherent and seamless system that aligns assessments from early childhood services through post-secondary education.

Performance Measure: We will be adding a new Key Performance Measure for this principle

Goal 3: Coordinate Integrated, Cross-Sector Systems of Support for Educator Advancement

Strategies

A. Develop an education workforce that reflects the demographics and diverse cultures of Oregon's students and communities.
B. Establish a continuum of professional learning and leadership supports for educators focused on high quality instruction and student engagement, cultural responsiveness, and continuous improvement in the Early Learning, K-12, and educator preparation systems.

Performance Measure:

Key Performance Measure 3 –Increase the percentage of educators who are culturally and linguistically diverse

<u>Goal 4:</u> To fulfill the Chief Education Office coordinating function and achieve statutory charges and the goals of the agency as outlined in Senate Bill 215, the Chief Education Office shall collaborate with The Early Learning Council, The State Board of Education, The Higher Education Coordinating Commission, The Teacher Standards and Practices Commission, and The Youth Development Council.

Performance Measure: We will be modifying the following existing Key Performance Measures of attendance to being on-track measures.

Key Performance Measure 1 – Percentage of students not chronically absent – 6th grade
Key Performance Measure 2 – Percentage of students not chronically absent – 9th grade

Program Descriptions

Chief Education Office

The Chief Education Office is established for the purpose of coordinating with education stakeholders to establish a unified public education system that ensures that all students in this state reach the educational goals established from cradle to career.

Thus, the activities of the Chief Education Office center around the following:

(1) Supporting the Chief Education Officer in the critical role of coordinating the P-20 Education System, including directing the Early Learning System Director, the Deputy Superintendent of Public Instruction, the Executive Director of the Higher Education Coordinating Commission and the Executive Director of the Teachers Standards and Practices Commission in multi-agency planning and policy development.
(2) Coordinating with education stakeholders to streamline and connect early childhood services to public education from kindergarten to grade 12 and to connect public education from kindergarten through grade 12 to postsecondary education. This includes collaborating with The Early Learning Council, The State Board of Education, The Higher Education Coordinating Commission, The Teacher Standards and Practices Commission, and The Youth Development Council.
(3) Coordinating with education stakeholders to provide a seamless education system that: eliminates systemic barriers, provides education equity for opportunity and success, and meets educational goals established for the state.
(4) In meeting the education goals established for the state, the CEdO is charged with being culturally responsive and identifying existing strengths among collaborating partners, including those strengths in the construction and implement of state agency initiatives.
(5) Collaborating with education stakeholders to develop and review the education goals established for this state, and monitoring and reporting on state progress toward achieving educational goals as measured by targets and outcomes.
(6) Providing an integrated statewide data system that contains student-level outcomes from all public education institutions in order to allow for longitudinal analysis and research.
(7) Working with Quality Education Commission to identify best practices for school districts and the costs and benefits of the adoption of those best practices by school districts.

The CEdO's staff and brief description of duties:

Chief Education Officer: Established under SB 909 (2011) with duties further defined under SB 215 (2015), the Chief Education Officer oversees the coordination of an integrated and aligned public education system from birth to college and career. The Chief Education Officer directs education agency directors in multi-agency planning, including supporting key educational transitions for students, eliminating the barriers to student attainment, and recommending an integrated cradle to career budget to the Governor and the Legislature aligned to state goals and student outcomes and grounded in the Equity Lens. Serves as the administrator of the Chief Education Office, managing a small policy and research staff in carrying out the purposes of the agency, and performs other duties as determined by the Governor.

Education Innovation Officer: Charged with developing a comprehensive strategy to improve high school graduation and student readiness for college and career. The EIO engages with schools, communities and researchers to identify promising practices, and makes recommendations as to policy drivers, actions, investments, and focused innovation opportunities to improve graduation rates. The EIO coordinates closely with the Chief Education Officer and Deputy Superintendent of Public Instruction to guide the Governor's priorities and implementation strategies related to graduation.

Operations Director: Assists the Chief Education Officer to direct and implement the operations of the agency, manage agency technology; new staffing and orientation; budget development and implementation, accounts payable and receivable tracking and approval, contract adherence; essential trainings; supports various meetings for the CEdO staff and supervision of the administrative staff.

Public Affairs Director: Assists the Chief Education Officer in managing projects and initiatives requiring strategic coordination between state education agencies, partners and communities with a focus on equity and inclusion; plays a leadership role in the management of stakeholder, legislative and intergovernmental outreach by the Chief Education Office (CEdO); and manages the agency's community engagement, strategic partnership development, and media relations.

Executive Assistant to the CEdO: Provides support to the Chief Education Officer and the CEdO team on scheduling, meeting coordination and stakeholder outreach and communication.

Assistants to the Directors: Supports Operations Director and provides administrative support, scheduling, meeting coordination and preparations to agency Directors.

Policy Directors

College & Career Readiness and Educator Advancement Policy Director: Serving under the direction of the Chief Education Officer and in collaboration with the Oregon Department of Education and Higher Education Coordinating Commission, leads policy development and coordination of postsecondary transitions and college and career readiness with a focus on successful completion of postsecondary certificates and degrees in community colleges, state's public universities and private institutions, and access and affordability for postsecondary students.

Serving under the direction of the Chief Education Officer and in collaboration with the Teachers Standards and Practices Commission, Oregon Department of Education and Higher Education Coordinating Commission, leads policy development and coordination related to the early learning and K-12 educator workforce with an emphasis on recruitment, preparation, licensure, mentoring, professional support and educator leadership.

CTE & STEAM Education Policy Director: Serving under the direction of the Chief Education Officer and in collaboration with the Oregon Department of Education, Higher Education Coordinating Commission and the Oregon Department of Employment, leads coordination organizations of statewide strategy for improving science, technology, engineering, arts, math and career/technical education with K-12, postsecondary institutions, industry, community organizations and regional CTE networks/STEM Hubs. Directs and supports the STEM Investment Council in recommending strategic investments to meet state goals for student learning outcomes in math and science at the secondary and postsecondary level.

Regional Education Partnership Policy Advisor: Serving under the direction of the Chief Education Officer, coordinates and leads planning for statewide Regional Achievement Collaboratives and supports the work of the STEM Hubs in partnership with the Oregon Department of Education. In concert with the CTE & STEAM Director, serves in an advisory capacity to the Chief Education Officer, Deputy of Public Instruction and the Executive Director of the Higher Education Coordinating Commission on regional STEAM education initiatives.

Interagency Policy Research Unit

The Interagency Policy Research Unit supports the Chief Education Office and the Chief Education Officer to fulfill the statutory charge to recommend to the Governor and Legislature policy and strategic investments to achieve Oregon's 40-40-20 goals for education. On behalf of the CEdO, Governor, and Legislature, the Interagency Policy Research Unit conducts and synthesizes research, evidence-based models and best practices to evaluate the impact of recommended strategic investments, policy and initiatives across the P-20 public education system. The Interagency Policy Research Unit is also responsible for inter-agency coordination and implementation of the State Longitudinal Data System for P-20 public education.

Interagency Policy Research Director: Serving under the direction of the Chief Education Officer and in collaboration with the Oregon Department of Education, the Early Learning Division, the Youth Development Division, and the Higher Education Coordinating Commission. Oversees a team of quantitative and qualitative research staff to analyze current and proposed P-20 education policy; coordinates with research staff in other agencies to articulate and resource the state's education research agenda, with a focus on equity and inclusion.

Research Analysts: Serves under the direction of the Interagency Policy Research Director to gather, analyze and summarize educational research on behalf of the CEdO, Legislators and Governor. Lead researcher for work relating to the improvement of postsecondary teaching practices and analyses of best practices in Science, Technology, Education, Arts and Math programs from pre-school to postsecondary. Provides research for policy development.

Statewide Longitudinal Data System Unit

SLDS Director: Serving under the direction of the Chief Education Officer, the Project Director is responsible to lead the overall project direction for cost, schedule, scope, and quality. This is accomplished by leading the system team through the system's tactical execution, continuous improvement plan, and critical success indicators. The Project Director is also responsible for the strategic direction of the project/system team and facilitates the project Core Team and Steering Committee meetings.

SLDS Director of Systems Integration: Serving under the direction of the SLDS Project Director, the Director of Systems Integration is responsible for the system's technical vision, content, and quality. The Director of Systems Integration is responsible for the design of the State Longitudinal Data System and coordinating the collection of data from other state agencies which maintain student data. The Director of System Integration owns and contributes to the development of algorithms to connect data between agencies to build longitudinal students records and serves as the technical owner of the SLDS portal.

SLDS Project Manager: Serving under the direction of the SLDS Project Director, the Project Manager is the coordinator for the core interagency SDLS project team and the State Longitudinal Data System Steering Committee. The Project Manager is responsible for the creation and organization of all project materials, including detailed plans and budget, risk assessment, system requirements.

SLDS Business Analyst: Serving under the direction of the SLDS Project Director, the Business Analyst is responsible for the business objectives of the stakeholders, partner agencies, and develops solutions to meet the goals and objectives of the Statewide Longitudinal Data System. The Business Analyst identifies, analyzes, and documents business requirements and delivers work products throughout the project life cycle. The SLDS Business Analyst owns and is responsible for the system documentation; data dictionary, change control, continuous improvement plan, and translation of business needs.

SLDS Solutions Architect: Serving under the direction of the SLDS Project Director, the Solutions Architect is the agency lead (owner) in the design, specifying and selecting information system solutions; considering functionality, data, security, integration, infrastructure, and performance. The Solutions Architect will own the development and maintenance of the agency model of current and future web architecture and the design of a structure that is stable, resilient, and performant.

SLDS Systems Architect: Serving under the direction of the SLDS Project Director, the Systems Architect is the system owner for the architectural leadership, facilitation, analysis, and design tasks required to ensure that assigned information system is evolving appropriately; and ensuring that underlying infrastructure supports existing needs as well as evolving to meet changing application requirements. The System Architect's responsibilities include: following the architecture development methodology established by Enterprise Architecture, e.g. develop documentation of current and future state, roadmaps, and transition plans for future data sharing opportunities.

Statewide Literacy Campaign

The Statewide Reading Campaign was established as an initiative of the Oregon Education Investment Board in the 2013-15 biennium. This targeted, statewide community engagement project focused on promoting parent and family involvement in early literacy was completed in the 2013-15 biennium. The Statewide Reading Campaign was aligned with statewide goals for kindergarten readiness and 3rd grade reading outcomes.

In the 2015-17 biennium, funds allocated to the Chief Education Office under this category are being utilized to support the charge and functions of the Education Innovation Officer. A key function of the Education Innovation Officer is to engage communities in identifying strategies and practices across the cradle to career continuum to improve student learning and graduation outcomes. This includes convening local and regional planning efforts inclusive of 3rd grade reading outcomes, as well as evidence-based research and development of policy recommendations related to preschool to kindergarten student transitions.

College and Career Readiness and High School Transitions

The Chief Education Office is focused on ensuring that each and every Oregon student graduates high school, college and career ready with the support and opportunities they need to thrive. Meeting this readiness challenge on a statewide scale requires a comprehensive state action agenda with goals, involvement of all key education and political stakeholders, a plan for implementation, and recommended state policies. The CEdO provides leadership and coordination across multiple state agencies including Oregon Department of Education, Higher Education Coordinating Commission, Oregon Employment Division, associations such as Oregon Community Colleges Association, Oregon Association of Independent Colleges and Universities, Public Universities and others groups and community organizations who are focused on dramatically accelerating progress toward Oregon's progress towards ensuring every Oregon student graduates high school ready for success in a postsecondary education.

The CEdO convenes an Oregon College and Career Readiness Cross Sector Planning Group that meets monthly to better understand access gaps and barriers, apply an Equity Lens to policy development, share progress and coordinate action in two major areas:

Area 1: Accelerated Learning-- identifying means by which the state can support and enable students to obtain college credits while still in high school by creating more equitable and seamless pathways for every Oregon student; and supporting a sustainable collaborative culture engaging K-12 and postsecondary educators providing instruction.

This includes regular engagement with interagency policy staff as new Accelerated Learning Standards are developed and adopted, tracking outcomes and promising practices from state investments, (e.g. Regional Promise grants), and supporting cross agency policy development in areas including sustainable funding models, data-sharing, placement practices, developmental education models, and curriculum alignment coordinated across high schools and postsecondary institutions.

Area 2: SB 418 Student Transitions –identifying policy and practices that mobilize school counselors, administrators, college advisors, financial aid officers, and mentors across the state to provide every student with information and supports needed for a viable and affordable pathway to adult success.

In 2015, the Oregon Legislature passed SB 418 charging the HECC with providing recommendations to provide services and supports for students transitioning between high school and enrollment in a postsecondary institution. During the 2016 session, funding in SB 5071 was distributed to Chief Education Office, Higher Education Coordinating Commission and Office of Student Access and Completion (OSAC), and Oregon Department of Education to carry out approved activities.

In the Spring of 2016, the Chief Education Office contracted with OSAC (to engage in planning and coordination of a Summer Summit that provided shared professional development for K-12 school counselors, postsecondary advisors, and support personnel. Following the summit CEdO is providing roughly 40K to each regional team and contracting with Oregon Solutions Network to assist Regional Achievement Collaboratives in using community-specific data to create and implement action plans based on local needs and opportunities.

The CEdO Research Office is also overseeing evaluation to track impact of SB 418 investments and dissemination of best and promising practices across regions.

Program Justification and Link to 10-Year Outcome: Governor Kate Brown has affirmed a goal that every Oregon student should graduate from high school with a plan for college and career. In order for young people to be genuinely "ready" for both college and career, they need to have attended to their academic achievement, their aspirations and plans for the future, and their success in making transitions to subsequent levels. And, the efforts of K-12, higher education, and college access professionals require coordination, alignment, and common messaging to all students, their families, educators, and community based organizations.

Program Performance: An Inter-Governmental Agreement was developed with the HECC Office of Student Success and Completion to coordinate the Summit that was held on July 19-20 with over 350 participants.

A Scope of Work contract was developed with Oregon Solutions Network who facilitated collaborative planning sessions for the RACs and ESDs during the Summit and who will continue providing teams with facilitation, mediation, strategic planning and other targeted services necessary to increase effectiveness for the use of funds to be allocated to each RAC and three ESD following the Summit.

A Comprehensive Shared Policy Vision for Seamless High School to Postsecondary Student Transitions was facilitated by CEdO to inform legislation for the 2017 session.

Enabling Legislation/Program Authorization: Senate Bill 5071 appropriated the funds for this program that stemmed out of recommendations proposed by a HECC workgroup as a result of SB 418.

Funding Streams: The State Legislature appropriated $1 M during the 2016 session for the program as outlined below:

Significant Proposed Program Changes from 2015-17: Response to the Summit exceeded the capacity of the facility and points to the need for continued supports.

Legislation is also required to address the remaining equity gaps across the state where students do not yet have access to accelerated college credit and transition supports known to lead to improved graduation outcomes and postsecondary enrollment, retention, and completion.

Activities, programs, and issues in the program unit base budget: No additional impacts on the program unit base budget are anticipated.

Expected results from the 2017-19 budget for the program unit: Discussion is underway to request a Roll Up of the current funding allocation for the 2017-19 biennium. There is cross-sector agency agreement that these one-time funds, although helpful, will not be able to serve the entire state's need for services and supports for students transitioning between high school and enrollment in a postsecondary institution. In addition, the relatively small amount of funds to further support RAC or ESD implementation of their regional plans is insufficient (both in amount and timeframe) to garner any significant impact on students' ease of transition from high school to enrollment in a postsecondary institution.

LC 671 also supports additional areas for the 2017-19 biennium:

- Seeding partnerships to offer access to college credits while in high school including collaboration time for educators in K-12 and postsecondary to ensure development of courses that meet expected rigor of college level coursework
- Establishing funding mechanisms for accelerated college credit programs for high school students
- Charging TSPC to create a specialization for high school teachers to acquire additional professional learning credits aligned with national standards
- Establishing loan forgiveness plan for qualifying more high school instructors to teach dual credit courses
- Charge HECC and ODE to continue supports relative to HB 418 such as mentoring, first year supports, Oregon Promise, AVID-like etc.
- Charging ODE and HECC to support curricular alignment to include improved math pathways

Revenue sources and proposed revenue changes: See above

Proposed new laws that apply to the program unit: LC 671 (see above).

Reach Higher Summer Summit and 2016-17 Regional Partnership Implementation Plan Funding

In 2015, the Oregon Legislature passed SB 418 charging the HECC with providing recommendations to provide services and supports for students transitioning between high school and enrollment in a postsecondary institution. During the 2016 session, funding in SB 5071 was distributed to Chief Education Office, Higher Education Coordinating Commission (HECC) and Office of Student Access and Completion (OSAC), and Oregon Department of Education (ODE) to carry out approved activities.

Summer Summit

The Chief Education Office was responsible for working with ODE, HECC and other partners to plan and coordinate a Summer Summit that provided shared professional development for K-12 school counselors, postsecondary advisors, and support personnel.

The goals of the summit were to:

1) To mobilize school counselors, administrators, college advisors, financial aid officers, and mentors across the state to provide every student with information and supports needed for a viable and affordable pathway to adult success.
2) To dramatically accelerate progress toward Oregon's vision of graduating each of our young people from high school to be ready for success in a postsecondary environment, such as a trade school or college, and ultimately a professional career.

Participants are organized within regional teams, leveraging the collective impact of Oregon's 13 Regional Achievement Collaboratives (RAC) and 3 Education Service Districts (ESD) that do not have RACs.

Regional Coordination and Alignment Activities

Following the summit in 2016, CEdO will provide additional grant funding to each regional team through an IGA process with the Regional Achievement Collaboratives to convene and coordinate around development and implementation of Action Plans. The Chief Education Office, with contracted services from Oregon Solutions Network, will assist RACs in using community-specific data to identify needs and opportunities related to educational outcomes, and to create and implement action plans based on regional needs and assets.

Program Justification and Link to 10-Year Outcome: Governor Kate Brown has affirmed a goal that every Oregon student should graduate from high school with a plan for college and career. Helping students develop a plan that connects their schoolwork to real life—and to their future—can positively impact academic achievement, high school completion, enrollment in postsecondary education, as well as career and life success. In order for young people to be genuinely "ready" for both college and career, they need to have attended to their academic achievement, their aspirations and plans for the future, and their success in making transitions to subsequent levels.

Students are far more likely to succeed in postsecondary education if they have a purpose in mind; yet many new students arrive without clear goals for college and careers and, in many cases, without an understanding of their options. This process starts early in the K-12 setting where career and college-going cultures are established and where skills such as planning, career education, tenacity, college know-how, communication skills, etc. are initially developed. An early determination of even the most general post-high school academic direction can help a student better understand the purpose of the courses they are taking in high school, make better selections of courses during their last two years of high school and contribute to increased student motivation and persistence.

Program Performance: Planning for the Reach Higher Summer Summit involved a cross sector agency planning team that met weekly. An Inter-Governmental Agreement was developed with the HECC Office of Student Success and Completion to:

- Develop and refine an operating budget for the Summit
- Regularly update planning team on budget estimates, adjustments and final costs
- Research and finalize venue and details such as room rentals, catering, and AV
- Coordinate honorariums, hotel, and travel costs for presenters
- Coordinate budget reimbursements for attendees eligible for housing, travel reimbursements and stipends
- Coordinate hotel and travel reimbursements for planning team
- Handle printing of Summit materials, signage, and coordinate Summit supplies
- Reconcile all invoices with approved budget in a final report

The two-day event was held on July 19-20 at Central Oregon Community College in Bend. More than 350 individuals attended.

The White House sent a representative and customized invitations were sent to every legislator who serves on an education committee. The Southern Regional Education Board sent a representative to share the newly licensed professional development modules that will be available for use in Oregon. A pre-summit inventory was developed to assist participants in taking stock of current services and gaps at the local level. The inventory areas were coded to sessions at the Summit that will be useful for spotlighting best practices in Oregon and nationwide.

Participants were organized into regional teams, organized around Regional Achievement Collaboratives or in the case of three counties without RACs, by ESD. Data on each high school's graduates was provided to the teams at the beginning of the Summit to ground the planning efforts over the course of the two-day event.

A Scope of Work contract was been entered into with Oregon Solutions Network who facilitated collaborative planning sessions for the RACs and ESDs during the Summit. Oregon Solutions will continue providing teams with facilitation, mediation, strategic planning and other targeted services necessary to increase effectiveness for the use of funds that will be allocated to each RAC and three ESD following the Summit.
Specifically they will:

- Provide support for integrating high school transition to college and career efforts into existing RAC goals.
- Assist RACs in using community-specific data to identify needs and opportunities related to educational outcomes, and to create and implement action plans based on regional needs and assets.
- Convene and facilitate monthly or bi-monthly team meetings to coordinate service delivery and ensure communication, alignment and learning between OS and CEdO.
- Facilitate communication between RACs and CEdO to communicate barriers, identify opportunities, and serve as neutral liaison.

Enabling Legislation/Program Authorization: Senate Bill 5071 appropriated the funds for this program that stemmed out of recommendations proposed by a HECC workgroup as a result of SB 418.

Funding Streams: The State Legislature appropriated $1 M during the 2016 session for the program as outlined below:

Two-day Summer Summit that brings together high school counselors and administrators with community college and university staff from advising and financial aid offices. (Includes travel, stipends, hotel, speaker costs, food, and facilities) **Funding to: Office of Student Access and Completion $300 K** Regional support for local collaboration teams of high school counselors and postsecondary advisors to refine and implement local plans for strengthening advising and college access for high school students. (Includes travel, and cost for a facilitator provided by Oregon Solutions) **Funding to: Regional Achievement Collaboratives and to Chief Education Office for coordination $700 K**	$1,000,000

Expenditures by fund type, positions and full-time equivalents:

Summer Summit Budget 2016			
7/1/2015 - June 30, 2105			
Fixed Expenses	**Proposed Budget**	**Running Balance**	**Budget Remaining**
Venue	$28,726	$0	$28,726
Supplies	$4,500	$0	$4,500
Travel for Attendees	$215,350	$0	$215,350
Travel For Planning Team	$6,524	$0	$6,524
Speakers	$9,000	$0	$9,000
Oregon Solutions	$36,800	$0	$36,800
Total*	**$300,900**	**$0**	**$300,900**

Year-Round Supports 2016-17			
7/1/2015 - June 30, 2105			
Fixed Expenses	**Cost Share**	**Running Balance**	**Cost Share Remaining**
Oregon Solutions	$100,000.00		
Travel for DOE & OEIB	$5,000.00		
Regional Funds	$757,800.00		
Total*	**$862,800.00**		

Activities, programs, and issues in the program unit base budget: No additional impacts on the program unit base budget are anticipated.

Important background for decision makers. Although both Hilda Rosselli and Krissi Hewitt are involved in this program, the majority of the workload was carried out by other agency partners or contractors, namely the HECC Office of Student Success and Completion, the Oregon Department of Education, and Oregon Solutions Network.

Expected results from the 2017-19 budget for the program unit: There is cross-sector agency agreement that these onetime funds, although helpful, will not be able to serve the entire state's need for services and supports for students transitioning between high school and enrollment in a postsecondary institution. This is borne out by the numbers of individual seeking to register for the Summer Summit. In addition, the relatively small amount of funds to further support RAC or ESD implementation of their regional plans is insufficient (both in amount and timeframe) to garner any significant impact on students' ease of transition from high school to enrollment in a postsecondary institution.

Discussion is underway to request a Roll Up of the current funding allocation for the 2017-19 biennium.

Chronic Absenteeism – Trauma Informed Pilot Completion of HB 4002

In the 2016 legislative session, HB 4002 directed the CEdO to implement a pilot program to study the effectiveness of a "trauma informed" approach and appropriated funding for two pilot programs for one year. An associated budget note directed the CEdO to develop a POP to complete the pilot program:

"The pilot program will last three years with grant funding allocated in three different allotments; the Legislative Fiscal Office recommends that the CEdO include a policy option package in the Agency Request Budget for the 2017-19 biennium for the remainder of the pilot program funding."

House Bill 4002 (2016) directed the Chief Education Office to develop a pilot program to support school districts in developing a Trauma Informed approach to education, health services, and intervention strategies. HB 4002 relevant language is in Sections 5, 6, and 7. The appropriated funding only allows for two pilot programs; however, a budget note included during the 2016 session asks the CEdO to submit a plan to fully fund the pilot in the 2017 session.

Program Justification and Link to 10-Year Outcome: Students who have experienced trauma are more likely to be absent from school. Graduation and certificate attainment are correlated with attendance.

Enabling Legislation/Program Authorization: HB 4002 (2016)

Funding Streams: General Fund

Significant Proposed Program Changes from 2015-17: The CEdO's 2017-19 requested POP will fund the final two years for the original pilot schools and funds four additional pilot sites. It also allocates funding to investigate student level outcomes for the trauma informed schools.

Important background for decision makers: The Chief Education Office (CEdO) has identified improving student attendance as a key priority and lever to help meet Governor Kate Brown's goal of every student graduating high school with a plan for their future. The Legislature has charged the CEdO to collaborate with the Oregon Department of Education (ODE) and the Oregon Health Authority (OHA) to develop a statewide plan and to pilot a Trauma Informed approach to this issue in Oregon high schools.

Expected results from the 2017-19 budget for the program unit:

1. Description and design for Trauma Informed approaches to the delivery of education, health services, and intervention strategies in Oregon High Schools. At least two models will be designed, one with relies on the presence of a School Based Heath Center (SBHC) and another that relies on analogous mental health delivery models.
2. Development of professional development tools for high school staff members that include curriculum and assessment with respect to awareness, attitude towards trauma informed care, and utilization of community partnerships.
3. Refined job description for a school based trauma coordinator.
4. Identification of foundational requirements that must be present for a school to adopt a trauma informed approach and of barriers that must be overcome for success.
5. Qualitative and quantitative data regarding prevalence and impact of trauma on students and the possible effects of a trauma informed approach with respect to student attendance.
6. Description of the systemic changes among and between staff members and community partners with respect to mental health services referrals and delivery.

Network for Quality Teaching and Learning and the Council for Educator Advancement

In HB 3233 (2013), established a dedicated appropriation to foster a statewide umbrella of professional development for teachers and school leaders, known as the *Network for Quality Teaching and Learning*. Pursuant to ORS 342.950, the Chief Education Office is charged to provide strategic direction and carry out other functions to support the purposes of the Network.

In 2016, Governor Kate Brown issued Executive Order 16-03 in January 2016 establishing the Governor's Council on Educator Advancement. The Chief Education Officer and Chief Education Office is charged with facilitating the Council process.

ORS 342.950 charges the Chief Education Office with:

- Providing direction and control of funding to accomplish the purposes of the Network.
- Conducting and coordinating research to determine best practices and evidence-based models.
- Convening an advisory group to guide network activities and expand the implementation of effective practices.
- Working with educator preparation programs to ensure ongoing collaboration with education providers.

ORS 342.90, the Chief Education Office is also charged with developing processes to establish the network and ensure the accountability of the network.

The Chief Education Office has facilitated quarterly meetings of a Network Advisory that reviews various aspects of the Network Investments and provides input and recommendations to support accomplishing the purpose of the Network.

As part of this work, the Chief Education Office coordinates the biennial administration of the Teaching, Empowering, Leading and Learning or TELL Oregon Survey, a survey of school-based educators that provides feedback on the impact of state investments on enhancing teaching and learning conditions. Survey administration requires extensive preparation, coordination, analysis, and dissemination of the survey results every two years.

Since the issuance of the Governor's Executive Order 16-03, staff the Chief Education Office have been providing support for monthly meetings of the Council requiring extensive preparation, analysis, and synthesis to produce a final report for the Governor.

Program Justification and Link to 10-Year Outcome: Educators are one of the single greatest in-school factors impacting student success. If we are going to position 100% of Oregon students to graduate high school with a plan, we have to invest in the support, mentoring and development of our educators. Educators deserve specialized professional learning and ongoing support; more than current levels of federal, state, and local systems (like the Network for Quality Teaching and Learning) are designed to deliver.

Program Performance: The Legislature has received regular updates from the Chief Education Office and the Oregon Department of Education on the Network and biennial investments. The most recent results of the TELL Survey are also available at the TELLOregon website. Staff at the Chief Education Office continue to engage with various partners to address how best to eliminate disparities in access statewide to professional learning and educator supports such as the Oregon Mentor Project, District Collaboration Grants, and support for educator preparation program partnerships with school districts.

Enabling Legislation/Program Authorization: HB 3233 (2013), SB 215 (2015)

Funding Streams: There is no direct funding allocated to the Chief Education Office specific to the statutory duties of the agency related to the Network for Quality Teaching and Learning.

Significant Proposed Program Changes from 2015-17: Now in its third year of implementation, a reevaluation and potential redesign of the Network to scale up key functions, educator development initiatives and supports has been initiated for the purpose of meeting the growing demands for a well-supported and culturally-responsive education workforce. Making recommendations toward this end has been tasked to the Council of Educator Advancement by the Governor under Executive Order 16-08 in its charge to coordinate comprehensive support to deliver excellence in teaching and learning, enhancing Oregon's ability to elevate the educator profession and advancing teacher and school leadership.

Purpose, customers, and source of funding: No direct funding was allocated to the Chief Education Office specific to this function.

Expenditures by fund type, positions and full-time equivalents: No direct funding has been allocated to the Chief Education Office specific to the agency's role respective to the Network and TELL Oregon Survey.

Activities, programs, and issues in the program unit base budget: There are clearly costs affiliated with the Chief Education Office carrying out its responsibilities relative to the Network. There is a cost for Network Advisory meetings and a need to cover the cost of substitutes and travel costs for classroom teachers to participate as well as travel costs for CEdO staff to share Network and TELL results at key conferences throughout the state.

Participation on the TELL Survey could be greatly enhanced with temporary assistance to assist with monitoring participation rates and making phone calls to follow up with individual schools and districts.

Important background for decision makers: Supporting the Network function charged to the Chief Education Office requires significant staff resources in addition in addition to supporting three Network-specific advisory groups: the Council for Educator Advancement as directed by Executive Order 16-03; and the Educator Equity Advisory Group and Network Advisory Committees as directed by statute.

Expected results from the 2017-19 budget for the program unit: The Governor issued an Executive Order in January of 2016 charging a Council on Educator Advancement. Their recommendations to the Governor are due September 1, 2016 and are likely to further define the duties and responsibilities of the Chief Education Office related to governance, interagency coordination and policy development.

Revenue sources and proposed revenue changes: No revenue at this time.

Suggested funding needs include:

- TELL Survey
  - Full funding of TELL Survey contract—$250,000-260,000
  - Mileage for at least one other advisory group member to share results at meetings of COSA, OSPA, ORATE, TSPC, OACTE and OAICU meetings. Depending on location, at least two of these meetings may require an overnight lodging and meal per diem.
- Network
  - Travel associated with this work includes listening sessions, travel for educators to participate in regular meetings, and occasional travel to present at in-state professional meetings.
  - Substitute costs and mileage for two teachers to regularly attend Educator Advisory Committees.
  - Charges for room space when the Somerville Building Conference room is not available. For meetings that span the entire day, lunch is provided along with coffee.
- Council placeholders

- Could also be a cost for other staff as recommended by the Council for Educator Advancement.
- Annual larger scale convening may be critical to the work of the Council and Network to annually engage educators in helping to design meaningful professional learning and supports.
- Additional research costs may be incurred as data are compiled on resulting investments to assess impact on selected outcomes.

Proposed new laws that apply to the program unit: LC 663 Network/Council on Educator Advancement

Educator Equity Report and Advisory Group

Oregon Statutes related to the Oregon Educators Equity Act (ORS 342.448, 342.437, 342.443, 342.447, and 342.449) charge the Chief Education Office to report to the Legislative Assembly longitudinal data on the diversity of Oregon's educator workforce.

The Chief Education Office publishes an annual report required on Oregon's progress in meeting the goals of the Educators Equity Act. Development of the report requires engagement from a wide group of stakeholders. The Chief Education Office works with an Oregon Educator Equity Advisory group that provides oversight, recommendations, and field-based examples to highlight within the report. The Chief Education Office co-facilitates these meetings and prepares materials to be shared including slides, handouts, and info-graphics informing multiple agencies and communities on Oregon's progress in diversifying the educator workforce and relevant policy recommendations.

Program Justification and Link to 10-Year Outcome: Every Oregon student deserves a caring, competent, and culturally responsive educator in the classroom. Nonwhite educators offer new and valuable perspectives for students of all backgrounds and the staff who work with them. As the demographics of Oregon's K-12 student population becomes more culturally and linguistically diverse, the state must take proactive steps to recruit, prepare, hire, retain, and advance more educators who mirror the K-12 student demographics.

Program Performance: The most recent report has been published at http://education.oregon.gov/portfolio/2016-educator-equity-report/ and early reports are also available on the Chief Education Office website.

This past year, the Chief Education Office collaborated with the Oregon Department of Education to plan, develop, and oversee launch of a statewide teacher recruitment website called TeachInOregon. As this was an initial investment of the Network in 2013, it is unclear from where continued support for regular maintenance and costs affiliated with maximizing search visibility will be located.

In April 2016, the Chief Education Office collaborated with the Advisory Group to host an Education Equity Teacher Preparation and Retention Summit. Over 100 representatives participated from Oregon's public and private non-profit educator preparation programs and administrators from over a dozen of the state's K-12 school districts that enroll over 40 percent students of color.

Enabling Legislation/Program Authorization: SB 755 (2013), HB 3375 (2015)

Funding Streams: Currently no direct funds are allocated specific to the statutory responsibilities of the Chief Education Office.

Significant Proposed Program Changes from 2015-17: None at this time. The Chief Education Office recently received recommendations from the Educator Equity Advisory Group that were shared and discussed with the Council on Educator Advancement. The Council is charged with making recommendations to Governor Kate Brown that include ways to build a more diverse educator workforce that mirrors Oregon's student demographics and supports the development of culturally responsive educators.

Purpose, customers, and source of funding: NA

Expenditures by fund type, positions and full-time equivalents: NA

Activities, programs, and issues in the program unit base budget: Currently there is no budget for this work; There costs associated with printing and publication of the report, travel and costs associated costs for regular Advisory Group convenings and to share the results at key conferences throughout the state. There is currently no teacher representation on the Advisory Group due to lack of funds for substitute and travel costs.

Important background for decision makers: The preparation of the annual report and preparation for, convening and following up on actions taken at meetings of the Educator Equity Advisory Group require significant staff and resources.

Expected results from the 2017-19 budget for the program unit: With the recommendations to the Governor from the Council on Educator Advancement, it is likely that there will be additional duties for the Chief Education Office.

Regional Achievement Collaboratives (RACs)

In the 2015-17 biennium, CEdO received continued funding of the Regional Achievement Collaboratives project. A Request for Qualifications was issued in July 2015 to any region/ community who did not have a pilot project, with the intent of funding an additional two RACs. In addition, a modest continuation grant was awarded to existing RACs which demonstrated commitment to continued collaboration and achievement of key student outcomes. In August of 2015, a statewide convening was held in Medford, which was attended by more than 130 education and community leaders from across Oregon. In August 2016 the leaders of Regional Achievement Collaboratives, STEM Hubs and Early Learning Hubs and local workforce boards to engaged in a visioning session with policy makers to further collaborate across the P-20 education system and with community partners to provide holistic support systems for learners cradle to career. These leaders also made recommendations for ways the state can more effectively support regional partnerships to drive key state priorities in their regions and communities.

STEAM Education (Science, Technology, Engineering, Arts, and Mathematics)

The STEAM program is a P-20 (birth to career) initiative under the direction of the Chief Education Office (CEdO) to drive state and community economic prosperity by building a STEAM-ready workforce to meet the competitive talent needs of Oregon in high-wage, high-growth sectors. The CEdO oversees the work of the STEM Investment Council, develops policy and investment recommendations, monitors investment outcomes, and coordinates closely with the Department of Education (ODE), the Higher Education Coordinating Commission (HECC), and the Oregon Employment Department (OED) on the implementation and evaluation of P-20 STEAM investments. There are also very strong connections between this program and the state and federal investments in Career Technical Education (CTE), of which a significant portion are classified as STEAM related. Additionally, the CEdO coordinates with the CTE and STEAM employer community as well as philanthropic organizations to align additional private investments with public dollars.

The STEAM program has several different elements in order to achieve the desired outcomes.

The STEM Investment Council: This statutory Council was established in 2013 through HB 2636 and consists of nine private sector members as well as advisors from education, workforce, research, and out of school time programs. Its charge is to develop a statewide strategic plan to improve STEAM education, and to make policy and investment recommendations to the Chief Education Officer. Their STEM strategic plan is in the final stages of receiving public comment and input from agencies. Another role of the STEM Investment Council has been to oversee the processes and criteria of agency STEAM investments, while also ensuring that those investments target specific interim outcomes tied to the statutory goals (see Outcomes and Metrics below). The work of the Council, as included in legislation, is directed and supported by the CEdO.

Outcomes and metrics: In addition to the legislative goals to double the number of STEM degrees and to double the math and science proficiency at 4th and 8th grade by 2025, the CEdO has worked with the STEM Council and other partners to identify several other metrics to monitor the impact of this program initiative. Additionally, there are no nationally agreed upon definitions of what constitutes a STEM job/career, nor what is a STEM degree. The CEdO has led a cross-agency effort to reach agreement on these definitions in order to carry out the legislated directive of the STEM Council. The CEdO has also led efforts to bring more consistency to the evaluation of the investments through the development of common evaluation tools and instruments.

Interagency coordination: With funding for STEAM investments flowing to the Department of Education and the HECC, a significant role of the CEdO is to ensure alignment and coordination of the investment efforts while also leveraging synergies between these STEAM investments as well as other educational investments such as Accelerated Learning, Educator Equity, and Oregon Promise. As previously mentioned, CTE and STEAM are very complementary in nature and this is an area where the CEdO is playing a coordinating role with Community Colleges and Workforce Development (CCWD) and ODE. This work is also closely aligned with the Oregon Talent Council and the ongoing work of the Oregon Employment Department's Sector Strategy approaches and of the federal Workforce Innovation and Opportunity (WIOA) state plan. Finally, the CEdO is working with the Youth Development Council to prioritize many of their grants to enhance STEAM literacy skills and positive opportunities for those students who are underemployed or otherwise marginalized in the system.

Regional STEM Hubs: One of the key STEM investment strategies is the development of a statewide network of Regional STEM Hubs. These local, multi-sector partnerships were a primary recommendation of the Joint Interim Task Force on STEM Access and Success (HB 4056) Report (2012) and bring together K-12, postsecondary institutions, out of school program providers, STEM employers, civic leaders, and economic and workforce development agencies to design local solutions to local needs. Given that their scope cuts across the entire educational system and involves non-education agencies, the CEdO has been the primary coordinator of this strategy in partnership with ODE's administrative support.

Multi-state coordination: President Obama and several congressional and industry leaders have made STEAM a national priority for ensuring the economic competitiveness of the nation. As a result, several states are working on similar efforts to strengthen STEAM education outcomes. Oregon is part of the two major, multi-state initiatives STEMx and the STEM Funders Ecosystem Initiative. The CEdO is a prominent contributor to these efforts in order to learn promising emerging practices to improve the effectiveness of local state investments and to increase the visibility of Oregon's STEAM efforts, which make Oregon institutions and partnerships more competitive for federal funding.

Program Justification and Link to 10-Year Outcome: Given that this work involves the connection between education, workforce, and economic development that span several agencies and involves broad partnerships with state business and industry partners, the Legislature situated this work at the CEdO.

STEAM related jobs are growing at a pace 2-3 times greater than non-STEAM jobs. They represent higher wage jobs that can help break the cycle of poverty have a disproportionately high positive impact on community economic growth. Unfortunately, many of our high-wage, high-demand jobs are being filled by talent imported from other states and overseas, while many Oregonians remain unemployed. Furthermore, while STEAM skills open the doors of opportunity, women and persons of color are woefully underrepresented in these fields.

The statutory 10-year outcome is to:

1) Double the number of STEM degrees
2) Double the number of 4th and 8th grade students' proficient or advanced on nationally-normed assessments of science and mathematics.

An additional goal is to dramatically increase Oregonians, particularly women and persons of color, filling these high-wage and high-demand jobs.

Program Performance: While the long-term goals focus on math and science scores, and increase STEM degree production, extraordinary complexities and barriers in the system must be addressed in order to make progress toward those goals. In the interim, the STEM Council has proposed interim outcomes to monitor the impact of their recommended investments. Among these are:

- Increased high school graduation rates.
- Increased student selection of and retention in STEM degree and certificate programs.
- Increased student diversity in STEM degree and certificate programs.
- Increased student interest in STEM careers.

- Increased access to out of school STEM programs for underserved and underrepresented students.
- Decreased need for remedial mathematics programs.
- Increased use of hands-on, project-based learning approaches.

The CEdO has also developed a "Backbone Effectiveness" tool to evaluate the strength and effectiveness of the Regional STEM Hub partnerships.

Enabling Legislation/Program Authorization: The STEM Council was established under HB 2636 (2013) with a charge that the Council be staffed and directed by the Chief Education Office. An initial $8M of funding for STEM investments was provided through SB 217 (2013) Connecting to the World of Work investments including Regional STEM Hubs, STEM Lab Schools, and CTE/STEM/STEAM grants. Additional legislation in 2015, HB 3072, included both CTE and STEAM funding, providing $12.5M in STEM investments to expand and enhance the Regional STEM Hub network, provide postsecondary support services for underserved and underrepresented students, and a four STEM Innovation areas that included: 1) Math in Real Life professional development, 2) Adaptive math technology pilots, 3) Out of School programs for historically underserved and underrepresented students, and 4) Digital literacy and Computer Science.

Funding Streams: Funding for agency-managed STEM investments primarily come from public dollars allocated via HB 3072 (2015) in the current biennium, and SB 217 for the 2013-15 biennium. Additional financial and in-kind support is provided by corporate and private philanthropy made at the local and regional level.

Significant Proposed Program Changes from 2015-17: The growth and impact of the Regional STEM Hubs and other current initiatives are growing capacity to serve more students and educators across the State—building on what has been effective and eliminating approaches not shown to be effective. Solutions are being sought for a more sustainable funding mechanism to enable continuity of investments across biennia to maximize impact and achieve improved outcomes. In addition, CEdO and agency partners are collaborating to strengthen integration and coordination between the CTE and STEAM investment strategies.

Purpose, customers, and source of funding: Ultimately, the purpose of the STEAM work is to drive economic growth in the state and to meet essential workforce talent needs in high-wage, high-growth sectors. The customers of the Oregon STEAM initiative are the P-20 learners and educators in the formal and informal education system, as well as the CTE/STEAM employers and communities across the State.

Expenditures by fund type, positions and full-time equivalents: Currently, the CEdO budget includes 1.0 FTE for the CTE & STEAM Director position with no additional dollars for the convening, evaluation, communication, monitoring, research, or coordination roles described elsewhere.

CTE/STEAM pathways are critical to improving high school and college completion. The joint meeting of the HECC and State Board of Education identified joint priorities for removing barrier for those interested in pursuing CTE/STEAM pathways, which requires a strong interagency coordination and collaboration. This will increase the participation of the CEdO in coordinating those discussions and the collaborative leadership of both the STEM Investment Council and CTE revitalization grant advisory committee.

Expected results from the 2017-19 budget for the program unit: During the 2017-19 biennium, there will continue to be closer coordination and integration between CTE and STEAM strategies. Regional STEM Hubs will continue to strengthen their partnerships and increase the student and educator outcomes related to STEAM, while expanding their programs to reach more students in the State, particularly women, students of color, and those facing poverty. We expect to see much improved student outcomes in mathematics and science for those educators participating in the STEAM grants, and increased access for underserved and underrepresented students to out of school STEAM programs.

Revenue sources and proposed revenue changes: HB 3072 (2015) provides an investment framework across sectors and agency budgets for particular CTE and STEAM strategies.

Environmental Factors

Changing Student Population
As the demographics of Oregon's schools and communities change, an increasing proportion of students are English Language Learners, from communities of color, or from recently immigrated families. This brings a tremendous depth of diversity, culture, and perspective to our communities and regions, and also presents a challenge to how we have historically configured our systems of education to be more of a one size fits all model. Currently, more than one third of Oregon's student population are students of color or speak a first language other than English, and by 2060 this is expected to rise to 44 percent.

This diversity brings opportunity for innovation and a spectrum of ideas that will enhance the vitality of our communities, regions and state. However, to effectively leverage this increasing diversity, we must ensure that our systems of education are designed to support, empower and reinforce the cultural identities of our students. We must ensure that our educator workforce better reflects the students they serve, and that our larger school communities are prepared to meaningfully engage students and their families. From cradle to career, we must provide access to high quality learning opportunities for each of our students and multiple pathways to the future so that students can pursue something meaningful to them.

Much of this foundation building of this work is underway in Oregon. There is an unwavering commitment to creating an equitable education system, and the 2015-17' Legislative session included investments in both early learning and higher education that have increased the access and affordability of high quality learning opportunities for many of our historically underserved students. Our work ahead as a state is to build on these investments and to re-double our commitment to creating school cultures that are inclusive, engaging and supportive of all of our students and families.

Chronic Absenteeism and High School Graduation
In Oregon, one in five students routinely misses more than 10 percent of school days. This intensifies in high school, and contributes to 26 percent of students not graduating on time. Over the last several years, this issue has increasingly been recognized as one of the most critical facing our students and schools. As a result, there are multiple cross-sector collaborative initiatives underway at the state and regional levels to develop comprehensive solutions, particularly those that reach students who are most likely to be disengaged from our current systems: students of color, students with disabilities, students living in poverty, students who have faced discipline, and English language learners.

Child and family poverty in Oregon has also risen as a result of the recent economic recession contributing to an increase in families who keep children home to care for siblings while parents work and older students working to help support their families.

Currently only 74 percent of Oregon's students graduate high school on time. This equates to approximately 12,000 students annually. To curb this trend, Governor Brown has outlined a vision that each Oregon student graduates high school with a plan and recently appointed Education Innovation Officer Colt Gill to make recommendations to increase graduation rates through budget, policies and other actions the State can take.

System Building
Since 2011 and the creation of the Oregon Education Investment Board, now called the Chief Education Office, Oregon has been committed to building a seamless system of education from cradle to career. This commitment stemmed from recognition that the historic silos between early learning and K-12, and K-12 and our higher education and workforce institutions make it challenging for students to navigate key educational transitions. In its coordinating and convening capacity, the Chief Education Office has lead the building of an increasingly seamless system where joint-planning across agencies focused on key student outcomes has become a regular practice.

These efforts are showing promising impact in the coordination and alignment between segments of the student-learning continuum, but there is much work to be done to continue to build on the momentum to date and truly establish a seamless, student-centered system of education.

Sustainable Funding
While Oregon is beginning to recover from the disinvestment in education that occurred during the economic recession, there is much more re-building to do to ensure that our schools, early learning centers, and higher education institutions have the resources, supports and partnerships they need to prepare each of Oregon's students for graduation and their future.

Initiatives and Accomplishments

- **Coordinate Cross-Sector Planning and Policy Development to Achieve Statewide Goals for Student Learning Outcomes:**
  - Coordination of policy, budget development and external communication across education agencies cradle to career
  - Development of a statewide plan to address chronic absenteeism by students in public schools with the Oregon Department of Education, Oregon Health Authority, Department of Human Services, and cross-sector partners; and pilot trauma informed attendance pilots in two districts.
  - Development of recommended strategies for policies, budget and actions to improve high school graduation rates and student preparedness for college and/or career
  - In coordination with partners, improve access to multiple pathways of learning for students including: opportunities to earn college credit in high school and an increase of applied learning opportunities that engage students and connect them to future opportunities

- **Coordinate Integrated, Cross-Sector Systems that Support Student Success**
  - Coordination and convening of 10 Community Conversations between with each of the Federally Recognized Oregon Tribes and tribal communities per the American Indian/Alaska Native State Plan
  - Convening and coordination of cross-agency research team
  - Convening and coordination of College and Career Readiness Cross Sector Team
  - Coordinate and convene education, community and cross-sector partners through 13 Regional Achievement Collaboratives
  - Coordinate and convene education, community and industry partners through 11 STEAM (science, technology, engineering and math) Hubs
  - In coordination with partners, lead the creation and implementation of a statewide longitudinal database (SLDS)

- **Coordinate Integrated, Cross-Sector Systems of Support for Educator Advancement including:**
  - The staffing and coordination of the Governor's Council on Educator Advancement
  - Annual submission of the Oregon Educator Equity Report and staffing of Educator Equity Advisory Group
  - The coordination and staffing of the Network for Quality Teaching and Learning Advisory Committee, and strategic role in distribution of Network funds in partnership with ODE

Proposed legislation:

1) *Prenatal to Grade 3 Legislative Concept:* Alignment of Early Learning and K-12 systems including the implementation of culturally responsive, evidence-based transition supports, technical assistance and professional development for districts and Early Learning Hubs.
2) *High School Graduation Legislative Concept:* Implementation of supports to ensure students, families, and educators are supporting each learner's path to graduation and successful plan for their future education or career.
3) *Support to Implement Statewide Student Attendance Plan Concept:* Will contain any statutory changes that are designated by the State Chronic Absenteeism Plan that is currently being developed as directed by HB 4002 by CEdO and ODE, in coordination with DHS, OHA, ELC, YDD and other partners.
4) *Accelerated Learning Concept:* Will create more equitable access to accelerated college credits for high school students, increase the supply of qualified dual credit instructors, and support collaboration time for educators in K-12 and postsecondary to ensure course offerings that meet expected rigor of college-level coursework. The legislation will also enhance student career and college advising services and increase collaboration across high schools and higher education providers to help students graduate with a plan and transition into a career or college.
5) *Council for Education Advancement & Education Workforce Concept:* Will improve access to high-quality culturally responsive professional learning that is responsive to local contexts, maximizes teacher leadership, leverages resources from local, regional, private, and non-profit sources, and minimizes disparities between rural and urban areas. The legislation will also establish an Oregon Teaching Fellows scholarship fund with supports that result in a more diverse teacher workforce that mirrors Oregon's student demographics.
6) *CTE-STEAM Education Concept:* Will amend funding mechanisms and investment strategies for CTE/STEAM.
7) *Chief Education Office Charge Concepts:* (1) Adds a duty of the CEdO to create a seamless system of assessment. (2) Adds to the statutory charge and authority of the CEdO with respect to the State Longitudinal Data System. (3) Amends statutory language with respect to the Network for Quality Teaching and Learning to include quality assessment practices for the entire progression of an educator's career.
8) *E-Rate Matching Fund for Broadband Concept:* Creates a 2 permanent funds (one for ODE and one for the State Library) dedicated to hold and distribute state matching funds for the Federal E-Rate program. State funds are matched at a rate of up to 20:1 for high poverty districts and schools that do not have broadband access.

2015-2017 ACCOMPLISHMENTS

- **Coordinate Cross-Sector Planning and Policy to Achieve Statewide Goals for Student Learning Outcomes:**
  1) Production of a Chronic Absenteeism Report in partnership with PSU and the Coalition of Communities of Color that drew on interviews from students and families most likely to be disengaged from school. The report included a summary of existing research in the State and nationally and will be used to inform the creation of a State Plan on Attendance this fall.
  2) Through the work of the Education Innovation Officer, began a statewide engagement tour to gather input from communities on regional barriers and opportunities related to high school graduation and paths to future opportunities for students
  3) Ongoing planning, coordination, policy analysis and development across the cradle to career continuum.

- **Coordinate Integrated, Cross-Sector Systems of Support for Student Success**
  1) Convened cradle to career agency leaders, local education leaders and tribal communities for 5 community conversations in regions across the state as part of the American/Indian Alaska Native State Plan
  2) Provide strategic direction and support to Regional Achievement Collaboratives and convened regional partners annually from across the state for professional development, technical assistance and future planning.
  3) Convened STEM Hubs from across the state for professional development, shared visioning and planning
  4) Convened monthly with cradle to career research staff representing each state education agency to align research initiatives, share best practices and coordinate research across the education continuum.
  5) Completed timely stage gate processes related to the development of the creation and implementation of the Statewide Longitudinal Database. At this time, the project funding is approved and the staff resources are in place. The data system development is underway and consumption of data for system development and testing is forecasted to begin soon.

- **Coordinate Integrated, Cross-Sector Systems of Support for Educator Advancement including:**
  1) Planning, Coordination and Staffing of the Governor's Council on Educator Advancement. On January 26, 2016, Governor Brown created the Council on Educator Advancement to provide recommendations to ensure that educators across the state have open access to high quality, relevant, and culturally responsive professional development
  2) Production of the 2016 Educator Equity Report detailing Oregon's progress on increasing the educators who reflect the State's student population. The report also detailed the status of current state investments to increase culturally and linguistically diverse educators, and prepare existing educators to be culturally responsive.

- **Coordinate Cross-Sector, Interagency Convening on Assessment Literacy:**
  1) The CEdO convenes education agency partners, teachers and administrators, educator preparation programs, professional organizations, and professional development providers to establish a definition of assessment literacy and to align systems to improve quality assessment practices that tie directly to increased student achievement.

- **Coordinate collaboration of Governing State Education Boards and Commissions**
    1) The CEdO convened the State Board of Education and the Higher Education Coordinating Commission on secondary to postsecondary transitions.

Criteria for 2017-2019 Budget Development

The CEdO's budget was developed with the following criteria in mind: (1) efficiency and flexibility; (2) ability to implement the CEdO key strategies:

- Create a coordinated, student-centered education system, from birth through college and career readiness (0-20), to enable all Oregon students to learn at a pace that is appropriate for them, have multiple options for the future and, ultimately, achieve their full potential. At the state level, this will require integration of Oregon's sectors and systems, vision alignment from cradle to career partnerships beyond the traditional school system, and more strategic leveraging of resources to encourage and support successful teaching and learning across the education continuum.

- Focus state investment on achieving equitable student outcomes: The state must continue to focus investment on core student and community outcomes that are more critical for putting students on a path to high school graduation and onto college or career. The state must drive state and local investment strategies toward achieving these outcomes for students, being much more intentional about investing in the programs, services, tools, leverage points and the community strategies that will make the biggest difference for effective teaching and learning and student success. The state must also seek to work with partners and educational entities to create multiple paths to the future for students that engage and empower them to pursue a track that is relevant and meaningful to them.

- Build statewide support systems: The state's role is not to deliver education, but rather to invest in and support the thousands of institutions, providers and communities 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 support, and conduct assessments, coordinated along the education pathway. Nevertheless, the state must also focus on researching what works, providing a structure to support continuous improvement, improving educator effectiveness, and increasing support for educational entities and their educators.

Major Information Technology Projects/Initiatives

Senate Bill 909 (2011) established the Oregon Education Investment Board (OEIB), along with the directive to establish a statewide longitudinal data system in order to provide policy makers and educators a tool to direct funds and methodologies to support continuous improvement within the Oregon educational system.

This directive was reaffirmed by Senate Bill 215 (2015) when the OEIB was redefined in its focus and mission to become the Chief Education Office (CEdO). The key elements for the Oregon Statewide Longitudinal Data System P-20W (OR-SLDS P-20W) have not changed.

Overview:

An education longitudinal data system is defined as a data system that collects and maintains detailed and high quality data that are linked across entities and over time, providing a complete academic and performance history for each student, and makes these data accessible through reporting and analysis tools. This data analysis allows educators, researchers, and policy makers to make better informed decisions on programs, investments, and policies.

Functionally, the Chief Education Office operates by engaging individual districts, community colleges, and public universities in a data-based process tied to 40-40-20 goals, meeting with stakeholders to identify barriers and to create more equitable and seamless systems, analyzing existing and recommending new policies, and recommending new strategic investments or systems of investments to improve state performance.

The Chief Education Office in its role as an educational oversight agency provides the right level of leadership and coordination to govern and unify data from data systems that currently exist independently and do not communicate easily. Until a longitudinal data system exists, policy research regarding the efficacy and effect of achievement compact targets and ways to support student growth and efficient school operations will not be informed by Oregon longitudinal data.

During the 2015-17 Legislative Session, the project team was given specific deliverables to complete:

The Joint Ways and Means Subcommittee on Education recommended conditional approval of Policy Option Package #802 within HB 5022 which provided $550,000 General Fund and three limited duration positions (1.14 FTE) to continue development of the Oregon Statewide Longitudinal Data System P-20W (OR-SLDS P-20W).

Current law requires the Chief Education Office (CEdO) fka Oregon Education Investment Board (OEIB) to deliver a data system to measure outcomes from educational investments across the P-20 continuum (early learning through postsecondary). The OR-SLDS P-20W, once developed, will combine data from multiple agencies (primarily the Department of Education and the Higher Education Coordinating Commission) to evaluate the effectiveness of education investments.

The funding in this package provided resources to continue the development of the necessary project planning and management documents though March 2016. The package included three limited duration positions that make up the current project staff. Two of these positions have been filled with Oregon Department of Education employees who will transfer to Chief Education Office.

During the 2016 legislative session, the agency provided a cost estimate for the overall package so the Legislature could then determine whether to fund implementation of the system. In developing the OR-SLDS P-20W, the agency is to fulfill the following due diligence, project management, and oversight requirements:

Continue to work closely with and regularly report project status to the Office of the State Chief Information Officer (OSCIO) and the Legislative Fiscal Office (LFO) throughout the project's lifecycle.

Chief Education Office (CEdO) has been working with OSCIO, DAS, and LFO since early May of 2015 to align with the Stage Gate process and provide Project Management Plan documents that align with expectations, as outlined in the Stage Gate process. This has been conducted in off line meetings as well as scheduled Core team meetings since early May of 2015. Stage Gate 3 endorsement was received in January of 2016.

- Continue to follow the Joint State CIO/LFO Stage Gate Review Process.

CEdO is in alignment and supports the Stage Gate Process and the intent of the process.

- Retain, hire, appoint, or contract for qualified project management services that have experience in planning and managing projects of this type, scope, and magnitude.

Completed, the project now has a project director overseeing the day to day activities of the project.

- Update the business case and other foundational project management documents as required by OSCIO.

Completed, a complete set of project plan documents were developed and turned over to DAS/OCIO for distribution and review July 30th of 2015. This comprised of 31 documents, critical success indicators, and support matrices. The project will continue to maintain and update these documents throughout the duration of the project execution.

- Work with OSCIO to contract with an independent quality management services firm to conduct an initial risk assessment, perform quality control reviews of foundational project documents as appropriate, and perform ongoing, independent quality management services as directed by OSCIO.

Contract for independent QA services was executed the week of October 12, 2015. Kick off meeting is scheduled for October 19, 2015. CEdO worked with DAS procurement and OCIO to procure and approve vendor. Risk assessment and document review completed with comments incorporated into project documents.

- Submit the updated business case, other project management documents, initial risk assessment, and quality control reviews to OSCIO and LFO for Stage Gate Review.

Completed, a complete set of project plan documents were developed and turned over to DAS/OCIO for distribution and review July 30, 2015. This comprised of 31 documents, critical success indicators, and support matrices.

- Report back to the Legislature on project status during the 2016 legislative session and/or to other legislative committees as required.

CEdO presented to the Joint Ways and Means Committee in January of 2016. The project gave an update on current status and required deliverables from previous legislative directives. The committee approved and was carried to the full legislature for approval (Senate Bill 5701).

- Request legislative approval to proceed with the project prior to initiating project execution activities.

The project team is working with DAS/OCIO, DAS procurement and LFO to comply with all regulations and approval processes in order to gain legislative approval prior to vendor contract execution. This requirement has been met; the project and DAS procurement awarded a contract to a qualified vendor only after meeting all requirements stated in past LFO/DAS oversight directives.

- Utilize the Office of the State CIO's Enterprise Project and Portfolio Management (PPM) System as it is deployed for all project review, approval, and project status and quality assurance reporting activities throughout the life of the project.

The PPM application is now operational and the project team will utilize.

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Summary of 2017-19 Biennium Budget

Chief Education Office
Chief Education Office
2017-19 Biennium

Agency Request Budget
Cross Reference Number: 52400-000-00-00-00000

Description	Positions	Full-Time Equivalent (FTE)	ALL FUNDS	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds
2015-17 Leg Adopted Budget	17	14.64	6,239,594	6,239,594	-	-	-	-	-
2015-17 Emergency Boards	3	3.61	7,117,548	7,117,548	-	-	-	-	-
2015-17 Leg Approved Budget	**20**	**18.25**	**13,357,142**	**13,357,142**	**-**	**-**	**-**	**-**	**-**
2017-19 Base Budget Adjustments									
Net Cost of Position Actions									
Administrative Biennialized E-Board, Phase-Out	(1)	0.25	3,054,937	3,054,937	-	-	-	-	-
Estimated Cost of Merit Increase			-	-	-	-	-	-	-
Base Debt Service Adjustment			-	-	-	-	-	-	-
Base Nonlimited Adjustment			-	-	-	-	-	-	-
Capital Construction			-	-	-	-	-	-	-
Subtotal 2017-19 Base Budget	**19**	**18.50**	**16,412,079**	**16,412,079**	**-**	**-**	**-**	**-**	**-**
Essential Packages									
010 - Non-PICS Pers Svc/Vacancy Factor									
Non-PICS Personal Service Increase/(Decrease)	-	-	132,362	132,362	-	-	-	-	-
Subtotal	**-**	**-**	**132,362**	**132,362**	**-**	**-**	**-**	**-**	**-**
020 - Phase In / Out Pgm & One-time Cost									
021 - Phase - In	-	-	-	-	-	-	-	-	-
022 - Phase-out Pgm & One-time Costs	-	-	(6,960,200)	(6,960,200)	-	-	-	-	-
Subtotal	**-**	**-**	**(6,960,200)**	**(6,960,200)**	**-**	**-**	**-**	**-**	**-**
030 - Inflation & Price List Adjustments									
Cost of Goods & Services Increase/(Decrease)	-	-	359,675	359,675	-	-	-	-	-
State Gov"t & Services Charges Increase/(Decrease)			38,488	38,488	-	-	-	-	-
Subtotal	**-**	**-**	**398,163**	**398,163**	**-**	**-**	**-**	**-**	**-**

Summary of 2017-19 Biennium Budget

Chief Education Office
Chief Education Office
2017-19 Biennium

Agency Request Budget
Cross Reference Number: 52400-000-00-00-00000

Description	Positions	Full-Time Equivalent (FTE)	ALL FUNDS	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds
040 - Mandated Caseload									
040 - Mandated Caseload	-	-	-	-	-	-	-	-	-
050 - Fundshifts and Revenue Reductions									
050 - Fundshifts	-	-	-	-	-	-	-	-	-
060 - Technical Adjustments									
060 - Technical Adjustments	-	-	-	-	-	-	-	-	-
Subtotal: 2017-19 Current Service Level	**19**	**18.50**	**9,982,404**	**9,982,404**	**-**	**-**	**-**	**-**	**-**

Summary of 2017-19 Biennium Budget

Chief Education Office
Chief Education Office
2017-19 Biennium

Agency Request Budget
Cross Reference Number: 52400-000-00-00-00000

Description	Positions	Full-Time Equivalent (FTE)	ALL FUNDS	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds
Subtotal: 2017-19 Current Service Level	**19**	**18.50**	**9,982,404**	**9,982,404**	**-**	**-**	**-**	**-**	**-**
070 - Revenue Reductions/Shortfall									
070 - Revenue Shortfalls	-	-	-	-	-	-	-	-	-
Modified 2017-19 Current Service Level	**19**	**18.50**	**9,982,404**	**9,982,404**	**-**	**-**	**-**	**-**	**-**
080 - E-Boards									
080 - May 2016 E-Board	-	-	-	-	-	-	-	-	-
Subtotal Emergency Board Packages	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**
Policy Packages									
101 - Operational Restructure	3	3.00	1,104,712	1,104,712	-	-	-	-	-
102 - SLDS Staffing	1	1.00	366,957	366,957	-	-	-	-	-
103 - Research & Evaluation	-	-	545,467	545,467	-	-	-	-	-
104 - Network for Quality Teaching and Learning	-	-	1,838,667	1,838,667	-	-	-	-	-
105 - Chronic Absenteeism - Trauma Informed Pilot Completion of	-	-	3,060,000	3,060,000	-	-	-	-	-
106 - Statewide Longitudinal Data System (SLDS)	-	-	1,778,000	1,778,000	-	-	-	-	-
Subtotal Policy Packages	**4**	**4.00**	**8,693,803**	**8,693,803**	**-**	**-**	**-**	**-**	**-**
Total 2017-19 Agency Request Budget	**23**	**22.50**	**18,676,207**	**18,676,207**	**-**	**-**	**-**	**-**	**-**
Percentage Change From 2015-17 Leg Approved Budget	15.00%	23.29%	39.82%	39.82%	-	-	-	-	-
Percentage Change From 2017-19 Current Service Level	21.05%	21.62%	87.09%	87.09%	-	-	-	-	-

Summary of 2017-19 Biennium Budget

Chief Education Office
Chief Education Office
2017-19 Biennium

Agency Request Budget
Cross Reference Number: 52400-001-00-00-00000

Description	Positions	Full-Time Equivalent (FTE)	ALL FUNDS	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds
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2017-19 Base Budget Adjustments									
Net Cost of Position Actions									
Administrative Biennialized E-Board, Phase-Out	(1)	0.25	3,054,937	3,054,937	-	-	-	-	-
Estimated Cost of Merit Increase			-	-	-	-	-	-	-
Base Debt Service Adjustment			-	-	-	-	-	-	-
Base Nonlimited Adjustment			-	-	-	-	-	-	-
Capital Construction			-	-	-	-	-	-	-
Subtotal 2017-19 Base Budget	**19**	**18.50**	**16,412,079**	**16,412,079**	**-**	**-**	**-**	**-**	**-**
Essential Packages									
010 - Non-PICS Pers Svc/Vacancy Factor									
Non-PICS Personal Service Increase/(Decrease)	-	-	132,362	132,362	-	-	-	-	-
Subtotal	**-**	**-**	**132,362**	**132,362**	**-**	**-**	**-**	**-**	**-**
020 - Phase In / Out Pgm & One-time Cost									
021 - Phase - In	-	-	-	-	-	-	-	-	-
022 - Phase-out Pgm & One-time Costs	-	-	(6,960,200)	(6,960,200)	-	-	-	-	-
Subtotal	**-**	**-**	**(6,960,200)**	**(6,960,200)**	**-**	**-**	**-**	**-**	**-**
030 - Inflation & Price List Adjustments									
Cost of Goods & Services Increase/(Decrease)	-	-	359,675	359,675	-	-	-	-	-
State Gov"t & Services Charges Increase/(Decrease)			38,488	38,488	-	-	-	-	-
Subtotal	**-**	**-**	**398,163**	**398,163**	**-**	**-**	**-**	**-**	**-**

Summary of 2017-19 Biennium Budget

Chief Education Office
Chief Education Office
2017-19 Biennium

Agency Request Budget
Cross Reference Number: 52400-001-00-00-00000

Description	Positions	Full-Time Equivalent (FTE)	ALL FUNDS	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds
040 - Mandated Caseload									
040 - Mandated Caseload	-	-	-	-	-	-	-	-	-
050 - Fundshifts and Revenue Reductions									
050 - Fundshifts	-	-	-	-	-	-	-	-	-
060 - Technical Adjustments									
060 - Technical Adjustments	-	-	-	-	-	-	-	-	-
Subtotal: 2017-19 Current Service Level	**19**	**18.50**	**9,982,404**	**9,982,404**	**-**	**-**	**-**	**-**	**-**

Summary of 2017-19 Biennium Budget

Chief Education Office
Chief Education Office
2017-19 Biennium

Agency Request Budget
Cross Reference Number: 52400-001-00-00-00000

Description	Positions	Full-Time Equivalent (FTE)	ALL FUNDS	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds
Subtotal: 2017-19 Current Service Level	**19**	**18.50**	**9,982,404**	**9,982,404**	-	-	-	-	-
070 - Revenue Reductions/Shortfall									
070 - Revenue Shortfalls	-	-	-	-	-	-	-	-	-
Modified 2017-19 Current Service Level	**19**	**18.50**	**9,982,404**	**9,982,404**	-	-	-	-	-
080 - E-Boards									
080 - May 2016 E-Board	-	-	-	-	-	-	-	-	-
Subtotal Emergency Board Packages	-	-	-	-	-	-	-	-	-
Policy Packages									
101 - Operational Restructure	3	3.00	1,104,712	1,104,712	-	-	-	-	-
102 - SLDS Staffing	1	1.00	366,957	366,957	-	-	-	-	-
103 - Research & Evaluation	-	-	545,467	545,467	-	-	-	-	-
104 - Network for Quality Teaching and Learning	-	-	1,838,667	1,838,667	-	-	-	-	-
105 - Chronic Absenteeism - Trauma Informed Pilot Completion of	-	-	3,060,000	3,060,000	-	-	-	-	-
106 - Statewide Longitudinal Data System (SLDS)	-	-	1,778,000	1,778,000	-	-	-	-	-
Subtotal Policy Packages	**4**	**4.00**	**8,693,803**	**8,693,803**	-	-	-	-	-
Total 2017-19 Agency Request Budget	**23**	**22.50**	**18,676,207**	**18,676,207**	-	-	-	-	-
Percentage Change From 2015-17 Leg Approved Budget	15.00%	23.29%	39.82%	39.82%	-	-	-	-	-
Percentage Change From 2017-19 Current Service Level	21.05%	21.62%	87.09%	87.09%	-	-	-	-	-

PROGRAM PRIORITIZATION FOR 2017-19

Agency Name: Chief Education Office

2017-19 Biennium

Agency Number: 524000

Agency-Wide Priorities for 2017-19 Biennium

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22
Priority (ranked with highest priority first)		Agency Initials	Program or Activity Initials	Program Unit/Activity Description	Identify Key Performance Measure(s)	Primary Purpose Program-Activity Code	GF	LF	OF	NL-OF	FF	NL-FF	TOTAL FUNDS	Pos.	FTE	New or Enhanced Program (Y/N)	Included as Reduction Option (Y/N)	Legal Req. Code (C, D, FM, FO, S)	Legal Citation	Explain What is Mandatory (for C, FM, and FO Only)	Comments on Proposed Changes to CSL Included in Agency Request
Agcy	Prgm/ Div																				
1		CEdO	Policy Operations	Coordinating with education stakeholders to establish a unified public education system that ensures all public school students in this state reach the educational goals established for Oregon.	1, 2, 3	7	18,676,207						$ 18,676,207	17			Y	S	SB 909, SB 215		Reductions are made to this program to stay within the projected revenues.
2		CEdO	SLDS	The Oregon Statewide Longitudinal Data System collects and maintains detailed and high quality data that are linked across entities and over time, providing a complete academic and performance history for each student, and makes these data accessible through reporting and analysis tools.		7							$ -	6			Y	S	SB 909, SB 215		Reductions are made to this program to stay within the projected revenues.
													$ -		22.50						
													$ -								
													$ -								
													$ -								
													$ -								
													$ -								
							18,676,207	-	-	-	-	-	$ 18,676,207	23	22.50						

7. Primary Purpose Program/Activity Exists
1 Civil Justice
2 Community Development
3 Consumer Protection
4 Administrative Function
5 Criminal Justice
6 Economic Development
7 Education & Skill Development
8 Emergency Services
9 Environmental Protection
10 Public Health
11 Recreation, Heritage, or Cultural
12 Social Support

19. Legal Requirement Code
C Constitutional
D Debt Service
FM Federal - Mandatory
FO Federal - Optional (once you choose to participate, certain requirements exist)
S Statutory

Prioritize each program activity for the Agency as a whole

Document criteria used to prioritize activities:

Note: SLDS funding is included in the total CEdO

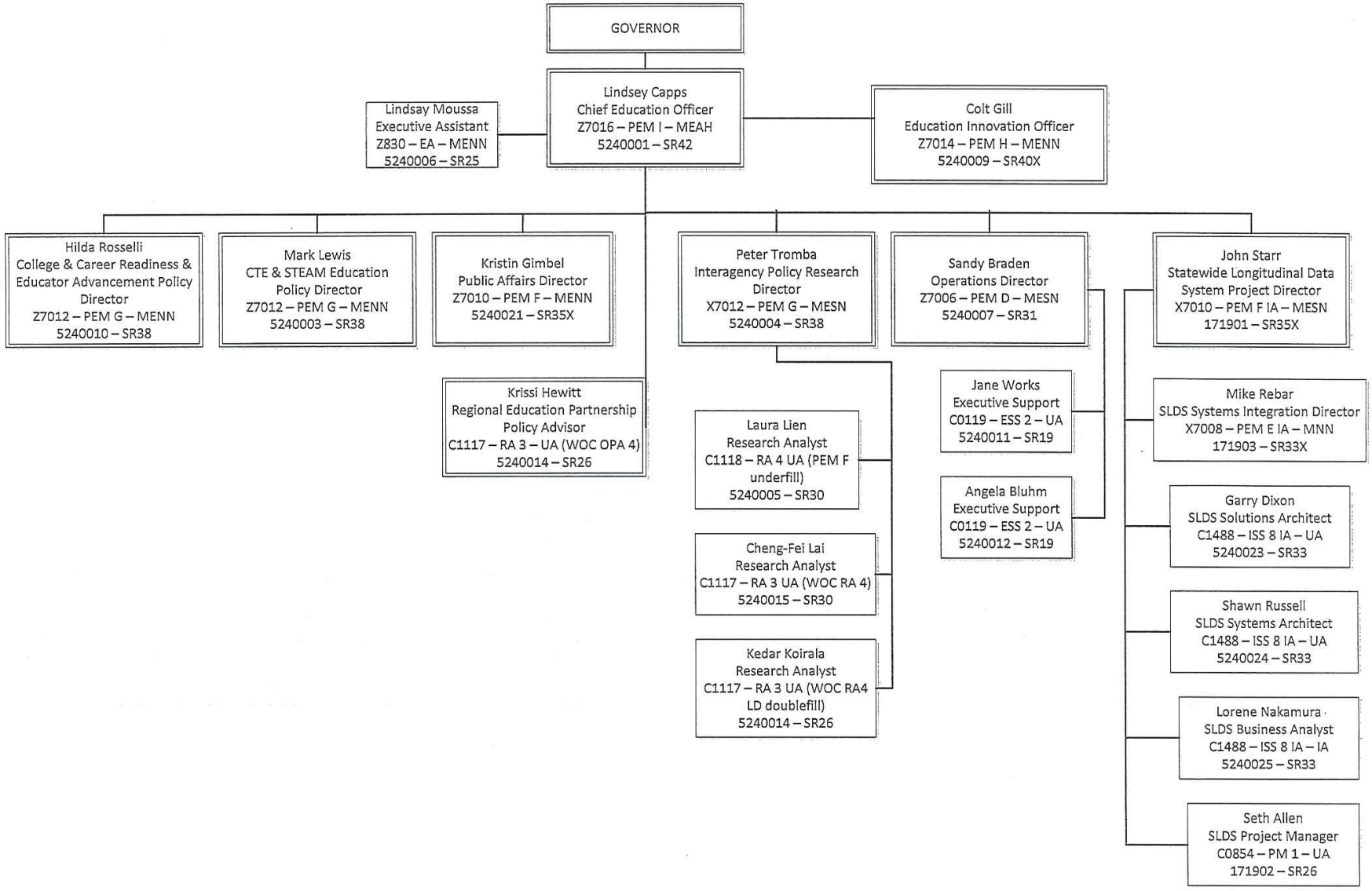
Agency-Wide

107BF23

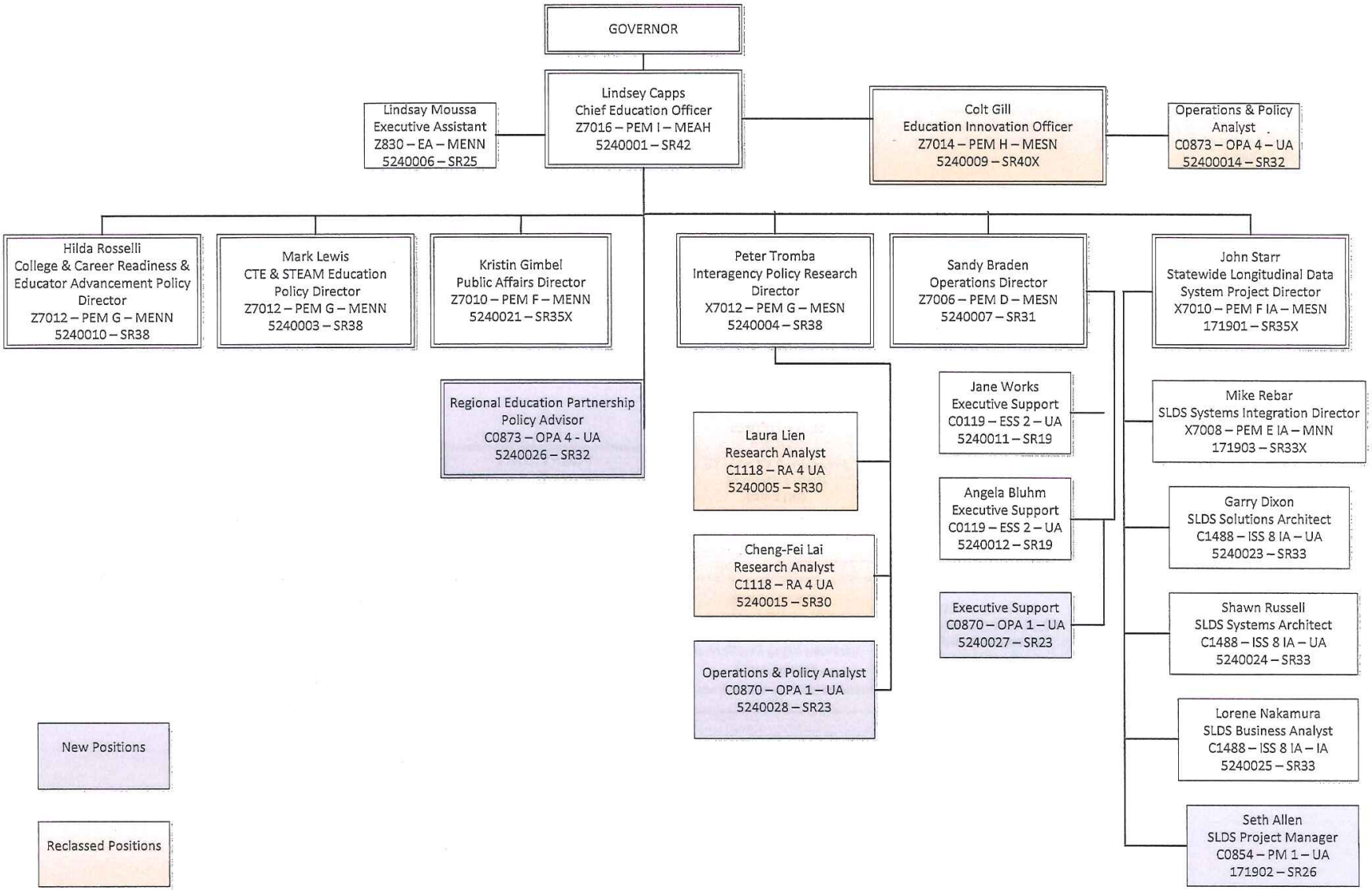
Reduction Options

ACTIVITY OR PROGRAM	DESCRIBE REDUCTION	AMOUNT AND FUND TYPE	RANK AND JUSTIFICATION
(WHICH PROGRAM OR ACTIVITY WILL NOT BE UNDERTAKEN)	(DESCRIBE THE EFFECTS OF THIS REDUCTION. INCLUDE POSITIONS AND FTE IN 2015-17 AND 2017-19)	(GF, LF, OF, FF. IDENTIFY REVENUE SOURCE FOR OF, FF)	(RANK THE ACTIVITIES OR PROGRAMS NOT UNDERTAKEN IN ORDER OF LOWEST COST FOR BENEFIT OBTAINED)
1. Agency-wide reduction of Services & Supplies	ACROSS THE BOARD, AGENCY-WIDE REDUCTIONS WILL BE MADE IN SERVICES & SUPPLIES, ELIMINATING GRANT FUNDING FOR REGIONAL ACHIEVEMENT COLLABORATIVES AND RELATED, STATEWIDE CONVENINGS; AND THE STATEWIDE READING CAMPAIGN AS APPLIED TO SUPPORT THE CHARGE OF THE EDUCATION INNOVATION OFFICER AND MAJOR REDUCTION IN THE SLDS CONTINGENCY FUNDS	$998,240 GENERAL FUND	1. ELIMINATION OF THE STATEWIDE CONVENINGS FUNDS WILL ELIMINATE THE TECHNICAL SUPPORT TO THE RACS AND ALSO FUNDING FOR THE ANNUAL CONVENINGS. 2. REDUCTION OF THE SLDS CONTINGENCY FUND WOULD REDUCE THE AMOUNT AVAILABLE TO THE PROJECT FOR CHANGE DUE TO UNFORESEEN NEEDS OR SHORTFALLS. 3.THE RACS HAVE RECEIVED GRANT FUNDING OVER THE PAST TWO BIENNIUM. ELIMINATING THESE GRANTS WILL CUT BACKBONE SUPPORT FOR THESE REGIONAL CROSS-SECTOR PARTNERSHIPS. 4. ELIMINATION OF THE FUNDING FOR THE STATEWIDE READING CAMPAIGN WILL LIMIT FUNCTIONS CRITICAL TO THE CHARGE OF THE EDUCATION INNOVATION OFFICER.

Chief Education O
August 31, 2016



Chief Education Office
2017-19 Proposed



Summary Cross Reference Number	*Cross Reference Description*	*2013-15 Actuals*	*2015-17 Leg Adopted Budget*	*2015-17 Leg Approved Budget*	*2017-19 Agency Request Budget*	*2017-19 Governor's Budget*	*2017-19 Leg Adopted Budget*
001-00-00-00000	**Chief Education Office**						
	General Fund	20,421,275	6,239,594	13,357,142	18,676,207	-	-
TOTAL AGENCY							
	General Fund	20,421,275	6,239,594	13,357,142	18,676,207	-	-

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DETAIL OF LOTTERY FUNDS, OTHER FUNDS, AND FEDERAL FUNDS REVENUE

Chief Education Office
2017-19 Biennium

Agency Number: 52400

Source	2013-15 Actuals	2015-17 Leg Adopted Budget	2015-17 Leg Approved Budget	2017-19 Agency Request Budget	2017-19 Governor's Budget	2017-19 Leg Adopted Budget
No Records Available						
		-	-	-	-	-

_____ Agency Request
2017-19 Biennium

_____ Governor's Budget
Page _____

_____ Legislatively Adopted
Detail of LF, OF, and FF Revenues - BPR012

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Essential and Policy Package Narrative

Policy Package 101 – CEdO Organizational Restructure

Package Description

Purpose: To meet the agencies mission to build and coordinate a seamless system of education that meets the diverse learning needs of students from cradle to career and ensures each student graduates high school with the support and opportunities to prosper in college and/or career, the Legislature during the 2015-17 biennium made changes to the charge of the Chief Education Office and became fully staffed which included hiring the Education Innovation Officer pursuant to the Governor's request.

The purpose of this package is to align our agency with present-day needs by requesting:

1. The reclass of one position to a lower classification and three positions to a higher classification; and
2. Permanent position authority for three new positions.

Reclass Positions:

	Position #	Title After Reclassification	Current Classification	July 1, 2017 Classification	Reclass Type
1	5240005	Research Analyst 4	Z7010	C1118	Downward
2	5240009	Education Innovation Officer	Z7010	Z7014	Upward
3	5240014	Operations & Policy Analyst 4	C1117	C0873	Upward
4	5240015	Research Analyst 4	C1117	C1118	Upward
					Total Costs for Reclassed Positions

Position 5240005 Research Analyst 4 – This position is assigned to the Research and Policy Unit and its primary purpose is to lead and manage the identification, development, implementation and evaluation of complex data analyses projects. This position consults agency directors and the Chief Education Officer to provide research needs, findings and conclusions and also provides consultation throughout the development of possible legislative concepts, including identification of best practices, policy analysis, fiscal analysis, and feasibility.

Position 5240009 Education Innovation Officer - This position was established, appointed and charged by the Governor to work directly with the Deputy Superintendent of Public Instruction, the Chief Education Officer and the Governor to direct the development, program priorities and implementation of a comprehensive strategy to increase the number of Oregon students who graduate from high school with a plan for their future.

Position 5240014 Operations & Policy Analyst 4– This position will be assigned to the Education Innovation Officer to assist in leading and planning the Education Innovation Officer's cross-sector work focused on improving graduation outcomes which include developing and writing proposals for implementing best practices. This position will also do policy and funding analysis and development regarding legislative issues, policy research relating to the charge of the Education Innovation Officer, and stakeholder outreach. This position also represents the Education Innovation Officer at meetings with the public, legislators, boards, early learning entities, schools, community colleges, public universities, stakeholder groups, and other agencies.

Position 5240015 Research Analyst 4 – This position is assigned to the Research and Policy Unit and its primary purpose is to lead and manage the identification, development, implementation and evaluation of complex data analyses projects. This position consults agency directors and the Chief Education Officer to provide research needs, findings and conclusions and also provides consultation throughout the development of possible legislative concepts, including identification of best practices, policy analysis, fiscal analysis, and feasibility.

New Positions:

	Position #	Title	Classification	TYPE
1	5240026	Operations & Policy Analyst 4	C0873	PF
2	5240027	Operations & Policy Analyst 1	C0870	PF
3	5240028	Operations & Policy Analyst 1	C0870	PF

Position 5240026 Operations & Policy Analyst 4 – This primary purpose of this position is to work with the Chief Education Officer to lead the planning of the agency's regional cross-sector work, oversees the expenditure of agency resources through cross-sector initiatives including the budgeting of the funds for program activities. Writing/reviewing all reports of regional cross-sector projects, grant work plans and applications, vendor contracts, interagency agreements as well as review of all written communication regarding the initiatives. This position will also do policy analysis regarding legislative issues, policy research relating to CTE/STEAM and stakeholder outreach.

Position 5240027 Operations & Policy Analyst 1 – This position will be assigned to provide executive-level support to the Education Innovation Officer and team. This position also supports the team by evaluating program operations and/or administrative system, identify problems, analyze information and make recommendations.

Position 5240028 Operations & Policy Analyst 1 – This position will be assigned to support the Research and Policy Unit. The primary purpose of this position is to support the Education Agency Research Team to better utilize cross-agency research staff to answer the key research questions given to agencies. This includes operational support for agency and cross-agency activities, system analysis and improvement of a new partnership program between agency researchers and graduate students, and system analysis and improvement of the methods, rules, and policies all research staff will use to access the state longitudinal data system. This position, during legislative session, will also help review statutes to determine agency impact and/or needs for policy research.

How Achieved:

Reclasses - This package reclasses three positions upward to address the skills and experience needed to perform the duties of the position and also to align the classification with the work performed.

New positions - The additional two Operations & Policy Analyst positions would expand the Education Innovation Officers capacity to achieve results which the Governor has charged him with to improve high school graduation rates and pathways to future for students.

The additional Operations & Policy Analyst position would expand the capacity of the Research and Policy Unit to meet its assigned deliverables:

1. Unit staff complete the research by using existing data sets and published results
2. Unit staff conducts research
3. Unit staff partners with agency staff from other State agencies to complete the task
4. Unit staff contracts out research with external partners
5. Masters and Doctoral students, working within a collaborative process between agency researchers and university faculty, complete the task.

Staffing Impact: Reclass four positions and establish three new positions. 3 positions – 3 FTE.

Quantifying Results: The addition of two of the Operation & Policy Analyst positions will allow the Education Innovation Officer the ability to focus on the higher-level requirements of that position. The addition of the other Operations & Policy Analyst position will expand the Research and Policy Unit's capacity to improve the Unit's ability to partner and maximize systemic assets and improve the quality of the major research tasks assigned during legislative session.

Revenue Source: $1,104,712 of General Fund

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STATE OF OREGON
POSITION DESCRIPTION

Position Revised Date:
July 1, 2017

This position is:
- ☒ Classified
- ☐ Unclassified
- ☐ Executive Service
- ☐ Mgmt Svc – Supervisory
- ☐ Mgmt Svc – Managerial
- ☐ Mgmt Svc - Confidential

Agency: Chief Education Office

Facility: Somerville Building, Salem

☐ New ☒ Revised

SECTION 1. POSITION INFORMATION

a. Classification Title:	Research Analyst 4	**b.** Classification No:	C1118
c. Effective Date:	07/01/17	**d.** Position No:	5240005
e. Working Title:	Data & Research Analyst	**f.** Agency No:	52400
g. Section Title:	CEdO Policy & Research Unit	**h.** Budget Auth No:	001213490
i. Employee Name:	Laura Lien	**j.** Repr. Code:	UA

k. Work Location (City – County): Salem, Oregon

l. Supervisor Name (Optional): Interagency Policy Research Director - Peter Tromba

m. Position: ☒ Permanent ☐ Seasonal ☐ Limited Duration ☐ Academic Year
☒ Full-Time ☐ Part-Time ☐ Intermittent ☐ Job Share

n. FLSA: ☒ Exempt ☐ Non-Exempt

If Exempt: ☐ Executive ☐ Professional ☒ Administrative

o. Eligible for Overtime: ☐ Yes ☒ No

SECTION 2. PROGRAM AND POSITION INFORMATION

a. Describe the program in which this position exists. Include program purpose, who is affected, size, and scope. Include relationship to agency mission.

The Chief Education Office (CEdO), formerly the Oregon Education Investment Board, was established for the purpose of coordinating with education stakeholders to establish a unified public education system that ensures that all public school students in this state reach the educational goals established for this state.

This office will leverage both directing authority and coordinating capacity to lead: cross-agency planning tied to critical student outcomes, the alleviation of barriers impeding student success, and a core focus on equity within all educational settings. This will be accomplished by convening groups to co-construct powerful solutions, enhance coordination with agency leaders and boards, operationalize the Equity Lens across all educational entities and stakeholders, and develop a coordinated system to link and analyze student data.

Oregon's education system can potentially be affected as this position will play a role in analyzing data with strategic and programmatic implications.

b. Describe the primary purpose of this position, and how it functions within this program. Complete this statement. The primary purpose of this position is to:

Within each CEdO policy area, lead and manage the identification, development, implementation and evaluation of complex data analyses projects. These areas include regional initiatives (Regional Achievement Collaboratives and STEM Hubs), statewide STEM activities, early learning and K-12 program articulation, educational equity, dual credit, chronic non-attendance, and educator diversity. With the appropriate policy director or the Chief Education Officer, this position consults with, and provides research needs, findings, and conclusions. This position is expected to be the agency liaison and/or coordinator with other agencies and educators and institutions in the field. All of the issues in the scope of this work are complex and statewide and affect the entire education system from pre-school through K-12, higher education, and the workforce. This position is the key consultant to agency directors and the Chief Education Officer throughout the development of possible legislative concepts, including identification of best practices, policy analysis, fiscal analysis, and feasibility. This position has direct contact with local education, government, and community leaders throughout the state and is often the only CEdO representative present at high stakes meetings.

The Chief Education Office provides cross-agency analysis of policy option packages, budget requests, program development, and evaluation using an equity lens. This position is the agency lead for equity analysis, which requires the ability to apply critical socio-cultural frameworks to reveal the differential affects for different groups of students.

SECTION 3. DESCRIPTION OF DUTIES

List the major duties of the position. State the percentage of time for each duty. Mark "N" for new duties, "R" for revised duties or "NC" for no change in duties. Indicate whether the duty is an "Essential" (E) or "Non-Essential" (NE) function.

% of Time	N/R/NC	E/NE	DUTIES
Note: If additional rows of the below table are needed, place curser at end of a row (outside table) and hit "Enter".			
30%	NC	E	**Research Planning, Design, and Analyses** Initiate, design, and develop comprehensive research related to achievement of statewide goals for student outcomes that contribute to student completion of high school including but not limited to 3rd Grade reading proficiency, 5th and 8th Grade math proficiency, 9th grade credit completion and student attendance. Lead the identification, planning, design and the implementation of, or request for proposals for, qualitative and quantitative research projects that will be performed in-house, by education partners, or external research groups. Use qualitative and quantitative data to identify strategies and practices to increase the efficiency and effectiveness of strategic initiatives or related

			education or social welfare programs/policies. Coordinate qualitative and quantitative projects, obtain and verify information and explain processes. Identify data applications that will create value for stakeholders as projects develop. Leads, plans, and design research, analyze and communicate best practices and evidence-based models for improving key education outcomes, particularly for students of color, English language learners and rural students; evaluate impact of strategic investments and support creation of return on investment models.
20%	NC	E	**Report Preparation** Develop professional development materials for research analysts and program managers at the Oregon Department of Education to improve the quality of program evaluation for strategic investments. Review and approve reports regarding program evaluation of strategic investments. Write reports to a variety of audiences interpreting educational attainment and demographic data. Present information to governing boards, legislative committees, and the education cross-agency research group. Produce Fiscal Impact statements and other just-in-time legislative requests for information.
35%	NC	E	**Technical Consultation** Work directly with appropriate CEdO policy director or the Chief Education Officer to lead and manage the identification, development, implementation and evaluation of complex data projects. Gather, analyze, summarize, and categorize educational research from all settings (pre-school to post-secondary). This collection and manipulation of existing research will include a broad span of sources, including technical journals, meta-analyses, program analyses, practitioner's journals, and popular sources. Give one-on-one support to CEdO directors with respect to research in their content areas. Create documents and other media for a variety of audiences (including policy makers, education executives, and educators) that give meaningful and actionable information based on educational research. Participate in the creation and maintenance of a web resource of such documents. Act as key consultant to agency directors and the Chief Education Officer throughout the development of possible legislative concepts, including identification of best practices, policy analysis, fiscal analysis, and feasibility. Participate in the development of legislative concepts and proposed policies that are based in research and evidence.

			Develop research partnerships w/ other research entities, including education agencies, partner agencies, institutions and private providers. Utilize these partnerships to forward the Oregon educational research agenda, especially with regard to equity.
10%	NC	E	**Project Management** Manage the work of research interns from local universities to complete tasks for the group. This includes work planning, formative reviews, and quality assurance of the work. Manage the work of contracted research partners, including the development of RFPs and RFAs, scoring proposals, negotiating contracts with timelines, and monitoring and evaluating timeline and deliverables. Lead and coordinate research projects with ODE, HECC, TSPC, ELD, YDD, DHS, OHA, and other agencies to analyze policy on key interagency data sharing issues or problems as they emerge. Provide technical direction for the office including verifying the accuracy, validity and completeness of data and reports generated by other staff.
5%			**Other Duties as Assigned**
100%			

SECTION 4. WORKING CONDITIONS

Describe any on-going working conditions. Include any physical, sensory, and environmental demands. State the frequency of exposure to these conditions.

Duties are performed in a cubicle office design resulting in on-going audible distractions. The position requires extended time working at a computer terminal with frequent use of common office technology, including phones, computers, printers, copy machines, fax machines, shredders, etc. Work may include long periods of sitting and standing. This position could require extra hours on evenings, weekends and holidays to attend work sessions and meetings and during heavy workload periods, especially during legislative session. The position requires occasional travel statewide, sometimes overnight. A valid driver's license and personal automobile insurance is required for use of state vehicles or acceptable alternate mode of transportation.

SECTION 5. GUIDELINES

a. List any established guidelines used in this position, such as state or federal laws or regulations, policies, manuals, or desk procedures.

Federal and State Laws, Oregon Revised Statutes, Oregon Administrative Rules, gubernatorial policies, legislative procedures and internal policies

b. How are these guidelines used?

Provide the parameters within which the employee interprets and applies professional research, analysis, and judgment.

SECTION 6. WORK CONTACTS

With whom, outside of co-workers in this work unit, must the employee in this position regularly come in contact?

Who Contacted	How	Purpose	How Often?
Note: If additional rows of the below table are needed, place curser at end of a row (outside table) and hit "Enter".			
Board/Council members	Written, e-mail, phone, in person	Provide direction, information, gather information, coordinate activities	Varies
Agency directors and executive staff	Written, e-mail, phone, in person	Communication, information gathering, coordination, collaboration	Varies
Outside organizations/ Stakeholders	Written, e-mail, phone, in person	Provide information, gather information; coordinate activities	Varies
Oregon early childhood service providers, schools, colleges and university personnel	Written, e-mail, phone, in person	Collaboration, discuss issues, provide information, gather information,	Varies

SECTION 7. POSITION RELATED DECISION MAKING

Describe the typical decisions of this position. Explain the direct effect of these decisions.

Determine the best analytical approaches to various primary and secondary research projects.

Identify the key implications and conclusions of large data sets.

These decisions will inform the agency's recommendations to the Oregon Department of Education, the Governor's office, the State Legislature, and others in terms of the strategies, programs and budgets associated with education from birth to career and college.

SECTION 8. REVIEW OF WORK

Who reviews the work of the position?

Classification Title	Position Number	How	How Often	Purpose of Review
Note: If additional rows of the below table are needed, place curser at end of a row (outside table) and hit "Enter".				

Director of Research & Policy	5240004	In person, email, reports	As needed	Provide direction and perform evaluation
			Annual	Performance Review

SECTION 9. OVERSIGHT FUNCTIONS

THIS SECTION IS FOR SUPERVISORY POSITIONS ONLY

a. How many employees are directly supervised by this position? 0

How many employees are supervised through a subordinate supervisor? 0

b. Which of the following activities does this position do?

- ☐ Plan work
- ☐ Assigns work
- ☐ Approves work
- ☐ Responds to grievances
- ☐ Disciplines and rewards
- ☐ Coordinates schedules
- ☐ Hires and discharges
- ☐ Recommends hiring
- ☐ Gives input for performance evaluations
- ☐ Prepares & signs performance evaluations

SECTION 10. ADDITIONAL POSITION-RELATED INFORMATION

ADDITIONAL REQUIREMENTS: List any knowledge and skills needed at time of hire that are not already required in the classification specification:

- Strong work ethic
- Required: Experience with multiple research methods, with demonstrated accomplishment in qualitative research
- Required: Master's or Doctorate in an education related field with a thesis project or dissertation that is predominantly qualitative.
- Required: Graduate coursework in equity-based studies
- Required: Strong oral and written communication skills
- Required: Experience building community-school partnerships in early learning, K-12, and/or higher education
- Preferred: Experience with research that directly involves practitioners in the articulation of the research questions
- Preferred: Spanish language fluency
- Preferred: High school experience
- Preferred: Background in policy research and development

SECTION 11. ORGANIZATIONAL CHART

Attach a current organizational chart. Be sure the following information is shown on the chart for each position: classification title, classification number, salary range, employee name and position number.

SECTION 12. SIGNATURES

Employee Signature	Date	Supervisor Signature	Date
Appointing Authority Signature	Date		

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STATE OF OREGON
POSITION DESCRIPTION

Position Revised Date: _____

This position is:
- ☐ Classified
- ☒ Unclassified
  - ☒ Executive Service
- ☐ Mgmt Svc – Supervisory
- ☐ Mgmt Svc – Managerial
- ☐ Mgmt Svc - Confidential

Agency: Chief Education Office

Facility: Somerville Building, Salem, OR

☒ New ☐ Revised

SECTION 1. POSITION INFORMATION

a. Classification Title:	PEM-H	**b.** Classification No:	Z7012
c. Effective Date:	June 1, 2016	**d.** Position No:	5240009
e. Working Title:	Education Innovation Officer	**f.** Agency No:	524000
g. Section Title:		**h.** Budget Auth No:	001213530
i. Employee Name:	Colt Gill	**j.** Repr. Code:	MENN
k. Work Location (City – County):	Salem, Oregon		
l. Supervisor Name:	Chief Education Officer		

m. Position: ☒ Permanent ☐ Seasonal ☐ Limited Duration ☐ Academic Year ☐ Full-Time ☐ Part-Time ☐ Intermittent ☐ Job Share

n. FLSA: ☒ Exempt ☐ Non-Exempt

If Exempt: ☒ Executive ☐ Professional ☐ Administrative

o. Eligible for Overtime: ☐ Yes ☒ No

SECTION 2. PROGRAM AND POSITION INFORMATION

a. Describe the program in which this position exists. Include program purpose, who's affected, size, and scope. Include relationship to agency mission.

In accordance with the mission of Oregon's education system (ORS 351.009 | "40-40-20 Goal"), the Governor has articulated a vision that every Oregon student graduate high school with a plan for his or her future

b. Describe the primary purpose of this position, and how it functions within this program. Complete this statement. The primary purpose of this position is to:

The position of Education Innovation Officer is established, appointed and charged by the Governor to work directly with the Deputy Superintendent of Public Instruction, the Chief Education Officer and the Governor to direct the development, program priorities and implementation of a comprehensive strategy to achieve this vision.

SECTION 3. DESCRIPTION OF DUTIES

List the major duties of the position. State the percentage of time for each duty. Mark "N" for new duties, "R" for revised duties or "NC" for no change in duties. Indicate whether the duty is an "Essential" (E) or "Non-Essential" (NE) function.

% of Time	N/R/NC	E/NE	DUTIES
Note: If additional rows of the below table are needed, place curser at end of a row (outside table) and hit "Enter".			
25%	N	E	Determine strategies and practices to achieve statewide goals for student outcomes that contribute to student completion of high school, including but not limited to 3rd Grade reading proficiency, 5th and 8th Grade math proficiency, 9th grade credit completion and student attendance.
35%	N	E	Evaluate and disseminate promising practices in consultation with stakeholders, research entities, relevant specialists within state and local education agencies, and other partners with track record of improving access, opportunity and outcomes for students.
25%	N	E	Convene school districts, stakeholders and communities to identify, promulgate and empower highly-effective promising practices, instructional strategies and interventions, and innovative leadership at the classroom, school and district-level.
10%	N	E	Determine recommendations for policy, administrative, resource allocation actions and accountability measures at the state and local level consistent with the State's Equity Lens.
5%	N	E	Gather critical information on barriers impeding high school graduation across student populations, school districts and diverse regions of the State.

SECTION 4. WORKING CONDITIONS

Describe any on-going working conditions. Include any physical, sensory, and environmental demands. State the frequency of exposure to these conditions.

Normal office environment. Position requires travel around the state. May require work in-excess of normal scheduled hours to meet program objectives.

SECTION 5. GUIDELINES

a. List any established guidelines used in this position, such as state or federal laws or regulations, policies, manuals, or desk procedures.

Federal Laws
Oregon Revised Statutes
State Constitution
Administrative Rules

Division Policies and Operating Procedures
Public Records Laws
Statewide Policies and Procedures
Equity Lens

b. How are these guidelines used?

Rules and policies guide agency actions; industry publications inform trends and practices of the profession; to ensure that the equity lens is front and center to all work.

SECTION 6. WORK CONTACTS

With whom, outside of co-workers in this work unit, must the employee in this position regularly come in contact?

Who Contacted	How	Purpose	How Often?
Note: If additional rows of the below table are needed, place curser at end of a row (outside table) and hit "Enter".			
Chief Education Officer	In Person/Phone/In Writing	Decision making, discussion, strategic planning	Weekly/As needed
Deputy Superintendent of Public Instruction	In Person/Phone/In Writing	Decision making, discussion, strategic planning	Weekly/As needed
Governor's Office	In Person/Phone/Written formats	Decision making, consultation	As needed
State education agencies – agency heads/deputies/staff	In Person/Phone/Meeting/ In Writing	Consult, advise, problem solve	As needed
Education Boards, Councils, Commissions	In Person/Phone/Meeting/ In Writing	Consult, advise, problem solve	As needed
Legislators	In Person/Phone/Meeting/ In Writing	Consult, advise, problem solve	As needed
K-12 School Districts	In Person/Phone/Meeting/ In Writing	Consult, advise, problem solve	As needed
Education Service Districts	In Person/Phone/Meeting/ In Writing	Consult, advise, problem solve	As needed
Education NGOs/Stakeholders	In Person/Phone/Meeting/ In Writing	Consult, advise, problem solve	As needed

SECTION 7. POSITION RELATED DECISION MAKING

Describe the typical decisions of this position. Explain the direct effect of these decisions.

This position will recommend policy, resource allocation and administrative actions to the Deputy Superintendent of Public Instruction, Chief Education Officer and Governor. Decisions will impact direction, function, practices and accountability of the state's education system.

Education agency directors and personnel charged to achieve related statewide goals for student outcomes, as described below, shall be consulted and advised by the Education Innovation Officer in performing duties of position and development of comprehensive strategy for high school graduation. These include:

- The Chief Education Officer as education policy advisor to the Governor; and Chief Education Office for purposes of informing a unified strategy and budget for education from cradle to career focused on equity and college and career readiness for every student;

- The Early Learning System Director/Early Learning Division on strategies and programs to ensure kindergarten readiness;
- The Youth Development Director/Youth Development Division on strategies and programs to engage and support out of school youth;
- The Executive Director of the Higher Education Coordinating Commission/Agency on strategies and programs to ensure post-secondary student support and completion;
- The Executive Director of the Teacher Standards and Practices Commission;
- The Deputy Superintendent of Public Instruction, Oregon Department of Education; and
- Chief Education Office Research and Policy Unit/Oregon Department of Education, Office of Research and Data Analysis.

SECTION 8. REVIEW OF WORK

Who reviews the work of the position?

Classification Title	Position Number	How	How Often	Purpose of Review
Note: If additional rows of the below table are needed, place curser at end of a row (outside table) and hit "Enter".				
PEM-I MEAH	5240001	Chief Education Officer	Weekly	To provide updates on progress to the established goals.
PEM-J Z7018	0000003	Deputy Superintendent of Public Instruction	Weekly	To provide updates on progress to the established goals; strategizing to implement best practices.

SECTION 9. OVERSIGHT FUNCTIONS

THIS SECTION IS FOR SUPERVISORY POSITIONS ONLY

a. How many employees are directly supervised by this position? 0

How many employees are supervised through a subordinate supervisor? 0

b. Which of the following activities does this position do?

- ☐ Plan work
- ☐ Assigns work
- ☐ Approves work
- ☐ Responds to grievances
- ☐ Disciplines and rewards
- ☐ Coordinates schedules
- ☐ Hires and discharges
- ☐ Recommends hiring
- ☐ Gives input for performance evaluations
- ☐ Prepares & signs performance evaluations

SECTION 10. ADDITIONAL POSITION-RELATED INFORMATION

ADDITIONAL REQUIREMENTS: List any knowledge and skills needed at time of hire that are not already required in the classification specification:

This position requires leadership, vision, creativity and innovation in the ongoing establishment of goals, planning, development, coordination, implementation, evaluation and dissemination of promising practices. Extensive experience as an educator in K-12 public education strongly preferred.

This position must understand complex programs and issues and be able to facilitate program and priority discussions, decision-making and to articulate information to various audiences.

This position also requires:

- Experience with and knowledge of large-scale, innovative organizational change efforts, change management principles, methodologies and tools;
- Organized with demonstrated skills in strategic planning and problem solving;
- Ability to establish strong relationships, effectively facilitate among diverse groups of stakeholders and influence others to move toward a common vision or goal;
- Able to work effectively at all levels within and across organizations;
- Exceptional active listening and communication skills – both written and verbal.

BUDGET AUTHORITY: If this position has authority to commit agency operating money, indicate the following:

Operating Area	Biennial Amount ($00000.00)	Fund Type
Note: If additional rows of the below table are needed, place curser at end of a row (outside table) and hit "Enter".		
n/a		

SECTION 11. ORGANIZATIONAL CHART

Attach a current organizational chart. Be sure the following information is shown on the chart for each position: classification title, classification number, salary range, employee name and position number.

SECTION 12. SIGNATURES

Employee Signature	6-1-16 Date	Supervisor Signature	6·1·16 Date
Appointing Authority Signature	6·1·16 Date		

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STATE OF OREGON
POSITION DESCRIPTION

Position Revised Date:
7/1/16

This position is:
☐ Classified
☒ Unclassified
☐ Executive Service
☐ Mgmt Svc – Supervisory
☐ Mgmt Svc – Managerial
☐ Mgmt Svc - Confidential

Agency: Chief Education Office

Facility: Somerville Building, Salem, OR

☒ New ☐ Revised

SECTION 1. POSITION INFORMATION

a. Classification Title:	OPA-4	**b.** Classification No:	C0873
c. Effective Date:	July 1, 2017	**d.** Position No:	5240014
e. Working Title:		**f.** Agency No:	524000
g. Section Title:		**h.** Budget Auth No:	
i. Employee Name:	Vacant	**j.** Repr. Code:	UA
k. Work Location (City – County):	Salem, Oregon		
l. Supervisor Name:	Education Innovation Officer - Colt Gill		

m. Position: ☒ Permanent ☐ Seasonal ☐ Limited Duration ☐ Academic Year
☐ Full-Time ☐ Part-Time ☐ Intermittent ☐ Job Share

n. FLSA: ☒ Exempt ☐ Non-Exempt

If Exempt: ☒ Executive ☐ Professional ☐ Administrative

o. Eligible for Overtime: ☐ Yes ☒ No

SECTION 2. PROGRAM AND POSITION INFORMATION

a. Describe the program in which this position exists. Include program purpose, who's affected, size, and scope. Include relationship to agency mission.

The Chief Education Office, formerly the Oregon Education Investment Board, was established for the purpose of coordinating with education stakeholders to establish a unified public education system that ensures that all public school students in this state reach the educational goals established for this state.

This office will leverage both directing authority and coordinating capacity to lead: cross-agency planning tied to critical student outcomes, the alleviation of barriers impeding student success, and a core focus on equity within all educational settings. This will be accomplished by convening groups to co-construct powerful solutions, enhance coordination with agency leaders and boards, operationalize the Equity Lens across all educational entities and stakeholders, and develop a coordinated system to link and analyze student data.

In accordance with the mission of Oregon's education system (ORS 350.014 | "40-40-20 Goal"), the Governor has articulated a vision that every Oregon student graduate high school with a plan for his or her future. Within the Chief Education Office, the position of Education Innovation Officer was established, appointed and charged by the Governor to develop policy and funding recommendations and to work directly

with the Deputy Superintendent of Public Instruction, the Chief Education Officer and the Governor to direct the development, program priorities and implementation of a comprehensive strategy to achieve this vision.

b. Describe the primary purpose of this position, and how it functions within this program. Complete this statement. The primary purpose of this position is to:

This position works within the Chief Education Office with the Education Innovation Officer in leading and planning the Education Innovation Officer's cross-sector work focused on improving graduation outcomes which includes developing and writing proposals for implementing best practices.

This position also does policy and funding analysis and development regarding legislative issues, policy research relating to the charge of the Education Innovation Officer, and stakeholder outreach. This position represents the Education Innovation Officers at meetings with the public, legislators, boards, early learning entities, schools, community colleges, public universities, stakeholder groups, and other agencies.

SECTION 3. DESCRIPTION OF DUTIES

List the major duties of the position. State the percentage of time for each duty. Mark "N" for new duties, "R" for revised duties or "NC" for no change in duties. Indicate whether the duty is an "Essential" (E) or "Non-Essential" (NE) function.

% of Time	N/R/NC	E/NE	DUTIES
Note: If additional rows of the below table are needed, place curser at end of a row (outside table) and hit "Enter".			
45%	N	E	**Development of Strategies and Practices** • At the direction of the Education Innovation Officer, lead, contribute and make recommendations of the development strategies and practices to achieve statewide goals for student outcomes that contribute to student completion of high school, including but not limited to 3rd Grade reading proficiency, 5th and 8th Grade math proficiency, 9th grade credit completion and student attendance. • Serve as a liaison for Oregon's Education Innovation Officer. • Gather and analyze P-20 data and best practices to develop proposals and implementation process guidance for school districts and state agencies to improve student high school completion. • Facilitates collaboration with school district leaders, community partners, and State Agency's in the development of the best practices and the implementation process for improving graduation outcomes in Oregon. • Oversee and monitor the work of contractors including setting goals and deliverables for complex, large-scale statewide projects, tracking progress and contributing to the CEdO vision.
35%	N	E	**Cross-agency and Cross-sector Coordination** • At the direction of the Education Innovation Officer, convene school districts, stakeholders and communities to identify, promulgate and empower highly-effective promising practices, instructional strategies and interventions, and innovative leadership at the classroom, school and district-level. • At the direction of the Chief Education Officer, evaluate cross-agency functioning and organizational systems related to graduation outcomes and related education policies and priorities shared by the CEdO, the Oregon Department of Education (ODE), the Early Learning Division (ELD), the Youth Development Division (YDD), and the Higher Education Coordinating Commission (HECC). • Gather critical information on barriers impeding high school

			graduation across student populations, school districts, and diverse regions of the State. • Evaluate and disseminate promising practices in consultation with stakeholders, research entities, relevant specialists within state and local education agencies, and other partners with track record of improving access, opportunity and outcomes for students. • Under the direction of the Education Innovation Officer, define and recommend to the Education Innovation Officer and Chief Education Officer, the development of strategies and implementation guidance that will positively impact graduation outcomes in Oregon. • Represent the Education Innovation Officer at regional, state and national events. • Deliver presentations on graduation outcomes and initiatives to stakeholder groups and policy-makers, which may include the State Board of Education, Higher Education Coordinating Commission, the Legislature, Governor's office and other state, private, and community-based agencies.
10%	N	E	**Policy Development** • At the direction of the Education Innovation Officer and/or Chief Education Officer, participate and contribute in interagency and/or internal work teams related to policy, legislation and cross-sector coordination. • At the direction of the Education Innovation Officer, contribute to recommendations for policy, administrative, resource allocation actions and accountability measures at the state and local level consistent with the State's Equity Lens. • Conduct research and analysis of P-20 legislative issues related to graduation outcomes. • Review professional journals, publications, and research documents to stay current on promising practices related to job functions and policy development.
10%	N	NE	**Other duties as assigned**

SECTION 4. WORKING CONDITIONS

Describe any on-going working conditions. Include any physical, sensory, and environmental demands. State the frequency of exposure to these conditions.

Normal office cubical environment. Position requires occasional travel. May require work in excess of normal scheduled hours to meet the Education Innovation Officer's objectives.

SECTION 5. GUIDELINES

a. List any established guidelines used in this position, such as state or federal laws or regulations, policies, manuals, or desk procedures.

State Constitution
Oregon Revised Statutes
Federal Laws
Administrative Rules
Division Policies and Operating Procedures

Statewide Policies and Procedures
Public Records Laws

b. How are these guidelines used?

Rules and policies guide agency actions
Industry publications inform of court decision, trends and practices of the profession

SECTION 6. WORK CONTACTS

With whom, outside of co-workers in this work unit, must the employee in this position regularly come in contact?

Who Contacted	How	Purpose	How Often?
Note: *If additional rows of the below table are needed, place curser at end of a row (outside table) and hit "Enter".*			
Oregon Dept. of Education	In Person/Phone/Meetings	Consult, advise, problem solve	As needed
Governor's Office	In Person/Phone/Meetings/In Writing	Decision making, consultation	As needed
Early Learning Hubs	In Person/Phone/Meetings	Consult, advise, problem solve	As needed
Legislators	In Person/Phone/Meetings/In Writing	Consult, coordinate, problem-solve	As needed
State education agencies – agency heads/deputies/staff	In Person/Phone/Meeting/ In Writing	Consult, advise, problem solve	As needed
K-12 School Districts	In Person/Phone/Meeting/ In Writing	Consult, advise, problem solve	As needed
Education Service Districts	In Person/Phone/Meeting/ In Writing	Consult, advise, problem solve	As needed
Community leaders	In Person/Phone/Meeting/ In Writing	Consult, advise, problem solve	As needed
Stakeholders	In Person/Phone/Meetings/In Writing	Consult, advise, provide information	As needed

SECTION 7. POSITION RELATED DECISION MAKING

Describe the typical decisions of this position. Explain the direct effect of these decisions.

This position will recommend policy, resource allocation and administrative actions to the Education Innovation Officer. Decisions will impact direction, function, practices and accountability of the state's education system.

Education agency directors and personnel charged to achieve related statewide goals for student outcomes, as described below, shall be consulted and advised by this position, under the direction and communication of the Education Innovation Officer, in performing duties of this position and development of comprehensive strategy for high school graduation. These include:

- The Chief Education Officer as education policy advisor to the Governor; and Chief Education Office for purposes of informing a unified strategy and budget for education from cradle to career focused on equity and college and career readiness for every student;
- The Early Learning System Director/Early Learning Division on strategies and programs to ensure kindergarten readiness;

- The Youth Development Director/Youth Development Division on strategies and programs to engage and support out of school youth;
- The Executive Director of the Higher Education Coordinating Commission/Agency on strategies and programs to ensure post-secondary student support and completion;
- The Executive Director of the Teacher Standards and Practices Commission;
- The Deputy Superintendent of Public Instruction, Oregon Department of Education; and
- Chief Education Office Research and Policy Unit/Oregon Department of Education, Office of Research and Data Analysis.

SECTION 8. REVIEW OF WORK

Who reviews the work of the position?

Classification Title	Position Number	How	How Often	Purpose of Review
Note: If additional rows of the below table are needed, place curser at end of a row (outside table) and hit "Enter".				
Z70110 PEM H (MMS)	5240009	Education Innovation Officer	Weekly	To provide updates on progress to the established goals; strategizing to implement efficiencies and best practices

SECTION 9. OVERSIGHT FUNCTIONS

THIS SECTION IS FOR SUPERVISORY POSITIONS ONLY

a. How many employees are directly supervised by this position? 0

How many employees are supervised through a subordinate supervisor? 0

b. Which of the following activities does this position do?

- ☐ Plan work
- ☐ Assigns work
- ☐ Approves work
- ☐ Responds to grievances
- ☐ Disciplines and rewards
- ☐ Coordinates schedules
- ☐ Hires and discharges
- ☐ Recommends hiring
- ☐ Gives input for performance evaluations
- ☐ Prepares & signs performance evaluations

SECTION 10. ADDITIONAL POSITION-RELATED INFORMATION

ADDITIONAL REQUIREMENTS: List any knowledge and skills needed at time of hire that are not already required in the classification specification:

BUDGET AUTHORITY: If this position has authority to commit agency operating money, indicate the following:

Operating Area	Biennial Amount ($00000.00)	Fund Type
Note: *If additional rows of the below table are needed, place curser at end of a row (outside table) and hit "Enter".*		
n/a		

SECTION 11. ORGANIZATIONAL CHART

Attach a current organizational chart. Be sure the following information is shown on the chart for each position: classification title, classification number, salary range, employee name and position number.

SECTION 12. SIGNATURES

Employee Signature	Date	Supervisor Signature	Date

Appointing Authority Signature	Date

STATE OF OREGON
POSITION DESCRIPTION

Position Revised Date:
August 24, 2016

Agency: Chief Education Office

Facility: Somerville Building, Salem

☐ New ☒ Revised

This position is:
☒ Classified
☐ Unclassified
☐ Executive Service
☐ Mgmt Svc – Supervisory
☐ Mgmt Svc – Managerial
☐ Mgmt Svc - Confidential

SECTION 1. POSITION INFORMATION

a. Classification Title:	Research Analyst 4	**b.** Classification No:	C1118
c. Effective Date:	December 30, 2014	**d.** Position No:	5240015
e. Working Title:	Data & Research Analyst	**f.** Agency No:	524000
g. Section Title:	CEdO Policy & Research Unit	**h.** Budget Auth No:	001213710
i. Employee Name:	Cheng-Fei Lai	**j.** Repr. Code:	UA

k. Work Location (City – County): Salem, Oregon

l. Supervisor Name (Optional): Interagency Policy Research Director - Peter Tromba

m. Position: ☐ Permanent ☐ Seasonal ☐ Limited Duration ☐ Academic Year
☒ Full-Time ☐ Part-Time ☐ Intermittent ☐ Job Share

n. FLSA: ☒ Exempt ☐ Non-Exempt

If Exempt: ☐ Executive ☐ Professional ☒ Administrative

o. Eligible for Overtime: ☐ Yes ☒ No

SECTION 2. PROGRAM AND POSITION INFORMATION

a. Describe the program in which this position exists. Include program purpose, who is affected, size, and scope. Include relationship to agency mission.

The Chief Education Office, formerly the Oregon Education Investment Board, was established for the purpose of coordinating with education stakeholders to establish a unified public education system that ensures that all public school students in this state reach the educational goals established for this state.

This office will leverage both directing authority and coordinating capacity to lead: cross-agency planning tied to critical student outcomes, the alleviation of barriers impeding student success, and a core focus on equity within all educational settings. This will be accomplished by convening groups to co-construct powerful solutions, enhance coordination with agency leaders and boards, operationalize the Equity Lens across all educational entities and stakeholders, and develop a coordinated system to link and analyze student data.

Oregon's education system can potentially be affected as this position will play a role in analyzing data with strategic and programmatic implications.

b. Describe the primary purpose of this position, and how it functions within this program. Complete this statement. The primary purpose of this position is to:

Within each CEdO policy area, lead and manage the identification, development, implementation and evaluation of complex data analyses projects. These areas include regional initiatives (Regional Achievement Collaboratives and STEM Hubs), statewide STEM activities, early learning and K-12 program articulation, educational equity, dual credit, chronic non-attendance, trauma informed pilot project and educator diversity. With the appropriate policy director or the Chief Education Officer, this position consults with, and provides research needs, findings, and conclusions. This position is also a co-principal investigator on agency grant proposals to the US Department of Education and private funding sources two or more times a year. This position is expected to be the agency liaison and/or coordinator with other agencies and educators and institutions in the field. All of the issues in the scope of this work are complex and statewide and affect the entire education system from pre-school through K-12, higher education, and the workforce. This position is the key consultant to agency directors and the Chief Education Officer throughout the development of possible legislative concepts, including identification of best practices, policy analysis, fiscal analysis, and feasibility. This position has direct contact with local education, government, and community leaders throughout the state and is often the only CEdO representative present at high stakes meetings.

SECTION 3. DESCRIPTION OF DUTIES

List the major duties of the position. State the percentage of time for each duty. Mark "N" for new duties, "R" for revised duties or "NC" for no change in duties. Indicate whether the duty is an "Essential" (E) or "Non-Essential" (NE) function.

% of Time	N/R/NC	E/NE	DUTIES
Note: If additional rows of the below table are needed, place curser at end of a row (outside table) and hit "Enter".			
50%	NC	E	**Research Planning, Design, and Analyses** Initiate, design, and develop a comprehensive research project to assess the success of the Trauma Informed Pilot Project, called for in HB 4002(2016). Include a three year research design as a policy option package for the 2017 session. Develop partnerships among agencies and university research staff to implement components of the research project and to align and share research relating to Trauma Informed practices. Leads research on key policy areas as set forth by the Governor, Legislature and the Chief Education Office by identifying, planning, and designing research methodologies, data analysis and data quality. Reports findings and conclusions to Policy Directors and Chief Education Officer. Leads, identifies, plans, researches and designs requests for project/grant proposals for, qualitative

			and quantitative research projects that will be performed in-house, by education partners, or external research groups. Reports findings and conclusions to Policy Directors and Chief Education Officer. Analyze qualitative and quantitative data to identify strategies and practices to increase the efficiency and effectiveness of achievement compacts, strategic initiatives or related education or social welfare programs/policies. Coordinate qualitative and quantitative projects, obtain and verify information and explain processes. Identify data applications that will create value for stakeholders as projects develop.
15%	NC	E	**Report Preparation** Develop professional development materials for research analysts and program managers at the Oregon Department of Education to improve the quality of program evaluation for strategic investments. Review and approve reports regarding program evaluation of strategic investments. Write reports to a variety of audiences interpreting educational attainment and demographic data. Present information to governing boards, legislative committees, and the education cross-agency research group. Produce Fiscal Impact statements and other just-in-time legislative requests for information.
15%	NC	E	**Technical Consultation** Lead and manages the identification, development, implementation and evaluation of complex data projects. Gather, analyze, summarize, and categorize educational research from all settings (pre-school to post-secondary). This collection and manipulation of existing research will include a broad span of sources, including technical journals, meta-analyses, program analyses, practitioner's journals, and popular sources. Give one-on-one support to CEdO directors with respect to research in their content areas. Create documents and other media for a variety of audiences (including policy makers, education executives, and educators) that give meaningful and actionable information based on educational research. Participate in the creation and maintenance of a web resource of such documents. Act as key consultant to agency directors and the Chief Education Officer throughout the development of possible legislative concepts, including identification of best practices, policy analysis, fiscal analysis, and feasibility Participate in the development of legislative concepts and proposed policies that are based in research and evidence.

15%	NC	E	**Project Management** Manage the CEdO Trauma Informed Pilot program, which involves cross agency partners from ODE, OHA, DHS, and ELD. Convene project steering committee, manage contracts with technical assistance vendor, and intergovernmental agreements with participating school districts. Lead and coordinate research projects with ODE, HECC, TSPC, ELD, YDD, DHS, OHA, and other agencies to analyze policy on key interagency data sharing issues or problems as they emerge. Provide technical direction for the office including verifying the accuracy, validity and completeness of data and reports generated by other staff.
5%			**Other Duties as Assigned**

SECTION 4. WORKING CONDITIONS

Describe any on-going working conditions. Include any physical, sensory, and environmental demands. State the frequency of exposure to these conditions.

Duties are performed in a cubicle office design resulting in on-going audible distractions. Requires extended time working at a computer terminal with frequent use of common office technology, including phones, computers, printers, copy machines, fax machines, shredders, etc. Work may include long periods of sitting and standing. This position could require extra hours on evenings, weekends and holidays to attend work sessions and meetings and during heavy workload periods, especially during legislative session. Requires occasional travel statewide, sometimes overnight. A valid driver's license and personal automobile insurance is required for use of state vehicles or acceptable alternate mode of transportation.

SECTION 5. GUIDELINES

a. List any established guidelines used in this position, such as state or federal laws or regulations, policies, manuals, or desk procedures.

Federal and State Laws, Oregon Revised Statutes, Oregon Administrative Rules, gubernatorial policies, legislative procedures and internal policies

b. How are these guidelines used?

Provide the parameters within which the employee interprets and applies professional research, analysis, and judgment.

SECTION 6. WORK CONTACTS

With whom, outside of co-workers in this work unit, must the employee in this position regularly come in contact?

Who Contacted	How	Purpose	How Often?
Note: If additional rows of the below table are needed, place curser at end of a row (outside table) and hit "Enter".			
Board/Council members	Written, e-mail, phone, in person	Provide direction, information, gather information, coordinate activities	Varies
Agency directors and executive staff	Written, e-mail, phone, in person	Communication, information gathering, coordination, collaboration	Varies
Outside organizations/ Stakeholders	Written, e-mail, phone, in person	Provide information, gather information; coordinate activities	Varies
Oregon early childhood service providers, schools, colleges and university personnel	Written, e-mail, phone, in person	Collaboration, discuss issues, provide information, gather information,	Varies

SECTION 7. POSITION RELATED DECISION MAKING

Describe the typical decisions of this position. Explain the direct effect of these decisions.

Determine the best analytical approaches to various primary and secondary research projects.

Identify the key implications and conclusions of large data sets.

These decisions will inform the agency's recommendations to the Oregon Department of Education, the Governor's office, the State Legislature, and others in terms of the strategies, programs and budgets associated with education from birth to career and college.

SECTION 8. REVIEW OF WORK

Who reviews the work of the position?

Classification Title	Position Number	How	How Often	Purpose of Review
Note: If additional rows of the below table are needed, place curser at end of a row (outside table) and hit "Enter".				
Director of Research & Policy	5240004	In person, email, reports	As needed	Provide direction and perform evaluation

SECTION 9. OVERSIGHT FUNCTIONS

THIS SECTION IS FOR SUPERVISORY POSITIONS ONLY

a. How many employees are directly supervised by this position? 0

How many employees are supervised through a subordinate supervisor? 0

b. Which of the following activities does this position do?

- ☐ Plan work
- ☐ Assigns work
- ☐ Approves work
- ☐ Responds to grievances
- ☐ Disciplines and rewards
- ☐ Coordinates schedules
- ☐ Hires and discharges
- ☐ Recommends hiring
- ☐ Gives input for performance evaluations
- ☐ Prepares & signs performance evaluations

SECTION 10. ADDITIONAL POSITION-RELATED INFORMATION

ADDITIONAL REQUIREMENTS: List any knowledge and skills needed at time of hire that are not already required in the classification specification:

- Strong work ethic
- Analytical and critical thinking skills
- Experience with research and data analysis, specifically, with large data sets, including both basic statistical tests and various advanced statistical analytical procedures
- Experience with writing summaries of research for non-technical audiences
- Expertise using statistical software like SAS, SPSS and/or R as well as database software like Access and spreadsheet software like Excel
- Ability to assist with qualitative research as needed, primarily with project coordination and qualitative analysis (largely pattern recognition)

SECTION 11. ORGANIZATIONAL CHART

Attach a current organizational chart. Be sure the following information is shown on the chart for each position: classification title, classification number, salary range, employee name and position number.

SECTION 12. SIGNATURES

Employee Signature	Date	Supervisor Signature	Date

Appointing Authority Signature	Date

STATE OF OREGON
POSITION DESCRIPTION

Position Revised Date: 7/1/17

This position is:
- ☐ Classified
- ☐ Unclassified
  - ☐ Executive Service
- ☐ Mgmt Svc – Supervisory
- ☐ Mgmt Svc – Managerial
- ☒ Mgmt Svc - Confidential

Agency: Chief Education Office

Facility: Somerville Building, Salem, OR

☒ New ☐ Revised

SECTION 1. POSITION INFORMATION

a. Classification Title:	OPA-4	**b.** Classification No:	C0873
c. Effective Date:	July 1, 2017	**d.** Position No:	5240026
e. Working Title:		**f.** Agency No:	524000
g. Section Title:		**h.** Budget Auth No:	
i. Employee Name:		**j.** Repr. Code:	UA

k. Work Location (City – County): Salem, Oregon

l. Supervisor Name: Chief Education Officer

m. Position: ☒ Permanent ☐ Seasonal ☐ Limited Duration ☐ Academic Year
☒ Full-Time ☐ Part-Time ☐ Intermittent ☐ Job Share

n. FLSA: ☒ Exempt ☐ Non-Exempt

If Exempt: ☒ Executive ☐ Professional ☐ Administrative

o. Eligible for Overtime: ☐ Yes ☒ No

SECTION 2. PROGRAM AND POSITION INFORMATION

a. Describe the program in which this position exists. Include program purpose, who's affected, size, and scope. Include relationship to agency mission.

The Chief Education Office, formerly the Oregon Education Investment Board, was established for the purpose of coordinating with education stakeholders to establish a unified public education system that ensures that all public school students in this state reach the educational goals established for this state.

This office will leverage both directing authority and coordinating capacity to lead: cross-agency planning tied to critical student outcomes, the alleviation of barriers impeding student success, and a core focus on equity within all educational settings. This will be accomplished by convening collaborative regional partnerships, such as the Regional Achievement Collaboratives and STEM Hubs, to co-construct powerful solutions, enhance coordination with agency leaders and boards, operationalize the Equity Lens across all educational entities and stakeholders, and develop a coordinated system to link and analyze student data.

b. Describe the primary purpose of this position, and how it functions within this program. Complete this statement. The primary purpose of this position is to:

This position works within the Chief Education Office, the Chief Education Officer and the Director of CTE STEAM and is charged with leading the planning of the agency's regional cross-sector work, while it oversees the expenditure of agency resources through cross-sector initiatives including the budgeting of the funds for program activities. The position writes/reviews all reports of regional cross-sector projects, grant work plans and applications, vendor contracts, interagency agreements as well as review of all written communication regarding the initiatives.

This position also does policy analysis and research relating to CTE/STEAM, legislative tracking and stakeholder outreach.

SECTION 3. DESCRIPTION OF DUTIES

List the major duties of the position. State the percentage of time for each duty. Mark "N" for new duties, "R" for revised duties or "NC" for no change in duties. Indicate whether the duty is an "Essential" (E) or "Non-Essential" (NE) function.

% of Time	N/R/NC	E/NE	DUTIES
Note: If additional rows of the below table are needed, place curser at end of a row (outside table) and hit "Enter".			
50%	N	E	**Direction of Statewide Regional Education Partnership Initiatives** Direct the development, alignment, and coordination of statewide regional education partnership initiatives RACs and STEM Hubs (Regional Achievement Collaboratives and STEM Hubs). • Serve as principal liaison for Oregon's statewide regional education partnership initiatives (RACs and STEM Hubs). • Engage with statewide regional leaders in collaborative, systems-level change as they implement collective impact work. • Promote and strengthen statewide collaborative learning networks and communities of practice to ensure the development of regional education partnerships (e.g. statewide convenings, webinars, etc.). • Lead through collaboration, evaluation efforts for statewide regional education partnership initiatives, including consensus-building and outcomes and metrics determination for accountability and continuous improvement. • Develop, implement and evaluate priorities, goals and objectives set for the CEdO's regional education partnership initiatives to ensure alignment with those of the CEdO. • Collaboratively develop policy, program goals, and program plans for STEM Hubs and RACs with key stakeholders (e.g. RACs and STEM Hub leaders). • At the direction of the Chief Education Officer, oversee RAC grant solicitation process, administration, and distribution of CEdO funds to RACs across the state aimed at improving educational outcomes. • Manage contracts with public and private contractors relative to STEM Hub and RAC evaluations and collaborative governance support, including writing contract scope of work statements, reviewing contract proposals and ensuring adherence to government contracting policies and procedures in collaboration with ODE staff where appropriate (STEM Hubs). • Oversee and monitor the work of contractors including setting goals and deliverables for complex, large-scale statewide projects, tracking progress and contributing to the CEdO vision. • Establish and maintain effective relationships with regional leaders across the state, which may include superintendents, legislators, county commissioners, college and university presidents, and leaders from business and non-profit sectors on behalf of the CEdO.

20%	N	E	**Cross-agency Coordination and Communication** • Evaluate cross-agency functioning and organizational systems related to STEM Hub and CTE-STEAM policies and priorities shared by the CEdO, the Oregon Department of Education (ODE), and the Higher Education Coordinating Commission (HECC). • Define and recommend to the Chief Education Officer and the Deputy Superintendent of Instruction, steps to ensure cross-agency organizational effectiveness and to ensure efficient and effective delivery of funding resources to STEM Hubs, RAC and STEM grant recipients by working with stakeholders from CEdO, ODE, HECC, State Board of Education, and the legislative and fiscal office. • Respond to inquiries about statewide regional education partnership initiatives from the Oregon Legislature, staff, the public, or the news media. • Represent the CEdO at regional, state and national events. • Deliver presentations on regional education partnership initiatives to stakeholder groups and policy-makers, which may include the State Board of Education, Higher Education Coordinating Commission, the Legislature, Governor's office and other state agencies. • Update and maintain the CEdO website with community resources.
20%	N	E	**Policy Advice** • Utilize regional networks to empower communities to influence the state's education policy agenda to reflect local perspectives • Build relationships and trust to improve the feedback loop between policy and practice; identify and address regional barriers to educational outcomes. • Conduct policy analyses research and analysis of legislative issues, related to regional partnerships, CTE and STEAM as directed by the Chief Education Officer. • Participate in the development of policies related to CTE-STEAM education and other priorities of the CEdO. • Establish relationships with stakeholders and other state and federal policy-makers relevant to regional education partnerships that will inform policy development. • Review professional journals, publications, and research documents to stay current on promising practices related to job functions and policy development
10%	N	NE	**Other duties as assigned**

SECTION 4. WORKING CONDITIONS

Describe any on-going working conditions. Include any physical, sensory, and environmental demands. State the frequency of exposure to these conditions.

Normal office environment. Position requires occasional travel. May require work in excess of normal scheduled hours to meet the Chief Education Office's objectives.

SECTION 5. GUIDELINES

a. List any established guidelines used in this position, such as state or federal laws or regulations, policies, manuals, or desk procedures.

State Constitution
Oregon Revised Statutes
Federal Laws
Administrative Rules
Division Policies and Operating Procedures
Statewide Policies and Procedures
Public Records Laws

b. How are these guidelines used?

Rules and policies guide agency actions
Industry publications inform of court decision, trends and practices of the profession

SECTION 6. WORK CONTACTS

With whom, outside of co-workers in this work unit, must the employee in this position regularly come in contact?

Who Contacted	How	Purpose	How Often?
Note: *If additional rows of the below table are needed, place curser at end of a row (outside table) and hit "Enter".*			
Chief Education Officer	In Person/Phone	Decision making; discussion, strategic planning	As needed
STEM Director	In Person/Phone	Decision making; discussion, strategic planning	As needed
Regional Achievement Collaboratives (RACs)	In Person/Phone/Meetings	Consult, advise, problem solve	As needed; Weekly
STEM Hubs	In Person/Phone/Meetings	Consult, advise, problem solve	As needed
STEM Investment Council	In Person/Phone/Meetings	Consult, advise, problem solve	As needed
Higher Education Coordinating Commission	In Person/Phone/Meetings	Consult, advise, problem solve	As needed
Oregon Dept. of Education	In Person/Phone/Meetings	Consult, advise, problem solve	As needed
Oregon Employment Department	In Person/Phone/Meetings	Consult, advise, problem solve	As needed
Early Learning Hubs	In Person/Phone/Meetings	Consult, advise, problem solve	As needed
Coordinated Care Organizations	In Person/Phone/Meetings	Consult, advise, problem solve	As needed
Legislators	In Person/Phone/Meetings/In Writing	Consult, coordinate, problem-solve	As needed
Stakeholders	In Person/Phone/Meetings/In Writing	Consult, advise, provide information	Weekly

SECTION 7. POSITION RELATED DECISION MAKING

Describe the typical decisions of this position. Explain the direct effect of these decisions.

This position directs the administration of statewide regional cross-sector education initiative programs (STEM Hubs, RAC's, etc.) determining program priorities and direction; solving operational problems and develops options to improve operations; establishing priorities and objectives to accomplish goals through use of practices and services. Guides development of applications for financial assistance; manages grant selection process and interprets selection criteria.

SECTION 8. REVIEW OF WORK

Who reviews the work of the position?

Classification Title	Position Number	How	How Often	Purpose of Review
Note: If additional rows of the below table are needed, place curser at end of a row (outside table) and hit "Enter".				
Z7012 PEM I (MEAH)	5240001	Chief Education Officer	Weekly	To provide updates on progress to the established goals; strategizing to implement efficiencies and best practices

SECTION 9. OVERSIGHT FUNCTIONS

THIS SECTION IS FOR SUPERVISORY POSITIONS ONLY

a. How many employees are directly supervised by this position? 0

How many employees are supervised through a subordinate supervisor? 0

b. Which of the following activities does this position do?

- ☐ Plan work
- ☐ Assigns work
- ☐ Approves work
- ☐ Responds to grievances
- ☐ Disciplines and rewards
- ☐ Coordinates schedules
- ☐ Hires and discharges
- ☐ Recommends hiring
- ☐ Gives input for performance evaluations
- ☐ Prepares & signs performance evaluations

SECTION 10. ADDITIONAL POSITION-RELATED INFORMATION

ADDITIONAL REQUIREMENTS: List any knowledge and skills needed at time of hire that are not already required in the classification specification:

BUDGET AUTHORITY: If this position has authority to commit agency operating money, indicate the following:

Operating Area	Biennial Amount ($00000.00)	Fund Type
Note: *If additional rows of the below table are needed, place curser at end of a row (outside table) and hit "Enter".*		
n/a		

SECTION 11. ORGANIZATIONAL CHART

Attach a current organizational chart. Be sure the following information is shown on the chart for each position: classification title, classification number, salary range, employee name and position number.

SECTION 12. SIGNATURES

Employee Signature	Date	Supervisor Signature	Date

Appointing Authority Signature	Date

STATE OF OREGON
POSITION DESCRIPTION

Position Revised Date: _____

This position is:
☒ Classified
☐ Unclassified
☐ Executive Service
☐ Mgmt Svc – Supervisory
☐ Mgmt Svc – Managerial
☐ Mgmt Svc - Confidential

Agency: Chief Education Office

Facility: Somerville Building, Salem, OR

☒ New ☐ Revised

SECTION 1. POSITION INFORMATION

a. Classification Title:	OPA 1	**b.** Classification No:	C0870
c. Effective Date:	July 1, 2017	**d.** Position No:	5240027
e. Working Title:		**f.** Agency No:	524000
g. Section Title:	Administration	**h.** Budget Auth No:	
i. Employee Name:	vacant	**j.** Repr. Code:	UA

k. Work Location (City – County): Salem

l. Supervisor Name (Optional): Operations Director - Sandy Braden

n. Position: ☒ Permanent ☐ Seasonal ☐ Limited Duration ☐ Academic Year
☒ Full-Time ☐ Part-Time ☐ Intermittent ☐ Job Share

n. FLSA: ☐ Exempt ☒ Non-Exempt

If Exempt: ☐ Executive ☐ Professional ☐ Administrative

o. Eligible for Overtime: ☒ Yes ☐ No

SECTION 2. PROGRAM AND POSITION INFORMATION

a. Describe the program in which this position exists. Include program purpose, who's affected, size, and scope. Include relationship to agency mission.

The Chief Education Office, formerly the Oregon Education Investment Board, was established for the purpose of coordinating with education stakeholders to establish a unified public education system that ensures that all public school students in this state reach the educational goals established for this state.

This office will leverage both directing authority and coordinating capacity to lead: cross-agency planning tied to critical student outcomes, the alleviation of barriers impeding student success, and a core focus on equity within all educational settings. This will be accomplished by convening groups to co-construct powerful solutions, enhance coordination with agency leaders and boards, operationalize the Equity Lens across all educational entities and stakeholders, and develop a coordinated system to link and analyze student data.

In accordance with the mission of Oregon's education system (ORS 351.009 | "40-40-20 Goal"), the Governor has articulated a vision that every Oregon student graduate with a plan for his or her future. Within the Chief Education Office, the position of Education Innovation Officer was established, appointed and charged by the Governor to develop policy and funding recommendations and to work directly with the

Deputy Superintendent of Public Instruction, the Chief Education Officer and the Governor to direct the development, program priorities and implementation of a comprehensive strategy to achieve this vision.

b. Describe the primary purpose of this position, and how it functions within this program. Complete this statement. The primary purpose of this position is to:

This position works within the Chief Education Office as part of the Education Innovation Officer (EIO) team with a focus related to statewide goals for student outcomes which contribute to high school completion and barriers which impede high school graduation. This position evaluates program operations or administrative system(s), analyze information, identifies problems, and makes recommendations for improvement. Additionally, this position administers a variety of functions including document control/management; coordinating, scheduling and preparation of information for community engagement; external communications; coordination of projects and implementation activities. Provides complex and confidential support requiring discretion and independent judgment in matters of significance.

SECTION 3. DESCRIPTION OF DUTIES

List the major duties of the position. State the percentage of time for each duty. Mark "N" for new duties, "R" for revised duties or "NC" for no change in duties. Indicate whether the duty is an "Essential" (E) or "Non-Essential" (NE) function.

% of Time	N/R/NC	E/NE	DUTIES
Note: *If additional rows of the below table are needed, place curser at end of a row (outside table) and hit "Enter".*			
50%			**Operational Support** • With direction from the EIO, plans, compiles and performs analytical research studies and data analysis to draw conclusions and recommend course of action relating to statewide goals for student outcomes which contribute to high school completion and barriers which impede high school graduation; prepare written summaries, conclusions and recommendations to the EIO based upon the research findings; • With direction from the EIO, evaluate State regulations, statute and legislation identifying potential operational problems and/or barriers relating to statewide goals for student outcomes which contribute to high school completion and prepare recommended solutions for improvements to EIO; • With direction from the EIO, develop and recommend administrative rules, policies and procedures relating to statewide goals for student outcomes which contribute to high school completion based upon research findings; • Assist in planning and participate in EIO convening relating to statewide goals for student outcomes which contribute to high school completion • Obtain data from interviews or other sources to evaluate quality of programs and recommend improvements.
30%	N	E	**Managing and overseeing various administrative matters** • Scheduling meetings, forums and appearances, including event and workgroup planning and coordination;

			• Prepare agendas and itineraries; • Gather and prepare materials needed for meetings and appearances; • Coordinate gathering information and preparing briefings; • Compose, type and proof correspondence and other documents; • Organize and maintain filing systems; • Enter information into the correspondence log and tracking; • Maintain contact lists and meeting schedules; • Answer, screen, place and direct telephone calls; • Respond to electronic mail messages for self and Directors; • Create and/or format reports, presentations, documents or other executive communications as directed, including simple graphics; • Works with CEdO team to ensure compliance with deadlines for reports, projects, information and other responses requested; • Prepares official meeting minutes and summarize key points from discussion meetings; Organize and maintain policies and procedures for groups facilitated by Directors; • Provides public (via telephone, in person and written documents), with information policies, procedures and programs to assist in resolving problems and answering inquiries. Assures that all constituents and members of the public are treated respectfully and fairly; • Communicates independently with a variety of P-20 agencies and national boards/organizations; • Open, sort and distribute incoming mail. Assist with entering information into the correspondence log, tracking and filing; • Building, compiling and sorting constituent communications lists including media contacts, education leaders, community partner, etc.;
10%			**Public Affairs Director Assistance:** • Supporting all coordinated media efforts including basic press inquiries, media acquisition tracking, and related media compiling. • Supporting the social media component of the communication strategy in conjunction with the Director and EIO. • Assists EIO and Director in writing and issuing press releases; responds to media requests for information as needed. • Creates and maintains sections of the agency website, monitoring and making on-going modifications for accuracy of information, currency of events and emerging information working with the Director. Regularly assess website analytics. Creates audio recordings on the website as appropriate. Performs other related activities to make certain information is comprehensive, yet understandable and useful to website users. • Works directly with the EIO and Director to coordinate requests and responses for information from the Education Innovation Officer, Chief Education Office, and stakeholders, Governor's Office and educational institutions keeping records of all requests for information. • Provides support to the EIO and Director in obtaining student

			and partner photos, video messaging and story capture. Serves as a secondary brand steward for branded templates and external communication materials. Creates graphic documents, power point presentations and other media as required. Works with the Director to develop strategies and support the leveraging the use of social media. • Work with Communications Director in supporting the coordination and compilation of the EIO sections of the CEdO Bulletin.
5%	N	E	**Serve as Travel Coordinator** • Prepare all travel packages, including out-of-state pre-authorization requests; • Make conference registration, hotel and flight reservations and ground transportation plans; • Prepare travel itineraries. Maintain travel records and files; • Prepare Travel Expense Detail Summary (TEDS) ensuring compliance with state policy and agency procedures.
5%	N	E	**Other duties as assigned**

SECTION 4. WORKING CONDITIONS

Describe any on-going working conditions. Include any physical, sensory, and environmental demands. State the frequency of exposure to these conditions.

Duties are performed in a cubicle office design resulting in on-going audible distractions. Requires extended time working at a computer terminal with frequent use of common office technology, including phones, computers, printers, copy machines, fax machines, shredders, etc. Work may include long periods of sitting and standing. Requires extended work schedule at various times to meet project due dates.

This person will periodically be required to walk short distances to hand-deliver documents to the appropriate state agency building. A key responsibility is to project a welcoming and pleasant atmosphere for the building. This position has occasional exposure to hostile or aggravated behavior. May lift and move up to 25 pounds.

Regular and consistent attendance is an essential function for this position.

SECTION 5. GUIDELINES

a. List any established guidelines used in this position, such as state or federal laws or regulations, policies, manuals, or desk procedures.

State Constitution
Oregon Revised Statutes
Federal Laws
Administrative Rules
Division Policies and Operating Procedures
Statewide Policies and procedures
Public Records Laws

b. How are these guidelines used?

Rules and policies guide agency actions
Industry publications inform of court decision, trends and practices of the profession

SECTION 6. WORK CONTACTS

With whom, outside of co-workers in this work unit, must the employee in this position regularly come in contact?

Who Contacted	How	Purpose	How Often?
Note: If additional rows of the below table are needed, place curser at end of a row (outside table) and hit "Enter".			
Governor's Staff	In Person/Phone written/e-mail	Gather and provide information, arrange meetings	As needed
Legislators/Legislative Staff	In Person/Phone written/e-mail	Gather and provide information, arrange meetings	As needed
Internal Agency Staff	In Person/Phone written/e-mail	Gather and provide information, coordinate activities	Regularly
Agency directors and executive staff	In Person/Phone written/e-mail	Communication, information gathering, coordination, collaboration	Regularly
Work group members	In Person/Phone written/e-mail	Provide direction, information, gather information, coordinate activities	Regularly
Oregon schools, colleges and university personnel	In Person/Phone written/e-mail	Gather and provide information, coordinate activities	Regularly
Outside organizations/ Stakeholders	In Person/Phone written/e-mail	Provide information, gather information; coordinate activities	As needed
Vendors/General Public	In Person/Phone written/e-mail	Gather and provide information, coordinate activities	As needed

SECTION 7. POSITION RELATED DECISION MAKING

Describe the typical decisions of this position. Explain the direct effect of these decisions.

This position requires excellent organization skills to balance work assignments and tasks; ability to conduct internet research and develop summary reports; respond to questions and provide program information to a variety of people. They also need to know who to refer people to and how best to respond to hostile people. The work of this position also requires independent decision-making while working with agency staff and stakeholders in order to provide an efficient flow of information, meeting schedules, and travel arrangements. Application and interpretation of Statewide and division policies and procedures are needed. Poor decisions may result in inefficient use of Agency resources.

SECTION 8. REVIEW OF WORK

Who reviews the work of the position?

Classification Title	Position Number	How	How Often	Purpose of Review
Note: If additional rows of the below table are needed, place curser at end of a row (outside table) and hit "Enter".				
Operations Director Z7006 PEM D	5240007	Observation, customer feedback, evaluation of work products and relationships; progress on established goals; implementation of efficiencies and best practices.	Continuously	To evaluate the effectiveness and influence of the incumbent

SECTION 9. OVERSIGHT FUNCTIONS

THIS SECTION IS FOR SUPERVISORY POSITIONS ONLY

a. How many employees are directly supervised by this position? 0

How many employees are supervised through a subordinate supervisor? 0

b. Which of the following activities does this position do?

- ☐ Plan work
- ☐ Assigns work
- ☐ Approves work
- ☐ Responds to grievances
- ☐ Disciplines and rewards
- ☐ Coordinates schedules
- ☐ Hires and discharges
- ☐ Recommends hiring
- ☐ Gives input for performance evaluations
- ☐ Prepares & signs performance evaluations

SECTION 10. ADDITIONAL POSITION-RELATED INFORMATION

ADDITIONAL REQUIREMENTS: List any knowledge and skills needed at time of hire that are not already required in the classification specification:

You are responsible to promote and foster a diverse and discrimination/harassment-free workplace; establish and maintain professional and collaborative working relationships with all contacts, contribute to a positive, respectful and productive work environment; maintain regular and punctual attendance; perform all duties in a safe manner; and comply with all policies and procedures. Working in a team oriented environment requires participative decision making and cooperative interactions among staff and management. You are to be aware of Affirmative Action and the department's Diversity strategies and goals.

Additional skills, abilities and requirements:

- Employee is required to possess and maintain a valid driver's license issued by the state where the employee actually resides or provide an acceptable alternate mode of transportation.
- Ability to communicate detailed information to diverse audience. Communication must be at a professional level with attention to grammar, spelling, and punctuation.
- Must be self-motivated and be able to meet numerous firm deadlines with frequent interruptions in their daily work schedules.
- Knowledge of and experience in Microsoft products, particularly Word, Excel, Visio and PowerPoint.
- Experience in updating websites and creating simple graphics.

BUDGET AUTHORITY: If this position has authority to commit agency operating money, indicate the following:

Operating Area	Biennial Amount ($00000.00)	Fund Type

Note: *If additional rows of the below table are needed, place curser at end of a row (outside table) and hit "Enter".*

N/A		

SECTION 11. ORGANIZATIONAL CHART

Attach a current organizational chart. Be sure the following information is shown on the chart for each position: classification title, classification number, salary range, employee name and position number.

SECTION 12. SIGNATURES

Employee Signature	Date	Supervisor Signature	Date

Appointing Authority Signature	Date

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STATE OF OREGON
POSITION DESCRIPTION

Position Revised Date: _____

This position is:
☒ Classified
☐ Unclassified
☐ Executive Service
☐ Mgmt Svc – Supervisory
☐ Mgmt Svc – Managerial
☐ Mgmt Svc - Confidential

Agency: Oregon Education Investment Board

Facility: Somerville Building

☒ New ☐ Revised

SECTION 1. POSITION INFORMATION

a. Classification Title:	Ops and Policy Analyst 1	**b.** Classification No:	C0870
c. Effective Date:	07/01/2017	**d.** Position No:	5240028
e. Working Title:		**f.** Agency No:	524000
g. Section Title:	CEdO Research Unit	**h.** Budget Auth No:	
i. Employee Name:	Vacant	**j.** Repr. Code:	UA

k. Work Location (City – County): Salem

l. Supervisor Name (Optional): Interagency Policy Research Director - Peter Tromba

m. Position: ☒ Permanent ☐ Seasonal ☐ Limited Duration ☐ Academic Year
☒ Full-Time ☐ Part-Time ☐ Intermittent ☐ Job Share

n. FLSA: ☐ Exempt ☒ Non-Exempt

If Exempt: ☒ Executive ☐ Professional ☐ Administrative

o. Eligible for Overtime: ☒ Yes ☐ No

SECTION 2. PROGRAM AND POSITION INFORMATION

a. Describe the program in which this position exists. Include program purpose, who's affected, size, and scope. Include relationship to agency mission.

The Chief Education Office (CEdO), formerly the Oregon Education Investment Board, was established for the purpose of coordinating with education stakeholders to establish a unified public education system that ensures that all public school students in this state reach the educational goals established for this state.

This office will leverage both directing authority and coordinating capacity to lead: cross-agency planning tied to critical student outcomes, the alleviation of barriers impeding student success, and a core focus on equity within all educational settings. This will be accomplished by convening groups to co-construct powerful solutions, enhance coordination with agency leaders and boards, operationalize the Equity Lens across all educational entities and stakeholders, and develop a coordinated system to link and analyze student data.

Oregon's education system can potentially be affected as this position will play a role in analyzing data with strategic and programmatic implications.

b. Describe the primary purpose of this position, and how it functions within this program. Complete this statement. The primary purpose of this position is to:

Respond to ad hoc requests to short-term research studies, using data from the CEdO State Longitudinal Data System and other sources by preparing summary reports and analysis. Support the Education Agency Research Team to better utilize cross agency research staff to answer the research questions given to agencies that require collaboration. This includes operational support for agency and cross-agency activities, system analysis and improvement of a new partnership program between agency researchers and graduation students, and system analysis and improvement of the methods. rules, and policies all research staff will use to access the state longitudinal data system.

SECTION 3. DESCRIPTION OF DUTIES

List the major duties of the position. State the percentage of time for each duty. Mark "N" for new duties, "R" for revised duties or "NC" for no change in duties. Indicate whether the duty is an "Essential" (E) or "Non-Essential" (NE) function.

% of Time	N/R/NC	E/NE	DUTIES
Note: If additional rows of the below table are needed, place curser at end of a row (outside table) and hit "Enter".			
50%	N	E	• In response to ad hoc requests from agency directors, conduct short-term research studies that utilize the CEdO State Longitudinal Data System and other data sources • Provide analytical support to policy directors to develop policy option packages and legislative concepts that are aligned and that conform to agency priorities • Prepare written summaries of research tailored to the needs of the policy lead and/or agency director. • Prepare data presentations for multiple audiences and in multiple formats
30%	N	E	• Develop and recommend policies and procedures that supplement cross-agency research operations or administrative processes. Identify potential operational problems and recommend solutions • Work jointly with agency staff to develop research questions appropriate for the Research Consortium. • Project manage the Research Consortium program • Problem-solve the disposition of legislative requests for information that are beyond the scope of the CEdO • Collaborate with information system staff for the SLDS and ODE to support data needs for agency, cross-agency researchers and for the graduate students in the partnership program. Partner with SLDS business analyst to explain operational business terms and data needs to system developers.
15%	N	E	• Analyze the formative success, processes and progress of the Research Consortium project and prepare monthly status updates and a yearly report. • Analyze the success, process and progress of the research and EART teams and effectiveness of Policy Director support.

			Provide report summarizing analysis, conclusion and feedback on prioritization, improvement and effectiveness. • Facilitate the partnership steering committee that identifies processing or system errors and solicit information from staff across state agencies to help coordinate and prioritize program improvements.
5%	n	e	Other duties as assigned

SECTION 4. WORKING CONDITIONS

Describe any on-going working conditions. Include any physical, sensory, and environmental demands. State the frequency of exposure to these conditions.

Duties are performed in a cubicle office design resulting in on-going audible distractions. The position requires extended time working at a computer terminal with frequent use of common office technology, including phones, computers, printers, copy machines, fax machines, shredders, etc. Work may include long periods of sitting and standing. This position could require extra hours on evenings, weekends and holidays to attend work sessions and meetings and during heavy workload periods, especially during legislative session. The position requires occasional travel statewide, sometimes overnight. A valid driver's license and personal automobile insurance is required for use of state vehicles or acceptable alternate mode of transportation.

SECTION 5. GUIDELINES

a. List any established guidelines used in this position, such as state or federal laws or regulations, policies, manuals, or desk procedures.

Federal and State Laws, Oregon Revised Statutes, Oregon Administrative Rules, gubernatorial policies, legislative procedures and internal policies

b. How are these guidelines used?

Provide the parameters within which the employee interprets and applies professional research, analysis, and judgment.

SECTION 6. WORK CONTACTS

With whom, outside of co-workers in this work unit, must the employee in this position regularly come in contact?

Who Contacted	How	Purpose	How Often?
Note: If additional rows of the below table are needed, place curser at end of a row (outside table) and hit "Enter".			
Board/Council members	Written, e-mail, phone, in person	Provide direction, information, gather information, coordinate activities	Varies
Agency directors and executive staff	Written, e-mail, phone, in person	Communication, information gathering, coordination, collaboration	Varies
Outside organizations/	Written, e-mail, phone, in	Provide information, gather information;	Varies

Stakeholders	person	coordinate activities	
Oregon early childhood service providers, schools, colleges and university personnel	Written, e-mail, phone, in person	Collaboration, discuss issues, provide information, gather information,	Varies

SECTION 7. POSITION RELATED DECISION MAKING

Describe the typical decisions of this position. Explain the direct effect of these decisions.

Determining whether proposed statutes will impact the agency and/or require policy or practice research. This will allow the agency to be prepared and respond to legislative requests.

Determining the key operational support needs for the research team and the cross-agency research activities AND proposing solutions. This will provide the key method to ensure risks and needs are identified and addressed as soon as possible.

Facilitating the partnership activities between researchers and graduate students to ensure a seamless system and stepping to assist when there are issues. This will ensure the maximum benefit for the state and the student and prevent small issues from becoming bigger problems.

SECTION 8. REVIEW OF WORK

Who reviews the work of the position?

Classification Title	Position Number	How	How Often	Purpose of Review
Note: If additional rows of the below table are needed, place curser at end of a row (outside table) and hit "Enter".				
P-20 Research & Promising Practices Director	5240004	Observation, customer feedback, evaluation of work products and relationships; progress on established goals; implementation of efficiencies and best practices.	Continuously	To evaluate the effectiveness and influence of the incumbent.
P-20 Research & Promising Practices Director	5240004	In person, email, reports	As needed	Provide direction and perform evaluation

SECTION 9. OVERSIGHT FUNCTIONS

THIS SECTION IS FOR SUPERVISORY POSITIONS ONLY

a. How many employees are directly supervised by this position? 0

How many employees are supervised through a subordinate supervisor? 0

b. Which of the following activities does this position do?

- ☐ Plan work
- ☐ Assigns work
- ☐ Coordinates schedules
- ☐ Hires and discharges

- ☐ Approves work
- ☐ Responds to grievances
- ☐ Disciplines and rewards
- ☐ Recommends hiring
- ☐ Gives input for performance evaluations
- ☐ Prepares & signs performance evaluations

SECTION 10. ADDITIONAL POSITION-RELATED INFORMATION

ADDITIONAL REQUIREMENTS: List any knowledge and skills needed at time of hire that are not already required in the classification specification:

You are responsible to promote and foster a diverse and discrimination/harassment-free workplace; establish and maintain professional and collaborative working relationships with all contacts, contribute to a positive, respectful and productive work environment; maintain regular and punctual attendance; perform all duties in a safe manner; and comply with all policies and procedures. Working in a team oriented environment requires participative decision making and cooperative interactions among staff and management. You are to be aware of Affirmative Action and the department's Diversity strategies and goals.

Program evaluation experience.

Web development experience.

Word and Excel experience.

Basic research skills and strong writing skills.

BUDGET AUTHORITY: If this position has authority to commit agency operating money, indicate the following:

Operating Area	Biennial Amount ($00000.00)	Fund Type
Note: *If additional rows of the below table are needed, place curser at end of a row (outside table) and hit "Enter".*		
N/A		

SECTION 11. ORGANIZATIONAL CHART

Attach a current organizational chart. Be sure the following information is shown on the chart for each position: classification title, classification number, salary range, employee name and position number.

SECTION 12. SIGNATURES

Employee Signature	Date	Supervisor Signature	Date

Appointing Authority Signature Date

Fiscal Impact Summary 17-19

Package No. POP 101 Operational Restructure

Position #	Classification No.	Group by Classification Name	# of Pos.	FTE	SR	Avg. Step	Avg. Salary	Avg. OPE	GF	LF	OF	FF	Non-Limited	All Funds
PERSONAL SERVICES									100%	0%	0%	0%	0%	
5240009	MENN Z7014 AA	PRINCIPAL EXECUTIVE/MANAGER H	1	1.00	40X	9	11,938	4,658	398,306	-	-	-	-	398,306
Colt	MENN Z7010 AA	PRINCIPAL EXECUTIVE/MANAGER F	-1	-1.00	35X	2	(6,673)	(3,219)	(237,400)	-	-	-	-	(237,400)
5240014	UA C0873 AA	OPERATIONS & POLICY ANALYST 4	1	1.00	32	6	6,704	3,227	238,347	-	-	-	-	238,347
Krissi	UA C1117 AA	RESEARCH ANALYST 3	-1	-1.00	26	9	(5,809)	(2,982)	(210,994)	-	-	-	-	(210,994)
5240015	UA C1118 AA	RESEARCH ANALYST 4	1	1.00	30	6	6,096	3,061	219,765	-	-	-	-	219,765
Cheng-Fei	UA C1117 AA	RESEARCH ANALYST 3	-1	-1.00	26	9	(5,809)	(2,982)	(210,994)	-	-	-	-	(210,994)
5240026	UA C0873 AA	OPERATIONS & POLICY ANALYST 4	1	1.00	32	6	6,704	3,227	238,347	-	-	-	-	238,347
5240027	UA C0870 AA	OPERATIONS & POLICY ANALYST 1	1	1.00	23	4	3,972	2,480	154,853	-	-	-	-	154,853
5240028	UA C0870 AA	OPERATIONS & POLICY ANALYST 1	1	1.00	23	4	3,972	2,480	154,853	-	-	-	-	154,853
					Salaries				745,083	-	-	-	-	745,083
					Overtime									-
					Shift Differential									-
					Other Differentials (for 5240009 PEM H)				61,168					61,168
					Reconciliation (PICS Push & OPE on Diffr				14,556		-			14,556
Total Personal Services									820,807	-	-	-	-	820,807

SERVICES AND SUPPLIES	GF	LF	OF	FF	Non-Limited	All Funds
4100 Instate Travel	61,280	-	-	-	-	61,280
4125 Out-of-State Travel						-
4150 Employee Training	6,528	-	-	-	-	6,528
4175 Office Expenses	5,695	-	-	-	-	5,695
4200 Telecommunications	4,746	-	-	-	-	4,746
4225 SGSC	9,810	-	-	-	-	9,810
4250 Data Processing	1,530	-	-	-	-	1,530
4275 Publicity and Publications	949	-	-	-	-	949
4300 Professional Services						-
4315 IT Professional Services						-
4325 Attorney General						-
4375 Employee Recruit and Develop	844	-	-	-	-	844
4400 Dues and Subscriptions	949	-	-	-	-	949
4425 Facilities Rental and Taxes	21,846	-	-	-	-	21,846
4475 Facilities Maintenance						-
4600 Interagency Charges						-
4575 Agency Program Related S&S						-
4650 Other Services and Supplies	1,055	-	-	-	-	1,055
4700 Expendable Property	5,069	-	-	-	-	5,069
						-
						-
Total Services and Supplies	120,301	-	-	-	-	120,301

# of Positions	
27 or Highe	1
13-26	2
12 or less	0
All-IA	
Total	3

	GF	LF	OF	FF	Non-Limited	All Funds
TOTAL REQUEST	941,108	-	-	-	-	941,108
TOTAL POSITIONS/FTE			3 / 3.00			3 / 3.00

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Policy Package 102 – SLDS Staffing

Package Description

Purpose: The 2016 legislature passed Senate Bill 5701, approved the project execution of the Oregon Statewide Longitudinal Data System P-20W (OR-SLDS P-20W) with 5 permanent positions (FTE's) and one limited duration FTE to support the project execution as well as the operations and maintenance of the system moving forward. The OR-SLDS P-20W was mandated by Senate Bill 909 (2011) and reaffirmed by Senate Bill 215 (2015). Each bill mandates the data system support and consumes data for preschool, k-12, and higher education (community college, college and university systems).

The current project phase supports K-12 and higher education; with early learning information becoming available in the near to middle future (2019-2020 timeframe).

The purpose of this package is to bring three positions to higher step levels to meet their wages upon transfer from another state agency and also to add one permanent position

Reclass Positions:

	Position #	Title	Current Classification	CSL Step	Reclass Step
1	5240023	SLDS Solutions Architect	C1488 IA	Step 2/$5,810	Step 9/$8,032
2	5240024	SLDS Systems Architect	C1488 IA	Step 2/$5,810	Step 8/$7,669
3	5240025	SLDS Business Analyst	C1488 IA	Step 2/$5,810	Step 4/$6,374

Position 5240023 SLDS Solutions Architect – As a member of the Statewide Longitudinal Data System team, the purpose of this position is to perform the leadership, facilitation, analysis and design tasks required to ensure that the assigned business solution system is appropriately ensuring that the current implementation supports existing needs, as well as evolves to meet changing business requirements. The Solutions Architect has the primary responsibility for "date in motion" – integration with partner agencies (API development and documentation, web service implementation, ETL from partner agencies, and data staging prior to consumption) and interfacing with the selected vendor on these topics.

Position 5240024 SLDS Systems Architect – As a member of the Statewide Longitudinal Data System team, the purpose of this position is to ensure the architecture of a system to fulfill the project requirements. The Systems Architects' primary responsibility is for "data at rest" – that includes appropriateness, accuracy, and completeness of data models for all data stores, database security at all levels and efficiency of data stores for providing required functionality. This position is also responsible for operational aspects of the back end, and serves as database owner and database administrator.

Position 5240025 SLDS Business Analyst - As a member of the Statewide Longitudinal Data System team, the purpose of this position is to analyze the business domain of the partner agencies, and documents, its business processes and systems, assessing the business model and its integration with the new technology solutions. This position documents extant contributing data systems at the Higher Education Coordinating Commission and Oregon Department of Education, develops and validates an Application Programming Interface (API) for web service integration, maps data elements to the Common Education Data Standards and develops methodologies for estimating data quality and completeness.

New Position:

	Position #	Title	Classification	TYPE
1	5240029	Project Manager 1	C0854	PF

Position 5240029 Project Manager – As a member of the Statewide Longitudinal Data System team, the purpose of this position is to ensure effective project management throughout all project phases: planning, execution, communication, and closure. This position will maintain and own the project critical success indicators, DAS quarterly project status reports, and project "health" evaluations. This individual will insure compliance to the project management plan and support documents and procedures. This individual will also be responsible for future DAS ORICO Stage Gate Submittals and compliance to the Stage Gate process.

How Achieved: The approved project supports three (3) IT Information Systems Specialists (ISS 8) in a Solutions Architect (5240023), Systems Architect (5240024) and Business Analyst (5240025) capacity. These are permanent positions and approved by the 2016 legislature session. These positions not only support the current project effort but will also function as a key member of the sustaining data system team, insuring maintainability (as stipulated in SB 909 and re-affirmed in SB 215), additional research requests, and continued longitudinal data usage for educators and policy makers. With the directive to add the Early Learning Division of ODE, the need for these positions will continue throughout the data system life cycle. The current OR-SLDS P-20W strategic vision has additional partner agencies participating in data sharing between education and other agencies; in the interest of an improved and seamless educational system (again supported by SB 909 and SB 215).

This approved project supports a Project Manager 1 position as a Limited Duration (LD) position; this position ends at the conclusion of the project. With the directive to add the Early Learning Division of ODE, the need for this position will continue past the approved LD duration thus requesting that this position be made permanent.

Staffing Impact: The current three (3) ISS-8 positions were vacant at the time of the current service level budget build and accordingly were all budgeted at step 2 level (normal DAS HR level for new positions). This salary level does not allow the agency to be competitive with the market place for highly skilled individuals within the private or within existing state agencies. In order for the agency to successfully recruit individuals from both sectors the agency needs to offer competitive salaries that match the skill set(s) being requested and the experience needed for this project. Therefore, the agency is seeking additional funds for each position as follows:

- Position #5240023 ISS 8 SLDS Solutions Architect increase to step 9
- Position #5240024 ISS 8 SLDS Systems Architect increase to step 8
- Position #5240025 ISS 8 SLDS Business Analyst increase to step 4. This aligns with current policies with individuals transferring between agencies.
- New position #5240029 Project Manager – permanent position requested

Revenue Source: $366,957 of General Fund.

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STATE OF OREGON
POSITION DESCRIPTION

Position Revised Date: **7/1/17**

This position is:
☒ Classified
☐ Unclassified
☐ Executive Service
☐ Mgmt Svc – Supervisory
☐ Mgmt Svc – Managerial
☐ Mgmt Svc - Confidential

Agency: Chief Education Office

Facility: Somerville Building, Salem, OR

☒ New ☐ Revised

SECTION 1. POSITION INFORMATION

a. Classification Title:	PM-1	**b.** Classification No:	CO854
c. Effective Date:	7/1/16	**d.** Position No:	5240029
e. Working Title:	Project Manager 1	**f.** Agency No:	52400
g. Section Title:	SLDS	**h.** Budget Auth No:	
i. Employee Name:		**j.** Repr. Code:	UA
k. Work Location (City – County):	Salem - Marion		
l. Supervisor Name (Optional):	SLDS Director - John Starr		

m. Position: ☒ Permanent ☐ Seasonal ☐ Limited Duration ☐ Academic Year
☒ Full-Time ☐ Part-Time ☐ Intermittent ☐ Job Share

n. FLSA: ☐ Exempt ☒ Non-Exempt

If Exempt: ☐ Executive ☐ Professional ☐ Administrative

o. Eligible for Overtime: ☒ Yes ☐ No

SECTION 2. PROGRAM AND POSITION INFORMATION

a. Describe the program in which this position exists. Include program purpose, who's affected, size, and scope. Include relationship to agency mission.

This position is located in the Chief Education Office (CEdO). Under current law, the CEdO is required to deliver a data system to measure outcomes from educational investments across the P-20 continuum (early learning through post-secondary). The Statewide Longitudinal Data System (SLDS), once developed, will combine data from multiple agencies to evaluate the effectiveness of education investments.

b. Describe the primary purpose of this position, and how it functions within this program. Complete this statement. The primary purpose of this position is to:

This position uses independent judgment in consultation with customers and agency management to ensure effective project management throughout all project phases: planning, execution, communication, and closure in support of the agency's mission and goals. The independent judgement will be performed on a daily basis to align project schedules, budget, and project scope. This individual will interface daily with the project vendor and represent the agency project team in team meetings and core team meetings. The individual will maintain

and own the project critical success indicators, DAS quarterly project status reports, and project "health" evaluations. This individual will insure compliance to the project management plan and support documents and procedures. This position will directly support joint project management efforts between the Department of Administrative Services, the Oregon Department of Education, Higher Education Coordinating Commission (HECC), Legislative Fiscal Office (LFO) and the Chief Education Office (CEdo).

Duties of this position include: project planning and management, business process consulting services, problem solving analysis, business systems design, systems specification documentation control, and implementation support for technology projects. This individual will support and act as the project director's representative during such times that the project director is unable to attend due to conflicting priorities.

This is not an administrative position. The successful individual must have basic project management skills and expertise; be familiar and have clear understanding of the PMI Project Management Body of Knowledge methodologies. This individual will be expected to coordinate efforts across partner agencies and support the technical project team members in following the project management methodologies established by the project. In addition will take initiative to identify new project risks (following the approved process), mitigating risks that are identified, and assuming ownership to insure the project closes open issues and risks throughout the project life cycle.

SECTION 3. DESCRIPTION OF DUTIES

List the major duties of the position. State the percentage of time for each duty. Mark "N" for new duties, "R" for revised duties or "NC" for no change in duties. Indicate whether the duty is an "Essential" (E) or "Non-Essential" (NE) function.

% of Time	N/R/NC	E/NE	DUTIES
Note: If additional rows of the below table are needed, place curser at end of a row (outside table) and hit "Enter".			
35%	N	E	Project Initiation and Planning Under supervision: Support statewide multi-agency or enterprise-level projects with varying projects lengths ranging from several months to multi-year. Work with internal and external stakeholders including obtaining authorization, commitments, demonstration of business need and project feasibility. Aid in the development and management of master project plans that coordinate individual work tasks, schedules, preliminary project funding plans, and project budgets. Work with managers and team leads to organize project teams according to project requirements and scope. Conduct project initiation meetings. Identify business needs, the necessary tools, deliverables, and appropriate milestones for the project. Prepare project budgets, assemble and lead groups to define project scope. Develop Statements of Work, project charters, and project plans. Create documentation procedures to deal with changes to the project and risks that arise. Work with project team to produce a work breakdown structure that outlines the project plan; and assign duties, responsibilities and scope of authority to project team members. Develop and implement plans to communicate with and involve project stakeholders. Identify project risks; identify which risks are likely to affect the project; and design strategies to manage and mitigate those risks.
20%	NC	E	Project Execution, Control, and Closure Under supervision: Help lead and coordinate activities of project teams that will include internal staff as well as staff from external groups such as School Districts, Universities, and other State agencies. Monitor tasks, their progress, and any associated risks. Work with staff to develop consensus when technical challenges arise. Update the project plan(s) as necessary throughout the life of the project. Communicate deliverable deadlines with project members. Evaluate Earned Value against Projected Value for the project. Manage risks and respond to changes in

			risks throughout the project. Evaluate projects to identify ways to improve project outcomes. Lead the problem identification and resolution process. Evaluate when project timelines are at risk, or are unreasonable. Make recommendations to management for project terminations. Conduct lessons learned meetings after project closures. Make recommendations for changes based on the findings.
40%	NC	E	Project Communication/Representation Under supervision: Aid in the development and maintenance of clear communication with team members, external and internal stakeholders, provide project updates to management, and communicate discovered risks to management, with plans on how to mitigate. Answer inquiries about the project from external stakeholders including School Districts, Oregon University System, and other outside partners.
5%	NC	E	Professional Duties: Maintain knowledge of current trends and developments in the field of Project Management. Attend trainings, webinars, and seminars to expand methodology knowledge. Recommend ways to improve Project Management methodology within the Agency. Interface with external groups to maintain current knowledge of emerging technologies in the field of Project Management.
100%			

SECTION 4. WORKING CONDITIONS

Describe any on-going working conditions. Include any physical, sensory, and environmental demands. State the frequency of exposure to these conditions.

Typical office environment. May spend majority of workday using video display terminal. May require occasional evening or weekend work to meet deadlines or resolve problems. May be requested to work extended hours or be on call to complete project deliverables. Occasional travel to other agency sites.

SECTION 5. GUIDELINES

a. List any established guidelines used in this position, such as state or federal laws or regulations, policies, manuals, or desk procedures.

Health Insurance Portability and Accountability Act (HIPPA)
Family Educational Rights and Privacy Act (FERPA)
Child Online Protection Act (COPA)

Children's Internet Protection Act (CIPA)
American Recovery and Reinvestment Act of 2009 (ARRA)
Generally Accepted Accounting Principles (GAAP)
Education Department General Administrative Regulations (EDGAR)
Project Management Body of Knowledge (PMBOK)
Business Analysis Body of Knowledge (BABOK)
Data Management Body of Knowledge (DMBOK)
Information Technology Infrastructure Library (ITIL)
Control Objectives for Information and Related Technology (COBIT)
DAS ESO Statewide Information Security Plan and Standards
DAS SPO Policies and Procedures
SEIU Collective Bargaining Agreements
Applicable Education ORSs and OARs

b. How are these guidelines used?

To manage projects and lead staff in a manner consistent with the goals and rules of the Agency and the Enterprise

SECTION 6. WORK CONTACTS

With whom, outside of co-workers in this work unit, must the employee in this position regularly come in contact?

Who Contacted	How	Purpose	How Often?
Note: If additional rows of the below table are needed, place curser at end of a row (outside table) and hit "Enter".			
Agency Staff	Phone, Email, In Person	Coordination of SLDS project, gather and provide information re SLDS project.	Daily
School Districts	Phone, Email, In Person	Coordination of SLDS project, gather and provide information re SLDS project.	As Necessary
Vendors	Phone, Email, In Person	Coordination of SLDS project, gather and provide information re SLDS project.	As Necessary
State Agencies,	Phone, Email, In Person	Coordination of SLDS project, gather and provide information re SLDS project.	As Necessary

SECTION 7. POSITION RELATED DECISION MAKING

Describe the typical decisions of this position. Explain the direct effect of these decisions.

Must identify project constraints and dependencies (all facets), adjust project plans accordingly (in collaboration with other project team members and project director); monitor all project strands for schedule compliance, scope control, and within-budget completion.

When risks arise, recommend, develop, implement (with project team collaboration) and monitor mitigation plans. Assume ownership of items identified until the appropriate owner is identified.

Assume responsibility and take the initiative to identify, mitigate, and close project issues as they occur. Project issues encompass schedule (this individual will insure alignment to project schedule goals), during the course of the project life cycle this individual will make recommendations and mitigation strategies to meet those project goals. These activities will require informed decision making methodologies on a day to day basis. As with all projects the team environment is highly desirable. Therefore, a collaborative approach to the decision making process is the norm. The final decision for any project change or deviation will come from the project director in consultation with the project sponsor. Day to day operational decisions will be made by each team member within their respective areas of ownership. It is expected that this individual has excellent communication skills and has the experience and vision on who, when, and how to communicate to project team members, members of the executive staff, and project director.

SECTION 8. REVIEW OF WORK

Who reviews the work of the position?

Classification Title	Position Number	How	How Often	Purpose of Review
Note: If additional rows of the below table are needed, place curser at end of a row (outside table) and hit "Enter".				
PEM F SLDS Project Lead	171901	Meeting	Regularly Scheduled	To keep the manager informed of progress and to discuss issues needing resolution
		Meeting	Annually	Performance Evaluation

SECTION 9. OVERSIGHT FUNCTIONS

THIS SECTION IS FOR SUPERVISORY POSITIONS ONLY

a. How many employees are directly supervised by this position? 0

How many employees are supervised through a subordinate supervisor? 0

b. Which of the following activities does this position do?

- ☐ Plan work
- ☐ Assigns work
- ☐ Approves work
- ☐ Responds to grievances
- ☐ Disciplines and rewards
- ☐ Coordinates schedules
- ☐ Hires and discharges
- ☐ Recommends hiring
- ☐ Gives input for performance evaluations
- ☐ Prepares & signs performance evaluations

SECTION 10. ADDITIONAL POSITION-RELATED INFORMATION

ADDITIONAL REQUIREMENTS: List any knowledge and skills needed at time of hire that are not already required in the classification specification:

- Experience with project management software.

- Experience with contract administration and procurement.
- Demonstrable knowledge of Project Management Institute (PMI) professional standards.
- Experience working in a government agency culture or environment (federal, state, or municipality) is desired.
- This is an entry level position; basic project management skills are required.
- Experience with Information Technology projects is desired.

BUDGET AUTHORITY: If this position has authority to commit agency operating money, indicate the following:

Operating Area	Biennial Amount ($00000.00)	Fund Type
Note: *If additional rows of the below table are needed, place curser at end of a row (outside table) and hit "Enter".*		
NA		

SECTION 11. ORGANIZATIONAL CHART

Attach a current organizational chart. Be sure the following information is shown on the chart for each position: classification title, classification number, salary range, employee name and position number.

SECTION 12. SIGNATURES

Employee Signature	Date	Supervisor Signature	Date

Appointing Authority Signature	Date

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Fiscal Impact Summary 17-19

Package No. POP 102 SLDS Staffing

PERSONAL SERVICES									100%	0%	0%	0%	0%	
Position #	Classification No.	Group by Classification Name	# of Pos.	FTE	SR	Avg. Step	Avg. Salary	Avg. OPE	GF	LF	OF	FF	Non-Limited	All Funds
5240029 Seth/SLDS	UA C0854 AA	PROJECT MANAGER 1 - SLDS	1	1.00	26	8	5,544	2,910	202,895	-	-	-	-	202,895
5240023	UA C1488 IA	INFO SYSTEMS SPECIALIST 8 - SLDS	1	1.00	33	9	8,253	3,651	285,687	-	-	-	-	285,687
Solutions	UA C1488 IA	INFO SYSTEMS SPECIALIST 8 - SLDS	-1	-1.00	33	2	(5,970)	(3,026)	(215,915)	-	-	-	-	(215,915)
5240024	UA C1488 IA	INFO SYSTEMS SPECIALIST 8 - SLDS	1	1.00	33	8	7,880	3,549	274,288	-	-	-	-	274,288
Systems	UA C1488 IA	INFO SYSTEMS SPECIALIST 8 - SLDS	-1	-1.00	33	2	(5,970)	(3,026)	(215,915)	-	-	-	-	(215,915)
5240025	UA C1488 IA	INFO SYSTEMS SPECIALIST 8 - SLDS	1	1.00	33	4	6,549	3,185	233,610	-	-	-	-	233,610
Business	UA C1488 IA	INFO SYSTEMS SPECIALIST 8 - SLDS	-1	-1.00	33	2	(5,970)	(3,026)	(215,915)	-	-	-	-	(215,915)
					Salaries				348,736	-	-	-	-	348,736
					Overtime									-
					Shift Differential									-
					Other Differentials									-
					Reconciliation						-			-
Total Personal Services									348,736	-	-	-	-	348,736

SERVICES AND SUPPLIES								
4100 Instate Travel			284	-	-	-	-	284
4125 Out-of-State Travel								-
4150 Employee Training			1,423	-	-	-	-	1,423
4175 Office Expenses			1,793	-	-	-	-	1,793
4200 Telecommunications			1,582	-	-	-	-	1,582
4225 SGSC			3,270	-	-	-	-	3,270
4250 Data Processing			422	-	-	-	-	422
4275 Publicity and Publications			211	-	-	-	-	211
4300 Professional Services								-
4315 IT Professional Services								-
4325 Attorney General								-
4375 Employee Recruit and Develop			211	-	-	-	-	211
4400 Dues and Subscriptions			211	-	-	-	-	211
4425 Facilities Rental and Taxes			7,282	-	-	-	-	7,282
4475 Facilities Maintenance								-
4600 Interagency Charges								-
4575 Agency Program Related S&S								-
4650 Other Services and Supplies			264	-	-	-	-	264
4700 Expendable Property			1,268	-	-	-	-	1,268
								-
								-
Total Services and Supplies			18,221	-	-	-	-	18,221

# of Positions	
27 or Highe	0
13-26	1
12 or less	0
All-IA	
Total	1

TOTAL REQUEST	366,957	-	-	-	-	366,957
TOTAL POSITIONS/FTE			1 / 1.00			1 / 1.00

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Policy Package 103 – Research & Evaluation

Package Description

Purpose: The CEdO Interagency Policy Research Unit will become the key leverage point to bring equity, research, policy development, and promising practices implementation together to impact State education goals. The CEdO is uniquely positioned, given its role as a convening agency, to play this role in the contexts of education agency planning, cross-sector collaboration, public/private partnerships, and student/parent/community voice. Ultimately, the Unit will be the steward of a co-constructed State education research agenda and function that is transparent, supported, and operationalized.

The Unit will continue to be a nexus between policy analysis and development, implementation of promising practices, mixed methods research, and equity. This package allows for an expansion of capacity to further take advantage of existing leverage points. The drivers for Unit activities will be from the Governor's Office, the Legislature, partner agencies, and regional education partnerships. The Unit will collaborate with other agency researchers, create capacity with a new program to partner with masters and doctoral students, and contract for specific work from external vendors.

The expanded capacity for research and collaboration will track with the emerging State Longitudinal Data System that will be operational in October of 2017. The Unit will be the prime user and owner of the new data sets, and will be the state leader in "sense making" this vast new resource.

How Achieved: The CEdO Interagency Policy Research Unit meets assigned deliverables in five ways:
1. Unit staff complete the research by using existing data sets and published results
2. Unit staff conducts research
3. Unit staff partners with agency staff from other State agencies to complete the task
4. Unit staff contracts out research with external partners
5. Masters and Doctoral students, working within a collaborative process between agency researchers and university faculty, complete the task

Significant Proposed Program Changes from 2015-17:

Original	Current	Proposed
1 Director	1 Director	1 Director
1 Deputy Director	0	0
2 RA 3 (4)	2 RA 4 perm 1 RA 4 ld	2 RA 4 perm
0 OPA 1	0 OPA 1	1 OPA 1
Executive support	Executive support	Increased hours of executive support

Staffing Impact:

Quantifying Results: Typically, the legislature assigns 3-5 major research tasks of varying degrees of complexity to the CEdO directly each session, with many more requested from partner agencies. This increased capacity will improve the quality of these reports.

Partner agencies receive many more such requests. The expanded capacity will improve the Unit's ability to partner and maximize systemic assets.

Regional education partnerships (Early Learning Hubs, STEM Hubs, and Regional Achievement Collaboratives) make frequent requests that are often beyond the capacity of the CEdO to answer. This proposal will allow for the Unit and its partners to meet those requests.

Revenue Source: $545,467 of General Fund

Policy Package 104 – Network for Quality Teaching and Learning

Package Description

Funding for 2018 TELL Oregon Survey

Purpose: In January, Governor Kate Brown issued an Executive Order establishing a Council on Educator Advancement charged with coordinating a comprehensive system of professional learning and support that empowers, connects and taps into the expertise of educators across the state to drive excellence in teaching through leadership development, mentoring, and best practices.

Governor Brown recognizes the state's need for a consistent source of data reflecting teaching and learning conditions in Oregon schools. The New Teacher Center developed a nationally validated Teaching, Empowering, Leading, and Learning (TELL) Survey of teaching and learning conditions that was administered in Oregon in 2014 and 2016. The results are used to prioritize and leverage resources within the Network for Quality Teaching and Learning and inform policy providing support for educators. During 2016 administration of the TELL, Governor Kate Brown was a key promoter of the Oregon TELL survey, encouraging teachers to let their voices be heard.

How Achieved: When administered every two years, it provides users at the school, district, and state level access to data that can be used both locally and at the state level to prioritize resources and supports for educators and track impact of investments in educators over time.

Staffing Impact: The TELL Survey is a survey product developed and managed by the New Teacher Center (NTC). States contract with NTC to co-develop communication materials, select implementation timelines, refine items, and communicate results. NTC staff are responsible for all aspects of the online administration of the survey and they provide 24/7 help staff during the month the survey is live. Once the survey window has closed, they conduct select analyses and post all results on the TELL Oregon website . When the contract is fully funded, NTC can provide additional customized reports and analyses requested by the state partners.

Currently, the College & Career Readiness and Educator Advancement Director in the CEdO has primary responsibility for working with the New Teacher Center to fulfill their contract to the state, convene partners, monitor and increase response rates, share results and leverage use of the results to inform state policies. The CEdO Public Affairs Director is also key in development of press releases, communications, and summary documents used to inform Oregon stakeholders of the process, progress, and results of the TELL Survey.

Key TELL Partners use the survey results to analyze impact of specific investments (Chalkboard), to inform reviews of School Improvement Plans (ODE), and to engage building leaders and practitioners in productive dialogues to inform continuous improvement of teaching and learning conditions (OEA).

Were additional resources available, the CEdO would be able to provide more nuanced analyses that address specific needs and concerns as they relate to disparities across schools and districts, change variables, improvement processes based on engagement at the school or district level. Currently, any analyses provided are limited to those provided by NTC as part of the existing contract.

Quantifying Results: Biennial analysis of TELL Oregon results are used to help districts improve teaching and working conditions, enhance student learning, and help retain educators. When teacher attrition occurs, it is most often in our impoverished school communities, it creates disruption in students' learning, contributes to low morale in school settings, and creates additional costs to the district when they need to recruit, hire, and support new teachers.

In 2016, the Chief Education Office contracted with New Teacher Center and oversaw the successful implementation of the 2016 TELL Oregon Survey. We convened advisory partners that include leaders from ODE, COSA, OSBA, OSPA, and Chalkboard to insure full support and implementation.

Revenue Source: $260,000 of General Funds. The cost for a two-year contract with the New Teacher Center is approximately $260 K. In 2013, the funding was included in funding designated for the Network for Quality Teaching and Learning. Although it was a high priority in 2015, no funds were allocated although a commitment had already been made to administer the survey. This bill seeks to establish funding in the Chief Education Office to fund the TELL Oregon Survey.

Network Quality Teaching & Learning

Purpose:

- Ensure that state funding for professional development includes time for professional learning, job-embedded professional learning, and effective models of learning with statewide access.
- Ensure that teaching and learning conditions data and teacher voice help set priorities for Network funding.
- Data and Improvement Science principles are used to:
    - Track outcomes that matter,
    - Develop and expand use of tested models and practices,
    - Build capacity in the system and
    - Communicate outcomes and needs back to the legislature

How Achieved: An oversight structure support is needed to oversee Network funding and results that engages teacher voice and involvement via quarterly meetings and an annual convening to share what works.

Quantifying Results: Results will include:

- Enhanced perceptions of teaching and working conditions,
- Improved teacher retention, including at high poverty and rural schools,
- Implementation of educator evaluation systems that show evidence of helping educators improve in responding to students' learning needs, and
- Ultimately, improved student learning and engagement with educators

Revenue Source: $78,668 of General Funds

Oregon Teaching Fellows Program

Purpose: Since 1991 when the Minority Teacher Act, now called the Oregon Educator Equity Act, was passed by the Oregon Legislature, Oregon has made intermittent efforts to address the gap between the demographics of the state's public K-12 educator workforce and that of the K-12 public school students they serve. These efforts have had a limited impact on a gap that continues to widen. In 2016, 36.6% of Oregon's K-12 students served were culturally and linguistically diverse while only 10.2% of classroom teachers were culturally and linguistically diverse.

The Governor's Council for Educator Advancement has reviewed the 2016 Educator Equity report required by law to be submitted to legislators annually and reviewed the recommendations of the Oregon Educator Equity Advisory Group formed by the Chief Education Office. The issues undergirding the lack of culturally and linguistically diverse educators in Oregon's schools are complex and nested with each stage of an educator's career continuum: recruitment, preparation, hiring, mentoring, and career advancement.

Recruitment of diverse educators must be deliberate and will need dedicated resources that support candidates' through the high cost of becoming a teacher. Other states have created Minority Teacher Fellowships and special scholarships but Oregon still lacks a designated scholarship fund for recruiting, preparing, hiring, mentoring, and supporting more culturally and linguistically diverse educators. Such action could create an Oregon Fellows program that supports Oregon students of color pursuing a TSPC teaching or administrative license. The funding should include not only scholarship funds but also the tools, supports, and connections needed to complete an educator prep program, gain employment in a public school, remain in teaching long term and advance in the profession.

The Educator Equity Advisory Group has also identified promising practices resulting from pilot district/postsecondary partnerships (TeachOregon) that can grow supports for local teacher pathways that support entry of more culturally and linguistically diverse teachers into the teaching profession.

How Achieved:

- Create and fund scholarship program and social network infrastructure, including peer-to-peer mentoring, designed to recruit and retain a cadre of students of color in the teaching profession across multiple universities.
- Leveraging Oregon Promise and other financial assistance resources such as PELL grants and Oregon Opportunity Grants, the state would offer each Oregon Fellow a two-year scholarship not to exceed $10,000 to culturally and linguistically diverse students transferring from a community college to a Commission-approved teacher education program at an Oregon four-year institution.
- Scholarship program would be administered by OSAC/HECC. Communication social network would be developed and housed at OSAC (similar to ASPIRE network), but could be managed by CEdO.
- Limited duration software developer at OSAC. Depending on program design, 0.5- 1.0 FTE of a PA1 to manage day to day operation of the social network and to do recruiting.
- Provide seed funding to grow and expand postsecondary/district partnership models like the Portland Teacher Program, TeachOregon, and Chemeketa Community College Bilingual Pathway Program in communities where students of color exceed 40% of the student population. (This could be specified within Network roll up funding.)

Staffing Impact: HECC has already included $119,000 in their 2017-19 POPs list to handle communication, social networking, and data to day manage of grant specifics.

Quantifying Results:

- Scholarships would fund 100 new teacher candidates of color who would then be matched with school districts seeking to diversify their educator workforce. Most of these teacher candidates would be ready for employment by 2020.
- Efforts would be made to also leverage the fiscal savings from PELL, Oregon Opportunity Grants, loan forgiveness, and Oregon Promise funding. (Students of color often start their postsecondary education at the community college level)
- Graduating another 100 teachers of color could almost double the number hired in the current biennium and would generate renewed interest in the career.
- Providing seed funding to develop strong partnerships between more of Oregon's most diverse school districts and educator preparation programs would:
    - Increase enrollment in teacher pathway programs;
    - Improve transfer of course credits from high school-based Teacher Cadet Programs and community college programs into educator preparation programs;
    - Increase access to anti-bias training to help refine educator preparation program application processes and school/district hiring procedures; and
    - Increase focus on culturally responsive teaching for all educators.

Revenue Source: $1,500,000 of General Fund

- Scholarships ($750,000 --$5,000 annually per candidate)
  - 2017-18--$250,000 for 50 candidates
  - 2018-19--$500,000 for 100 candidates
- Navigation/networking support for candidates at six public universities ($250,000—roughly $10 K per institution per year of biennium)
- Scholarship coordination by OSAC--$119,000 already in HECC POP for the following
  - Creation and funding of scholarship program and social network infrastructure, including peer-to-peer mentoring, designed to recruit and retain a cadre of students of color in the teaching profession across multiple universities.
  - Communication social network would be developed and housed at OSAC (similar to ASPIRE network in coordination with CEdO.
  - Limited duration software developer at OSAC. Depending on program design, 0.5- 1.0 FTE of a PA1 to manage day to day operation of the social network and to do recruiting.

- Seed funding ($500,000) to grow and expand postsecondary/district partnership models like the Portland Teacher Program, TeachOregon, and Chemeketa Community College Bilingual Pathway Program in communities where students of color exceed 40% of the student population. (This could be specified within Network roll-up funding.)

Total Request for Policy Package 104: $1,838,668 of General Fund

Policy Package 105 – Chronic Absenteeism – Trauma Informed Pilot Completion of HB 4002

Package Description

Purpose: House Bill 4002 (2016) directed the Chief Education Office to develop a pilot program to support school districts in developing a Trauma Informed approach to education, health services, and intervention strategies. HB 4002 relevant language is in Sections 5, 6, and 7. The appropriated funding only allows for two pilot programs; however, a budget note included during the 2016 session asks the CEdO to submit a plan to fully fund the pilot in the 2017 session.

The Chief Education Office (CEdO) has identified improving student attendance as a key priority and lever to help meet Governor Kate Brown's goal of every student graduating high school with a plan for their future. The Legislature has charged the CEdO to collaborate with the Oregon Department of Education (ODE) and the Oregon Health Authority (OHA) to develop a statewide plan for the K12 system and to pilot a Trauma Informed approach to this issue in Oregon high schools.

How Achieved: This package was requested in a 2016 Budget Note that accompanied HB 4002. The original bill called for a three year pilot with a minimum of five schools; the final bill funded 2 schools for one year. This POP completes the funding for the initial 2 schools and adds 4 additional schools for 2 years.

Staffing Impact: This POP does not require additional staff; however, it does include resources for technical assistance, contracted research, and other ad hoc contracted resources (e.g. transcription).

Quantifying Results:

1. Description and design for Trauma Informed approaches to the delivery of education, health services, and intervention strategies in Oregon High Schools. At least two models will be designed, one that relies on the presence of a School Based Heath Center (SBHC) and another that relies on analogous mental health delivery models.
2. Development of professional development tools for high school staff members that include curriculum and assessment with respect to awareness, attitude towards trauma informed care, and utilization of community partnerships.
3. Refined job description for a school based trauma coordinator.
4. Identification of foundational requirements that must be present for a school to adopt a trauma informed approach and of barriers that must be overcome for success.
5. Qualitative and quantitative data regarding prevalence and impact of trauma on students and the possible effects of a trauma informed approach with respect to student attendance.

6. Description of the systemic changes among and between staff members and community partners with respect to mental health services referrals and delivery.

Revenue Source: $3,060,00 of General fund

Total Pilot Schools	2	6	6	
	2016-17	2017-18	2018-19	Totals for 2017 POP
Pilot schools	$420,000	$1,260,000	$1,260,000	$2,520,000
TA vendor	$50,000	$120,000	$120,000	$240,000
Sub total to pilot sites and vendor	**$470,000**	**$1,380,000**	**$1,380,000**	**$2,760,000**
DAS	$1,950	$4,800	$4,800	$9,600
DOJ	$1,200	$3,000		$3,000
Sub total inter-agency costs	**$3,150**	**$7,800**	**$4,800**	**$12,600**
CEdO costs	**$26,850**	**$53,700**	**$53,700**	**$107,400**
Single case subject design (university partnership)		30,000	30,000	$60,000
Social network analysis		60,000	60,000	$120,000
Sub total research costs	**$0**	**$90,000**	**$90,000**	**$180,000**
Grand total for 2017 POP ONLY		**$1,531,500**	**$1,528,500**	**$3,060,000**

	Year 1	Year 2	Year 3	Total
School 1	$210,000	$210,000	$210,000	$630,000
School 2	$210,000	$210,000	$210,000	$630,000
School 3		$210,000	$210,000	$420,000
School 4		$210,000	$210,000	$420,000
School 5		$210,000	$210,000	$420,000
School 6		$210,000	$210,000	$420,000
Total	$420,000	$1,260,000	$1,260,000	$2,940,000

Policy Package 106 – SLDS Project Conclusion, Operations and Maintenance

Package Description

Purpose: This project received approval from the 2016 Legislature to move forward with the execution of the Oregon Statewide Longitudinal Data System (OR-SLDS P-20W). The approval was received by Senate Bill 5701 with a total Legislative approved amount of $5,505,280 of which $495,000 was unscheduled and held (as contingency funds) by the Department of Administrative Services (DAS). The project funding is to be handled (to completion) by two funding requests, one which occurred during the 2015-2017 biennium and one request for completion of the project and a separate request for continued operations and maintenance of the data system (sustainability).

How Achieved: Senate Bill 909 (2011) established the Oregon Educational Investment Board (OEIB), along with the directive to establish and maintain a statewide longitudinal data system in order to provide policy makers and educators a tool to direct funds and methodologies to support continuous improvement within the Oregon educational system.

This directive was reaffirmed by Senate Bill 215 (2015) when the OEIB was redefined in its focus and mission to become the Chief Education Office (CEdO). The key elements for the Oregon Statewide Longitudinal Data System P-20W (OR-SLDS P 20W) have not changed.

The Chief Education Office in its role as an educational oversight agency provides the right level of leadership and coordination to govern and unify data from partner agency data systems that currently exist independently and do not communicate easily. Until a longitudinal data system exists, policy research regarding the efficacy, the effect of state educational programs, ways to support student growth, and efficient school operations will not be supported by Oregon longitudinal data.

Quantifying Results: The OR-SLDS P-20W is requesting $610,600 to support project completion and $1,778,000 for continuted data system support and maintenance of the data system over the 2017-2019 biennium period.

Revenue Source: $1,778,000 of General Fund

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Chief Education Office
Pkg: 010 - Non-PICS Psnl Svc / Vacancy Factor

Cross Reference Name: Chief Education Office
Cross Reference Number: 52400-001-00-00-00000

Description	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
Revenues							
General Fund Appropriation	132,362	-	-	-	-	-	132,362
Total Revenues	**$132,362**	-	-	-	-	-	**$132,362**
Personal Services							
Temporary Appointments	-	-	-	-	-	-	-
Overtime Payments	-	-	-	-	-	-	-
All Other Differential	2,459	-	-	-	-	-	2,459
Public Employees' Retire Cont	469	-	-	-	-	-	469
Pension Obligation Bond	128,787	-	-	-	-	-	128,787
Social Security Taxes	188	-	-	-	-	-	188
Mass Transit Tax	459	-	-	-	-	-	459
Total Personal Services	**$132,362**	-	-	-	-	-	**$132,362**
Total Expenditures							
Total Expenditures	132,362	-	-	-	-	-	132,362
Total Expenditures	**$132,362**	-	-	-	-	-	**$132,362**
Ending Balance							
Ending Balance	-	-	-	-	-	-	-
Total Ending Balance	-	-	-	-	-	-	-

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Chief Education Office
Pkg: 022 - Phase-out Pgm & One-time Costs

Cross Reference Name: Chief Education Office
Cross Reference Number: 52400-001-00-00-00000

Description	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
Revenues							
General Fund Appropriation	(6,960,200)	-	-	-	-	-	(6,960,200)
Total Revenues	**($6,960,200)**	-	-	-	-	-	**($6,960,200)**
Personal Services							
Class/Unclass Sal. and Per Diem	-	-	-	-	-	-	-
All Other Differential	(149,979)	-	-	-	-	-	(149,979)
Public Employees' Retire Cont	(28,631)	-	-	-	-	-	(28,631)
Social Security Taxes	(11,473)	-	-	-	-	-	(11,473)
Other OPE	(2,648,884)	-	-	-	-	-	(2,648,884)
Total Personal Services	**($2,838,967)**	-	-	-	-	-	**($2,838,967)**
Services & Supplies							
Instate Travel	(280,593)	-	-	-	-	-	(280,593)
Employee Training	(2,389)	-	-	-	-	-	(2,389)
Office Expenses	(1,967)	-	-	-	-	-	(1,967)
Telecommunications	(1,024)	-	-	-	-	-	(1,024)
State Gov. Service Charges	(2,167)	-	-	-	-	-	(2,167)
Data Processing	(444)	-	-	-	-	-	(444)
Publicity and Publications	(341)	-	-	-	-	-	(341)
Professional Services	(214,580)	-	-	-	-	-	(214,580)
IT Professional Services	(2,343,402)	-	-	-	-	-	(2,343,402)
Employee Recruitment and Develop	(273)	-	-	-	-	-	(273)
Dues and Subscriptions	(341)	-	-	-	-	-	(341)
Facilities Rental and Taxes	(4,855)	-	-	-	-	-	(4,855)

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Chief Education Office
Pkg: 022 - Phase-out Pgm & One-time Costs

Cross Reference Name: Chief Education Office
Cross Reference Number: 52400-001-00-00-00000

Description	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
Services & Supplies							
Agency Program Related S and S	(188,300)	-	-	-	-	-	(188,300)
Other Services and Supplies	(341)	-	-	-	-	-	(341)
Expendable Prop 250 - 5000	(2,458)	-	-	-	-	-	(2,458)
Total Services & Supplies	**($3,043,475)**	-	-	-	-	-	**($3,043,475)**
Special Payments							
Dist to Local School Districts	(447,759)	-	-	-	-	-	(447,759)
Other Special Payments	(629,999)	-	-	-	-	-	(629,999)
Total Special Payments	**($1,077,758)**	-	-	-	-	-	**($1,077,758)**
Total Expenditures							
Total Expenditures	(6,960,200)	-	-	-	-	-	(6,960,200)
Total Expenditures	**($6,960,200)**	-	-	-	-	-	**($6,960,200)**
Ending Balance							
Ending Balance	-	-	-	-	-	-	-
Total Ending Balance	-	-	-	-	-	-	-

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ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Chief Education Office
Pkg: 031 - Standard Inflation

Cross Reference Name: Chief Education Office
Cross Reference Number: 52400-001-00-00-00000

Description	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
Revenues							
General Fund Appropriation	220,207	-	-	-	-	-	220,207
Total Revenues	**$220,207**	-	-	-	-	-	**$220,207**
Services & Supplies							
Instate Travel	2,085	-	-	-	-	-	2,085
Out of State Travel	1,284	-	-	-	-	-	1,284
Employee Training	527	-	-	-	-	-	527
Office Expenses	1,569	-	-	-	-	-	1,569
Telecommunications	1,095	-	-	-	-	-	1,095
State Gov. Service Charges	38,488	-	-	-	-	-	38,488
Data Processing	1,875	-	-	-	-	-	1,875
Publicity and Publications	1,180	-	-	-	-	-	1,180
Professional Services	58,041	-	-	-	-	-	58,041
IT Professional Services	95,827	-	-	-	-	-	95,827
Attorney General	2,291	-	-	-	-	-	2,291
Employee Recruitment and Develop	44	-	-	-	-	-	44
Dues and Subscriptions	231	-	-	-	-	-	231
Facilities Rental and Taxes	8,509	-	-	-	-	-	8,509
Facilities Maintenance	28	-	-	-	-	-	28
Agency Program Related S and S	-	-	-	-	-	-	-
Other Services and Supplies	6,057	-	-	-	-	-	6,057
Expendable Prop 250 - 5000	618	-	-	-	-	-	618

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Chief Education Office
Pkg: 031 - Standard Inflation

Cross Reference Name: Chief Education Office
Cross Reference Number: 52400-001-00-00-00000

Description	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
Services & Supplies							
IT Expendable Property	458	-	-	-	-	-	458
Total Services & Supplies	**$220,207**	-	-	-	-	-	**$220,207**
Capital Outlay							
Technical Equipment	-	-	-	-	-	-	-
Data Processing Software	-	-	-	-	-	-	-
Total Capital Outlay	-	-	-	-	-	-	-
Special Payments							
Dist to Local School Districts	-	-	-	-	-	-	-
Other Special Payments	-	-	-	-	-	-	-
Total Special Payments	-	-	-	-	-	-	-
Total Expenditures							
Total Expenditures	220,207	-	-	-	-	-	220,207
Total Expenditures	**$220,207**	-	-	-	-	-	**$220,207**
Ending Balance							
Ending Balance	-	-	-	-	-	-	-
Total Ending Balance	-	-	-	-	-	-	-

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Chief Education Office
Pkg: 032 - Above Standard Inflation

Cross Reference Name: Chief Education Office
Cross Reference Number: 52400-001-00-00-00000

Description	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
Revenues							
General Fund Appropriation	177,956	-	-	-	-	-	177,956
Total Revenues	**$177,956**	-	-	-	-	-	**$177,956**
Services & Supplies							
Professional Services	425	-	-	-	-	-	425
IT Professional Services	701	-	-	-	-	-	701
Facilities Rental and Taxes	151,946	-	-	-	-	-	151,946
Other Services and Supplies	24,884	-	-	-	-	-	24,884
Total Services & Supplies	**$177,956**	-	-	-	-	-	**$177,956**
Total Expenditures							
Total Expenditures	177,956	-	-	-	-	-	177,956
Total Expenditures	**$177,956**	-	-	-	-	-	**$177,956**
Ending Balance							
Ending Balance	-	-	-	-	-	-	-
Total Ending Balance	-	-	-	-	-	-	-

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Chief Education Office
Pkg: 101 - Operational Restructure

Cross Reference Name: Chief Education Office
Cross Reference Number: 52400-001-00-00-00000

Description	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
Revenues							
General Fund Appropriation	1,104,712	-	-	-	-	-	1,104,712
Total Revenues	**$1,104,712**	-	-	-	-	-	**$1,104,712**
Personal Services							
Class/Unclass Sal. and Per Diem	506,280	-	-	-	-	-	506,280
All Other Differential	61,168	-	-	-	-	-	61,168
Empl. Rel. Bd. Assessments	171	-	-	-	-	-	171
Public Employees' Retire Cont	108,325	-	-	-	-	-	108,325
Social Security Taxes	41,243	-	-	-	-	-	41,243
Worker's Comp. Assess. (WCD)	207	-	-	-	-	-	207
Mass Transit Tax	3,405	-	-	-	-	-	3,405
Flexible Benefits	100,008	-	-	-	-	-	100,008
Total Personal Services	**$820,807**	-	-	-	-	-	**$820,807**
Services & Supplies							
Instate Travel	81,280	-	-	-	-	-	81,280
Employee Training	38,528	-	-	-	-	-	38,528
Office Expenses	5,695	-	-	-	-	-	5,695
Telecommunications	4,746	-	-	-	-	-	4,746
Data Processing	1,530	-	-	-	-	-	1,530
Publicity and Publications	949	-	-	-	-	-	949
Employee Recruitment and Develop	844	-	-	-	-	-	844
Dues and Subscriptions	30,949	-	-	-	-	-	30,949
Facilities Rental and Taxes	21,846	-	-	-	-	-	21,846

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Chief Education Office
Pkg: 101 - Operational Restructure

Cross Reference Name: Chief Education Office
Cross Reference Number: 52400-001-00-00-00000

Description	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
Services & Supplies							
Agency Program Related S and S	81,604	-	-	-	-	-	81,604
Other Services and Supplies	10,865	-	-	-	-	-	10,865
Expendable Prop 250 - 5000	5,069	-	-	-	-	-	5,069
Total Services & Supplies	**$283,905**	-	-	-	-	-	**$283,905**
Total Expenditures							
Total Expenditures	1,104,712	-	-	-	-	-	1,104,712
Total Expenditures	**$1,104,712**	-	-	-	-	-	**$1,104,712**
Ending Balance							
Ending Balance	-	-	-	-	-	-	-
Total Ending Balance	-	-	-	-	-	-	-
Total Positions							
Total Positions							3
Total Positions	-	-	-	-	-	-	**3**
Total FTE							
Total FTE							3.00
Total FTE	-	-	-	-	-	-	**3.00**

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Chief Education Office
Pkg: 102 - SLDS Staffing

Cross Reference Name: Chief Education Office
Cross Reference Number: 52400-001-00-00-00000

Description	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
Revenues							
General Fund Appropriation	366,957	-	-	-	-	-	366,957
Total Revenues	**$366,957**	-	-	-	-	-	**$366,957**
Personal Services							
Class/Unclass Sal. and Per Diem	247,584	-	-	-	-	-	247,584
Empl. Rel. Bd. Assessments	57	-	-	-	-	-	57
Public Employees' Retire Cont	47,264	-	-	-	-	-	47,264
Social Security Taxes	18,940	-	-	-	-	-	18,940
Worker's Comp. Assess. (WCD)	69	-	-	-	-	-	69
Mass Transit Tax	1,486	-	-	-	-	-	1,486
Flexible Benefits	33,336	-	-	-	-	-	33,336
Total Personal Services	**$348,736**	-	-	-	-	-	**$348,736**
Services & Supplies							
Instate Travel	284	-	-	-	-	-	284
Employee Training	1,423	-	-	-	-	-	1,423
Office Expenses	1,793	-	-	-	-	-	1,793
Telecommunications	1,582	-	-	-	-	-	1,582
Data Processing	422	-	-	-	-	-	422
Publicity and Publications	211	-	-	-	-	-	211
Employee Recruitment and Develop	211	-	-	-	-	-	211
Dues and Subscriptions	211	-	-	-	-	-	211
Facilities Rental and Taxes	7,282	-	-	-	-	-	7,282
Other Services and Supplies	3,534	-	-	-	-	-	3,534

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Chief Education Office
Pkg: 102 - SLDS Staffing

Cross Reference Name: Chief Education Office
Cross Reference Number: 52400-001-00-00-00000

Description	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
Services & Supplies							
Expendable Prop 250 - 5000	1,268	-	-	-	-	-	1,268
Total Services & Supplies	**$18,221**	-	-	-	-	-	**$18,221**
Total Expenditures							
Total Expenditures	366,957	-	-	-	-	-	366,957
Total Expenditures	**$366,957**	-	-	-	-	-	**$366,957**
Ending Balance							
Ending Balance	-	-	-	-	-	-	-
Total Ending Balance	-	-	-	-	-	-	-
Total Positions							
Total Positions							1
Total Positions	-	-	-	-	-	-	**1**
Total FTE							
Total FTE							1.00
Total FTE	-	-	-	-	-	-	**1.00**

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ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Chief Education Office
Pkg: 103 - Research & Evaluation

Cross Reference Name: Chief Education Office
Cross Reference Number: 52400-001-00-00-00000

Description	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
Revenues							
General Fund Appropriation	545,467	-	-	-	-	-	545,467
Total Revenues	**$545,467**	-	-	-	-	-	**$545,467**
Services & Supplies							
Employee Training	10,800	-	-	-	-	-	10,800
Professional Services	500,000	-	-	-	-	-	500,000
Dues and Subscriptions	5,000	-	-	-	-	-	5,000
IT Expendable Property	29,667	-	-	-	-	-	29,667
Total Services & Supplies	**$545,467**	-	-	-	-	-	**$545,467**
Capital Outlay							
Data Processing Software	-	-	-	-	-	-	-
Total Capital Outlay	-	-	-	-	-	-	-
Total Expenditures							
Total Expenditures	545,467	-	-	-	-	-	545,467
Total Expenditures	**$545,467**	-	-	-	-	-	**$545,467**
Ending Balance							
Ending Balance	-	-	-	-	-	-	-
Total Ending Balance	-	-	-	-	-	-	-

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ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Chief Education Office
Pkg: 104 - Network for Quality Teaching and Learning

Cross Reference Name: Chief Education Office
Cross Reference Number: 52400-001-00-00-00000

Description	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
Revenues							
General Fund Appropriation	1,838,667	-	-	-	-	-	1,838,667
Total Revenues	**$1,838,667**	-	-	-	-	-	**$1,838,667**
Services & Supplies							
Instate Travel	41,734	-	-	-	-	-	41,734
Professional Services	270,000	-	-	-	-	-	270,000
Facilities Rental and Taxes	2,400	-	-	-	-	-	2,400
Agency Program Related S and S	24,533	-	-	-	-	-	24,533
Total Services & Supplies	**$338,667**	-	-	-	-	-	**$338,667**
Special Payments							
Dist to Non-Gov Units	500,000	-	-	-	-	-	500,000
Dist to Individuals	750,000	-	-	-	-	-	750,000
Spc Pmt to Public Universities	250,000	-	-	-	-	-	250,000
Total Special Payments	**$1,500,000**	-	-	-	-	-	**$1,500,000**
Total Expenditures							
Total Expenditures	1,838,667	-	-	-	-	-	1,838,667
Total Expenditures	**$1,838,667**	-	-	-	-	-	**$1,838,667**
Ending Balance							
Ending Balance	-	-	-	-	-	-	-
Total Ending Balance	-	-	-	-	-	-	-

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ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Chief Education Office — **Cross Reference Name: Chief Education Office**

Pkg: 105 - Chronic Absenteeism - Trauma Informed Pilot Completion of HB 4002 — **Cross Reference Number: 52400-001-00-00-00000**

Description	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
Revenues							
General Fund Appropriation	3,060,000	-	-	-	-	-	3,060,000
Total Revenues	**$3,060,000**	-	-	-	-	-	**$3,060,000**
Services & Supplies							
Professional Services	180,000	-	-	-	-	-	180,000
Agency Program Related S and S	107,400	-	-	-	-	-	107,400
Other Services and Supplies	12,600	-	-	-	-	-	12,600
Total Services & Supplies	**$300,000**	-	-	-	-	-	**$300,000**
Special Payments							
Dist to Local School Districts	2,760,000	-	-	-	-	-	2,760,000
Total Special Payments	**$2,760,000**	-	-	-	-	-	**$2,760,000**
Total Expenditures							
Total Expenditures	3,060,000	-	-	-	-	-	3,060,000
Total Expenditures	**$3,060,000**	-	-	-	-	-	**$3,060,000**
Ending Balance							
Ending Balance	-	-	-	-	-	-	-
Total Ending Balance	-	-	-	-	-	-	-

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ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Chief Education Office
Pkg: 106 - Statewide Longitudinal Data System (SLDS)

Cross Reference Name: Chief Education Office
Cross Reference Number: 52400-001-00-00-00000

Description	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
Revenues							
General Fund Appropriation	1,778,000	-	-	-	-	-	1,778,000
Total Revenues	**$1,778,000**	-	-	-	-	-	**$1,778,000**
Services & Supplies							
Employee Training	24,000	-	-	-	-	-	24,000
Data Processing	639,800	-	-	-	-	-	639,800
Professional Services	442,000	-	-	-	-	-	442,000
IT Professional Services	10,000	-	-	-	-	-	10,000
Attorney General	10,000	-	-	-	-	-	10,000
Other Services and Supplies	52,200	-	-	-	-	-	52,200
Total Services & Supplies	**$1,178,000**	-	-	-	-	-	**$1,178,000**
Capital Outlay							
Data Processing Software	600,000	-	-	-	-	-	600,000
Total Capital Outlay	**$600,000**	-	-	-	-	-	**$600,000**
Total Expenditures							
Total Expenditures	1,778,000	-	-	-	-	-	1,778,000
Total Expenditures	**$1,778,000**	-	-	-	-	-	**$1,778,000**
Ending Balance							
Ending Balance	-	-	-	-	-	-	-
Total Ending Balance	-	-	-	-	-	-	-

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POSITION NUMBER	CLASS COMP	CLASS NAME	POS CNT	FTE	MOS	STEP	RATE	GF SAL/OPE	OF SAL/OPE	FF SAL/OPE	LF SAL/OPE	AF SAL/OPE
5240009	MENNZ7010	AA PRINCIPAL EXECUTIVE/MANAGER F	1-	1.00-	24.00-	02	6,673.00	160,152- 76,287-				160,152- 76,287-
5240009	MENNZ7014	AA PRINCIPAL EXECUTIVE/MANAGER H	1	1.00	24.00	09	11,938.00	286,512 107,907				286,512 107,907
5240014	UA C0873	AA OPERATIONS & POLICY ANALYST 4	1	1.00	24.00	06	6,704.00	160,896 76,486				160,896 76,486
5240014	UA C1117	AA RESEARCH ANALYST 3	1-	1.00-	24.00-	09	5,809.00	139,416- 70,742-				139,416- 70,742-
5240015	UA C1117	AA RESEARCH ANALYST 3	1-	1.00-	24.00-	09	5,809.00	139,416- 70,742-				139,416- 70,742-
5240015	UA C1118	AA RESEARCH ANALYST 4	1	1.00	24.00	06	6,096.00	146,304 72,584				146,304 72,584
5240026	UA C0873	AA OPERATIONS & POLICY ANALYST 4	1	1.00	24.00	06	6,704.00	160,896 76,486				160,896 76,486
5240027	UA C0870	AA OPERATIONS & POLICY ANALYST 1	1	1.00	24.00	04	3,972.00	95,328 58,953				95,328 58,953
5240028	UA C0870	AA OPERATIONS & POLICY ANALYST 1	1	1.00	24.00	04	3,972.00	95,328 58,953				95,328 58,953
		TOTAL PICS SALARY						506,280				506,280
		TOTAL PICS OPE						233,598				233,598
		TOTAL PICS PERSONAL SERVICES =	3	3.00	72.00			739,878				739,878

POSITION NUMBER	CLASS COMP	CLASS NAME	POS CNT	FTE	MOS	STEP	RATE	GF SAL/OPE	OF SAL/OPE	FF SAL/OPE	LF SAL/OPE	AF SAL/OPE
5240023 UA	C1488 IA	INFO SYSTEMS SPECIALIST 8	1-	1.00-	24.00-	02	5,970.00	143,280- 71,775-				143,280- 71,775-
5240023 UA	C1488 IA	INFO SYSTEMS SPECIALIST 8	1	1.00	24.00	09	8,253.00	198,072 86,426				198,072 86,426
5240024 UA	C1488 IA	INFO SYSTEMS SPECIALIST 8	1-	1.00-	24.00-	02	5,970.00	143,280- 71,775-				143,280- 71,775-
5240024 UA	C1488 IA	INFO SYSTEMS SPECIALIST 8	1	1.00	24.00	08	7,880.00	189,120 84,033				189,120 84,033
5240025 UA	C1488 IA	INFO SYSTEMS SPECIALIST 8	1-	1.00-	24.00-	02	5,970.00	143,280- 71,775-				143,280- 71,775-
5240025 UA	C1488 IA	INFO SYSTEMS SPECIALIST 8	1	1.00	24.00	04	6,549.00	157,176 75,491				157,176 75,491
5240029 UA	C0854 AA	PROJECT MANAGER 1	1	1.00	24.00	08	5,544.00	133,056 69,041				133,056 69,041
		TOTAL PICS SALARY						247,584				247,584
		TOTAL PICS OPE						99,666				99,666
		TOTAL PICS PERSONAL SERVICES =	1	1.00	24.00			347,250				347,250

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DETAIL OF LOTTERY FUNDS, OTHER FUNDS, AND FEDERAL FUNDS REVENUE

Chief Education Office
2017-19 Biennium

Agency Number: 52400

Source	2013-15 Actuals	2015-17 Leg Adopted Budget	2015-17 Leg Approved Budget	2017-19 Agency Request Budget	2017-19 Governor's Budget	2017-19 Leg Adopted Budget
No Records Available						
	-	-	-	-	-	-

_____ Agency Request
2017-19 Biennium

_____ Governor's Budget
Page _____

_____ Legislatively Adopted
Detail of LF, OF, and FF Revenues - BPR012

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Special Reports

1. **Information Technology-related Projects/Initiatives in 2017-19**

   None.

2. **Annual Performance Progress Report**

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CHIEF EDUCATION OFFICE

Annual Performance Progress Report (APPR) for Fiscal Year (2014-2015)

Original Submission Date: 2015

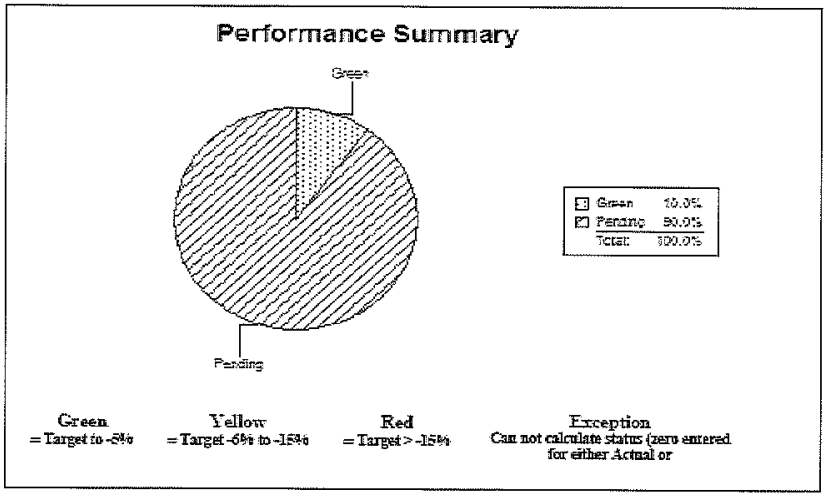
Finalize Date: 9/30/2015

2014-2015 KPM #	2014-2015 Approved Key Performance Measures (KPMs)
1	Increase reading readiness for students entering kindergartan
2	Percentage of students not chronically absent - 6th grade.
3	Percentage of students not chronically absent - 9th grade
4	Increase the number of high schools offering college credit
5	Increase the number of systemic educational barriers identified and addressed
6	Increase the percentage of college and university graduates employed within 1 year
7	Increase the percentage of educators who are culturally and linguistically diverse
8	CUSTOMER SERVICE - Increase the percentage of stakeholders who rate the quality of the research and policy service as "great" or "excellent"
9	BEST PRACTICES -- Total best practices met by the OEIB
10	Customer Service - Increase the percentage of customers who rate agency service as "great" or "excellent"

New Delete	Proposed Key Performance Measures (KPM's) for Biennium 2015-2017
DELETE	Title: BEST PRACTICES -- Total best practices met by the OEIB Rationale: As a result of SB 215 (2015) the CEdO no longer has a governing board therefore requesting this KMP be deleted.

CHIEF EDUCATION OFFICE	I. EXECUTIVE SUMMARY
Agency Mission: CEdO's mission is to build and coordinate a seamless system of education that meets the diverse learning needs of students from cradle to career and ensures each student graduates high school with the support and opportunities to prosper.	

Contact: Lindsey Capps, Chief Education Officer (Acting)	**Contact Phone:** 503-986-6541
Alternate: Sandy Braden, Operations Director	**Alternate Phone:** 503-373-0206



1. SCOPE OF REPORT

During the 2015 legislative session, the Chief Education Office agency was the subject of extensive discussions and eventual comprehensive legislative changes. The name of the agency changed (from Oregon Education Investment Board), the board itself was removed, and the some of the key agency responsibilities (e.g. Achievement Compacts) were discontinued. The KPM's detailed in this report were completed prior to final legislative action and therefore are not entirely aligned with the changed agency responsibility. Generally, the KPM's do give a fair representation of the work of the agency; however, others are either less relevant or not relevant at all. For each KPM, this report addresses this issue. What is well represented in this Annual Performance Progress Report are the key transitions that are an agency focus (between Early Learning and K-12, between K-12 and higher education,

and between higher education and career), some key issues that the agency addresses with local collective impact strategies (student attendance), and systemic areas where the agency gives systemic support (identifying and busting barriers, research, diverse educators). The new role as a coordinator of boards, councils, and commissions (SBE, HECC, ELC, YDC, and TSPC) is not represented in a KPM and the old KPM for board best practices remains despite the fact that the OEIB board is no more. One other limitation of the report is that many of the metrics are measures of student performance across the state. The Chief Education Office does not work directly with students and rarely works with early learning providers, districts, community colleges, or universities. Instead the CEdO works with agencies (ODE, HECC, and TSPC) who then implement changes to those local education providers. While moving these student goals is the ultimate aim of all that the CEdO does, the effect of CEdO actions is dependent on our partner agencies.

2. THE OREGON CONTEXT

The key higher-level outcome measure is ORS 351.009; known colloquially as "40-40-20". The numbers refer to a target, set for 2025: 40% of adult Oregonians with their highest level of academic achievement being a bachelor's degree or higher; 40% with an associates or professional certificate; and 20% with a high school diploma or equivalent. All of the other KPM's that measure student progress (from Kindergarten readiness to high schools offering dual credit) are connected by research to the goals of 40-40-20. These progress indicators are exactly the same measures that constituted the Achievement Compacts (AC), which, until this year, every district, community college, and university submitted to our agency. These progress indicators live on beyond the Achievement Compacts as elements to the accountability frameworks for the ELD, ODE, and HECC. Therefore, these KPM goals related to student progress are tied to high-level outcomes and to existing agency and institutional goals statewide.

3. PERFORMANCE SUMMARY

KPM1: The state continues to make slow progress on the Kindergarten Assessment in general and Letter Recognition in particular. The CEdO has a strategy of supporting the Early Learning Division and regional Early Learning Hubs to develop more and better early learning experiences for pre-school students.
KPM2 and KPM3: Oregon K-12 schools are improving the absence rates in schools, as measured by reducing the number of students who are not chronically absent. The CEdO influences this statewide by supporting 13 Regional Achievement Collaboratives covering almost every Oregon county and school district.
KPM4: The number and percentage of Oregon high schools that offer a dual credit program is increasing. The CEdO supports this work by generally convening K-12 and higher education staff and governance boards to eliminate barriers and align systems. More specifically, the CEdO has supported the replication of a promising practice that started as Eastern Promise and now exists in many locations across the state as Regional Promise sites.
KPM5: The Oregon Education Investment Board no longer exists and our agency has been reset as the Chief Education Office with no governing board. This key metric was designed to measure the work of the board and therefore it will need to be altered substantially or eliminated.
KMP6: The progress on this metric is not measurable at this time; the agency is collaborating with the HECC and the Oregon Employment Department to gather the data necessary to report and track this measure. The agency's key strategy in this area is to work with our STEM investment council and education agencies to increase the number of students attaining STEM degrees or certificates.
KPM7: The state continues to make progress in diversifying its K-12 teaching staff. The CEdO supports this effort by coordinating the work of the ODE, school districts, professional organizations, teacher preparation programs, and the TSPC.
KPM8: In its first full year of operation, the research staff at the CEdO has attained a positive rating from our customers. The agency will work to

continue to improve in this area with greater and more effective collaboration with the research staff of other education agencies, research organizations, and higher education institutional researchers.
KPM9: Because this metric applies to the work of governing boards, this no longer applies to the agency.
KPM10: The agency's customer service measure was lower than the target and needs improvement. The work associated with SB 215 (2015) has given more clarity to the agency and its stakeholders with respect to what work is most valuable to the system. This reset will improve the agency's performance on this metric.

4. CHALLENGES

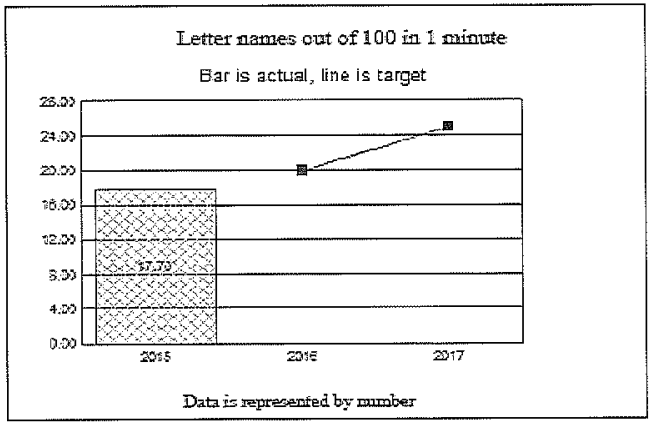
The single greatest challenge for the agency is also the greatest opportunity. In the 2015 Legislative Session, SB 215 was passed into law, significantly changing our role. Our name is changed (from the Oregon Education Investment Board to the Chief Education Office), reflecting the fact that we no longer have a governing board. In addition, the governance function of the CEdO is different, because there is no longer an OEIB that oversees other boards and commissions. The Chief Education Officer and the agency have the authority to direct the planning of programs that are in the scope of more than one agency and to coordinate the work of all educational agencies towards meeting state education goals. This changes some of the agency goals and functions. The Chief Education Officer and the agency are charged to: effectively convene and facilitate policy and budget work groups, research promising practices, evaluate programs, and develop effective policies that are legislatively approved and adopted.

5. RESOURCES AND EFFICIENCY

The legislatively approved budget for the 2013-15 biennium for the OEIB was $6,035,608 General Fund. The legislatively approved budget for the 2015-17 biennium for the CEdO is $6,239,594 General Fund, which included an additional $550,000 for 3 limited duration positions for the Statewide Longitudinal Data System (SLDS). None of the existing key performance measures specifically speak to the efficiency measures, but rather to the Agency's goals.

CHIEF EDUCATION OFFICE	II. KEY MEASURE ANALYSIS

KPM #1	Increase reading readiness for students entering kindergarten	2015
Goal	Targets for 2016: 20 Targets for 2017: 25 Aligns with CEdO Outcome Measure 2.A	
Oregon Context	CEdO Fundamentals Map Outcome Measure 2.A	
Data Source	Statewide Kindergarten Assessment: Letter names out of 100 in 1 minute.	
Owner	Chief Education Officer 503.986.6541	



1. OUR STRATEGY

Kindergarten assessments are administered to all students in the first month of their school year. Scores on these assessments are the result of preparation activities conducted before kindergarten. The agency strategy to affect change in this area is to support and help shape the work of the Early Learning Division (ELD). In particular, the CEdO participates on the Kindergarten Assessment core team and technical team and helps coordinate the activities of Early Learning to focus on efforts to improve the preparation of students. This includes investments in Early Learning Hubs, improving the quality of preschools, and aligning standards in preschools to match that of the K-12 system and the readiness assessment. The CEdO also delivers professional development to ELD staff and Early Learning Hub staff on how to develop more equitable programs.

2. ABOUT THE TARGETS

The chosen target, letter recognition, is a research based critical measure of Kindergarten readiness and it correlates to downstream measures like 3rd grade reading proficiency. It is also sensitive to preschool interventions.

3. HOW WE ARE DOING

A standardized kindergarten measure is new for Oregon. As of now, we have only two years' experience administering, collecting, and analyzing this data. The key finding at this point is that particular groups of students (students of color and students in poverty) both are performing below average.

4. HOW WE COMPARE

There is no state-to-state measure of Kindergarten readiness with which to compare.

5. FACTORS AFFECTING RESULTS

Schooling for pre-school students is not compulsory; students are not required to be in school until they are 6 years old. In addition, the state's scope of control over early learning programs is limited: Oregon Pre-Kindergarten/Head Start is a state controlled program; the Quality Rating System (that scores individual private programs) is optional; and interventions like mixed-delivery preschool and kindergarten innovation sites are not universal throughout the state. Furthermore, Early Learning Hubs do not yet exist in a mature state in every community. All of these factors limit the ability of the Chief Education Office to affect practice and influence results.

6. WHAT NEEDS TO BE DONE

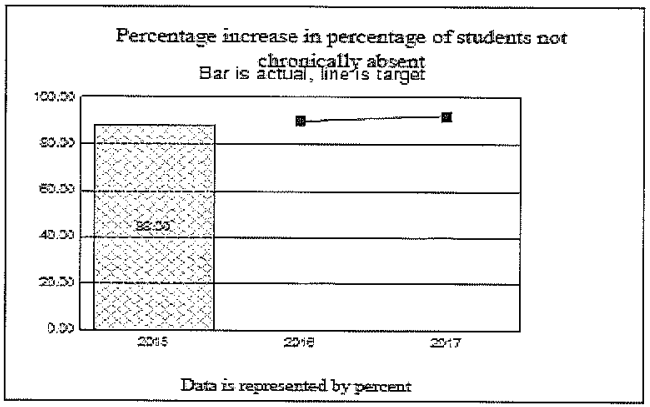
Increasing the access to and effectiveness of early learning for the groups of students who are underperforming.

7. ABOUT THE DATA

There are a number of data quality questions that the Kindergarten Assessment Core and Technical teams are currently processing. One recent addition has been a Spanish language version to better capture and quantify readiness for students whose first language is Spanish. Other questions include the administration window (tightening it) and the method (currently paper and pencil).

CHIEF EDUCATION OFFICE	II. KEY MEASURE ANALYSIS

KPM #2	Percentage of students not chronically absent - 6th grade.	2015
Goal	Target for 2016: 90% Target for 2017: 92% Aligns with CEdO Outcome Measure 2.B	
Oregon Context	CEdO Fundamentals Map Outcome Measure 2.B	
Data Source	ODE State Report Card	
Owner	Chief Education Officer 503.986.6541	



1. OUR STRATEGY

The CEdO directly supports 13 Regional Achievement Collaboratives (RAC) across the state. These RAC's are multi-sector collaborative impact projects that

involve early learning hubs, K-12, social service, business, and community participants. Most of these organizations explicitly have attendance as a goal to impact and research shows that the best attendance improvement efforts are designed in such a cross-sector manner. In addition, the CEdO has supported the development of an ODE accountability framework that contains the chronic non-attendance metric.

2. ABOUT THE TARGETS

This target was developed by the Oregon Education Investment Board as one of the Achievement Compact metrics that was determined as a result of a multi-year process. Attendance, especially in critical transition years (K, 6, and 9) is highly correlated to downstream outcomes. In particular, attendance is correlated to high school completion, which is a critical component to the state's 40-40-20 goal.

3. HOW WE ARE DOING

Currently 12% of students in 6th grade miss greater than 10% of their school days, which is the definition of "chronically absent"; stated in a positive fashion, 88% are not chronically absent. Students generally are not successful and do not complete high school if they are chronically absent. Therefore, the state has significant work to do in this area.

4. HOW WE COMPARE

Oregon is the only state to have a chronic non-attendance measure as a major school accountability measure.

5. FACTORS AFFECTING RESULTS

Individual schools and their students and families ultimately have the greatest influence on student attendance. The CEdO office seeks to establish the right policy environment and frameworks to create the best possible conditions on the ground, but it cannot directly influence any individual school or district. The key strategy, the Regional Achievement Collaboratives, has now been established in all but 4 counties in the state. However, a third of these RACs are brand new or only one year old and will need more time to build programs that will affect student attendance. Finally, the nature of the RACs is that their goals are a combination of state and local priorities, meaning that student attendance will be embraced as a goal at differing levels of commitment.

6. WHAT NEEDS TO BE DONE

Although the Achievement Compacts are no longer in force, the 6th grade attendance metric is part of the ODE accountability framework for schools. This

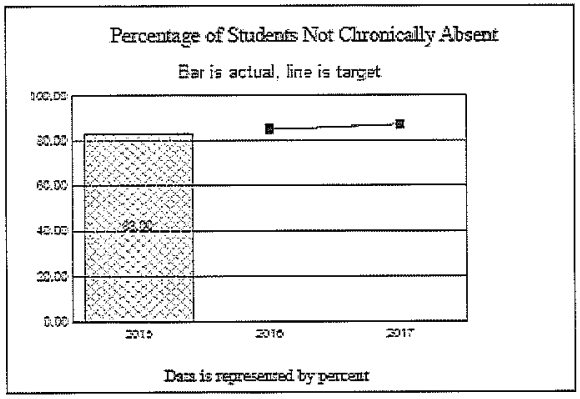
has resulted in schools and districts focusing more on attendance efforts. In addition, the Chief Education Office has developed an extensive research study of this problem and solutions that districts across the state are using to improve attendance. The CEdO will communicate with the field, directly and through partnerships with other agencies and educational stakeholder groups, to deliver this best practice information. Finally, the CEdO, in collaboration with the ODE, is implementing a strategic initiative developed especially for Oregon Tribal students, who show particularly low rates of attendance.

7. ABOUT THE DATA

This data collection has been vetted through the ODE collection and reporting process. It has built in data validity checks that help ensure the highest data quality from each district. However, this collection will be more valuable when districts directly report daily attendance information to the state.

CHIEF EDUCATION OFFICE	II. KEY MEASURE ANALYSIS

KPM #3	Percentage of students not chronically absent - 9th grade	2015
Goal	Target for 2016:85% Target for 2017:87% Aligns with CEdO Outcome Measure 2.C	
Oregon Context	CEdO Fundamentals Map Outcome Measure 2.C	
Data Source	ODE State Report Card	
Owner	Chief Education Officer 503.986.6541	



1. OUR STRATEGY

The CEdO directly supports 13 Regional Achievement Collaboratives (RAC) across the state. These RAC's are multi-sector collaborative impact projects that involve early learning hubs, K-12, social service, business, and community participants. Most of these organizations explicitly have attendance as a goal to

impact and research shows that the best attendance improvement efforts are designed in such a cross-sector manner. In addition, the CEdO has supported the development of an ODE accountability framework that contains the chronic non-attendance metric.

2. ABOUT THE TARGETS

This target was developed by the Oregon Education Investment Board as one of the Achievement Compact metrics that were determined as a result of a multi-year process. Attendance, especially in critical transition years (K, 6, and 9) is highly correlated to downstream outcomes. In particular, attendance is correlated to high school completion, which is a critical component to the state's 40-40-20 goal.

3. HOW WE ARE DOING

Currently 17% of students in 9th grade miss greater than 10% of their school days, which is the definition of "chronically absent"; stated in a positive fashion, 83% are not chronically absent. Students generally are not successful and do not complete high school if they are chronically absent. Therefore, the state has significant work to do in this area.

4. HOW WE COMPARE

Oregon is the only state to have a chronic non-attendance measure as a major school accountability measure.

5. FACTORS AFFECTING RESULTS

Individual schools and their students and families ultimately have the greatest influence on student attendance. The CEdO office seeks to establish the right policy environment and frameworks to create the best possible conditions on the ground, but it cannot directly influence any individual school or district. The key strategy, the Regional Achievement Collaboratives, has now been established in all but 4 counties in the state. However, a third of these RACs are brand new or only one year old and will need more time to build programs that will affect student attendance. Finally, the nature of the RACs is that their goals are a combination of state and local priorities, meaning that student attendance will be embraced as a goal at differing levels of commitment.

6. WHAT NEEDS TO BE DONE

Although the Achievement Compacts are no longer in force, the 9th grade attendance metric is part of the ODE accountability framework for schools. This has resulted in schools and districts focusing more on attendance efforts. In addition, the Chief Education Office has developed an extensive research study of

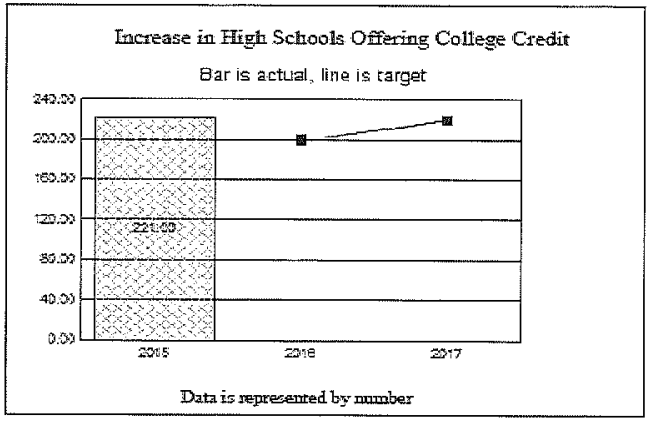
this problem and solutions that districts across the state are using to improve attendance. The CEdO will communicate with the field, directly and through partnerships with other agencies and educational stakeholder groups, to deliver this best practice information. Finally, the CEdO, in collaboration with the ODE, is implementing a strategic investment developed especially for Oregon Tribal students, who show particularly low rates of attendance.

7. ABOUT THE DATA

This data collection has been vetted through the ODE collection and reporting process. It has built in data validity checks that help ensure the highest data quality from each district. However, this collection will be more valuable when districts directly report daily attendance information to the state.

CHIEF EDUCATION OFFICE	II. KEY MEASURE ANALYSIS

KPM #4	Increase the number of high schools offering college credit	2015
Goal	Targets for 2016: 200 Targets for 2017: 220 Aligns with CEdO Outcome Measure 2.D	
Oregon Context	CEdO Fundamentals Map Outcome Measure 2.D	
Data Source	Survey	
Owner	Chief Education Officer 503.986.6541	



1. OUR STRATEGY

The CEdO is a key partner (along with the ODE, the HECC, Regional Promise sites, and Regional Achievement Collaboratives) in strategies across the state to increase the number of high schools offering college credit. This includes initiatives to increase AP and IB participation, conventional dual credit programs, early college, and 5th year programs. The chief functions of the CEdO are to convene cross-sector groups, to provide program evaluation and research from state and national data, and to direct the cross agency planning and budget development and recommendations.

2. ABOUT THE TARGETS

This target is different than the Achievement Compact measures that existed for K-12. Because of limitations in the scope of the data collected by the ODE, the original measure (the % of students taking 3+ college level courses) is not measureable at this time. Because high schools offering programs is a necessary precondition to students attending, this measure and target has been selected. In the future, when individual student data becomes available to the CEdO, this metric should change to match the original research-based metric contained in the Achievement Compacts.

3. HOW WE ARE DOING

The set of Oregon high schools contains a spectrum that ranges from comprehensive high schools to very specialized programs. Therefore, it is expected that not every school in the data set will have a college credit program that meets the standards in this metric. However, the current number (221) schools offering such programs is only 70%. Research shows that college level course and college credit attainment in high school correlates with both high school graduation and college completion. The lack of this key driver in most or all high schools is a missed opportunity to reach state goals.

4. HOW WE COMPARE

Eight states require all high schools and eligible public postsecondary institutions to provide dual enrollment opportunities. In 28 states and the District of Columbia, dual enrollment programs are based on voluntary partnerships between K-12 and postsecondary partners, or schools/districts/institutions may limit eligible students from participating. In seven states, multiple programs with varying requirements exist. In four states, policy does not specify whether the offering of dual enrollment is mandatory or voluntary. Three states do not have statewide dual enrollment policies.

5. FACTORS AFFECTING RESULTS

This is an area of very high interest among policy makers and agencies. A legislatively appointed committee, Accelerated Learning, was convened by the OEIB, met for 18 months before the 2015 legislative session, and authored comprehensive recommendations. None of these recommendations were approved in legislation. Also, the 2015 session featured significant discussions about the related topics of the Oregon Promise, Regional Promise, and 5th year programs in high schools. As a result of the 2015 session, new workgroups have been empaneled and are being led by different agencies and/or legislators. No policy area better exemplifies the need for coordination. The lack of results to this date and the prospects for future results depend greatly on the ability of the CEdO to conform all of these disparate efforts.

6. WHAT NEEDS TO BE DONE

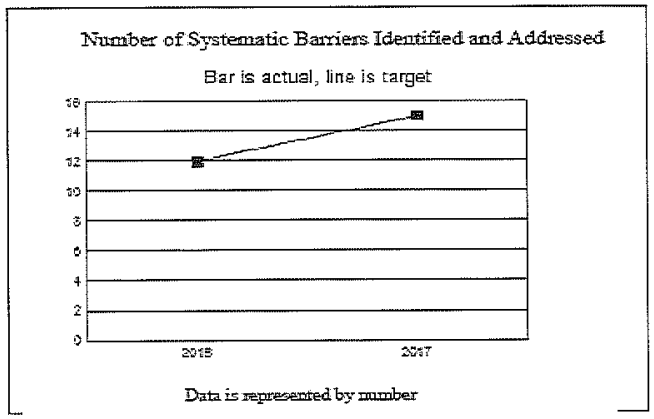
The state must develop a coordinated and articulated program to ensure college level course attendance and credit attainment for every student. In coordination with a generalized set of alignment activities between K-12 and higher education, this goal can be realized in a cost-neutral way over time. The current waste of resources and debt accumulation that results from too many high school students starting their higher education career in developmental education is one source that can be tapped. In addition, the lack of a coordinated approach has led to an array of state models. The diversity of approaches is not necessarily a problem, but the fact that they are not equitably distributed or resourced is.

7. ABOUT THE DATA

The current collection of this data is done in a partnership with Education Northwest. In the future, the ODE will collect this data directly from districts and supply that to the CEdO office.

CHIEF EDUCATION OFFICE	II. KEY MEASURE ANALYSIS

KPM #5	Increase the number of systemic educational barriers identified and addressed	2015
Goal	Target for 2016: 12 Target for 2017: 15 Aligns with CEdO Outcome Measure 2.E	
Oregon Context	Aligns with CEdO Outcome Measure 2.E	
Data Source	CEdO 's log of barriers identified and addressed.	
Owner	Chief Education Officer 503.986.6541	



1. OUR STRATEGY

This Key Performance Measure was identified before the end of the 2015 Legislative session. At that time, the Oregon Education Investment Board was the governing board of the agency. The strategy to identify and address barriers and propose policy or investment solutions to address key systemic educational barriers was to use three subcommittees, Outcomes and Investments, Best Practices and Student Transitions, and Equity and Partnerships. The OEIB would in turn approve policies that would direct its agency or other educational agencies to change their policies and practices. With the passage of Senate Bill 215 (2015), the name, role, and governance functions of the agency have substantially changed. The agency is still charged with coordinating the pre-school to post-secondary system; however the process definition inherent in a standing board meeting and subcommittee system no longer exists.

2. ABOUT THE TARGETS

The targets were based on the monthly OEIB board meetings and subcommittee meetings. Addressing an average of one per month would have been a reasonable stretch for the agency given past performance. With the removal of the OEIB, the targets are not meaningful.

3. HOW WE ARE DOING

This is a new metric and there is no historical data.

4. HOW WE COMPARE

No comparison data is available.

5. FACTORS AFFECTING RESULTS

The Chief Education Office is charged with continued implementation of the Equity Lens ensuring aligned assessments to support college enrollment, a focus on the age 3 to grade 3 and grade 11 to 14 transitions, implementing a comprehensive High School Equivalency program, a Statewide Longitudinal Data System, and the creation of a statewide assessment literacy professional development program which address key barriers.

6. WHAT NEEDS TO BE DONE

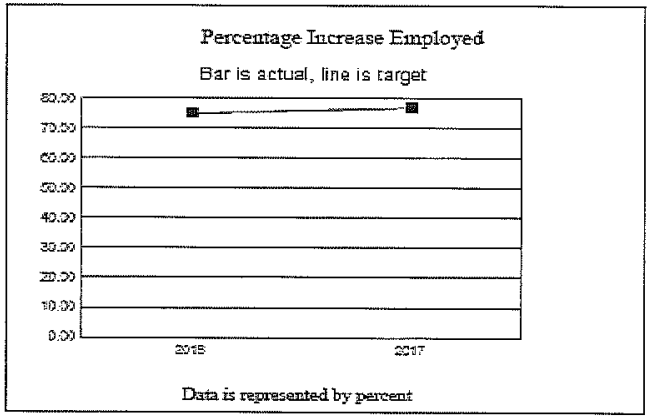
This KPM is not aligned to the work of the agency as charged under SB 215.

7. ABOUT THE DATA

No data is available.

CHIEF EDUCATION OFFICE	II. KEY MEASURE ANALYSIS

KPM #6	Increase the percentage of college and university graduates employed within 1 year	2015
Goal	Targets for 2016: 75% Targets for 2017: 77% Aligns with CEdO Outcome Measure 4.A	
Oregon Context	Aligns with CEdO Outcome Measure 4.A	
Data Source	Oregon Employment Department PRISM Report	
Owner	Chief Education Officer 503.986.6541	



1. OUR STRATEGY

Based on statute, the CEdO has appointed a STEM Investment Council that is responsible for developing statewide investments and strategies in the areas of Science, Technology, Engineering, and Math (STEM). The statutory goals in this area include increasing the number of degrees and certificates in STEM. Current statewide strategies advanced and/or endorsed by the STEM Council include increasing the number of STEM Hubs in the state, facilitating a grant process to fund STEM activities, aligning STEM with Career and Technical Program expansion, and aligning the categorization of STEM degrees and certificates and STEM occupations to national standards.

2. ABOUT THE TARGETS

The Oregon Employment Department (OED) currently does not have access to the type of job an individual holds; instead what is collected is the type of employer. Therefore, an administrative assistant at a medical supply company is in a STEM field, while a computer engineer at an advertising agency is not. Until this gap is bridged, this less specific target is best as a proxy for advances in degrees and certificates earned in high demand fields. The metric and current target are forecast based on national data. At this time, the CEdO, the HECC, and the OED are identifying all of the required data elements for this calculation. This metric has been calculated for individual post-secondary institutions, but not for the state as a whole.

3. HOW WE ARE DOING

At this time, the data required to calculate the measure is not available to the CEdO.

4. HOW WE COMPARE

At this time, the data required to calculate the measure is not available to the CEdO.

5. FACTORS AFFECTING RESULTS

The establishment of data collection and sharing processes prevents the agency and the state from gauging results. Key factors affecting results are relative lack of control the institutions and agencies have on the individual choices made by students. Academic advising is a resource that is spread thinly in high schools, community colleges, and universities. The key facts that students need to make the best course-taking decisions are not understood universally, especially impacting students of color and those navigating poverty.

6. WHAT NEEDS TO BE DONE

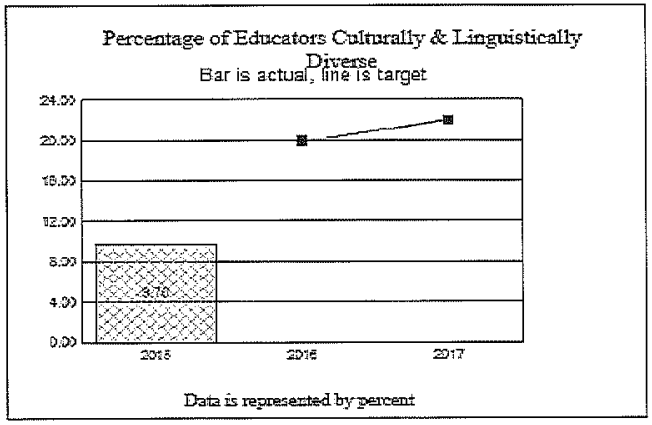
The current significant investments in STEM and CTE must be implemented and evaluated to determine the returns. In addition, the data sharing agreement and definition must be completed in order to establish a baseline of post-secondary performance.

7. ABOUT THE DATA

The necessary data is collected by post-secondary institutions and the OED. Post-secondary graduates and completers will be matched to employment records using Social Security numbers. This is a process that the state already does with respect to individual institutions.

CHIEF EDUCATION OFFICE	II. KEY MEASURE ANALYSIS

KPM #7	Increase the percentage of educators who are culturally and linguistically diverse	2015
Goal	Targets for 2016: 20% Targets for 2017: 22% Aligns with CEdO Outcome Measure 5.A	
Oregon Context	Aligns with CEdO Outcome Measure 5.A	
Data Source	Diverse Education Report	
Owner	Chief Education Officer 503.986.6541	



1. OUR STRATEGY

The CEdO reports yearly to the legislature on the state's progress in this area and our strategies moving forward. This year's report can be found at http://education.oregon.gov. The CEdO coordinates with the ODE and TSPC to produce this report and provide program evaluation for initiatives targeted at improving this metric. The CEdO also convenes the statewide Oregon Educator Equity Advisory group.

2. ABOUT THE TARGETS

The targets of the agency's KPM's are significantly higher than the current baseline data. However, the agency believes that coordinated effort in this area, led by the CEdO, and continued legislative attention to the topic will allow more rapid progress to occur. In addition, the CEdO now has coordinating authority with the TSPC.

3. HOW WE ARE DOING

Over 33% of Oregon students qualify as being linguistically and/or culturally diverse. Currently, only 9.7% of teachers and 11.6% of administrators are in this category.

4. HOW WE COMPARE

CEdO does not have comparative data from national studies.

5. FACTORS AFFECTING RESULTS

Individual decisions made by school districts and pre-service and practicing teachers ultimately are beyond the control of the CEdO. Survey data from teachers of color suggest strongly that the climate and culture of the district makes much more of a difference with respect to retention than do any state policies that lower barriers. A critical additional factor is that because of many state sponsored programs, new hires are much more likely to be people of color; however, these new hires have the least tenure and are therefore the first to get laid off or switched from school to school. The aggregate of these circumstances is that teachers of color not only are a minority in terms of the faculties, they are over-represented among teachers who leave the profession.

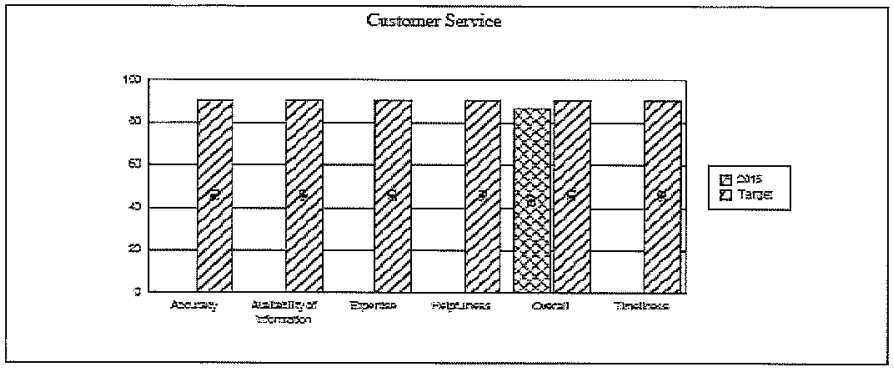
6. WHAT NEEDS TO BE DONE

The Oregon Educator Equity Advisory group has identified 10 key issues/barriers along with recommended actions.

7. ABOUT THE DATA

The data is collected for both licensed and employed educators in all public K-12 schools.

KPM #8	CUSTOMER SERVICE - Increase the percentage of stakeholders who rate the quality of the research and policy service as "great" or "excellent"	2015
Goal	Targets for 2016: 85% Targets for 2017: 90% Aligns with CEdO Process Measure OP3.A	
Oregon Context	Required Measure / CEdO Fundamentals Map Process Measure OP3.A	
Data Source	Customer Service Survey TBD	
Owner	Chief Education Officer 503.986.6541	



1. OUR STRATEGY

Almost all of the research and policy service of the agency is generated based on requests that come from the Governor's office, the Legislature, other education agencies, and regional initiative participants (RACs, STEM Hubs, and Early Learning HUBS). For each of these requests, the agency has a quality

control process to ensure that anything that is shared or published meets agency standards. In addition, the agency seeks formative feedback with the originating party of the request. The results of these requests are generally shared in public meetings and feedback is gathered from these forums as well.

2. ABOUT THE TARGETS

The targets are identical to our customer service targets and represent a reasonable goal.

3. HOW WE ARE DOING

In this area, the agency has already exceeded the 2016 target. 86% of those surveyed rated these services as "excellent" or "good".

4. HOW WE COMPARE

The agency's overall customer service score was 72% "excellent" or "good". Therefore, this area of the agency's function is rated relatively higher. Beyond that, the agency has not identified a direct comparator for this metric.

5. FACTORS AFFECTING RESULTS

The CEdO has four research staff and a research agenda that spans all age groups P-20 and includes topics outside of traditional educational research (Return on Investment, collective impact cross-sector organizations, comprehensive anti-poverty programs). The amount of work and expertise required versus the staff resource means that the research deliverables are not as timely as possible.

6. WHAT NEEDS TO BE DONE

The agency needs to continue to provide prompt and complete service and use feedback to ensure continued improvement. In particular, the new CEdO website contains a much more streamlined mechanism with which to share agency research and policy analysis.

7. ABOUT THE DATA

This metric was determined using a Survey Monkey survey of key external stakeholders identified above. The survey had a 16% response rate.

CHIEF EDUCATION OFFICE	II. KEY MEASURE ANALYSIS

KPM #9	BEST PRACTICES – Total best practices met by the OEIB	2015
Goal	Target for 2016: 90%Target for 2017: 95%Aligns with Required Measure / Chief Education Officer Scorecard and OEIB Measure. Legislation is currently pending which may remove the existing Board. The OEIB Board has not met since January 2015 due to the change of Governor and pending legislation. Therefore, OEIB may not have any data to report. Should the Board no longer exist, OEIB will ask that this required KPM be removed.	
Oregon Context	Required Measure / Chief Education Officer Scorecard and OEIB Fundamentals Map	
Data Source	OEIB Self-evaluation; policies, procedures & Board agendas	
Owner	Chief Education Officer 503.986.6541	

Data Display

1. OUR STRATEGY

As a result of SB 215 (2015), the CEdO no longer has a Governing Board. Therefore this KPM no longer applies to the agency and we will be requesting it to be removed.

2. ABOUT THE TARGETS

Not applicable.

3. HOW WE ARE DOING

Not applicable.

4. HOW WE COMPARE

Not applicable.

5. FACTORS AFFECTING RESULTS

Not applicable.

6. WHAT NEEDS TO BE DONE

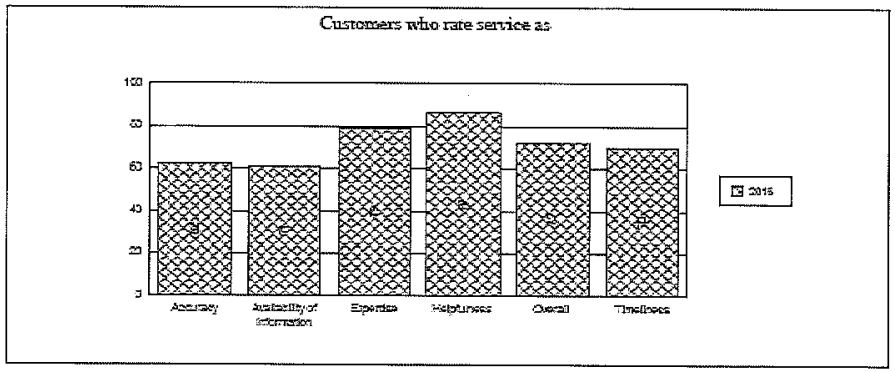
Not applicable.

7. ABOUT THE DATA

Not applicable.

CHIEF EDUCATION OFFICE	II. KEY MEASURE ANALYSIS

KPM #10	Customer Service - Increase the percentage of customers who rate agency service as "great" or "excellent"	2015
Goal	Targets for 2016: 85% Targets for 2017: 90% Aligns with Required Measure and CEdO Outcome Measure 3.D	
Oregon Context	Required Measure and CEdO Fundamentals Map Outcome Measure 3.D	
Data Source	Website Survey	
Owner	Chief Education Officer 503.986.6541	



1. OUR STRATEGY

Moving forward, the CEdO has a new governance structure and a changed relationship with respect to other education agencies. In particular, the agency will be a convener of key groups that include external and internal members and the Chief Education Officer will have the role of directing cross-agency planning. The removal of the OEIB Board will significantly change the focus of the agency from serving that group to other agencies and their governing boards and

commissions. The Board was our key customer and that is no longer true.

2. ABOUT THE TARGETS

These targets are similar to those of other agencies and represent where the agency needs to be over the next two years.

3. HOW WE ARE DOING

The relatively low rate (72%) is not unexpected. As noted above, for most of the biennium, the Board was the agency's key customer. However, by the end of this year when the surveys were sent out, they were not sent to the Board. Based on formative feedback over the last two years, including evaluations of the Chief Education Officer, the Board's evaluation of the agency's performance was substantially higher.

4. HOW WE COMPARE

It is difficult to compare customer service survey data to other agencies in the state of Oregon due to the wide variety of missions Oregon agencies have, and the methods for which they survey customer satisfaction. The OEIB was created as a stand-alone agency in the 2013-15 biennium with the KPM's adopted during the 2015 Legislative Session. As a result, this was the first customer service survey sent out therefore we do not have any earlier data to compare.

5. FACTORS AFFECTING RESULTS

The Oregon Education Investment Board was dissolved and the agency renamed and reconstituted by act of the Legislature in 2015.

6. WHAT NEEDS TO BE DONE

The agency has a new name, a new Acting Chief Education Officer, and new statutory relationships to other agencies. CEdO is changed from an agency that directs to an agency that coordinates whenever possible. This will increase our service focus toward external partners and improve our performance. In addition, the lowest rate subcategory of customer service (availability of information) is being addressed to some degree with the new agency website and new public engagement strategies.

7. ABOUT THE DATA

This metric was determined using a Survey Monkey survey of key external stakeholders identified above. The customer service score was the average score from 5 questions: timeliness of the services; ability of CEdO to provide services correctly the first time; helpfulness of CEdO employees; knowledge and expertise of CEdO employees; and availability of information at CEdO. The survey had a 16% response rate.

CHIEF EDUCATION OFFICE	III. USING PERFORMANCE DATA
Agency Mission: CEdO's mission is to build and coordinate a seamless system of education that meets the diverse learning needs of students from cradle to career and ensures each student graduates high school with the support and opportunities to prosper.	
Contact: Lindsey Capps, Chief Education Officer (Acting)	**Contact Phone:** 503-986-6541
Alternate: Sandy Braden, Operations Director	**Alternate Phone:** 503-373-0206

The following questions indicate how performance measures and data are used for management and accountability purposes.	
1. INCLUSIVITY	* **Staff :** The Key Performance Measures are a subset of measures that the CEdO has developed to measure our progress towards particular outcome and process goals. * **Elected Officials:** Elected officials are consulted as CEdO develops new performance measures and reports. They also have had input through the Senate Bill 215 (2015) process with respect to the Fundamentals Map. * **Stakeholders:** Most of the CEdO KPM's are Achievement Compact (AC) metrics for Early Learning, K-12, or Higher Education. All of the AC metrics were developed in public processes that involved multiple stakeholder groups. Final adoptions of these metrics were done by in public meetings of the Oregon Education Investment Board. * **Citizens:** Oregonians inform performance measures through participation in educational programs. Their participation guides the CEdO and its partners in designing services to meet state and local community needs.
2 MANAGING FOR RESULTS	The key P-20 Oregon educational goal is 40-40-20 and all of the benchmark goals adopted as Achievement Compact metrics are correlated to that overall goal. These Oregon benchmarks, Key Performance Measures, and other outcome and process measures from the CEdO Fundamentals map all guide the agency in creating an equitable and seamless system of education. The agency uses these measures in quarterly target reviews of agency progress.
3 STAFF TRAINING	Staff members are solicited during the Fall planning session to indicate their individual professional development interests with respect to meeting agency goals. These professional development activities are also tied to their individual professional goals. In addition, the staff as a whole engages in periodic professional development tied to key agency goals, especially educational equity.
4 COMMUNICATING RESULTS	* **Staff :** The entire staff has met together multiple times to examine agency performance which includes all of the KPM's.

	* **Elected Officials:** The CEdO reports progress on a large set of metrics, which include the agency KPM?s. These reports to elected officials happen within the course of interim legislative meetings of education related committees and during the legislative session. * **Stakeholders:** Historically, the CEdO has presented its scorecard to its governing board. In the future, the agency will report progress to the Governor. * **Citizens:** Oregonians has access to online versions of Key Performance Measures, Kindergarten Assessment, and the K-12 State Report Card. The HECC is currently in the process of developing a unified higher education web site with institution and state performance data.

3. Audit Response Report

None

Affirmative Action Report

Introduction:

The Chief Education Office developed and submitted their first Affirmative Action Plan on August 29, 2014 to act upon its value for workplace diversity, respect, and equal employment opportunities to include women, people of color, and persons with disabilities.

2015-2017 Analysis and Goals

Summary:

CEdO was well-represented in all job categories during the 2015-2017 period. Overall, the organization achieved and maintained a diverse workforce. CEdO has some under representation of unprotected classes and certain job titles. Overall CEdO is maintaining parity with State Diversity percentages.

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2015-2017 AFFIRMATIVE ACTION DIVERSITY AND INCLUSION PLAN

Dr. Nancy L. Golden
775 Court Street NE, Salem, OR 97301
503-378-0206

Oregon Education Investment Board

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OREGON EDUCATION INVESTMENT BOARD

November 24, 2014

Frank Garcia
Director, Diversity, Inclusion & Affirmative Action
Office of the Governor
Diversity & Inclusion/Affirmative Action
255 Capitol Street NE, Suite 126
Salem, OR 97301

Dear Mr. Garcia,

It is the policy of the Oregon Education Investment Board (OEIB) to provide a workplace for its employees that is free from discrimination on the basis of race, color, sex, marital status, age, religion, ancestry, national origin, sexual orientation, or mental or physical disability.

The OEIB Affirmative Action Plan is a key component of the agency's ongoing diversity development efforts. We continue to engage in numerous and varied activities in support of our affirmative action goals as we strive to become a leader in the area of affirmative action.

Our affirmative action efforts include reaching across traditional boundaries to ensure the entry and growth of people of color, women, and people with disabilities into our workforce. Each and every employee of OEIB is expected to promote a positive, respectful work place and to appreciate and encourage diversity of backgrounds, situations, and perspectives.

We are pleased to present the OEIB Affirmative Action Plan for the 2015-17 biennium.

If you have any questions about the plan, please contact Candice Obryant at (503) 378-2900.

Sincerely,

Nancy L Golden

Dr. Nancy L. Golden
Chief Education Officer

775 Court Street NE, Salem, Oregon, 97301 · 503-373-0206 · education.oregon.gov · @ORLearns

I. Description of the Agency

Senate Bill 909 (2011) created the Oregon Education Investment Board (OEIB), a 13-member board chaired by the Governor, to ensure that all students in the state reach the education outcomes established for the state. Senate Bill 253 (2011) defined those outcomes to include the "40/40/20" goals for high school and college completion by 2025. Passage of this bill signaled the state's intention to develop one of the best-educated citizenries in the world with the goal that by 2025, 100 percent of Oregon students will have earned an education degree that represents attainment of a quality education. Specifically, the state will achieve the following for Oregonians in 2025: 40 percent of adult Oregonians will have earned a bachelor's degree or higher; 40 percent of adult Oregonians will have earned an associate's degree or postsecondary credential as their highest level of education attainment; and 20 percent of all adult Oregonians will 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 education attainment. These goals must be achieved equitably, with Oregon's diversity equally well-represented in each stage.

A. OEIB Mission Statement

OEIB's vision is to advise and support the building, implementation and investment in a unified public education system in Oregon that meets the diverse learning needs of every pre-K through post-secondary student and provides boundless opportunities that support success. By doing so, we ensure 100% high school graduation by 2025 and ensure that Oregon students are college and career ready. 40-40-20 Goal: 40% completing 2-year degree, 40% completing 4-year degree and 20% career ready.

1. Agency Goals

SB 909 charges the OEIB with (1) creating a seamless system of education, including early learning programs, K-12 and post-secondary; (2) developing a statewide longitudinal database in order to measure progress toward outcomes; and (3) recommending strategic investments "targeted to achieve the education outcomes established for the state." Based on these statutory charges, the OEIB adopted a strategic plan in 2013, 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.

2. Intent of the Goals

The OEIB's overarching outcome is to ensure all Oregonians are prepared for lifelong learning, rewarding work, and engaged citizenship. Never before has this goal been more important to the lives and well-being of Oregonians and its communities. Education cements shared values, enriches culture and expands the personal horizons of individuals. Education advances family life, civic stability and democratic ideals. It provides opportunity for all, no matter their race, home language, disability or family income.

3. Our Primary Focus

The OEIB is focused on building a path to achieve the following:

- More kids ready for school
- More 3rd graders read at or above grade level
- More 9th graders finish strong
- High school and college graduations increase
- More Oregonians ready for rewarding jobs

4. Key Partnerships

- Confederation of School Administrators (COSA)
- Oregon School Boards Association (OSBA)
- Oregon Education Association (OEA)
- Office of the State Superintendent of Education (OSSE)
- Coalition of Communities of Color
- Latino Network
- Stand for Children
- The Chalkboard Project
- Oregon Business Council
- Oregon Business Association
- Oregon Parent Teacher Association
- Governor's Office

5. Agency Alignment and Responsibility

Alignment with the Early Learning Division, Oregon Department of Education, and the Higher Education Coordinating Commission

6. Governance

OEIB is governed by and/or provides staff resources to the Boards that oversee Oregon's education policy work. The Oregon Education Investment Board, members appointed by the Governor, works to ensure that the 40-40-20 Goal will be met by 2025.

7. What We Do

Create a seamless system, work on key transitions, and recommend investments.

8. Agency Values

- Every student has the ability to learn
- Speaking a language other than English is an asset
- Special Education Services are an educational responsibility
- Students previously described as "at risk" are the best opportunity to improve outcomes
- Intentional, proven practices must be implemented to return out of school youth to an educational setting
- Supporting great teachers is important
- Ending disparities and gaps in achievement begin in quality delivery
- Resource allocation demonstrates priorities and values
- Shared decision making with communities will improve outcomes
- All students should have access to information about future opportunities
- Community colleges and universities play a critical role in serving diverse, rural and ELL communities
- Rich history and culture is an asset to celebrate

B. Name of Agency Head

Dr. Nancy L. Golden
Chief Education Officer
775 Court Street NE
Salem, OR 97301
503-378-0206

C. Name of Governor's Policy Advisor for OEIB

Daniel Ledezma, Education Policy Advisor
5503-378-3072, daniel.ledezma@oregon.gov

D. Name of Affirmative Action Representative

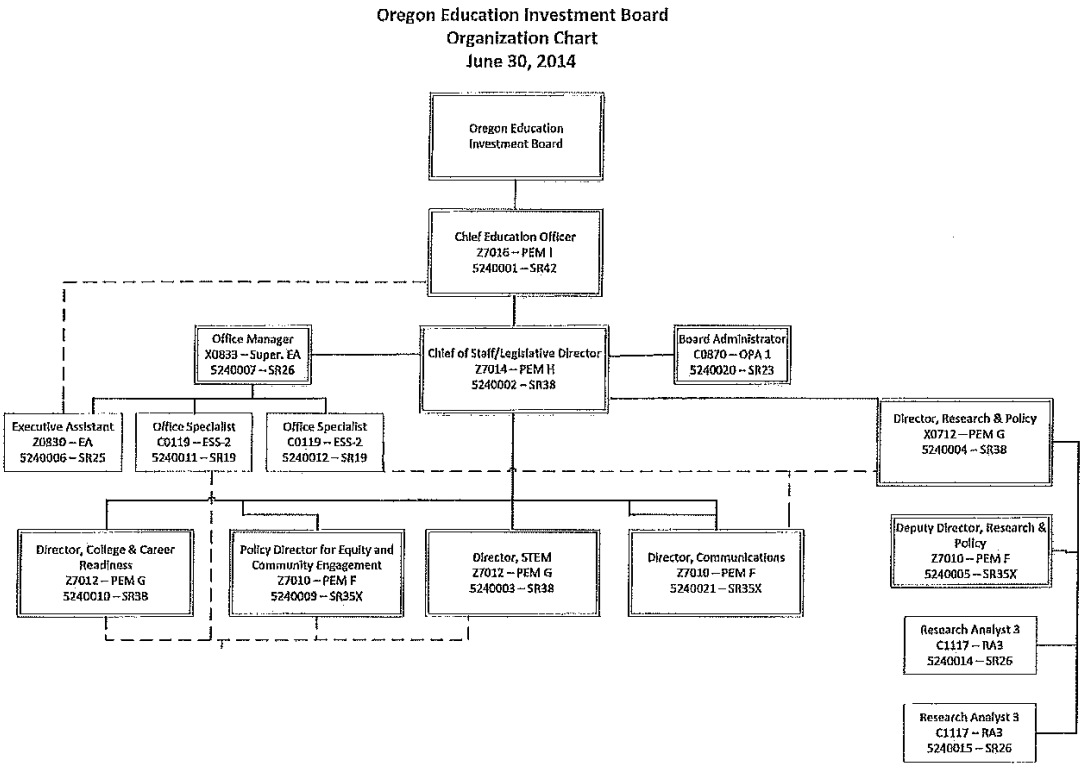
Candice O'Bryant, Human Resource Analyst
Enterprise Human Resource Services
503.378.2900, **Candice.c.obryant@oregon.gov**

E. Identify you Agencies Diversity and Inclusion Officer

Candice O'Bryant, Human Resource Analyst
Enterprise Human Resource Services
503.378.2900, **Candice.c.obryant@oregon.gov**

Please Note: We do not have dedicated FTE that have "diversity", "inclusion", "access", or "equity" in their working title.

F. Organizational Chart



II. Affirmative Action Plan

II. Affirmative Action Plan

A. Agency Affirmative Action Policy Statement

OEIB is committed to establishing and maintaining a diverse workforce, reflective of the diverse population within the State of Oregon. OEIB is committed to an affirmative action program that provides equal opportunities for all persons regardless of race, color, religion, sex, sexual orientation, national origin, marital status, age, or disability.

It is also the policy of OEIB to provide an environment for each applicant and employees that is free from sexual harassment, as well as harassment and intimidation on account of an individual's race, color, religion, gender, sexual orientation, national origin, age, or disability.

OEIB is an equal-opportunity employer that is committed to a pro-active role in the recruitment and selection process. OEIB will use diverse recruitment strategies to identify and attract candidates, and establish interview panels that represent protected-class groups.

OEIB will not discriminate, nor tolerate discrimination, against any applicant employee because of physical or mental disability in regard to any position for which the known applicant for employment is qualified.

OEIB agrees to take affirmative action to employ, advance in employment, and otherwise treat known qualified individuals with disabilities without regard to their physical or mental disabilities in all human resources selection and decision practices, such as: advertising, benefits, compensation, discipline (including probation, suspension, and /or termination for cause or layoff) recreational programs, and training. OEIB will also continue to administer these practices without regard to race, color, religion, gender, sexual orientation, national origin, age, or disability.

Additionally, all applicants and employees are protected from coercion, intimidation, interference, or discrimination for filing a complaint or assisting in an investigation under this policy.

OEIB will not discriminate or tolerate discrimination, against any employee because they are a member of, apply to be a member of, perform, has performed, applied to perform or have an obligation to perform service in a uniformed service.

Dr. Nancy L. Golden, Chief Education Officer

Aug. 28, 2014
Date

G. Affirmative Action Policy Statement for Individuals with Disabilities

OEIB will not discriminate, nor tolerate discrimination, against any applicant or employee because of physical or mental disability in regard to any position for which the known applicant for employment is qualified.

OEIB agrees to use affirmative action to employ, advance in employment, and otherwise treat known qualified individuals with disabilities without regard to their physical or mental disabilities in all human resources selection and decision practices, such as: advertising, benefits, compensation, discipline (including probation, suspension, and/or termination for cause or layoff), employee facilities, performance evaluation, recruitment, social/recreational programs, and training. OEIB will also continue to administer these practices without regard to race, color, religion, gender, sexual orientation, national origin, age or disability.

Additionally, all applicants and employees of OEIB are protected from coercion, intimidation, interference, or discrimination for filing a complaint or assisting in an investigation under this policy.

Affirmative Action Policy for Members Uniform Services (ORS 659A.082)

OEIB will not discriminate or tolerate discrimination, against any employee because they are a member of, apply to be a member of, performs, has performed, applies to perform or has an obligation to perform service in a uniformed service.

Harassment Policy and Complaint Procedure

State policy 50.010.01, *Discrimination and Harassment Free Workplace*, states that OEIB will provide a work environment free from unlawful discrimination on the basis of race, color, religion, sex, marital status, national origin, disability, age, or any other factor employers are prohibited by law from considering when making employment decisions. This policy applies to all matters relating to hiring, firing, transfer, promotion, benefits, compensation, and other terms and conditions of employment.

It is also the policy of OEIB that all employees, customers, clients, contractors and visitors to the work site enjoy a positive, respectful and productive work environment, free from behavior, actions or language that constitute workplace harassment. Harassment is prohibited, whether between managers and subordinates; or between employees and clients, contractors, the public, or co-workers.

Grievance/Complaint Procedure

For workplace harassment: Any employee who is subject to or is aware of workplace harassment should report that information immediately to agency management. The report may be made orally or in writing to the employee's immediate supervisor or to a higher management staff member if the employee prefers. (Note: Incidents involving violence, threats of violence or other matters deemed substantial by a supervisor shall be reported immediately to Chief of Staff.) Employees may report to any of the persons listed above and need not observe any particular chain of command. If the complainant desires, an investigation shall be conducted according to the investigation portion of this policy. If an investigation is not requested, the supervisor and employee shall document the incident.

Discrimination Complaints Procedure

Any employee who believes that employment-related discrimination was directed toward him/her by a member or representative of agency management may file a complaint with the Chief of Staff. Please submit complaints in writing except for reasons of disability. The complaint should be filed with the agency within 30 calendar days of the alleged act.

Complaints shall include the name of the complainant, the name of the person(s) alleged to have engaged in the prohibited conduct, a specific and detailed description of the conduct that the employee believes is discriminatory, and a description of the relief requested. An investigation shall be conducted according to the investigation section of this policy.

ADA and Reasonable Accommodation in Employment and Workplace

State policy 50.020.10 *ADA and Reasonable Accommodation in Employment*, states that OEIB will reasonably accommodate qualified individuals with disabilities. In accordance with the Americans with Disabilities Act, accommodations will be provided to qualified individuals with disabilities when such accommodations are directly related to performing the essential functions of a job, competing for a job, or to enjoy equal benefits and privileges of employment. This policy applies to all applicants, employees, and employees seeking promotional opportunities.

Reasonable Accommodation

A reasonable accommodation is a modification or adjustment to a job, an employment practice, or the work environment that makes it possible for a qualified individual with a disability to enjoy an equal employment opportunity.

Examples of accommodations may include acquiring or modifying equipment or devices; modifying training materials; making facilities readily accessible; modifying work schedules; and reassignment to a vacant position.

Reasonable accommodation applies to three aspects of employment

1. To assure equal opportunity in the employment process;
2. To enable a qualified individual with a disability to perform the essential functions of a job; and
3. To enable an employee with a disability to enjoy equal benefits and privileges of employment.

A. Agency Diversity and Inclusion Statement

OEIB is committed to establishing, monitoring, and maintaining a work environment where all employees are valued, treated fairly, and given opportunities to develop and grow to their full potential. Every employee plays a part in our diverse workforce and inclusive work environment by being respectful and supportive, and by acting with integrity to one another. Each person's skills, talents, knowledge, experiences, and personalities broaden the range of perspectives in and approaches to conducting the work we do at OEIB.

OEIB can best promote excellence by recruiting, retaining, and accommodating a diverse group of staff in an environment of respect that is supportive of their workplace success. This climate of diversity, inclusion and excellence is critical to successfully attaining our mission of contributing leadership and resources to increase the skills, knowledge and career opportunities of Oregonians.

B. Training, Education and Developmental Plan (TEDP)

At OEIB, State Policy 50.045.01, *Employee Development and Implementation of Oregon Benchmarks for Workforce Development* is used to promote employee career growth.

OEIB became a stand-alone agency July 1, 2013 with a sunset of March, 2016 and at this time OEIB has not developed promotional opportunities for its employees. OEIB is in the process of developing formal employee performance evaluations which will be done on a yearly basis.

1. Employees

- Upon the approval and adoption of OEIB's Affirmative Action Plan including the agency's AA Statement it will be posted on the agency website's home page.
- All staff have access to training opportunities per the Statewide Employee Development and Implementation of Oregon Benchmarks for Workforce Development Policy (50.045.01).
- OEIB New Employee Orientation is provided within the first two weeks of employment to new employees as well as assignment of staff to guide them through their first days of employment at the agency and to answer any questions.

2. Volunteers

There are no current volunteers.

3. Contractors/Vendors

OEIB does not provide diversity training to vendors currently. OEIB vendors are notified of EEO policy via our federally mandated electronic EEO clause included in our RFP's and contracts which states:

To the best of the undersigned's knowledge, Contractor has not discriminated against and will not discriminate against minority, women or emerging small business enterprises certified under ORS 200.055 in obtaining any required subcontracts.

C. Programs

1. Internships

The OEIB believes internships help develop future leaders, and provide an opportunity to translate theory into practice. The agency provides unpaid internships when opportunities and physical space become available. Internships are organized around work on specialized projects. The agency intends to implement a more formal internship program through Oregon's colleges and universities.

2. Mentorship Program(s)

The OEIB will develop a mentorship program by the end of the current biennium.

3. Community Outreach Program

By the end of the current biennium, the agency will complete the review of practices and programs consistent with the 10-Point Community Outreach/Engagement Strategies developed by the Governor's Office of Diversity & Inclusion/Affirmative Action.

The OEIB adopted an equity lens to evaluate and assess education policy, program and investments across the P-20 education system. The agency has staff dedicated to coordinating and implementing initiatives aimed at improving outcomes for students and families of color in which community engagement, diversity and inclusion are integrated strategies.

The OEIB participates in the regularly scheduled Government to Government education cluster meetings and activities. This includes quarterly meetings for the cluster, as well as special informational and educational activities related to education and workforce development.

4. Diversity Awareness Program

By the end of the current biennium, the agency will develop a formal diversity awareness program and adopt policies and practices to accommodate diverse needs of agency staff. OEIB job announcements are sent to the Governor's Affirmative Action Office for additional posting and dissemination.

5. Leadership Development/Training Program(s)

By the end of the current biennium, the agency will complete a plan for leadership development and training.

D. Update: Executive Order 08-18

1. Cultural Competency Assessment and Implementation Services

OEIB is committed to the goals of enriching the diversity of the agency and increasing the level of cultural competency, both internally and throughout our customer and partner base. As a new agency, the Cultural Competency Assessment will be in process of being completed by the end of the current biennium.

2. Statewide Exit Interview Survey

OEIB encourages all employees to complete this DAS web-based, exit-interview tool prior to their transfer or departure:

http://www.surveymonkey.com/s.asp?u=206582533018

Participation is optional and all responses are anonymous and cannot be traced back to an individual.

3. Performance Evaluation of all Management Personnel

OEIB is in the process of establishing a Performance Management Plan, in accordance with the statewide Performance Management Process Policy (50.035.01)

E. Status of Contracts to Minority Businesses (ORS 659A.015)

OEIB provides notice to certified firms for all competitive solicitations through Oregon Procurement Information Network (ORPIN). During the 2013-2015 biennium, OEIB contracted with Beverly Stein & Associates an emerging small business and women owned business.

III. Roles for Implementation of Affirmative Action Plan

A. Responsibilities and Accountabilities

1. Chief Education Officer and Chief of Staff

- Direct and supervise all activities of the Office of the Chief Education Officer of the Oregon Education Investment Board.
- The Chief Education Officer reports to the Oregon Education Investment Board annually and biennially to the Legislative Ways and Means Committee, on the progress and outcomes of the Board's Affirmative Action Plan.
- The Chief of Staff directs agency affirmative action functions, ensuring that the agency plan, targets and goals are followed, implemented, and achieved.
- The Chief of Staff conducts all final interviews to ensure there is no intended or unintended bias.

2. Managers/Supervisors

- Foster and promote the importance of a diverse workforce free of discrimination and harassment to staff.
- Ensure subordinates receive an orientation on the agency's affirmative action goals and responsibilities and understand their own responsibilities for helping promote diversity and a harassment free work environment.

- Work with OEIB Chief of Staff, following agency and State of Oregon procedures and rules in filling of employment vacancies.

3. Affirmative Action Representative

- OEIB contracts HR services with the Department of Administrative Services, Enterprise HR Services Division (EHRS). The HR Affirmative Action Representative reports to the EHRS Administrator and works directly with the HR Manager assigned to support OEIB:
    - Ensure employees receive and engage in a thorough orientation to the OEIB and to state government; this includes review of AA and EEO policy with employees during the New Employee Orientation;
    - Promote and oversees effective retention practices using the Affirmative Action Plan.
    - Assist with and/or investigate and address EEO/AA complaints;
    - Report EEO complaints or areas needing improvement to management team members; and
    - Provide EEO/AA and ADA training options to the agency.

IV. July 1, 2013-June 30, 2015

A. Accomplishments

OEIB is a new agency; therefore, there is no data at this time.

B. Progress Made or Lost Since Previous Biennium

No results available at this time.

V. July 1, 2015-June 30, 2017

A. Goals for Our Affirmative Action Plan/Programs

Key Goals: To increase the knowledge of our agency employees regarding affirmative action, and to increase the diversity of our staff.

B. Strategies for Achieving Those Goals

OEIB is applying active strategies in alignment with ORS 243.305 policy of affirmative action and fair and equal employment opportunities and advancement, and DAS recruitment policies and guidelines. Increasing workplace diversity and awareness efforts will include:

1. Upon the removal of OEIB's sunset, OEIB will develop volunteer membership for an OEIB Affirmative Action Workgroup, dedicated to the advancement of diversity; recommending affirmative action goals and better diversity within the agency.

2. OEIB will ensure that affirmative action and diversity responsibilities are included in the hiring manager's job descriptions.

    - So that they apply such philosophies in their day-to-day work; and that management effectiveness in taking affirmative action is included in annual performance appraisals, in compliance with ORS 659.025 (1) *"To achieve the public policy of the State of Oregon for persons in the state to attain employment and advancement without discrimination because of race, religion, color, sex, marital status, national origin, disability or age, every state agency shall be required to include in the evaluation of all management personnel the manager's or supervisor's effectiveness in achieving affirmative action."*

3. To educate and encourage diversity among those who are hired or appointed so they may assist in identifying and removing barriers that hinder or prevent a diverse work environment.

4. To ensure employees receive and engage in a thorough orientation to OEIB's affirmative action policy, goals and an employee's role in contributing to a diverse workforce free of harassment;

5. To coordinate annual presentation and review of the plan at:

    - An All-Staff meeting; additionally, OEIB will place a diversity related agenda item at All Staff meetings twice a year.

    - A Oregon Education Investment Board meeting.

6. To encourage all employees to complete the DAS web-based exit interview survey tool prior to their transfer or departure.

7. By posting the Affirmative Action Plan on the OEIB website upon approval and adoption.

8. By public announcement of the Plan and its availability on the web, to partners and state agency personnel.

9. To ensure that the OEIB will include the biennial affirmative action information as part of the regular Ways and Means presentation to the legislature.

10. Succession Plan

Currently there is no formal succession plan.

11. Timelines

The plan will be posted on the OEIB website upon approval of the plan from the Governor's Diversity, Inclusion & Affirmative Action Office.

B. Appendix A

A. Agency's Policy Documentation

1. ADA and Reasonable Accommodation Policy (No.50.020.10)

DAS DEPARTMENT OF ADMINISTRATIVE SERVICES

Statewide Policy

SUBJECT:	ADA and Reasonable Accommodation in Employment	NUMBER:	50.020.10
DIVISION:	Human Resource Services Division	EFFECTIVE DATE:	6/7/10
APPROVED:	Signature on file with Human Resource Services Division		

POLICY STATEMENT:

Oregon state government follows the clear mandate in state law and the Americans with Disabilities Act (ADA) of 1990, as amended by the ADA Amendments Act of 2008, to remove barriers that prevent qualified people with disabilities from enjoying the same employment opportunities that are available to people without disabilities.

Oregon state government provides equal access and equal opportunity in employment. Its agencies do not discriminate based on disability. Oregon state government uses only job-related standards, criteria, and methods of administration that are consistent with business necessity. These standards, criteria and methods do not discriminate or perpetuate discrimination based on disability.

According to OAR 105-040-0001 Equal Employment Opportunity and Affirmative Action, Oregon state government takes positive steps to recruit, hire, train, and provide reasonable accommodation to applicants and employees with disabilities.

AUTHORITY:

ORS 240.145; 240.240; 240.250; ORS 659A.103 -145; 243.305; 243.315; The Americans with Disabilities Act (ADA) of 1990 as amended by the Americans with Disabilities Act Amendments Act (ADAAA) of 2008; Civil Rights Act of 1991; and 42 U.S.C. §12101 *et seq.*

APPLICABILITY:

This policy applies to all state employees, including state temporary employees, according to provisions of federal and state law.

ATTACHMENTS:

ADA Accommodation Tool Kit

DEFINITIONS:

See State HR Policy 10.000.01 Definitions and OAR 105-010-0000

The following definitions apply to terms referenced in this policy and its attachments:

Americans with Disabilities Act (ADA) – The ADA is a federal civil rights statute that removes barriers that prevent qualified people with disabilities from enjoying the same employment opportunities available to people without disabilities. References to ADA also refer to amendments to that Act.

Essential Functions – These include, but are not limited to, duties that are necessary because:

- The primary reason the position exists is to perform these duties.
- A limited number of employees are available who can perform these duties.
- The incumbent is hired or retained to perform highly specialized duties.

Individual with a Disability – This term means a person to whom one or more of the following apply:

- A person with a physical or mental impairment that substantially limits one or more of the major life activities of such a person without regard to medications or other assistive measures a person might use to eliminate or reduce the effect of impairment.
- A person with a record of such an impairment
- A person regarded as having such impairment.

Major Life Activities – This term means the basic activities the average person in the general population can perform with little or no difficulty. These including breathing; walking;
hearing; thinking; concentrating; seeing; communicating; speaking; reading; learning; eating; self-care; performing manual tasks such as reaching, bending, standing and lifting; sleeping; or working (working in general, not the ability to perform a specific job). The term also includes but not limited to "major bodily functions," such as functions of the
immune system, normal cell growth, digestive, bowel, bladder, neurological, brain, respiratory, circulatory, endocrine, and reproductive functions.

Physical or Mental Impairment – This term refers to any of the following:

- Physiological disorder, condition, cosmetic disfigurement, or anatomical loss that affects one or more bodily systems, including neurological, musculoskeletal, special sense organs, respiratory, cardiovascular or reproductive
- Mental or psychological disorder including but not limited to mental retardation, organic brain syndrome, emotional or mental illness or specific learning disability
- Disease or condition including orthopedic, visual, speech and hearing impairment, cerebral palsy, epilepsy, muscular dystrophy, multiple sclerosis, cancer, heart disease, diabetes, HIV disease or alcoholism
- Any other physical or mental impairment listed under the ADA.

Qualified Person – This term means a person who has the personal and professional attributes, including skill, experience, education, physical and mental ability, medical, safety and
other requirements to hold the position.

"Qualified person" does not include people who currently engage in illegal use of drugs. A person may qualify, however, if he or she is currently enrolled in or has completed a rehabilitation program, and continues to abstain from illegal use of drugs.

Reasonable Accommodation – This term means change or adjustment to a job or work environment that enables a qualified employee with a disability to perform the essential functions of a job, or enjoy the benefits and privileges of employment equal to those enjoyed by
employees who have no disabilities. "Reasonable accommodation" does not include modifications or adjustments that cause an undue hardship to the agency.

"Reasonable accommodation" does not mean providing personal auxiliary aids or services, such as service dogs or hearing aids that person uses both on and off the job.

A reasonable accommodation does not include lowering production standards, promoting or assigning an employee to a higher-paying job, creating a position or reassigning essential functions to another worker.

Undue Hardship – This term means significant difficulty or expense. Whether a particular accommodation imposes undue hardship is determined on a case-by-case basis, with consideration of such factors as the following:

- The nature and cost of the accommodation needed
- The agency's size, employee's official worksite, and financial resources
- The agency's operation, structure, functions, and geographic separateness
- The agency's administrative or fiscal relationship to its facility responding to the accommodation request and to the other state agencies
- The impact of the accommodation on the operation of the agency or its facility.

POLICY

(1) Each state agency director or authorized designee (agency) administers State HR Policy 50.020.10 as the agency's policy. Compliance with the ADA is mandatory.

(a) Each agency identifies an ADA Coordinator for the agency to coordinate ADA accommodation requests and function as an agency resource on ADA matters.

(b) Each agency develops and follows its own procedures for receiving, processing and documenting accommodation requests under this policy. The attached tool kit will assist in this process.

(2) An employee may request an accommodation under this policy by following agency procedures.

(3) The agency must review and respond in a timely manner to each request for accommodation. The agency must engage in an interactive dialogue with the employee to determine whether the accommodation is necessary and will be effective.

(4) Each accommodation is unique to the person, the disability and the nature of the job. No specific form of accommodation can guarantee success for all people in any particular job. The agency must give primary consideration to the specific accommodation requested by the employee. Through the interactive process the agency may identify and provide an alternative accommodation.

(5) The duty to provide reasonable accommodation is ongoing. The agency and the employee must engage in the interactive process again if an accommodation proves ineffective.

(6) The agency may deny an accommodation if it is not effective, if it will cause undue hardship to the agency, or if the agency identifies imminent physical harm or risk. The undue hardship exception is available only after careful consideration. The agency must consider alternative accommodations, should a requested accommodation pose undue hardship.

(7) Federal and state law prohibit retaliation against an employee with respect to hiring or any other term or condition of employment because the employee asked about, requested, or was previously accommodated under the ADA.

2. Discrimination and Harassment Free Workplace (No.50.010.01)

DAS DEPARTMENT OF ADMINISTRATIVE SERVICES
Statewide Policy

SUBJECT:	Discrimination and Harassment Free Workplace	NUMBER:	50.010.01
DIVISION:	Human Resource Services Division	EFFECTIVE DATE:	01/25/08
APPROVED: Signature on file with Human Resource Services Division			

POLICY STATEMENT: **The State of Oregon is committed to a discrimination and harassment free work environment. This policy outlines types of prohibited conduct and procedures for reporting and investigating prohibited conduct.**

AUTHORITY: ORS 174.100, 240.086(1); 240.145(3); 240.250; 240.316(4); 240.321; 240.555; 240.560; 659A.029; 659A.030; Title VII; Civil Rights Act of 1964; Executive Order EO-93-05; Rehabilitation Act of 1973; Employment Act of 1967; Americans with Disabilities Act of 1990; and 29 CFR §37.

APPLICABILITY: All employees, state temporary employees and volunteers.

ATTACHMENTS: None

DEFINITIONS: See also HRSD State Policy 10.000.01, Definitions; and OAR 105-010-0000

Collective Bargaining Agreement (CBA): A written agreement between the State of Oregon, (Department of Administrative Services) and a labor union. References to CBAs contained in this policy are applicable only to employees covered by a CBA.

Complainant: A person or persons allegedly subjected to discrimination, workplace harassment or sexual harassment.

Contractor: For the purpose of this policy, a contractor is an individual or business with whom the State of Oregon has entered into an agreement or contract to provide goods or services. Qualified rehabilitation facilities who by contract provide temporary workers to state agencies are considered contractors. Contractors are not subject to ORS 240 but must comply with all federal and state laws.

Discrimination: Making employment decisions related to hiring, firing, transferring, promoting, demoting, benefits, compensation, and other terms and conditions of employment, based on or because of an employee's protected class status.

Employee: Any person employed by the state in one of the following capacities: management service, unclassified executive service, unclassified or classified unrepresented service, unclassified or classified represented service, or represented or unrepresented temporary service. For the purpose of this policy, this definition includes board and commission members, and individuals who volunteer their services on behalf of state government.

Higher Standard: Applies to managers and supervisors. Proactively taking an affirmative

posture to create and maintain a discrimination and harassment free workplace.

Manager/Supervisor: Those who supervise or have authority or influence to effect employment decisions.

Protected Class Under Federal Law: Race; color; national origin; sex (includes pregnancy-related conditions); religion; age (40 and older); disability; a person who uses leave covered by the Federal Family and Medical Leave Act; a person who uses Military Leave; a person who associates with a protected class; a person who opposes unlawful employment practices, files a complaint or testifies about violations or possible violations; and any other protected class as defined by federal law.

Protected Class Under Oregon State Law: All Federally protected classes, plus: age (18 and older); physical or mental disability; injured worker; a person who uses leave covered by the Oregon Family Leave Act; marital status; family relationship; sexual orientation; whistleblower; expunged juvenile record; and any other protected class as defined by state law.

Sexual Harassment: Sexual harassment is unwelcome, unwanted, or offensive sexual advances, requests for sexual favors, and other verbal or physical conduct of a sexual nature when:

1) Submission to such conduct is made either explicitly or implicitly a term or condition of the individual's employment, or is used as a basis for any employment decision (granting leave requests, promotion, favorable performance appraisal, etc.); or

2) Such conduct is unwelcome, unwanted or offensive and has the purpose or effect of unreasonably interfering with an individual's work performance or creating an intimidating, hostile or offensive working environment.

Examples of sexual harassment include but are not limited to: unwelcome, unwanted, or offensive touching or physical contact of a sexual nature, such as, closeness, inpeding or blocking movement, assaulting or pinching; gestures; innuendoes; teasing, jokes, and other sexual talk; intimate inquiries; persistent unwanted courting; sexist put-downs or insults; epithets; slurs; or derogatory comments.

Sexual Orientation under Oregon State Law: An individual's actual or perceived heterosexuality, homosexuality, bisexuality or gender identity, regardless of whether the individual's gender identity, appearance, expression or behavior differs from that traditionally associated with the individual's sex at birth.

Workplace Harassment: Unwelcome, unwanted or offensive conduct based on or because of an employee's protected class status.

Harassment may occur between a manager/supervisor and a subordinate, between employees, and among non-employees who have business contact with employees. A complainant does not have to be the person harassed, but could be a person affected by the offensive conduct.

Examples of harassing behavior include, but are not limited to, derogatory remarks, slurs and jokes about a person's protected class status.

POLICY

(1) The State of Oregon is committed to a discrimination and harassment free work environment. This policy outlines types of prohibited conduct and procedures for reporting and investigating prohibited conduct.

(a) Discrimination, Workplace Harassment and Sexual Harassment. The State of Oregon provides a work environment free from unlawful discrimination or workplace harassment based on or because of an employee's protected class status. Additionally, the state of Oregon provides a work environment free from sexual harassment. Employees at every level of the organization, including state temporary employees and volunteers, must conduct themselves in a business-like and professional manner at all times and not engage in any form of discrimination, workplace harassment or sexual harassment.

(b) Higher Standard. Managers/supervisors are held to a higher standard and are expected to take a proactive stance to ensure the integrity of the work environment. Managers/supervisors must exercise reasonable care to prevent and promptly correct any discrimination, workplace harassment or sexual harassment they know about or should know about.

(c) Reporting. Anyone who is subject to or aware of what he or she believes to be discrimination, workplace harassment, or sexual harassment should report that behavior to the employee's immediate supervisor, another manager, or the agency, board, or commission Human Resource section, Executive Director, or chair, as applicable. A report of discrimination, workplace harassment or sexual harassment is considered a complaint. A supervisor or manager receiving a complaint should promptly notify the Human Resource section, Executive Director, or chair, as applicable.

(A) A complaint may be made orally or in writing.

(B) A complaint must be filed within one year of the occurrence.

(C) An oral or written complaint should contain the following:

(i) the name of the person filing the report;

(ii) the name of the complainant;

(iii) the names of all parties involved, including witnesses;

(iv) a specific and detailed description of the conduct or action that the employee believes is discriminatory or harassing;

(v) the date or time period in which the alleged conduct occurred; and

(vi) a description of the remedy the employee desires.

(d) Other Reporting Options. Nothing in this policy prevents any person from filing a formal grievance in accordance with a CBA, or a formal complaint with the Bureau of Labor and Industries (BOLI) or the Equal Employment Opportunity Commission (EEOC) or if applicable, the United States Department of Labor (USDOL) Civil Rights Center. However, some CBAs require an employee to choose between the complaint procedure outlined in the CBA and filing a BOLI or EEOC complaint.

(e) Filing a Report with the USDOL Civil Rights Center. An employee whose position is funded by the Oregon Workforce Investment Act (WIA), such as employees of the Oregon Workforce One-stop System, may file a complaint under the WIA, Methods of Administration (MOA) with the State of Oregon WIA, MOA Equal Opportunity Officer or directly through the USDOL, Civil Rights Center. The

complaint must be written, signed and filed within 180 days of when the alleged discrimination or harassment occurred.

(f) Investigation. The agency, board, or commission Human Resource section, Executive Director, or chair, as applicable, will coordinate and conduct or delegate responsibility for coordinating and conducting an investigation.

(A) All complaints will be taken seriously and an investigation will be initiated as quickly as possible.

(B) The agency, board or commission may need to take steps to ensure employees are protected from further potential discrimination or harassment.

(C) Complaints will be dealt with in a discreet and confidential manner, to the extent possible.

(D) All parties are expected to cooperate with the investigation and keep information regarding the investigation confidential.

(E) The agency, board or commission will notify the accused and all witnesses that retaliating against a person for making a report of discrimination, workplace harassment or sexual harassment will not be tolerated.

(F) The agency, board or commission will notify the complainant and the accused when the investigation is concluded.

(G) Immediate and appropriate action will be taken if a complaint is substantiated.

(H) The agency, board or commission will inform the complainant if any part of a complaint is substantiated and that action has been taken. The complainant will not be given the specifics of the action.

(I) The complainant and the accused will be notified by the agency, board or commission if a complaint is not substantiated.

(g) Penalties. Conduct in violation of this policy will not be tolerated.

(A) Employees engaging in conduct in violation of this policy may be subject to disciplinary action up to and including dismissal.

(B) State temporary employees and volunteers who engage in conduct in violation of this policy may be subject to termination of their working or volunteer relationship with the agency, board or commission.

(C) An agency, board or commission may be liable for discrimination, workplace harassment or sexual harassment if it knows of or should know of conduct in violation of this policy and fails to take prompt, appropriate action.

(D) Managers and supervisors who know or should know of conduct in violation of this policy and who fail to report such behavior or fail to take prompt, appropriate action may be subject to disciplinary action up to and including dismissal.

(E) An employee who engages in harassment of other employees while away from the workplace and outside of working hours may be subject to the provisions of this policy if that conduct has a negative impact on the work environment and/or working relationships.

(F) If a complaint involves the conduct of a contracted employee or a contractor, the agency, board, or commission Human Resource section, Executive Director, chair, or designee must inform the contractor

of the problem behavior and require prompt, appropriate action.

(G) If a complaint involves the conduct of a client, customer, or visitor, the agency, board or commission should follow its own internal procedures and take prompt, appropriate action.

(h) Retaliation. This policy prohibits retaliation against employees who file a complaint, participate in an investigation, or report observing discrimination, workplace harassment or sexual harassment.

(A) Employees who believe they have been retaliated against because they filed a complaint, participated in an investigation, or reported observing discrimination, workplace harassment or sexual harassment, should report this behavior to the employee's supervisor, another manager, the Human Resource section, the Executive Director, or the chair, as applicable. Complaints of retaliation will be investigated promptly.

(B) Employees who violate this policy by retaliating against others may be subject to disciplinary action, up to and including dismissal.

(C) State temporary employees and volunteers who retaliate against others may be subject to termination of their working or volunteer relationship with the agency, board or commission.

(i) Policy Notification. All employees including state temporary employees and volunteers shall:

(A) be given a copy or the location of Statewide Policy 50.010.01, Discrimination and Harassment Free Workplace;

(B) be given directions to read the policy;

(C) be provided an opportunity to ask questions and have their questions answered; and

(D) sign an acknowledgement indicating the employee read the policy and had the opportunity to ask questions.

(i) Signed acknowledgements are kept on file at the agency, board or commission.

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(1) Performance Measure:	Percent of employees informed of Policy 50.010.01, prohibited behavior and reporting procedures.
Performance Standard:	100%
(2) Performance Measure:	Percent of complaints where prompt, appropriate action is taken following investigation of a substantiated complaint.
Performance Standard:	100%

3. Employee Development and Implementation of Oregon Benchmarks for Workforce Development (No.50.045.01)

State of Oregon
DEPARTMENT OF ADMINISTRATIVE SERVICES
Human Resource Services Division

State Policy: 50.045.01 **Employee Development and Implementation of Oregon Benchmarks for Workforce Development**

APPLICABILITY: Classified (where not in conflict with the collective bargaining contract), management service, executive service and unclassified unrepresented employees

REFERENCE: ORS 240.145(3)(4); 240.250; Oregon Benchmarks

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(1) **Policy:** Oregon state government shall be a leader in achieving or exceeding the Oregon workforce development benchmarks of developing the best trained workforce in the U.S. by the year 2000 and in the world by the year 2010.

(a) For each biennium, an agency head shall develop a written agency training plan to require a minimum of 20 hours of education and training related to work skills and knowledge for at least 50% of their permanent employees in each fiscal year.

(b) Supervisors, in discussion with their employees, shall develop and update annually a written development plan for each employee that provides for the continuous improvement of the employee's job related knowledge and skills.

(c) An agency head shall maintain written documentation of agency workforce development hours and expenditures per instructions from Department of Administrative Services regarding expenditures and account numbers related to training and travel.

(d) When opportunities permit, agencies shall invite other state agencies to fill staff development openings and share training facilities and other employee development resources.

(e) An agency head may provide educational assistance to employees when it directly relates to their job responsibility and can be accommodated within the agency budget:

(A) When an employee is assigned to attend courses, the agency shall reimburse all of the costs of course registration fees, course materials, and necessary travel.

(B) When an employee makes a request to attend a class(s), either during or after working hours, the agency may reimburse all or part of the costs attendant to the class(s).

(C) Educational assistance to employees may include paid leave. Provisions of the paid leave agreement between the agency and the employee shall be documented and maintained in the agency file.

(2) **Policy Clarification:**

(a) The written agency training plan is intended to relate individual employee development plans and agency workforce development priorities to the agency mission.

(b) Training or education related to work skills and knowledge includes formal instructions or a structured learning plan related to:

(A) employee's competence to perform a specific job,

(B) employee's state government career, or

(C) Employee's work environment.

(c) Modes of training delivery may be formal education, on the job training, supervised learning activities, and other specific training approved by the employee's supervisor as job related.

(1) **Performance Measure:**	Percentage of agency employees who received 20 or more hours of job related training in each fiscal year.
Performance Standard:	50%
(2) **Performance Measure:**	A current, completed written agency training plan for each biennium.
Performance Standard:	100%
(3) **Performance Measure:**	Percentage of agency employees with current written individual development plans.
Performance Standard:	100%

4. Veterans Preference in Employment (No.105.040.0015)

Veterans' Preference in Employment

839-006-0435

Veterans' Preference in Public Employment

(1) It is the policy of the State of Oregon that a public employer grant a preference in hiring and promotion to veterans and disabled veterans under the provisions of ORS 408.230.

(2) The requirement to grant a preference in hiring and promotion to veterans and disabled veterans under the provisions of ORS 408.230 applies only to a public employer's civil service positions.

Stat. Auth.: ORS 659A.805

Stats. Implemented: ORS 408.230, 408.235

839-006-0440

Definitions

(1) "Active duty" does not include attendance at a school under military orders, except schooling incident to an active enlistment or a regular tour of duty, or normal military training as a reserve officer or member of an organized reserve or a National Guard unit.

(2) "Armed Forces" means the United States Army, Navy, Marine Corps, Air Force, and Coast Guard, including the reserve components thereof. (Title 38 USC Part I Chapter 1 Section 101). Reserve components mean:

(a) The Army Reserve;

(b) The Navy Reserve;

(c) The Marine Corps Reserve;

(d) The Air force Reserve;

(e) The Coast Guard Reserve;

(f) The Army National Guard of the United States; and

(g) The Air National Guard of the United States.

(3) "Civil service position" means any position for which a hiring or promotion decision is made or required to be made based on the results of a merit based, competitive process that includes, but is not limited to, consideration of an applicant's or employee's relative ability, knowledge, experience and other skills.

(a) A "civil service" position need not be labeled a "civil service position."

(4) "Combat zone" means an area designated by the President of the United States by executive order in which, on the dates designated by executive order, the Armed Forces of the United States are or have engaged in combat.

(5) "Disabled veteran" means a person **who has a disability rating from the United States** [*entitled to disability compensation under the laws administered by the U.S.*] Department of Veterans Affairs, a person whose discharge or release from active duty was for a disability incurred or aggravated in the line of duty or a person who was awarded the Purple Heart for wounds received in combat.

(6) "Eligibility list" means a list of ranked eligible candidates for a civil service position who have become eligible for the position through a test or series of tests and who will be considered for the civil service position in ranked order.

(7) [*(6)*] "Military leave" means any period of time for which a person is absent from a permanent civil service position for the performance of active duty in the Armed Forces of the United States.

(8) [*(7)*] "Promotion" means any position with a higher maximum salary rate.

(9) [*(8)*] "Public employer" includes a public body as defined in ORS 174.109, and any person authorized to act on behalf of the public body, with respect to control, management or supervision of any employee. "Public employer" includes but is not limited to:

(a) Employers in local governments;

(b) Employers in a public corporation created under a statute of this state and specifically designated as a public corporation; and

(c) Employers in any public body that is created by statute, ordinance or resolution that is not part of state government or local government.

(10) "Transferable skill" means a skill that a veteran has obtained through military education or experience that substantially relates, directly or indirectly, to the civil service position for which the veteran is applying. For instance, an Army infantryman receives training in the use, maintenance and storage of weapons, skills which are transferable to positions in corrections or law enforcement.

(11) [*(9)*] "Veteran" means a person who:

(a) Served on active duty with the Armed Forces of the United States:

(i) For a period of more than 178 consecutive days and was discharged or released from active duty under honorable conditions;

(ii) For 178 days or less and was discharged or released from active duty under honorable conditions because of a service-connected disability; or

(iii) For at least one day in a combat zone and was discharged or released from active duty under honorable conditions; or

(b) Received a combat or campaign ribbon for service in the Armed Forces of the United States.

Stat. Auth.: ORS 659A.805

Stats. Implemented: ORS 408.225, 408.230, 408.235**, OL 2011 Ch 484, OL 2011 Ch 29**

839-006-0445

Eligibility for Employment Preference

(1) A veteran is eligible to use the preference provided for in OAR 839-006-0450 and 839-006-0455 for a civil service position for which application is made at any time after discharge or release from service in the Armed Forces of the United States.

(2) Except as provided in (1) of this rule there are no limitations to the number of times a person can claim the preference.

Stat. Auth.: ORS 659A.805

Stats. Implemented: ORS 408.230, 408.235

839-006-0450

Applying the Employment Preference

(1) At each stage of the application process a public employer will grant a preference to a veteran or disabled veteran who successfully completes an initial application screening or an application examination or a civil service test the public employer administers to establish eligibility for a vacant civil service position.

(2) For an initial application screening used to develop a list of persons for interviews, the public employer will add five preference points to a veteran's score and ten preference points to a disabled veteran's score.

(3) For an application examination, given after the initial application screening, that results in a score, the public employer will add five preference points to a veteran's and ten preference points to a disabled veteran's total combined examination score without allocating the points to any single feature or part of the examination.

(4) If a public employer uses an application examination that consists of an evaluation method of ranking an applicant that does not result in a score, the public employer will devise and apply methods by which the public employer gives special consideration in the public employer's hiring decision to veterans and disabled veterans.

(5) When an interview is a component of the selection process for a civil service position or for an eligibility list for a civil service position, a public employer shall interview each veteran:

(a) Whom the public employer determines meets the minimum qualifications and special qualifications for the civil service position or eligibility list; and

(b) Who submits application materials that the public employer determines show sufficient evidence that the veteran has the transferable skills required and requested by the public employer for the civil service position or eligibility list.

(6) A public employer is not required to comply with subsection (5) of this rule if the employer conducts interviews only as part of the process of selecting a candidate for a civil service position from an eligibility list.

(7) A public employer may consult with the Oregon Military Department and the Department of Veterans' Affairs to determine whether certain military education or experience produces a transferable skill. To evaluate a veteran's transferable skills from a transcript of military training, a public employer may consult the American Council on Education's website, "A Guide to Educational Experiences in the Military," at <http://militaryguides.acenet.edu/CourseSearch.asp>.

Stat. Auth.: ORS 659A.805

Stats. Implemented: ORS 408.230, 408.235**, OL 2011 Ch 484**

839-006-0455

Employment Preference for Promotions

(1) A public employer will grant a preference to a person seeking promotion **to a civil service position with a higher maximum salary rate** and who is employed by the public employer in a permanent civil service position only if the person:

(a) Was granted military leave by the public employer to serve in the Armed Forces of the United States;

(b) Returned from the military leave to the civil service position;

(c) Qualified as a veteran or disabled veteran, as defined in OAR 839-006-0440(5) and (9), by reason of the person's service during the military leave or otherwise;

(d) Successfully completed a test or examination for the promotional position; and

(e) Meets the minimum qualifications and any special qualifications for the promotional position.

(3) If a person meets the criteria for a promotional preference under subsection (1) of this rule, the public employer will add five preference points to a veteran's score and ten preference points to a disabled veteran's score.

(4) For the purposes of a promotional preference under subsection (1) of the rule, if a public employer uses an application examination that consists of an evaluation method of ranking an applicant that does not result in a score, the public employer will devise and apply methods by which the public employer gives special consideration in the public employer's hiring decision to veterans and disabled veterans.

Stat. Auth.: ORS 659A.805

Stats. Implemented: ORS 408.225, 408.230, 408.235**, OL 2011 Ch 82**

839-006-0460

Appointment to a Position

(1) A public employer will appoint an otherwise qualified veteran or disabled veteran to a vacant civil service position if the results of a veteran's or disabled veteran's application examination, when combined with the veteran's or disabled veteran's preference, are equal to or higher than the results of an application examination for an applicant who is not a veteran or disabled veteran.

(2) Preferences of the type described in OAR 839-006-0450 and 839-006-0455 are not a requirement that a public employer appoint a veteran or disabled veteran to a civil service position.

(3) A public employer may base a decision not to appoint the veteran or disabled veteran solely on the veteran's or disabled veteran's merits or qualifications with respect to the vacant civil service position.

(4) If a public employer does not appoint a veteran or disabled veteran to a vacant civil service position, upon written request of the veteran or disabled veteran, the public employer, will provide the public employer's reasons for the decision not to appoint the veteran or disabled veteran to the position.

Stat. Auth.: ORS 659A.805

Stats. Implemented: ORS 408.230, 408.235

839-006-0465

Certification

(1) A public employer may require an applicant to provide certification that the person is an eligible veteran or disabled veteran under OAR 839-006-0440(5) and (9).

(2) An applicant for a position with a public employer claiming veteran's or disabled veteran's preference points may submit as certification of eligibility under OAR 839-006-0440(5) and (9) a copy of the Certificate of Release or Discharge from Active Duty (a federal DD Form 214 or 215) with the application for employment.

(3) Disabled veterans may also submit a copy of their veteran's disability preference letter from the U.S. Department of Veterans Affairs, unless the information is included in the federal DD Form 214/215.

(4) If a person's record appears to show service qualifying for the preference the public employer may provisionally designate an applicant as an eligible veteran or disabled veteran. However, before the person can be appointed, the person must submit proof of the entitlement to the preference.

Stat. Auth.: ORS 659A.805

Stats. Implemented: ORS 408.225, 408.230, 408.235

839-006-0470

Enforcement

The Civil Rights Division of the Bureau of Labor and Industries enforces the provisions of ORS 408.230. A person claiming a violation of ORS 408.230 may file

a verified written complaint with the Civil Rights Division in accordance with ORS 659A.820.

Stat. Auth.: ORS 659A.805

Stats. Implemented: ORS 408.230, 408.235, 659A.820**, OL 2011 Ch 484**

839-006-0480

Discrimination Based on Uniformed Service

(1) For purposes of this rule:

(a) "Service" means the performance of duty on a voluntary or involuntary basis in a uniformed service that may involve active duty, active duty for training, initial active duty for training, inactive duty for training, full time duty in the National Guard, funeral honors duty or an examination to determine fitness for service in a uniformed service; and

(b) "Uniformed service" means the **Armed Forces of the United States, the Army National Guard and the Air National Guard when engaged in active duty for training, inactive duty training or full-time National Guard duty, the commissioned corps of the United States Public Health Service and any other category of persons designated by the President of the United States in a time of war or national emergency** [*Army, Navy, Air Force, Marine Corps, Coast Guard, National Guard or military reserve forces*].

(2) It is an unlawful employment practice for an employer to discriminate against a person because of the person's service in a uniformed service by:

(a) Denying a public officer or public employee the status or rights provided by ORS 408.240 to 408.240 and 408.290, if the employer is a public body.

(b) Discharging, expelling, disciplining, threatening or otherwise retaliating against the person for exercising or attempting to exercise the status or rights provided by this section.

(c) Denying any of the following because a person is a member of, applies to be a member of, performs, has performed, applies to perform or has an obligation to perform service in a uniformed service:

(A) Initial employment;

(B) Reemployment following a leave from employment taken by reason of service in a uniformed service;

(C) Retention in employment;

(D) Promotion; or

(E) Any other term, condition or privilege of employment, including but not limited to compensation.

(3) An employer does not commit an unlawful employment practice under this rule if the employer acted based on a bona fide occupational requirement reasonably necessary to the normal operation of the employer's business and the employer's actions could not be avoided by making a reasonable accommodation of the person's service in a uniformed service.

(4) The federal Uniformed Services Employment and Reemployment Act, 38 USC 43 (USERRA) provides that an employee reemployed following a period of uniformed service is entitled to the seniority and seniority-based rights and benefits that the employee had on the date the uniformed service began, plus any seniority and seniority-based rights and benefits that the employee would have attained if the employee had remained continuously employed. Federal Department of Labor regulation 20 CFR 1002.210 provides that in determining entitlement to seniority and seniority-based rights and benefits, the period of absence from employment due to or necessitated by uniformed service is not considered a break in employment. The rights and benefits protected by USERRA upon reemployment include those provided by the employer and those required by statute.

(5) To the extent possible, this rule shall be construed in a manner that is consistent with similar provisions of the federal Uniformed Services Employment and Reemployment Rights Act of 1994, 38 USC 43.

(6) Protections for spouses and domestic partners of uniformed service members may be found under the Oregon Family Military Leave Act, ORS 659A.090 to 659A.099 and OAR 839-009-0370 - 839-009-0460.

Stat. Auth.: ORS 659A.805

Stats. Implemented: ORS 659A.082**, OL 2011 Ch 18**

5. Maintaining a Professional Workplace (No.50.010.03)

DAS DEPARTMENT OF ADMINISTRATIVE SERVICES

Statewide Policy

SUBJECT:	Maintaining a Professional Workplace	NUMBER:	50.010.03
DIVISION:	Chief Human Resource Office	EFFECTIVE DATE:	11/01/13
APPROVED:			

POLICY STATEMENT: It is the policy of Oregon state government that mutual respect between and among managers, employees, temporary employees and volunteers is integral to the efficient conduct of business. All individuals work together to create and maintain a work environment that is respectful, professional and free from inappropriate workplace behavior.

AUTHORITY: ORS 240.145 and ORS 240.250

APPLICABILITY: All employees, including temporary employees and volunteers, and others working in the agency

DEFINITIONS: Professional Workplace Behavior: Supporting the values and mission of Oregon state government and the agency, building positive relationships with others, communicating in a respectful manner, holding oneself accountable and pursuing change within the system.

Inappropriate Workplace Behavior: Unwelcome or unwanted conduct or behavior that causes a negative impact or disruption to the workplace or the business of the state, or results in the erosion of employee morale and is not associated with an employee's protected class status.[1] (See State HR Policy 50.010.01 Discrimination and Harassment Free Workplace for guidance on issues involving protected class status.)

Examples of inappropriate workplace behavior include but are not limited to, comments, actions or behaviors of an individual or group that embarrass, humiliate, intimidate, disparage, demean, or show disrespect for another employee, a manager, a subordinate, a volunteer, a customer, a contractor or a visitor in the workplace.

[1] Protected Class Under Federal Law: Race; color; national origin; sex (includes pregnancy-related conditions); religion; age (40 and older); disability; a person who uses leave covered by the Federal Family and Medical Leave Act; a person who uses Military Leave; a person who associates with a protected class; a person who opposes unlawful employment practices, files a complaint or testifies about violations or possible violations; and any other protected class as defined by federal law.

Protected Class Under Oregon State Law: All federally protected classes, plus: age (18 and older); physical or mental disability; injured worker; a person who uses leave covered by the Oregon Family Leave Act; marital status; family relationship; sexual orientation; whistleblower; expunged juvenile record; and any other protected class as defined by state law.

Inappropriate workplace behavior does not include actions of performance management such as supervisor instructions, expectations or feedback, administering of disciplinary actions, or investigatory meetings.

Inappropriate workplace behavior does not include assigned, requested or unsolicited constructive peer feedback on projects or work.

State HR Policy 10.000.01 Definitions and OAR 105-010-0000

POLICY

(1) **Conduct** **Employees of all service types, temporary employees and volunteers, at every level of the agency (includes boards and commissions) must foster an environment that encourages professionalism and discourages disrespectful behavior. All employees, temporary employees and volunteers must behave respectfully and professionally and refrain from engaging in inappropriate workplace behavior.**

(2) **Addressing Inappropriate Workplace Behavior**

(a) Supervisors must address inappropriate behavior they observe or experience and should do so as close to the time of the occurrence as possible and appropriate.

(b) If an employee, temporary employee or volunteer observes or experiences inappropriate workplace behavior and feels comfortable in doing so, he or she should do one or both of the following:

(A) Redirect inappropriate conversations or behavior to workplace business

(B) Tell an offending employee, temporary employee or volunteer his or her behavior is offensive and ask him or her to stop.

(3) **Reporting Inappropriate Workplace Behavior**

(a) An employee, temporary employee or volunteer should report inappropriate workplace behavior he or she experiences or observes to his or her immediate supervisor as soon as practical. If the employee, temporary employee or volunteer's immediate supervisor is the one engaging in the inappropriate behavior, he or she should report the behavior to upper management, the agency head or agency Human Resource section, as soon as practical. The report may be verbal or written.

(b) If past practice exists in the agency, an employee represented by a labor union may have a union representative present during regular work hours, when reporting inappropriate workplace behavior and through the process set forth in this policy.

(4) **Responding to a Report of Inappropriate Workplace Behavior** Inappropriate workplace behavior must be addressed and corrected before it becomes pervasive, causes further workplace disruption or lowers morale. Unless the agency decides otherwise, the supervisor of the individual allegedly engaging in inappropriate workplace behavior must **address**[2] the report as soon as possible.

[2] The agency determines the best method of addressing the report, depending upon the behavior reported or observed, including determining method of follow up if necessary.

(5) Consequences

(a) Any employee found to have engaged in inappropriate workplace behavior, will be counseled, or, depending on the severity of the behavior, may be subject to discipline, up to and including dismissal.

(b) An employee in trial service found to have engaged in inappropriate workplace behavior may be removed from trial service.

(c) A temporary employee or volunteer found to have engaged in inappropriate workplace behavior will be counseled or, depending on the severity of the behavior, may have his or her service terminated.

(d) A supervisor who fails to address inappropriate behavior, will be counseled, or, depending on the severity of the behavior, may be subject to disciplinary action, up to and including dismissal.

(6) Retaliation Retaliating against someone for reporting or addressing inappropriate workplace behavior is prohibited. An employee who believes he or she is experiencing retaliation as a result of reporting inappropriate behavior should report this to his or her immediate supervisor as soon as practical[1]. The agency will investigate reports of retaliation. Any employee found to have engaged in retaliation may be subject to discipline, up to and including dismissal. An employee in trial service found to have engaged in retaliation may be removed from trial service. A temporary employee or volunteer found to have engaged in retaliation may have his or her service terminated.

(7) Policy Notification. All employees including temporary employees and volunteers will:

(a) Be given a copy or told the location of State HR Policy 50.010.03 Maintaining a Professional Workplace by the agency

(b) Be given directions to read the policy

(c) Be provided an opportunity to ask questions and have their questions answered

(d) Acknowledge he or she read the policy and had the opportunity to ask questions

(A) The agency decides the form of the acknowledgement, such as electronic, signed, or other documented acknowledgment

(B) The agency may create and offer training as it deems necessary;

[1] If the employee believes his or her immediate supervisor is engaging in retaliation, he or she should report the behavior to the agency human resource office, upper management or the agency head as soon as practical.

C. Appendix B

A. Federal Policy Documentation

1. Age Discrimination in Employment Act of 1967 (ADEA)

Age Discrimination:

The Age Discrimination in Employment Act of 1967 (ADEA) protects individuals who are 40 years of age or older from employment discrimination based on age. The ADEA's protections apply to both employees and job applicants. Under the ADEA, it is unlawful to discriminate against a person because of his/her age with respect to any term, condition, or privilege of employment, including hiring, firing, promotion, layoff, compensation, benefits, job assignments, and training.

It is also unlawful to retaliate against an individual for opposing employment practices that discriminate based on age or for filing an age discrimination charge, testifying, or participating in any way in an investigation, proceeding, or litigation under the ADEA.

The ADEA applies to employers with 20 or more employees, including state and local governments. It also applies to employment agencies and labor organizations, as well as to the federal government. ADEA protections include:

Apprenticeship Programs

It is generally unlawful for apprenticeship programs, including joint labor-management apprenticeship programs, to discriminate on the basis of an individual's age. Age limitations in apprenticeship programs are valid only if they fall within certain specific exceptions under the ADEA or if the EEOC grants a specific exemption.

Job Notices and Advertisements

The ADEA generally makes it unlawful to include age preferences, limitations, or specifications in job notices or advertisements. A job notice or adve1tisement may specify an age limit only in the rare circumstances where age is shown to be a "bona fi de occupational qualification" (BFOQ) reasonably necessary to the normal operation of the business.

Pre-Employment Inquiries

The ADEA does not specifically prohibit an employer from asking an applicant's age or date ofbi1th. However, because such inquiries may deter

older workers from applying for employment or may otherwise indicate possible intent to discriminate based on age, requests for age information will be closely scrutinized to make sure that the inquiry was made for a lawful purpose, rather than for a purpose prohibited by the ADEA.

Benefits

The Older Workers Benefit Protection Act of 1990 (OWBPA) amended the ADEA to specifically prohibit employers from denying benefits to older employees. Congress recognized that the cost of providing certain benefits to older workers is greater than the cost of providing those same benefits to younger workers, and that those greater costs would create a disincentive to hire older workers. Therefore, in limited circumstances, an employer may be permitted to reduce benefits based on age, as long as the cost of providing the reduced benefits to older workers is the same as the cost of providing benefits to younger workers.

Waivers of ADEA Rights

An employer may ask an employee to waive his/her rights or claims under the ADEA either in the settlement of an ADEA administrative or court claim or in connection with an exit incentive program or other employment termination program. However, the ADEA, as amended by OWBPA, sets out specific minimum standards that must be met in order for a waiver to be considered knowing and voluntary and, therefore, valid. Among other requirements, a valid

ADEA waiver must:

1. be in writing and be understandable;
2. specifically refer to ADEA rights or claims;
3. not waive rights or claims that may arise in the future;
4. be in exchange for valuable consideration;
5. advise the individual in writing to consult an attorney before signing the waiver; and
6. provide the individual at least 21 days to consider the agreement and at least seven days to revoke the agreement after signing it.

If an employer requests an ADEA waiver in connection with an exit incentive program or other employment termination program, the minimum requirements for a valid waiver are more extensive.

2. Disability Discrimination Title 1 of the Americans with Disability Act of 1990

Disability Discrimination

Title I of the Americans with Disabilities Act of 1990 prohibits private employers, state and local governments, employment agencies and labor unions from discriminating against or treating unfairly, qualified individuals with disabilities in job application procedures, hiring, firing, advancement, compensation, job training, and other terms, conditions, and privileges of employment. The ADA covers employers with 15 or more employees, including state and local governments. It also applies to employment agencies and to labor organizations. The ADA's nondiscrimination standards also apply to federal sector employees under section 501 of the Rehabilitation Act, as amended, and it's implementing rules.

An individual with a disability is a person who:

Has a physical or mental impairment that substantially limits one or more major life activities;

- Has a record of such an impairment; or
- Is regarded as having such impairment.

A qualified employee or applicant with a disability is an individual who, with or without reasonable accommodation, can perform the essential functions of the job in question. Reasonable accommodation may include, but is not limited to:

Making existing facilities used by employees readily accessible to and usable by persons with disabilities.

Job restructuring, modifying work schedules, reassignment to a vacant position;

Acquiring or modifying equipment or devices, adjusting or modifying examinations, training materials, or policies, and providing qualified readers or interpreters.

An employer is required to make a reasonable accommodation to the known disability of a qualified applicant or employee if it would not impose an "undue hardship" on the operation of the employer's business. Undue hardship is defined as an action requiring significant difficulty or expense when considered in light of factors such as an employer's size, financial resources, and the

nature and structure of its operation.

An employer is not required to lower quality or production standards to make an accommodation; nor is an employer obligated to provide personal use items such as glasses or hearing aids.

Title I of the ADA also covers:

Medical Examinations and Inquiries

Employers may not ask job applicants or employees about the existence, nature, or severity of a disability. Applicants may be asked about their ability to perform specific job functions with or without an accommodation. A job offer may be conditioned on the results of a medical examination, but only if the examination is required for all entering employees in similar jobs. Medical examinations of employees must be job related and consistent with the employer's business needs.

All medical records or any information obtained must be kept confidential. This includes information that may or may not indicate a diagnosis, treatment course or may not have been generated by a health care professional. For example, an employee's request for a reasonable accommodation would be considered medical information subject to the ADA's confidentiality requirements.

Drug and Alcohol Abuse

Employees and applicants currently engaging in the illegal use of drugs are not covered by the ADA when an employer acts on the basis of such use. Tests for illegal drugs are not subject to the ADA's restrictions on medical examinations. Employers may hold illegal drug users and alcoholics to the same performance standards as other employees.

The law also protects people from discriminating based on their relationship with a person with a disability (even if they do not themselves have a disability). For example, it is illegal to discriminate against an employee because her husband or child has a disability.

It is unlawful to retaliate against an individual for opposing employment practices that discriminate based on disability or for filing a discrimination charge, testifying, or participating in any way in an investigation, proceeding, or litigation under the ADA.

3. Equal Pay and Compensation Discrimination Equal Pay Act of 1963, and Title VII of the Civil Rights Act of 1964

Equal Pay and Compensation Discrimination

The right of employees to be free from discrimination in their compensation is protected under several federal laws, including the following enforced by the U.S. Equal Employment Opportunity Commission (EEOC): the Equal Pay Act of 1963, Title VII of the Civil Rights Act of 1964, the Age Discrimination in Employment Act of 1967, and Title I of the Americans with Disabilities Act of 1990.

The Equal Pay Act requires that men and women be given equal pay for equal work in the same establishment. The jobs need not be identical, but they must be substantially equal. It is job content, not job titles, that determines whether jobs are substantially equal.

Under the EPA, employers may not pay unequal wages to men and women who perform jobs that require substantially equal skill, effort and responsibility, and that are performed under similar working conditions within the same establishment. Each of these factors is summarized below:

SKILL- Measured by factors such as the experience, ability, education, and training required to perform the job. The key issue is what skills are required for the job, not what skills the individual employees may have. For example, two bookkeeping jobs could be considered equal under the EPA even if one of the job holders has a master's degree in physics, since that degree would not be required for the job.

EFFORT- The amount of physical or mental exertion needed to perform the job. For example, suppose that men and women work side by side on a line assembling machine parts. The person at the end of the line must also lift the assembled product as he or she completes the work and place it on a board. That job requires more effort than the other assembly line jobs if the extra effort of lifting the assembled product of the line is substantial and is a regular part of the job. As a result, it would not be a violation to pay that person more, regardless of whether the job is held by a man or a woman.

RESPONSIBILITY- The degree of accountability required in performing the job. For example, a salesperson who is delegated the duty of determining whether to accept customers' personal checks has more responsibility than other salespeople. On the other hand, a minor difference in responsibility, such as turning out the lights at the end of the day, would not justify a pay differential.

WORKING CONDITIONS - This encompasses two factors: (*11* physical surroundings like temperature, fumes, and ventilation; and (2) hazards.

ESTABLISHMENT - The prohibition against compensation discrimination under the EPA applies only to jobs within an establishment. An establishment is a distinct physical place of business rather than an entire business or enterprise consisting of several places of business.

However, in some circumstances, physically separate places of business should be treated as one establishment. For example, if a central administrative unit hires employees, sets their compensation, and assigns them to work locations, the separate work sites can be considered part of one establishment.

Pay differentials are permitted when they are based on seniority, merit, quantity or quality of production, or a factor other than sex. These are known as "affirmative defenses" and it is the employer's burden to prove that they apply.

In correcting a pay differential, no employee's pay may be reduced. Instead, the pay of the lower paid employee(s) must be increased.

Title VII, ADEA, and ADA

Title VII, the ADEA, and the ADA prohibit compensation discrimination on the basis of race, color, religion, sex, national origin, age, or disability. Unlike the EPA, there is no requirement under Title VII, the ADEA, or the ADA that the claimant's job be substantially equal to that of a higher paid person outside the claimant's protected class, nor do these statutes require the claimant to work in the same establishment as a comparator.

Compensation discrimination under Title VII, the ADEA, or the ADA can occur in a variety of forms. For example:

An employer pays an employee with a disability less than similarly situated employees without disabilities and the employer's explanation (if any) does not satisfactorily account for the differential.

A discriminatory compensation system has been discontinued, but still has lingering discriminatory effects on present salaries. For example, if an employer has a compensation policy or practice that pays Hispanics lower salaries than other employees, the employer must not only adopt a new non-discriminatory compensation policy, it also must affirmatively eradicate salary disparities that began prior to the adoption of the new policy and make the victims whole.

An employer sets the compensation for jobs predominately held by, for example, women or African-Americans below that suggested by the employer's job evaluation study, while the pay for jobs predominately held by men or whites is consistent with the level suggested by the job evaluation study.

An employer maintains a neutral compensation policy or practice that has an adverse ·impact on employees in a protected class and cannot be justified as job-related and consistent with business necessity. For example, if an employer provides extra compensation to employees who are the "head of household," i.e., married with dependents and the primary financial contributor to the household, the practice may have an unlawful disparate impact on women.

It is also unlawful to retaliate against an individual for opposing employment practices that discriminate based on compensation or for filing a discrimination charge, testifying, or participating in any way in an investigation, proceeding, or litigation under Title VII, ADEA, ADA or the Equal Pay Act.

4. Genetic Information Discrimination Title II of the Genetic Information Nondiscrimination Act of 2008 (GINA)

Genetic Information Discrimination

Title II of the Genetic Information Nondiscrimination Act of2008 (GINA) prohibits the use of genetic information to discriminate against employees or applicants. The law forbids discrimination under any aspect of employment including hiring, firing, pay, job assignments, promotions, layoffs, training, benefits and/or any other terms/conditions of employment. In addition, the Department of Labor, Health and Human Services strictly restricts the acquisition of genetic information and the disclosure of genetic information.

Definition

Genetic Information includes an individual's genetic test and /or the tests of an individual's family members. Italso includes any information about disease, disorder or condition including a family member's known condition. Family medical history is included in the definition of genetic information because it is often misused to determine increased risk of disease, disorder or condition in the future.

Harassment

Under GINA, it is illegal to harass a person based on their genetic information or genetic information of their relative. Harassing actions include offensive or derogatory remarks, which rise to a level to create a hostile work environment.

Employers are required to take appropriate steps to prevent and correct unlawful harassment. Likewise, employees are responsible for reporting harassment at an early stage to prevent its escalation.

Retaliation

It is unlawful to retaliate against an employee who has filed a discrimination charge based on genetic information'; testified on genetic information; or participated in an investigation, proceeding or litigation based on genetic information. It is also unlawful to retaliate against an individual for opposing employment practices that discriminate based on genetic information.

Exceptions

There are very limited exceptions to an employer obtaining genetic information that do not violate the GINA as follows:

Inadvertent knowledge of genetic information by overhearing an employee's conversation about a family member's conditions/illnesses.

Obtaining genetic information or family medical history through health services, including wellness programs that are offered on a voluntary basis.

Information obtained as part of the certification process for FMLA/OFLA leave for the employee's own serious health condition or the serious health condition of the employee's family member.

Gaining knowledge through commercially or publicly available documents like newspapers is permitted, as long as the employer is not searching those resources with the intent of finding genetic information.

Acquisition of genetic information through monitoring programs to test the effects of biological toxic substances in the workplace, where monitoring is required by law or the program)I is voluntary.

Acquisition of information of employees who engage in DNA testing for law enforcement purposes as a forensic laborer or purposes of human remains identification is permitted, but the information may only be used for analysis of DNA markers for quality control to detect contamination.

Confidentiality

It is unlawful for employers to disclose genetic information about applicants or employees. Employers must keep genetic information confidential and in a file

separate from any personnel file. Genetic Information can be kept in the same file as other medical information in compliance with the Americans with Disabilities Act.

5. **National Origin Discrimination Title VII of the Civil Rights Act of 1964 and The Immigration Reform and Control Act of 1986**

The Immigration Reform and Control Act of 1986 (IRCA)

National Origin Discrimination

Whether an employee or job applicant's ancestry or appearance may possibly be Mexican, Ukrainian, Filipino, Arab, American Indian, or any other nationality, he or she is entitled to the same treatment and employment opportunities as anyone else. EEOC enforces the federal prohibition against national origin discrimination in employment under Title VII of the Civil Rights Act of 1964, which covers employers with fifteen (15) or more employees.

"With American society growing increasingly diverse, protection against national origin discrimination is vital to the right of workers to compete for jobs on a level playing field, " said EEOC Chair Cari M. Dominguez, announcing the issuance of recent guidance on national origin discrimination. "Immigrants have long been an asset to the American workforce. This is more true than ever in today's increasingly global economy. Recent world events, including the events of September II, 2001, only add to the need for employers to be vigilant in ensuring a workplace free from discrimination."

The Immigration Reform and Control Act of 1986 (IRCA) makes it illegal for an employer to discriminate with respect to hiring, firing, recruitment or referral for a fee, based upon an individual's citizenship or immigration status. Employers may not refuse to accept lawful documentation that establishes the employment eligibility of an employee, or demand additional documentation beyond what is legally required.

About National Origin Discrimination

National origin discrimination means treating someone less favorably because he or she comes from a particular place, because of his or her ethnicity or accent, or because it is believed that he or she has a particular ethnic background. National origin discrimination also means treating someone less favorably at work because of marriage or other association with someone of a particular nationality.

Examples of violations covered under Title VII include:

Employment Decisions

Title VII prohibits any employment decision, including recruitment, hiring, and firing, pay, training, promotions, benefits or layoffs, based on national origin.

Harassment

Title VII prohibits offensive conduct, such as ethnic slurs, that creates a hostile work environment based on national origin or results in adverse employment decisions. Employers are required to take appropriate steps to prevent and correct unlawful harassment. Likewise, employees are responsible for reporting harassment at an early stage to prevent its escalation.

Language

Accent Discrimination

An employer may not base a decision on an employee's foreign accent unless the accent materially interferes with job performance.

English Fluency

A fluency requirement is only permissible if required for the effective performance of the position for which it is imposed.

English-only rules

English-only rules must be adopted for nondiscriminatory reasons. An English-only rule may be used if it is needed to promote the safe or efficient operation of the employer's business.

Itis also unlawful to retaliate against an individual for imposing employment practices that discriminate based on the IRCA's nondiscrimination requirements or for filing a discrimination charge, testifying, or participating in any way in an investigation, proceedings or litigation under the IRCA.

Coverage of foreign nationals

Title VII and the other antidiscrimination laws prohibit discrimination against individuals employed in the United States, regardless of citizenship. However, relief may be limited if an individual does not have legally required work authorization or documentation.

6. Pregnancy Discrimination Title VII of the Civil Rights Act of 1964

Pregnancy Discrimination

The Pregnancy Discrimination Act is an amendment to Title VII of the Civil Rights Act of 1964. Discrimination on the basis of pregnancy, childbirth, or related medical conditions constitutes unlawful sex discrimination under Title VII, which covers employers with 15 or more employees, including state and local governments. Title VII also applies to employment agencies and to labor organizations, as well as to the federal government. Women who are pregnant or affected by related conditions must be treated in the same manner as other applicants or employees with similar abilities or limitations.

Title VII's pregnancy-related protections include:

Harassment

Prohibits of offensive conduct such as derogatory remarks that create a hostile work environment based on the condition or results in adverse employment decisions.

Employers are required to take appropriate steps to prevent and correct unlawful harassment. Likewise, employees are responsible for reporting harassment at an early stage to prevent its escalation.

Hiring

An employer cannot refuse to hire a pregnant woman because of her pregnancy, because of a pregnancy-related condition or because of the prejudices of co-workers, clients, or customers.

Pregnancy and Maternity Leave

An employer may not single out pregnancy-related conditions for special procedures to determine an employee's ability to work. However, if an employer requires its employees to submit a doctor's statement concerning their inability to work before granting leave or paying sick benefits, the employer may require employees affected by pregnancy-related conditions to submit such statements.

If an employee is temporarily unable to perform her job due to pregnancy, the employer must treat her the same as any other temporarily disabled employee. For example, if the employer allows temporarily disabled employees to modify tasks, perform alterative assignments or take disability leave or leave without pay, the

employer also must allow an employee who is temporarily disabled due to pregnancy the same options or choices.

Pregnant employees must be permitted to work as long as they are able to perform their jobs. If an employee has been absent from work as a result of a pregnancy-related condition and recovers, her employer may not require her to remain on leave until the baby's birth. An employer also may not have a rule that prohibits an employee from returning to work for a predetermined length of time after childbirth.

Employers must hold open a job for a pregnancy-related absence the same length of time jobs are held open for employees on sick or disability leave.
In addition, pregnant employees may have additional rights under the Family and Medical Leave Act (FMLA) and/or Oregon Family Medical Leave Act (OFLA).

Health Insurance

Any health insurance provided by an employer must cover expenses for pregnancy-related conditions on the same basis as costs for other medical conditions. Health insurance for expenses arising from abortion is not required, except where the life of the mother is endangered. Pregnancy-related expenses should be reimbursed exactly as those incurred for other medical conditions, whether payment is on a fixed basis or a percentage of reasonable-and-customary-charge basis.

The amounts payable by the insurance provider can be limited only to the same extent as amounts payable for other conditions. No additional, increased, or larger deductible can be imposed.

Employers must provide the same level of health benefits for spouses of male employees as they do for spouses of female employees.

Fringe Benefits

Pregnancy-related benefits cannot be limited to married employees. In an all-female workforce or job classification, benefits must be provided for pregnancy-related conditions if benefits are provided for other medical conditions.

If an employer provides any benefits to workers on leave, the employer must provide the same benefits for those on leave for pregnancy-related conditions.

Employees with pregnancy-related disabilities must be treated the same as other temporarily disabled employees for accrual and crediting of seniority, vacation calculation, pay increases, and temporary disability benefits.

It is also unlawful to retaliate against an individual for opposing employment practices

that discriminate based on pregnancy or for filing a discrimination charge, testifying, or participating in any way in an investigation, proceeding, or litigation under Title VII.

7. Race/Color Discrimination Title VII of the Civil Rights Act of 1964

Race/Color Discrimination

Title VII of the Civil Rights Act of 1964 protects individuals against employment discrimination on the bases of race and color, as well as national origin, sex, and religion. Title VII applies to employers with 15 or more employees, including state and local governments. It also applies to employment agencies and to labor organizations, as well as to the federal government.

Equal employment opportunity cannot be denied any person because of his/her racial group or perceived racial group, his/her race-linked characteristics (e.g., hair texture, color, facial features), or because of his/her marriage to or association with someone of a particular race or color. Title VII also prohibits employment decisions based on stereotypes and assumptions about abilities, traits, or the performance of individuals of certain racial groups. Title VII's prohibitions apply regardless of whether the discrimination is directed at Whites, Blacks, Asians, Latinos, Arabs, Native Americans, Native Hawaiians and Pacific Islanders, multi-racial individuals, or persons of any other race, color, or ethnicity.

It is unlawful to discriminate against any individual in regard to recruiting, hiring and promotion, transfer, work assignments, performance measurements, the work environment, job training, discipline and discharge, wages and benefits, or any other term, condition, or privilege of employment. Title VII prohibits not only intentional discrimination, but also neutral job policies that disproportionately affect persons of a certain race or color and that are not related to the job and the needs of the business. Employers should adopt "best practices" to reduce the likelihood of discrimination and to address impediments to equal employment opportunity.

Title VII's protections include:

Recruiting, Hiring, and Advancement

Job requirements must be uniformly and consistently applied to persons of all races and colors. Even if a job requirement is applied consistently, if it is not important for job performance or business needs, the requirement may be found unlawful if it excludes persons of a certain racial group or color significantly more than others. Examples of potentially unlawful practices include: (I) soliciting applications only from sources in which all or most potential workers are of the same race or color; (2) requiring applicants to have a certain educational background that is not important for job performance or business needs; (3) testing applicants for knowledge, skills or

abilities that are not important for job performance or business needs.

Employers may legitimately need information about their employees or applicants race for affirmative action purposes and/or to track applicant flow. One way to obtain racial information and simultaneously guard against discriminatory selection is for employers to use separate forms or otherwise keep the information about an applicant's race separate from the application. In that way, the employer can capture the information it needs but ensure that it is not used in the selection decision.

Unless the information is for such a legitimate purpose, pre-employment questions about race can suggest that race will be used as a basis for making selection decisions. If the information is used in the selection decision and members of particular racial groups are excluded from employment, the inquiries can constitute evidence of discrimination.

Harassment/Hostile Work Environment

Title VII prohibits of offensive conduct, such as racial or ethnic slurs, racial "jokes," derogatory comments, or other verbal or physical conduct based on an individual's race/color. The conduct has to be unwelcome and of offensive, and has to be severe or pervasive. Employers are required to take appropriate steps to prevent and correct unlawful harassment. Likewise, employees are responsible for reporting harassment at an early stage to prevent its escalation.

Compensation and Other Employment Terms, Conditions, and Privileges

Title VII prohibits discrimination in compensation and other terms, conditions, and privileges of employment. Thus, race or color discrimination may not be the basis for differences in pay or benefits, work assignments, performance evaluations, training, discipline or discharge, or any other area of employment.

Segregation and Classification of Employees

Title VII is violated where employees who belong to a protected group are segregated by physically isolating them from other employees or from customer contact. In addition, employers may not assign employees according to race or color. For example, Title VII prohibits assigning primarily African-Americans to predominantly African-American establishments or geographic areas. It is also illegal to exclude members of one group from particular positions or to group or categorize employees or jobs so that certain jobs are generally held by members of a certain protected group. Coding applications/resumes to designate an applicant's race, by either an employer or employment agency, constitutes evidence of discrimination where people of a certain race or color are excluded from employment or from certain positions.

Retaliation

Employees have a right to be free from retaliation for their opposition to discrimination or their participation in an EEOC proceeding by filing a charge, testifying, assisting, or otherwise participating in an agency proceeding.

8. Religious Discrimination Title VII of the Civil Rights Act of 1964

Religious Discrimination

Title VII of the Civil Rights Act of1964 prohibits employers from discriminating against individuals because of their religion in hiring, firing, and other terms and conditions of employment. Title VII covers employers with 15 or more employees, including state and local governments. It also applies to employment agencies and to labor organizations, as well as to the federal government.
Under Title VII:

Employers may not treat employees or applicants more or less favorably because of their religious beliefs or practices - except to the extent a religious accommodation is warranted. For example, an employer may not refuse to hire individuals of a certain religion, may not impose stricter promotion requirements for persons of a certain religion, and may not impose more or different work requirements on an employee because of that employee's religious beliefs or practices.

Employees cannot be forced to participate -- or not participate -- in a religious activity as a condition of employment.

Employers must reasonably accommodate employees' sincerely held religious practices unless doing so would impose an undue hardship on the employer. A reasonable religious accommodation is any adjustment to the work environment that will allow the employee to practice his religion. An employer might accommodate an employee's religious beliefs or practices by allowing: flexible scheduling, voluntary substitutions or swaps, job reassignments and lateral transfers, modification of grooming requirements and other workplace practices, policies and/or procedures.

An employer is not required to accommodate an employee's religious beliefs and practices if doing so would impose an undue hardship on the employers' legitimate business interests. An employer can show undue hardship if accommodating an employee's religious practices requires more than ordinary administrative costs, diminishes efficiency in other jobs, infringes on other employees' job rights or benefits, impairs workplace safety, causes co-workers to carry the accommodated employee's share of potentially hazardous or burdensome work, or if the proposed accommodation conflicts with another law or regulation.

Employers must permit employees to engage in religious expression, unless the religious expression would impose an undue hardship on the employer. Generally, an employer may not place more restrictions on religious expression than on other

forms of expression that have a comparable effect on workplace efficiency.

Employers must take steps to prevent religious harassment of their employees. An employer can reduce the chance that employees will engage unlawful religious harassment by implementing an anti-harassment policy and having an effective procedure for reporting, investigating and correcting harassing conduct.

It is also unlawful to retaliate against an individual for opposing employment practices that discriminate based on religion or for filing a discrimination charge, testifying, or participating in any way in an investigation, proceeding, or litigation under Title VII.

9. Retaliation Title VII of the Civil Agency Affirmative Action Policy

Retaliation

An employer may not fire, demote, harass or otherwise "retaliate" against an individual for filing a charge of discrimination, participating in a discrimination proceeding, or otherwise opposing discrimination. The same laws that prohibit discrimination based on race, color, sex, religion, national origin, age, and disability, as well as wage differences between men and women performing substantially equal work, also prohibit retaliation against individuals who oppose unlawful discrimination or participate in an employment discrimination proceeding.

In addition to the protections against retaliation that are included in all of the laws enforced by EEOC, the Americans with Disabilities Act (ADA) also protects individuals from coercion, intimidation, threat, harassment, or interference in their exercise of their own rights or their encouragement of someone else's exercise of rights granted by the ADA.

There are three main terms that are used to describe retaliation. Retaliation occurs when an employer, employment agency, or labor organization takes an adverse action against a covered individual because he or she engaged in a protected activity. These three terms are described below.

Adverse Action

An adverse action is an action taken to try to keep someone from opposing a discriminatory practice, or from participating in an employment discrimination proceeding. Examples of adverse actions include:

- employment actions such as termination, refusal to hire, and denial of promotion,

- other actions affecting employment such as threats, unjustified negative evaluations, unjustified negative references, or increased surveillance, and
- any other action such as an assault or unfounded civil or criminal charges that are likely to deter reasonable people from pursuing their rights.

Adverse actions do not include petty slights and annoyances, such as stray negative comments in an othe1wise positive or neutral evaluation, "snubbing" a colleague, or negative comments that are justified by an employee's poor work performance or history. Even if the prior protected activity alleged wrongdoing by a different employer, retaliatory adverse actions are unlawful. For example, it is unlawful for a worker's current employer to retaliate against him for pursuing an EEO charge against a former employer.

Of course, employees are not excused from continuing to perform their jobs or follow their company's legitimate workplace rules just because they have filed a complaint with the EEOC or opposed discrimination. For more information about adverse actions, see EEOC's Compliance Manual Section 8, Chapter II, Part D.

Covered Individuals

Covered individuals are people who have opposed unlawful practices, participated in proceedings, or requested accommodations related to employment discrimination based on race, color, sex, religion, national origin, age, or disability. individuals who have a close association with someone who has engaged in such protected activity also are covered individuals. For example, it is illegal to terminate an employee because his spouse participated in employment discrimination litigation.

Individuals who have brought attention to violations of law other than employment discrimination are NOT covered individuals for purposes of anti-discrimination retaliation laws. For example," whistleblowers" who raise ethical, financial, or other concerns unrelated to employment discrimination are not protected by the EEOC enforced laws.

Protected Activity

Protected activity includes:

- Opposition to a practice believed to be unlawful discrimination
- Opposition is informing an employer that yon believe that he/she is engaging in prohibited discrimination.
- Opposition is protected from retaliation as long as it is based on a reasonable, good-faith belief that the complained of practice violates anti-discrimination law; and the manner of the opposition is reasonable.

Examples of protected opposition include:

- Complaining to anyone about alleged discrimination against oneself or others;
- Threatening to file a charge of discrimination;
- Picketing in opposition to discrimination; or
- Refusing to obey an order reasonably believed to be discriminatory.

Examples of activities that are NOT protected opposition include:

- Actions that interfere with job performance so as to render the employee ineffective; or Unlawful activities such as acts or threats of violence.
- Participation in an employment discrimination proceeding.
- Participation means taking part in an employment discrimination proceeding.
- Participation is protected activity even if the proceeding involved claims that ultimately were found to be invalid.

Examples of participation include:

- Filing a charge of employment discrimination;
- Cooperating with an internal investigation of alleged discriminatory practices; or
- Serving as a witness in an EEO investigation or litigation.

A protected activity can also include requesting a reasonable accommodation based on religion or disability.

For more information about Protected Activities, see EEOC's Compliance Manual, Section 8, Chapter II, Part B - Opposition and Part C-Participation.

10. Sex-Base Discrimination Title VII of the Civil Rights Act of 1964

Sex-Based Discrimination

Title VII of the Civil Rights Act of 1964 protects individuals against employment discrimination on the basis of sex as well as race, color, national origin, and religion. Title VII applies to employers with 15 or more employees, including state and local governments. It also applies to employment agencies and to labor organizations, as well as to the federal government.

It is unlawful to discriminate against any employee or applicant for employment because of his/her sex in regard to hiring, termination, promotion, compensation, job training, or any other term, condition, or privilege of employment. Title VII also prohibits employment decisions based on stereotypes and assumptions about abilities, traits, or the performance of individuals on the basis of sex. Title VII prohibits both intentional discrimination and neutral job policies that

disproportionately exclude individuals on the basis of sex and that are not job related.

Title VII's prohibitions against sex-based discrimination also cover:

Sexual Harassment
This includes practices ranging from direct requests for sexual favors to workplace conditions that create a hostile environment for persons of either gender, including same sex harassment.

Pregnancy Based Discrimination

Title VII was amended by the Pregnancy Discrimination Act, which prohibits discrimination on the basis of pregnancy, childbirth and related medical conditions.

The Equal Pay Act of 1963 requires that men and women be given equal pay for equal work in the same establishment. The jobs need not be identical, but they must be substantially equal. Title VII also prohibits compensation discrimination on the basis of sex. Unlike the Equal Pay Act, however, Title VII does not require that the claimant's job be substantially equal to that of a higher paid person of the opposite sex or require the claimant to work in the same establishment.

It is also unlawful to retaliate against an individual for opposing employment practices that discriminate based on sex or for filing a discrimination charge, testifying, or participating in any way in an investigation, proceeding, or litigation under Title VII.

11. Sexual Harassment Discrimination Title VII of the Civil Rights Act of 1964

Sexual Harassment

Sexual harassment is a form of sex discrimination that violates Title VII of the Civil Rights Act of 1964. Title VII applies to employers with 15 or more employees, including state and local governments. It also applies to employment agencies and to labor organizations, as well as to the federal government.

Unwelcome sexual advances, requests for sexual favors, and other verbal or physical conduct of a sexual nature constitute sexual harassment when this conduct explicitly or implicitly affects an individual's employment, unreasonably interferes with an individual's work performance, or creates an intimidating, hostile, or offensive work environment.

Sexual harassment can occur in a variety of circumstances, including but not limited to the following:

The victim as well as the harasser may be a woman or a man. The victim does not have to be of the opposite sex.

The harasser can be the victim's supervisor, an agent of the employer, a supervisor in another area, a co-worker, or a non-employee.

The victim does not have to be the person harassed but could be anyone affected by the offensive conduct.

Unlawful sexual harassment may occur without economic injury to or discharge of the victim.

The harasser's conduct must be unwelcome.

It is helpful for the victim to inform the harasser directly that the conduct is unwelcome and must stop. The victim should use any employer complaint mechanism or grievance system available.

When investigating allegations of sexual harassment, EEOC looks at the whole record: the circumstances, such as the nature of the sexual advances, and the context in which the alleged incidents occurred. A determination on the allegations is made from the facts on a case-by-case basis.

Prevention is the best tool to eliminate sexual harassment in the workplace. Employers are encouraged to take steps necessary to prevent sexual harassment from occurring. They should clearly communicate to employees that sexual harassment will not be tolerated. They can do so by providing sexual harassment training to their employees and by establishing an effective complaint or grievance process and taking immediate and appropriate action when an employee complains.

It is also unlawful to retaliate against an individual for opposing employment practices that discriminate based on sex or for filing a discrimination charge, testifying, or participating in any way in an investigation, proceeding, or litigation under Title VII.

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Chief Education Office

Summary Cross Reference Listing and Packages
2017-19 Biennium

Agency Number: 52400
BAM Analyst: McGee, Bill
Budget Coordinator: Heinrichs, Valerie - (503)373-0743

Cross Reference Number	*Cross Reference Description*	*Package Number*	Priority	*Package Description*	*Package Group*
001-00-00-00000	Chief Education Office	010	0	Non-PICS Psnl Svc / Vacancy Factor	Essential Packages
001-00-00-00000	Chief Education Office	021	0	Phase - In	Essential Packages
001-00-00-00000	Chief Education Office	022	0	Phase-out Pgm & One-time Costs	Essential Packages
001-00-00-00000	Chief Education Office	031	0	Standard Inflation	Essential Packages
001-00-00-00000	Chief Education Office	032	0	Above Standard Inflation	Essential Packages
001-00-00-00000	Chief Education Office	080	0	May 2016 E-Board	Policy Packages
001-00-00-00000	Chief Education Office	101	0	Operational Restructure	Policy Packages
001-00-00-00000	Chief Education Office	102	0	SLDS Staffing	Policy Packages
001-00-00-00000	Chief Education Office	103	0	Research & Evaluation	Policy Packages
001-00-00-00000	Chief Education Office	104	0	Network for Quality Teaching and Learning	Policy Packages
001-00-00-00000	Chief Education Office	105	0	Chronic Absenteeism - Trauma Informed Pilot Completion	Policy Packages
001-00-00-00000	Chief Education Office	106	0	Statewide Longitudinal Data System (SLDS)	Policy Packages
999-00-00-00000	Suspense	010	0	Non-PICS Psnl Svc / Vacancy Factor	Essential Packages
999-00-00-00000	Suspense	021	0	Phase - In	Essential Packages
999-00-00-00000	Suspense	022	0	Phase-out Pgm & One-time Costs	Essential Packages
999-00-00-00000	Suspense	031	0	Standard Inflation	Essential Packages
999-00-00-00000	Suspense	080	0	May 2016 E-Board	Policy Packages

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Chief Education Office

Policy Package List by Priority
2017-19 Biennium

Agency Number: 52400
BAM Analyst: McGee, Bill
Budget Coordinator: Heinrichs, Valerie - (503)373-0743

Priority	*Policy Pkg Number*	*Policy Pkg Description*	*Summary Cross Reference Number*	*Cross Reference Description*
0	080	May 2016 E-Board	001-00-00-00000	Chief Education Office
			999-00-00-00000	Suspense
	101	Operational Restructure	001-00-00-00000	Chief Education Office
	102	SLDS Staffing	001-00-00-00000	Chief Education Office
	103	Research & Evaluation	001-00-00-00000	Chief Education Office
	104	Network for Quality Teaching and Learning	001-00-00-00000	Chief Education Office
	105	Chronic Absenteeism - Trauma Informed Pilot	001-00-00-00000	Chief Education Office
	106	Statewide Longitudinal Data System (SLDS)	001-00-00-00000	Chief Education Office

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DESCRIPTION	2013-15 Actuals	2015-17 Leg Adopted Budget	2015-17 Emergency Boards	2015-17 Leg Approved Budget	2017-19 Base Budget	2017-19 Current Service Level
REVENUE CATEGORIES						
GENERAL FUND APPROPRIATION						
0050 General Fund Appropriation						
8000 General Fund	21,008,299	6,239,594	7,117,548	13,357,142	16,412,079	9,982,404
REVENUES						
8000 General Fund	21,008,299	6,239,594	7,117,548	13,357,142	16,412,079	9,982,404
AVAILABLE REVENUES						
8000 General Fund	21,008,299	6,239,594	7,117,548	13,357,142	16,412,079	9,982,404
EXPENDITURES						
PERSONAL SERVICES						
SALARIES & WAGES						
3110 Class/Unclass Sal. and Per Diem						
8000 General Fund	2,243,520	1,113,717	615,490	1,729,207	3,343,140	3,343,140
3160 Temporary Appointments						
8000 General Fund	22,827	-	-	-	-	-
3170 Overtime Payments						
8000 General Fund	1,745	-	-	-	-	-
3190 All Other Differential						
8000 General Fund	189,378	216,435	-	216,435	216,435	68,915
TOTAL SALARIES & WAGES						

DESCRIPTION	2013-15 Actuals	2015-17 Leg Adopted Budget	2015-17 Emergency Boards	2015-17 Leg Approved Budget	2017-19 Base Budget	2017-19 Current Service Level
8000 General Fund	2,457,470	1,330,152	615,490	1,945,642	3,559,575	3,412,055
TOTAL SALARIES & WAGES	**$2,457,470**	**$1,330,152**	**$615,490**	**$1,945,642**	**$3,559,575**	**$3,412,055**
OTHER PAYROLL EXPENSES						
3210 Empl. Rel. Bd. Assessments						
8000 General Fund	180	667	138	805	1,026	1,026
3220 Public Employees' Retire Cont						
8000 General Fund	299,017	209,548	97,187	306,735	678,941	650,779
3221 Pension Obligation Bond						
8000 General Fund	134,156	63,844	14,423	78,267	78,267	207,054
3230 Social Security Taxes						
8000 General Fund	159,614	101,755	47,085	148,840	265,915	254,630
3250 Worker's Comp. Assess. (WCD)						
8000 General Fund	808	1,044	206	1,250	1,311	1,311
3260 Mass Transit Tax						
8000 General Fund	12,965	16,561	3,693	20,254	20,254	20,713
3270 Flexible Benefits						
8000 General Fund	361,436	95,400	117,619	213,019	633,384	633,384
3280 Other OPE						
8000 General Fund	-	2,648,884	-	2,648,884	2,648,884	-
TOTAL OTHER PAYROLL EXPENSES						

DESCRIPTION	2013-15 Actuals	2015-17 Leg Adopted Budget	2015-17 Emergency Boards	2015-17 Leg Approved Budget	2017-19 Base Budget	2017-19 Current Service Level
8000 General Fund	968,176	3,137,703	280,351	3,418,054	4,327,982	1,768,897
TOTAL OTHER PAYROLL EXPENSES	**$968,176**	**$3,137,703**	**$280,351**	**$3,418,054**	**$4,327,982**	**$1,768,897**
P.S. BUDGET ADJUSTMENTS						
3465 Reconciliation Adjustment						
8000 General Fund	-	(531,076)	-	(531,076)	-	-
TOTAL PERSONAL SERVICES						
8000 General Fund	3,425,646	3,936,779	895,841	4,832,620	7,887,557	5,180,952
TOTAL PERSONAL SERVICES	**$3,425,646**	**$3,936,779**	**$895,841**	**$4,832,620**	**$7,887,557**	**$5,180,952**
SERVICES & SUPPLIES						
4100 Instate Travel						
8000 General Fund	71,597	336,966	3,970	340,936	336,936	58,428
4125 Out of State Travel						
8000 General Fund	16,783	-	3,200	3,200	34,700	35,984
4150 Employee Training						
8000 General Fund	12,788	9,603	2,389	11,992	16,642	14,780
4175 Office Expenses						
8000 General Fund	28,667	20,323	5,550	25,873	44,373	43,975
4200 Telecommunications						
8000 General Fund	39,271	37,413	3,712	41,125	30,625	30,696
4225 State Gov. Service Charges						

DESCRIPTION	2013-15 Actuals	2015-17 Leg Adopted Budget	2015-17 Emergency Boards	2015-17 Leg Approved Budget	2017-19 Base Budget	2017-19 Current Service Level
8000 General Fund	68,757	42,351	7,856	50,207	50,993	87,314
4250 Data Processing						
8000 General Fund	33,627	90,000	1,610	91,610	51,110	52,541
4275 Publicity and Publications						
8000 General Fund	33,844	20,988	1,237	22,225	32,225	33,064
4300 Professional Services						
8000 General Fund	1,568,561	1,415,632	214,580	1,630,212	1,630,212	1,474,098
4315 IT Professional Services						
8000 General Fund	-	-	4,680,648	4,680,648	4,680,648	2,433,774
4325 Attorney General						
8000 General Fund	20,044	17,436	-	17,436	17,436	19,727
4375 Employee Recruitment and Develop						
8000 General Fund	-	3,969	991	4,960	1,460	1,231
4400 Dues and Subscriptions						
8000 General Fund	41,569	5,357	1,237	6,594	6,594	6,484
4425 Facilities Rental and Taxes						
8000 General Fund	136,531	110,574	17,599	128,173	128,173	283,773
4475 Facilities Maintenance						
8000 General Fund	-	-	-	-	750	778
4575 Agency Program Related S and S						

DESCRIPTION	2013-15 Actuals	2015-17 Leg Adopted Budget	2015-17 Emergency Boards	2015-17 Leg Approved Budget	2017-19 Base Budget	2017-19 Current Service Level
8000 General Fund	18,223	-	188,300	188,300	188,300	-
4650 Other Services and Supplies						
8000 General Fund	23,297	163,600	1,237	164,837	164,051	194,651
4700 Expendable Prop 250 - 5000						
8000 General Fund	19,988	7,728	9,832	17,560	19,160	17,320
4715 IT Expendable Property						
8000 General Fund	44,242	20,876	-	20,876	12,376	12,834
TOTAL SERVICES & SUPPLIES						
8000 General Fund	2,177,789	2,302,816	5,143,948	7,446,764	7,446,764	4,801,452
TOTAL SERVICES & SUPPLIES	**$2,177,789**	**$2,302,816**	**$5,143,948**	**$7,446,764**	**$7,446,764**	**$4,801,452**
CAPITAL OUTLAY						
5200 Technical Equipment						
8000 General Fund	6,024	-	-	-	-	-
5550 Data Processing Software						
8000 General Fund	6,095	-	-	-	-	-
TOTAL CAPITAL OUTLAY						
8000 General Fund	12,119	-	-	-	-	-
TOTAL CAPITAL OUTLAY	**$12,119**	-	-	-	-	-
SPECIAL PAYMENTS						
6040 Dist to Local School Districts						

DESCRIPTION	2013-15 Actuals	2015-17 Leg Adopted Budget	2015-17 Emergency Boards	2015-17 Leg Approved Budget	2017-19 Base Budget	2017-19 Current Service Level
8000 General Fund	-	-	447,759	447,759	447,759	-
6085 Other Special Payments						
8000 General Fund	14,805,721	(1)	630,000	629,999	629,999	-
TOTAL SPECIAL PAYMENTS						
8000 General Fund	14,805,721	(1)	1,077,759	1,077,758	1,077,758	-
TOTAL SPECIAL PAYMENTS	**$14,805,721**	**($1)**	**$1,077,759**	**$1,077,758**	**$1,077,758**	**-**
EXPENDITURES						
8000 General Fund	20,421,275	6,239,594	7,117,548	13,357,142	16,412,079	9,982,404
REVERSIONS						
9900 Reversions						
8000 General Fund	(587,024)	-	-	-	-	-
ENDING BALANCE						
8000 General Fund	-	-	-	-	-	-
TOTAL ENDING BALANCE	**-**	**-**	**-**	**-**	**-**	**-**
AUTHORIZED POSITIONS						
8150 Class/Unclass Positions	15	17	3	20	19	19
AUTHORIZED FTE POSITIONS						
8250 Class/Unclass FTE Positions	15.00	6.84	3.61	10.45	18.50	18.50
8280 FTE Reconciliation	-	7.80	-	7.80	-	-
TOTAL AUTHORIZED FTE	**15.00**	**14.64**	**3.61**	**18.25**	**18.50**	**18.50**

DESCRIPTION	2013-15 Actuals	2015-17 Leg Adopted Budget	2015-17 Emergency Boards	2015-17 Leg Approved Budget	2017-19 Base Budget	2017-19 Current Service Level
REVENUE CATEGORIES						
GENERAL FUND APPROPRIATION						
0050 General Fund Appropriation						
8000 General Fund	21,008,299	6,239,594	7,117,548	13,357,142	16,412,079	9,982,404
REVENUES						
8000 General Fund	21,008,299	6,239,594	7,117,548	13,357,142	16,412,079	9,982,404
AVAILABLE REVENUES						
8000 General Fund	21,008,299	6,239,594	7,117,548	13,357,142	16,412,079	9,982,404
EXPENDITURES						
PERSONAL SERVICES						
SALARIES & WAGES						
3110 Class/Unclass Sal. and Per Diem						
8000 General Fund	2,243,520	1,113,717	615,490	1,729,207	3,343,140	3,343,140
3160 Temporary Appointments						
8000 General Fund	22,827	-	-	-	-	-
3170 Overtime Payments						
8000 General Fund	1,745	-	-	-	-	-
3190 All Other Differential						
8000 General Fund	189,378	216,435	-	216,435	216,435	68,915
TOTAL SALARIES & WAGES						

DESCRIPTION	2013-15 Actuals	2015-17 Leg Adopted Budget	2015-17 Emergency Boards	2015-17 Leg Approved Budget	2017-19 Base Budget	2017-19 Current Service Level
8000 General Fund	2,457,470	1,330,152	615,490	1,945,642	3,559,575	3,412,055
TOTAL SALARIES & WAGES	**$2,457,470**	**$1,330,152**	**$615,490**	**$1,945,642**	**$3,559,575**	**$3,412,055**
OTHER PAYROLL EXPENSES						
3210 Empl. Rel. Bd. Assessments						
8000 General Fund	180	667	138	805	1,026	1,026
3220 Public Employees' Retire Cont						
8000 General Fund	299,017	209,548	97,187	306,735	678,941	650,779
3221 Pension Obligation Bond						
8000 General Fund	134,156	63,844	14,423	78,267	78,267	207,054
3230 Social Security Taxes						
8000 General Fund	159,614	101,755	47,085	148,840	265,915	254,630
3250 Worker's Comp. Assess. (WCD)						
8000 General Fund	808	1,044	206	1,250	1,311	1,311
3260 Mass Transit Tax						
8000 General Fund	12,965	16,561	3,693	20,254	20,254	20,713
3270 Flexible Benefits						
8000 General Fund	361,436	95,400	117,619	213,019	633,384	633,384
3280 Other OPE						
8000 General Fund	-	2,648,884	-	2,648,884	2,648,884	-
TOTAL OTHER PAYROLL EXPENSES						

DESCRIPTION	2013-15 Actuals	2015-17 Leg Adopted Budget	2015-17 Emergency Boards	2015-17 Leg Approved Budget	2017-19 Base Budget	2017-19 Current Service Level
8000 General Fund	968,176	3,137,703	280,351	3,418,054	4,327,982	1,768,897
TOTAL OTHER PAYROLL EXPENSES	**$968,176**	**$3,137,703**	**$280,351**	**$3,418,054**	**$4,327,982**	**$1,768,897**
P.S. BUDGET ADJUSTMENTS						
3465 Reconciliation Adjustment						
8000 General Fund	-	(531,076)	-	(531,076)	-	-
TOTAL PERSONAL SERVICES						
8000 General Fund	3,425,646	3,936,779	895,841	4,832,620	7,887,557	5,180,952
TOTAL PERSONAL SERVICES	**$3,425,646**	**$3,936,779**	**$895,841**	**$4,832,620**	**$7,887,557**	**$5,180,952**
SERVICES & SUPPLIES						
4100 Instate Travel						
8000 General Fund	71,597	336,966	3,970	340,936	336,936	58,428
4125 Out of State Travel						
8000 General Fund	16,783	-	3,200	3,200	34,700	35,984
4150 Employee Training						
8000 General Fund	12,788	9,603	2,389	11,992	16,642	14,780
4175 Office Expenses						
8000 General Fund	28,667	20,323	5,550	25,873	44,373	43,975
4200 Telecommunications						
8000 General Fund	39,271	37,413	3,712	41,125	30,625	30,696
4225 State Gov. Service Charges						

DESCRIPTION	2013-15 Actuals	2015-17 Leg Adopted Budget	2015-17 Emergency Boards	2015-17 Leg Approved Budget	2017-19 Base Budget	2017-19 Current Service Level
8000 General Fund	68,757	42,351	7,856	50,207	50,993	87,314
4250 Data Processing						
8000 General Fund	33,627	90,000	1,610	91,610	51,110	52,541
4275 Publicity and Publications						
8000 General Fund	33,844	20,988	1,237	22,225	32,225	33,064
4300 Professional Services						
8000 General Fund	1,568,561	1,415,632	214,580	1,630,212	1,630,212	1,474,098
4315 IT Professional Services						
8000 General Fund	-	-	4,680,648	4,680,648	4,680,648	2,433,774
4325 Attorney General						
8000 General Fund	20,044	17,436	-	17,436	17,436	19,727
4375 Employee Recruitment and Develop						
8000 General Fund	-	3,969	991	4,960	1,460	1,231
4400 Dues and Subscriptions						
8000 General Fund	41,569	5,357	1,237	6,594	6,594	6,484
4425 Facilities Rental and Taxes						
8000 General Fund	136,531	110,574	17,599	128,173	128,173	283,773
4475 Facilities Maintenance						
8000 General Fund	-	-	-	-	750	778
4575 Agency Program Related S and S						

DESCRIPTION	2013-15 Actuals	2015-17 Leg Adopted Budget	2015-17 Emergency Boards	2015-17 Leg Approved Budget	2017-19 Base Budget	2017-19 Current Service Level
8000 General Fund	18,223	-	188,300	188,300	188,300	-
4650 Other Services and Supplies						
8000 General Fund	23,297	163,600	1,237	164,837	164,051	194,651
4700 Expendable Prop 250 - 5000						
8000 General Fund	19,988	7,728	9,832	17,560	19,160	17,320
4715 IT Expendable Property						
8000 General Fund	44,242	20,876	-	20,876	12,376	12,834
TOTAL SERVICES & SUPPLIES						
8000 General Fund	2,177,789	2,302,816	5,143,948	7,446,764	7,446,764	4,801,452
TOTAL SERVICES & SUPPLIES	**$2,177,789**	**$2,302,816**	**$5,143,948**	**$7,446,764**	**$7,446,764**	**$4,801,452**
CAPITAL OUTLAY						
5200 Technical Equipment						
8000 General Fund	6,024	-	-	-	-	-
5550 Data Processing Software						
8000 General Fund	6,095	-	-	-	-	-
TOTAL CAPITAL OUTLAY						
8000 General Fund	12,119	-	-	-	-	-
TOTAL CAPITAL OUTLAY	**$12,119**	-	-	-	-	-
SPECIAL PAYMENTS						
6040 Dist to Local School Districts						

DESCRIPTION	2013-15 Actuals	2015-17 Leg Adopted Budget	2015-17 Emergency Boards	2015-17 Leg Approved Budget	2017-19 Base Budget	2017-19 Current Service Level
8000 General Fund	-	-	447,759	447,759	447,759	-
6085 Other Special Payments						
8000 General Fund	14,805,721	(1)	630,000	629,999	629,999	-
TOTAL SPECIAL PAYMENTS						
8000 General Fund	14,805,721	(1)	1,077,759	1,077,758	1,077,758	-
TOTAL SPECIAL PAYMENTS	**$14,805,721**	**($1)**	**$1,077,759**	**$1,077,758**	**$1,077,758**	**-**
EXPENDITURES						
8000 General Fund	20,421,275	6,239,594	7,117,548	13,357,142	16,412,079	9,982,404
REVERSIONS						
9900 Reversions						
8000 General Fund	(587,024)	-	-	-	-	-
ENDING BALANCE						
8000 General Fund	-	-	-	-	-	-
TOTAL ENDING BALANCE	**-**	**-**	**-**	**-**	**-**	**-**
AUTHORIZED POSITIONS						
8150 Class/Unclass Positions	15	17	3	20	19	19
AUTHORIZED FTE POSITIONS						
8250 Class/Unclass FTE Positions	15.00	6.84	3.61	10.45	18.50	18.50
8280 FTE Reconciliation	-	7.80	-	7.80	-	-
TOTAL AUTHORIZED FTE	**15.00**	**14.64**	**3.61**	**18.25**	**18.50**	**18.50**

Description	2017-19 Base Budget	Essential Packages	2017-19 Current Service Level	Policy Packages	2017-19 Agency Request Budget
REVENUE CATEGORIES					
GENERAL FUND APPROPRIATION					
0050 General Fund Appropriation					
8000 General Fund	16,412,079	(6,429,675)	9,982,404	8,693,803	18,676,207
AVAILABLE REVENUES					
8000 General Fund	16,412,079	(6,429,675)	9,982,404	8,693,803	18,676,207
EXPENDITURES					
PERSONAL SERVICES					
SALARIES & WAGES					
3110 Class/Unclass Sal. and Per Diem					
8000 General Fund	3,343,140	-	3,343,140	753,864	4,097,004
3190 All Other Differential					
8000 General Fund	216,435	(147,520)	68,915	61,168	130,083
TOTAL SALARIES & WAGES					
8000 General Fund	3,559,575	(147,520)	3,412,055	815,032	4,227,087
OTHER PAYROLL EXPENSES					
3210 Empl. Rel. Bd. Assessments					
8000 General Fund	1,026	-	1,026	228	1,254
3220 Public Employees' Retire Cont					
8000 General Fund	678,941	(28,162)	650,779	155,589	806,368
3221 Pension Obligation Bond					
8000 General Fund	78,267	128,787	207,054	-	207,054
3230 Social Security Taxes					

Description	2017-19 Base Budget	Essential Packages	2017-19 Current Service Level	Policy Packages	2017-19 Agency Request Budget
8000 General Fund	265,915	(11,285)	254,630	60,183	314,813
3250 Worker's Comp. Assess. (WCD)					
8000 General Fund	1,311	-	1,311	276	1,587
3260 Mass Transit Tax					
8000 General Fund	20,254	459	20,713	4,891	25,604
3270 Flexible Benefits					
8000 General Fund	633,384	-	633,384	133,344	766,728
3280 Other OPE					
8000 General Fund	2,648,884	(2,648,884)	-	-	-
TOTAL OTHER PAYROLL EXPENSES					
8000 General Fund	4,327,982	(2,559,085)	1,768,897	354,511	2,123,408
TOTAL PERSONAL SERVICES					
8000 General Fund	7,887,557	(2,706,605)	5,180,952	1,169,543	6,350,495
SERVICES & SUPPLIES					
4100 Instate Travel					
8000 General Fund	336,936	(278,508)	58,428	123,298	181,726
4125 Out of State Travel					
8000 General Fund	34,700	1,284	35,984	-	35,984
4150 Employee Training					
8000 General Fund	16,642	(1,862)	14,780	74,751	89,531
4175 Office Expenses					
8000 General Fund	44,373	(398)	43,975	7,488	51,463
4200 Telecommunications					

Description	2017-19 Base Budget	Essential Packages	2017-19 Current Service Level	Policy Packages	2017-19 Agency Request Budget
8000 General Fund	30,625	71	30,696	6,328	37,024
4225 State Gov. Service Charges					
8000 General Fund	50,993	36,321	87,314	-	87,314
4250 Data Processing					
8000 General Fund	51,110	1,431	52,541	641,752	694,293
4275 Publicity and Publications					
8000 General Fund	32,225	839	33,064	1,160	34,224
4300 Professional Services					
8000 General Fund	1,630,212	(156,114)	1,474,098	1,392,000	2,866,098
4315 IT Professional Services					
8000 General Fund	4,680,648	(2,246,874)	2,433,774	10,000	2,443,774
4325 Attorney General					
8000 General Fund	17,436	2,291	19,727	10,000	29,727
4375 Employee Recruitment and Develop					
8000 General Fund	1,460	(229)	1,231	1,055	2,286
4400 Dues and Subscriptions					
8000 General Fund	6,594	(110)	6,484	36,160	42,644
4425 Facilities Rental and Taxes					
8000 General Fund	128,173	155,600	283,773	31,528	315,301
4475 Facilities Maintenance					
8000 General Fund	750	28	778	-	778
4575 Agency Program Related S and S					
8000 General Fund	188,300	(188,300)	-	213,537	213,537

Description	2017-19 Base Budget	Essential Packages	2017-19 Current Service Level	Policy Packages	2017-19 Agency Request Budget
4650 Other Services and Supplies					
8000 General Fund	164,051	30,600	194,651	79,199	273,850
4700 Expendable Prop 250 - 5000					
8000 General Fund	19,160	(1,840)	17,320	6,337	23,657
4715 IT Expendable Property					
8000 General Fund	12,376	458	12,834	29,667	42,501
TOTAL SERVICES & SUPPLIES					
8000 General Fund	7,446,764	(2,645,312)	4,801,452	2,664,260	7,465,712
CAPITAL OUTLAY					
5550 Data Processing Software					
8000 General Fund	-	-	-	600,000	600,000
SPECIAL PAYMENTS					
6030 Dist to Non-Gov Units					
8000 General Fund	-	-	-	500,000	500,000
6035 Dist to Individuals					
8000 General Fund	-	-	-	750,000	750,000
6040 Dist to Local School Districts					
8000 General Fund	447,759	(447,759)	-	2,760,000	2,760,000
6048 Spc Pmt to Public Universities					
8000 General Fund	-	-	-	250,000	250,000
6085 Other Special Payments					
8000 General Fund	629,999	(629,999)	-	-	-
TOTAL SPECIAL PAYMENTS					

Description	2017-19 Base Budget	Essential Packages	2017-19 Current Service Level	Policy Packages	2017-19 Agency Request Budget
8000 General Fund	1,077,758	(1,077,758)	-	4,260,000	4,260,000
TOTAL EXPENDITURES					
8000 General Fund	16,412,079	(6,429,675)	9,982,404	8,693,803	18,676,207
AUTHORIZED POSITIONS					
8150 Class/Unclass Positions	19	-	19	4	23
AUTHORIZED FTE					
8250 Class/Unclass FTE Positions	18.50	-	18.50	4.00	22.50

Description	2017-19 Base Budget	Essential Packages	2017-19 Current Service Level	Policy Packages	2017-19 Agency Request Budget
REVENUE CATEGORIES					
GENERAL FUND APPROPRIATION					
0050 General Fund Appropriation					
8000 General Fund	16,412,079	(6,429,675)	9,982,404	8,693,803	18,676,207
AVAILABLE REVENUES					
8000 General Fund	16,412,079	(6,429,675)	9,982,404	8,693,803	18,676,207
EXPENDITURES					
PERSONAL SERVICES					
SALARIES & WAGES					
3110 Class/Unclass Sal. and Per Diem					
8000 General Fund	3,343,140	-	3,343,140	753,864	4,097,004
3190 All Other Differential					
8000 General Fund	216,435	(147,520)	68,915	61,168	130,083
TOTAL SALARIES & WAGES					
8000 General Fund	3,559,575	(147,520)	3,412,055	815,032	4,227,087
OTHER PAYROLL EXPENSES					
3210 Empl. Rel. Bd. Assessments					
8000 General Fund	1,026	-	1,026	228	1,254
3220 Public Employees' Retire Cont					
8000 General Fund	678,941	(28,162)	650,779	155,589	806,368
3221 Pension Obligation Bond					
8000 General Fund	78,267	128,787	207,054	-	207,054
3230 Social Security Taxes					

Description	2017-19 Base Budget	Essential Packages	2017-19 Current Service Level	Policy Packages	2017-19 Agency Request Budget
8000 General Fund	265,915	(11,285)	254,630	60,183	314,813
3250 Worker's Comp. Assess. (WCD)					
8000 General Fund	1,311	-	1,311	276	1,587
3260 Mass Transit Tax					
8000 General Fund	20,254	459	20,713	4,891	25,604
3270 Flexible Benefits					
8000 General Fund	633,384	-	633,384	133,344	766,728
3280 Other OPE					
8000 General Fund	2,648,884	(2,648,884)	-	-	-
TOTAL OTHER PAYROLL EXPENSES					
8000 General Fund	4,327,982	(2,559,085)	1,768,897	354,511	2,123,408
TOTAL PERSONAL SERVICES					
8000 General Fund	7,887,557	(2,706,605)	5,180,952	1,169,543	6,350,495
SERVICES & SUPPLIES					
4100 Instate Travel					
8000 General Fund	336,936	(278,508)	58,428	123,298	181,726
4125 Out of State Travel					
8000 General Fund	34,700	1,284	35,984	-	35,984
4150 Employee Training					
8000 General Fund	16,642	(1,862)	14,780	74,751	89,531
4175 Office Expenses					
8000 General Fund	44,373	(398)	43,975	7,488	51,463
4200 Telecommunications					

Description	2017-19 Base Budget	Essential Packages	2017-19 Current Service Level	Policy Packages	2017-19 Agency Request Budget
8000 General Fund	30,625	71	30,696	6,328	37,024
4225 State Gov. Service Charges					
8000 General Fund	50,993	36,321	87,314	-	87,314
4250 Data Processing					
8000 General Fund	51,110	1,431	52,541	641,752	694,293
4275 Publicity and Publications					
8000 General Fund	32,225	839	33,064	1,160	34,224
4300 Professional Services					
8000 General Fund	1,630,212	(156,114)	1,474,098	1,392,000	2,866,098
4315 IT Professional Services					
8000 General Fund	4,680,648	(2,246,874)	2,433,774	10,000	2,443,774
4325 Attorney General					
8000 General Fund	17,436	2,291	19,727	10,000	29,727
4375 Employee Recruitment and Develop					
8000 General Fund	1,460	(229)	1,231	1,055	2,286
4400 Dues and Subscriptions					
8000 General Fund	6,594	(110)	6,484	36,160	42,644
4425 Facilities Rental and Taxes					
8000 General Fund	128,173	155,600	283,773	31,528	315,301
4475 Facilities Maintenance					
8000 General Fund	750	28	778	-	778
4575 Agency Program Related S and S					
8000 General Fund	188,300	(188,300)	-	213,537	213,537

Description	2017-19 Base Budget	Essential Packages	2017-19 Current Service Level	Policy Packages	2017-19 Agency Request Budget
4650 Other Services and Supplies					
8000 General Fund	164,051	30,600	194,651	79,199	273,850
4700 Expendable Prop 250 - 5000					
8000 General Fund	19,160	(1,840)	17,320	6,337	23,657
4715 IT Expendable Property					
8000 General Fund	12,376	458	12,834	29,667	42,501
TOTAL SERVICES & SUPPLIES					
8000 General Fund	7,446,764	(2,645,312)	4,801,452	2,664,260	7,465,712
CAPITAL OUTLAY					
5550 Data Processing Software					
8000 General Fund	-	-	-	600,000	600,000
SPECIAL PAYMENTS					
6030 Dist to Non-Gov Units					
8000 General Fund	-	-	-	500,000	500,000
6035 Dist to Individuals					
8000 General Fund	-	-	-	750,000	750,000
6040 Dist to Local School Districts					
8000 General Fund	447,759	(447,759)	-	2,760,000	2,760,000
6048 Spc Pmt to Public Universities					
8000 General Fund	-	-	-	250,000	250,000
6085 Other Special Payments					
8000 General Fund	629,999	(629,999)	-	-	-
TOTAL SPECIAL PAYMENTS					

Description	2017-19 Base Budget	Essential Packages	2017-19 Current Service Level	Policy Packages	2017-19 Agency Request Budget
8000 General Fund	1,077,758	(1,077,758)	-	4,260,000	4,260,000
TOTAL EXPENDITURES					
8000 General Fund	16,412,079	(6,429,675)	9,982,404	8,693,803	18,676,207
AUTHORIZED POSITIONS					
8150 Class/Unclass Positions	19	-	19	4	23
AUTHORIZED FTE					
8250 Class/Unclass FTE Positions	18.50	-	18.50	4.00	22.50

Description	Total Essential Packages	Pkg: 010 Non-PICS Psnl Svc / Vacancy Factor Priority: 00	Pkg: 022 Phase-out Pgm & One-time Costs Priority: 00	Pkg: 031 Standard Inflation Priority: 00	Pkg: 032 Above Standard Inflation Priority: 00	
REVENUE CATEGORIES						
GENERAL FUND APPROPRIATION						
0050 General Fund Appropriation						
8000 General Fund	(6,429,675)	132,362	(6,960,200)	220,207	177,956	
AVAILABLE REVENUES						
8000 General Fund	(6,429,675)	132,362	(6,960,200)	220,207	177,956	
TOTAL AVAILABLE REVENUES	**($6,429,675)**	**$132,362**	**($6,960,200)**	**$220,207**	**$177,956**	
EXPENDITURES						
PERSONAL SERVICES						
SALARIES & WAGES						
3190 All Other Differential						
8000 General Fund	(147,520)	2,459	(149,979)	-	-	
OTHER PAYROLL EXPENSES						
3220 Public Employees Retire Cont						
8000 General Fund	(28,162)	469	(28,631)	-	-	
3221 Pension Obligation Bond						
8000 General Fund	128,787	128,787	-	-	-	
3230 Social Security Taxes						
8000 General Fund	(11,285)	188	(11,473)	-	-	
3260 Mass Transit Tax						
8000 General Fund	459	459	-	-	-	
3280 Other OPE						
8000 General Fund	(2,648,884)	-	(2,648,884)	-	-	

Description	Total Essential Packages	Pkg: 010 Non-PICS Psnl Svc / Vacancy Factor Priority: 00	Pkg: 022 Phase-out Pgm & One-time Costs Priority: 00	Pkg: 031 Standard Inflation Priority: 00	Pkg: 032 Above Standard Inflation Priority: 00	
OTHER PAYROLL EXPENSES						
8000 General Fund	(2,559,085)	129,903	(2,688,988)	-	-	
TOTAL OTHER PAYROLL EXPENSES	**($2,559,085)**	**$129,903**	**($2,688,988)**	-	-	
PERSONAL SERVICES						
8000 General Fund	(2,706,605)	132,362	(2,838,967)	-	-	
TOTAL PERSONAL SERVICES	**($2,706,605)**	**$132,362**	**($2,838,967)**	-	-	
SERVICES & SUPPLIES						
4100 Instate Travel						
8000 General Fund	(278,508)	-	(280,593)	2,085	-	
4125 Out of State Travel						
8000 General Fund	1,284	-	-	1,284	-	
4150 Employee Training						
8000 General Fund	(1,862)	-	(2,389)	527	-	
4175 Office Expenses						
8000 General Fund	(398)	-	(1,967)	1,569	-	
4200 Telecommunications						
8000 General Fund	71	-	(1,024)	1,095	-	
4225 State Gov. Service Charges						
8000 General Fund	36,321	-	(2,167)	38,488	-	
4250 Data Processing						
8000 General Fund	1,431	-	(444)	1,875	-	
4275 Publicity and Publications						

Description	Total Essential Packages	Pkg: 010 Non-PICS Psnl Svc / Vacancy Factor Priority: 00	Pkg: 022 Phase-out Pgm & One-time Costs Priority: 00	Pkg: 031 Standard Inflation Priority: 00	Pkg: 032 Above Standard Inflation Priority: 00	
8000 General Fund	839	-	(341)	1,180	-	
4300 Professional Services						
8000 General Fund	(156,114)	-	(214,580)	58,041	425	
4315 IT Professional Services						
8000 General Fund	(2,246,874)	-	(2,343,402)	95,827	701	
4325 Attorney General						
8000 General Fund	2,291	-	-	2,291	-	
4375 Employee Recruitment and Develop						
8000 General Fund	(229)	-	(273)	44	-	
4400 Dues and Subscriptions						
8000 General Fund	(110)	-	(341)	231	-	
4425 Facilities Rental and Taxes						
8000 General Fund	155,600	-	(4,855)	8,509	151,946	
4475 Facilities Maintenance						
8000 General Fund	28	-	-	28	-	
4575 Agency Program Related S and S						
8000 General Fund	(188,300)	-	(188,300)	-	-	
4650 Other Services and Supplies						
8000 General Fund	30,600	-	(341)	6,057	24,884	
4700 Expendable Prop 250 - 5000						
8000 General Fund	(1,840)	-	(2,458)	618	-	
4715 IT Expendable Property						
8000 General Fund	458	-	-	458	-	

Description	Total Essential Packages	Pkg: 010 Non-PICS Psnl Svc / Vacancy Factor Priority: 00	Pkg: 022 Phase-out Pgm & One-time Costs Priority: 00	Pkg: 031 Standard Inflation Priority: 00	Pkg: 032 Above Standard Inflation Priority: 00	
SERVICES & SUPPLIES						
8000 General Fund	(2,645,312)	-	(3,043,475)	220,207	177,956	
TOTAL SERVICES & SUPPLIES	**($2,645,312)**	**-**	**($3,043,475)**	**$220,207**	**$177,956**	
SPECIAL PAYMENTS						
6040 Dist to Local School Districts						
8000 General Fund	(447,759)	-	(447,759)	-	-	
6085 Other Special Payments						
8000 General Fund	(629,999)	-	(629,999)	-	-	
SPECIAL PAYMENTS						
8000 General Fund	(1,077,758)	-	(1,077,758)	-	-	
TOTAL SPECIAL PAYMENTS	**($1,077,758)**	**-**	**($1,077,758)**	**-**	**-**	
EXPENDITURES						
8000 General Fund	(6,429,675)	132,362	(6,960,200)	220,207	177,956	
TOTAL EXPENDITURES	**($6,429,675)**	**$132,362**	**($6,960,200)**	**$220,207**	**$177,956**	
ENDING BALANCE						
8000 General Fund	-	-	-	-	-	
TOTAL ENDING BALANCE	-	-	-	-	-	

Description	Total Essential Packages	Pkg: 010 Non-PICS Psnl Svc / Vacancy Factor Priority: 00	Pkg: 022 Phase-out Pgm & One-time Costs Priority: 00	Pkg: 031 Standard Inflation Priority: 00	Pkg: 032 Above Standard Inflation Priority: 00	
REVENUE CATEGORIES						
GENERAL FUND APPROPRIATION						
0050 General Fund Appropriation						
8000 General Fund	(6,429,675)	132,362	(6,960,200)	220,207	177,956	
AVAILABLE REVENUES						
8000 General Fund	(6,429,675)	132,362	(6,960,200)	220,207	177,956	
TOTAL AVAILABLE REVENUES	**($6,429,675)**	**$132,362**	**($6,960,200)**	**$220,207**	**$177,956**	
EXPENDITURES						
PERSONAL SERVICES						
SALARIES & WAGES						
3190 All Other Differential						
8000 General Fund	(147,520)	2,459	(149,979)	-	-	
OTHER PAYROLL EXPENSES						
3220 Public Employees Retire Cont						
8000 General Fund	(28,162)	469	(28,631)	-	-	
3221 Pension Obligation Bond						
8000 General Fund	128,787	128,787	-	-	-	
3230 Social Security Taxes						
8000 General Fund	(11,285)	188	(11,473)	-	-	
3260 Mass Transit Tax						
8000 General Fund	459	459	-	-	-	
3280 Other OPE						
8000 General Fund	(2,648,884)	-	(2,648,884)	-	-	

Description	Total Essential Packages	Pkg: 010 Non-PICS Psnl Svc / Vacancy Factor Priority: 00	Pkg: 022 Phase-out Pgm & One-time Costs Priority: 00	Pkg: 031 Standard Inflation Priority: 00	Pkg: 032 Above Standard Inflation Priority: 00	
OTHER PAYROLL EXPENSES						
8000 General Fund	(2,559,085)	129,903	(2,688,988)	-	-	
TOTAL OTHER PAYROLL EXPENSES	**($2,559,085)**	**$129,903**	**($2,688,988)**	-	-	
PERSONAL SERVICES						
8000 General Fund	(2,706,605)	132,362	(2,838,967)	-	-	
TOTAL PERSONAL SERVICES	**($2,706,605)**	**$132,362**	**($2,838,967)**	-	-	
SERVICES & SUPPLIES						
4100 Instate Travel						
8000 General Fund	(278,508)	-	(280,593)	2,085	-	
4125 Out of State Travel						
8000 General Fund	1,284	-	-	1,284	-	
4150 Employee Training						
8000 General Fund	(1,862)	-	(2,389)	527	-	
4175 Office Expenses						
8000 General Fund	(398)	-	(1,967)	1,569	-	
4200 Telecommunications						
8000 General Fund	71	-	(1,024)	1,095	-	
4225 State Gov. Service Charges						
8000 General Fund	36,321	-	(2,167)	38,488	-	
4250 Data Processing						
8000 General Fund	1,431	-	(444)	1,875	-	
4275 Publicity and Publications						

Description	Total Essential Packages	Pkg: 010 Non-PICS Psnl Svc / Vacancy Factor Priority: 00	Pkg: 022 Phase-out Pgm & One-time Costs Priority: 00	Pkg: 031 Standard Inflation Priority: 00	Pkg: 032 Above Standard Inflation Priority: 00	
8000 General Fund	839	-	(341)	1,180	-	
4300 Professional Services						
8000 General Fund	(156,114)	-	(214,580)	58,041	425	
4315 IT Professional Services						
8000 General Fund	(2,246,874)	-	(2,343,402)	95,827	701	
4325 Attorney General						
8000 General Fund	2,291	-	-	2,291	-	
4375 Employee Recruitment and Develop						
8000 General Fund	(229)	-	(273)	44	-	
4400 Dues and Subscriptions						
8000 General Fund	(110)	-	(341)	231	-	
4425 Facilities Rental and Taxes						
8000 General Fund	155,600	-	(4,855)	8,509	151,946	
4475 Facilities Maintenance						
8000 General Fund	28	-	-	28	-	
4575 Agency Program Related S and S						
8000 General Fund	(188,300)	-	(188,300)	-	-	
4650 Other Services and Supplies						
8000 General Fund	30,600	-	(341)	6,057	24,884	
4700 Expendable Prop 250 - 5000						
8000 General Fund	(1,840)	-	(2,458)	618	-	
4715 IT Expendable Property						
8000 General Fund	458	-	-	458	-	

Description	Total Essential Packages	Pkg: 010 Non-PICS Psnl Svc / Vacancy Factor Priority: 00	Pkg: 022 Phase-out Pgm & One-time Costs Priority: 00	Pkg: 031 Standard Inflation Priority: 00	Pkg: 032 Above Standard Inflation Priority: 00	
SERVICES & SUPPLIES						
8000 General Fund	(2,645,312)	-	(3,043,475)	220,207	177,956	
TOTAL SERVICES & SUPPLIES	**($2,645,312)**	**-**	**($3,043,475)**	**$220,207**	**$177,956**	
SPECIAL PAYMENTS						
6040 Dist to Local School Districts						
8000 General Fund	(447,759)	-	(447,759)	-	-	
6085 Other Special Payments						
8000 General Fund	(629,999)	-	(629,999)	-	-	
SPECIAL PAYMENTS						
8000 General Fund	(1,077,758)	-	(1,077,758)	-	-	
TOTAL SPECIAL PAYMENTS	**($1,077,758)**	**-**	**($1,077,758)**	**-**	**-**	
EXPENDITURES						
8000 General Fund	(6,429,675)	132,362	(6,960,200)	220,207	177,956	
TOTAL EXPENDITURES	**($6,429,675)**	**$132,362**	**($6,960,200)**	**$220,207**	**$177,956**	
ENDING BALANCE						
8000 General Fund	-	-	-	-	-	
TOTAL ENDING BALANCE	**-**	**-**	**-**	**-**	**-**	

Description	Total Policy Packages	Pkg: 101 Operational Restructure Priority: 00	Pkg: 102 SLDS Staffing Priority: 00	Pkg: 103 Research & Evaluation Priority: 00	Pkg: 104 Network for Quality Teaching and Learning Priority: 00	Pkg: 105 Chronic Absenteeism - Trauma Informed Pilot Completion of HB 4002 Priority: 00
REVENUE CATEGORIES						
GENERAL FUND APPROPRIATION						
0050 General Fund Appropriation						
8000 General Fund	8,693,803	1,104,712	366,957	545,467	1,838,667	3,060,000
AVAILABLE REVENUES						
8000 General Fund	8,693,803	1,104,712	366,957	545,467	1,838,667	3,060,000
TOTAL AVAILABLE REVENUES	**$8,693,803**	**$1,104,712**	**$366,957**	**$545,467**	**$1,838,667**	**$3,060,000**
EXPENDITURES						
PERSONAL SERVICES						
SALARIES & WAGES						
3110 Class/Unclass Sal. and Per Diem						
8000 General Fund	753,864	506,280	247,584	-	-	-
3190 All Other Differential						
8000 General Fund	61,168	61,168	-	-	-	-
SALARIES & WAGES						
8000 General Fund	815,032	567,448	247,584	-	-	-
TOTAL SALARIES & WAGES	**$815,032**	**$567,448**	**$247,584**	-	-	-
OTHER PAYROLL EXPENSES						
3210 Empl. Rel. Bd. Assessments						
8000 General Fund	228	171	57	-	-	-
3220 Public Employees Retire Cont						
8000 General Fund	155,589	108,325	47,264	-	-	-

Description	Total Policy Packages	Pkg: 101 Operational Restructure Priority: 00	Pkg: 102 SLDS Staffing Priority: 00	Pkg: 103 Research & Evaluation Priority: 00	Pkg: 104 Network for Quality Teaching and Learning Priority: 00	Pkg: 105 Chronic Absenteeism - Trauma Informed Pilot Completion of HB 4002 Priority: 00
3230 Social Security Taxes						
8000 General Fund	60,183	41,243	18,940	-	-	-
3250 Workers Comp. Assess. (WCD)						
8000 General Fund	276	207	69	-	-	-
3260 Mass Transit Tax						
8000 General Fund	4,891	3,405	1,486	-	-	-
3270 Flexible Benefits						
8000 General Fund	133,344	100,008	33,336	-	-	-
OTHER PAYROLL EXPENSES						
8000 General Fund	354,511	253,359	101,152	-	-	-
TOTAL OTHER PAYROLL EXPENSES	**$354,511**	**$253,359**	**$101,152**	-	-	-
PERSONAL SERVICES						
8000 General Fund	1,169,543	820,807	348,736	-	-	-
TOTAL PERSONAL SERVICES	**$1,169,543**	**$820,807**	**$348,736**	-	-	-
SERVICES & SUPPLIES						
4100 Instate Travel						
8000 General Fund	123,298	81,280	284	-	41,734	-
4150 Employee Training						
8000 General Fund	74,751	38,528	1,423	10,800	-	-
4175 Office Expenses						
8000 General Fund	7,488	5,695	1,793	-	-	-
4200 Telecommunications						

Description	Total Policy Packages	Pkg: 101 Operational Restructure Priority: 00	Pkg: 102 SLDS Staffing Priority: 00	Pkg: 103 Research & Evaluation Priority: 00	Pkg: 104 Network for Quality Teaching and Learning Priority: 00	Pkg: 105 Chronic Absenteeism - Trauma Informed Pilot Completion of HB 4002 Priority: 00
8000 General Fund	6,328	4,746	1,582	-	-	-
4250 Data Processing						
8000 General Fund	641,752	1,530	422	-	-	-
4275 Publicity and Publications						
8000 General Fund	1,160	949	211	-	-	-
4300 Professional Services						
8000 General Fund	1,392,000	-	-	500,000	270,000	180,000
4315 IT Professional Services						
8000 General Fund	10,000	-	-	-	-	-
4325 Attorney General						
8000 General Fund	10,000	-	-	-	-	-
4375 Employee Recruitment and Develop						
8000 General Fund	1,055	844	211	-	-	-
4400 Dues and Subscriptions						
8000 General Fund	36,160	30,949	211	5,000	-	-
4425 Facilities Rental and Taxes						
8000 General Fund	31,528	21,846	7,282	-	2,400	-
4575 Agency Program Related S and S						
8000 General Fund	213,537	81,604	-	-	24,533	107,400
4650 Other Services and Supplies						
8000 General Fund	79,199	10,865	3,534	-	-	12,600
4700 Expendable Prop 250 - 5000						
8000 General Fund	6,337	5,069	1,268	-	-	-

Description	Total Policy Packages	Pkg: 101 Operational Restructure Priority: 00	Pkg: 102 SLDS Staffing Priority: 00	Pkg: 103 Research & Evaluation Priority: 00	Pkg: 104 Network for Quality Teaching and Learning Priority: 00	Pkg: 105 Chronic Absenteeism - Trauma Informed Pilot Completion of HB 4002 Priority: 00
4715 IT Expendable Property						
8000 General Fund	29,667	-	-	29,667	-	-
SERVICES & SUPPLIES						
8000 General Fund	2,664,260	283,905	18,221	545,467	338,667	300,000
TOTAL SERVICES & SUPPLIES	**$2,664,260**	**$283,905**	**$18,221**	**$545,467**	**$338,667**	**$300,000**
CAPITAL OUTLAY						
5550 Data Processing Software						
8000 General Fund	600,000	-	-	-	-	-
SPECIAL PAYMENTS						
6030 Dist to Non-Gov Units						
8000 General Fund	500,000	-	-	-	500,000	-
6035 Dist to Individuals						
8000 General Fund	750,000	-	-	-	750,000	-
6040 Dist to Local School Districts						
8000 General Fund	2,760,000	-	-	-	-	2,760,000
6048 Spc Pmt to Public Universities						
8000 General Fund	250,000	-	-	-	250,000	-
SPECIAL PAYMENTS						
8000 General Fund	4,260,000	-	-	-	1,500,000	2,760,000
TOTAL SPECIAL PAYMENTS	**$4,260,000**	**-**	**-**	**-**	**$1,500,000**	**$2,760,000**
EXPENDITURES						
8000 General Fund	8,693,803	1,104,712	366,957	545,467	1,838,667	3,060,000

Description	Total Policy Packages	Pkg: 101 Operational Restructure Priority: 00	Pkg: 102 SLDS Staffing Priority: 00	Pkg: 103 Research & Evaluation Priority: 00	Pkg: 104 Network for Quality Teaching and Learning Priority: 00	Pkg: 105 Chronic Absenteeism - Trauma Informed Pilot Completion of HB 4002 Priority: 00
TOTAL EXPENDITURES	$8,693,803	$1,104,712	$366,957	$545,467	$1,838,667	$3,060,000
ENDING BALANCE						
8000 General Fund	-	-	-	-	-	-
TOTAL ENDING BALANCE	-	-	-	-	-	-
AUTHORIZED POSITIONS						
8150 Class/Unclass Positions	4	3	1	-	-	-
AUTHORIZED FTE						
8250 Class/Unclass FTE Positions	4.00	3.00	1.00	-	-	-

Description	Pkg: 106 Statewide Longitudinal Data System (SLDS) Priority: 00					
REVENUE CATEGORIES						
GENERAL FUND APPROPRIATION						
0050 General Fund Appropriation						
8000 General Fund	1,778,000					
AVAILABLE REVENUES						
8000 General Fund	1,778,000					
TOTAL AVAILABLE REVENUES	**$1,778,000**					
EXPENDITURES						
SERVICES & SUPPLIES						
4150 Employee Training						
8000 General Fund	24,000					
4250 Data Processing						
8000 General Fund	639,800					
4300 Professional Services						
8000 General Fund	442,000					
4315 IT Professional Services						
8000 General Fund	10,000					
4325 Attorney General						
8000 General Fund	10,000					
4650 Other Services and Supplies						
8000 General Fund	52,200					
SERVICES & SUPPLIES						
8000 General Fund	1,178,000					

Description	Pkg: 106 Statewide Longitudinal Data System (SLDS) Priority: 00					
TOTAL SERVICES & SUPPLIES	$1,178,000					
CAPITAL OUTLAY						
5550 Data Processing Software						
8000 General Fund	600,000					
EXPENDITURES						
8000 General Fund	1,778,000					
TOTAL EXPENDITURES	$1,778,000					
ENDING BALANCE						
8000 General Fund	-					
TOTAL ENDING BALANCE	-					

Description	Total Policy Packages	Pkg: 101 Operational Restructure Priority: 00	Pkg: 102 SLDS Staffing Priority: 00	Pkg: 103 Research & Evaluation Priority: 00	Pkg: 104 Network for Quality Teaching and Learning Priority: 00	Pkg: 105 Chronic Absenteeism - Trauma Informed Pilot Completion of HB 4002 Priority: 00
REVENUE CATEGORIES						
GENERAL FUND APPROPRIATION						
0050 General Fund Appropriation						
8000 General Fund	8,693,803	1,104,712	366,957	545,467	1,838,667	3,060,000
AVAILABLE REVENUES						
8000 General Fund	8,693,803	1,104,712	366,957	545,467	1,838,667	3,060,000
TOTAL AVAILABLE REVENUES	**$8,693,803**	**$1,104,712**	**$366,957**	**$545,467**	**$1,838,667**	**$3,060,000**
EXPENDITURES						
PERSONAL SERVICES						
SALARIES & WAGES						
3110 Class/Unclass Sal. and Per Diem						
8000 General Fund	753,864	506,280	247,584	-	-	-
3190 All Other Differential						
8000 General Fund	61,168	61,168	-	-	-	-
SALARIES & WAGES						
8000 General Fund	815,032	567,448	247,584	-	-	-
TOTAL SALARIES & WAGES	**$815,032**	**$567,448**	**$247,584**	-	-	-
OTHER PAYROLL EXPENSES						
3210 Empl. Rel. Bd. Assessments						
8000 General Fund	228	171	57	-	-	-
3220 Public Employees Retire Cont						
8000 General Fund	155,589	108,325	47,264	-	-	-

Description	Total Policy Packages	Pkg: 101 Operational Restructure Priority: 00	Pkg: 102 SLDS Staffing Priority: 00	Pkg: 103 Research & Evaluation Priority: 00	Pkg: 104 Network for Quality Teaching and Learning Priority: 00	Pkg: 105 Chronic Absenteeism - Trauma Informed Pilot Completion of HB 4002 Priority: 00
3230 Social Security Taxes						
8000 General Fund	60,183	41,243	18,940	-	-	-
3250 Workers Comp. Assess. (WCD)						
8000 General Fund	276	207	69	-	-	-
3260 Mass Transit Tax						
8000 General Fund	4,891	3,405	1,486	-	-	-
3270 Flexible Benefits						
8000 General Fund	133,344	100,008	33,336	-	-	-
OTHER PAYROLL EXPENSES						
8000 General Fund	354,511	253,359	101,152	-	-	-
TOTAL OTHER PAYROLL EXPENSES	**$354,511**	**$253,359**	**$101,152**	-	-	-
PERSONAL SERVICES						
8000 General Fund	1,169,543	820,807	348,736	-	-	-
TOTAL PERSONAL SERVICES	**$1,169,543**	**$820,807**	**$348,736**	-	-	-
SERVICES & SUPPLIES						
4100 Instate Travel						
8000 General Fund	123,298	81,280	284	-	41,734	-
4150 Employee Training						
8000 General Fund	74,751	38,528	1,423	10,800	-	-
4175 Office Expenses						
8000 General Fund	7,488	5,695	1,793	-	-	-
4200 Telecommunications						

Description	Total Policy Packages	Pkg: 101 Operational Restructure Priority: 00	Pkg: 102 SLDS Staffing Priority: 00	Pkg: 103 Research & Evaluation Priority: 00	Pkg: 104 Network for Quality Teaching and Learning Priority: 00	Pkg: 105 Chronic Absenteeism - Trauma Informed Pilot Completion of HB 4002 Priority: 00
8000 General Fund	6,328	4,746	1,582	-	-	-
4250 Data Processing						
8000 General Fund	641,752	1,530	422	-	-	-
4275 Publicity and Publications						
8000 General Fund	1,160	949	211	-	-	-
4300 Professional Services						
8000 General Fund	1,392,000	-	-	500,000	270,000	180,000
4315 IT Professional Services						
8000 General Fund	10,000	-	-	-	-	-
4325 Attorney General						
8000 General Fund	10,000	-	-	-	-	-
4375 Employee Recruitment and Develop						
8000 General Fund	1,055	844	211	-	-	-
4400 Dues and Subscriptions						
8000 General Fund	36,160	30,949	211	5,000	-	-
4425 Facilities Rental and Taxes						
8000 General Fund	31,528	21,846	7,282	-	2,400	-
4575 Agency Program Related S and S						
8000 General Fund	213,537	81,604	-	-	24,533	107,400
4650 Other Services and Supplies						
8000 General Fund	79,199	10,865	3,534	-	-	12,600
4700 Expendable Prop 250 - 5000						
8000 General Fund	6,337	5,069	1,268	-	-	-

Description	Total Policy Packages	Pkg: 101 Operational Restructure Priority: 00	Pkg: 102 SLDS Staffing Priority: 00	Pkg: 103 Research & Evaluation Priority: 00	Pkg: 104 Network for Quality Teaching and Learning Priority: 00	Pkg: 105 Chronic Absenteeism - Trauma Informed Pilot Completion of HB 4002 Priority: 00
4715 IT Expendable Property						
8000 General Fund	29,667	-	-	29,667	-	-
SERVICES & SUPPLIES						
8000 General Fund	2,664,260	283,905	18,221	545,467	338,667	300,000
TOTAL SERVICES & SUPPLIES	**$2,664,260**	**$283,905**	**$18,221**	**$545,467**	**$338,667**	**$300,000**
CAPITAL OUTLAY						
5550 Data Processing Software						
8000 General Fund	600,000	-	-	-	-	-
SPECIAL PAYMENTS						
6030 Dist to Non-Gov Units						
8000 General Fund	500,000	-	-	-	500,000	-
6035 Dist to Individuals						
8000 General Fund	750,000	-	-	-	750,000	-
6040 Dist to Local School Districts						
8000 General Fund	2,760,000	-	-	-	-	2,760,000
6048 Spc Pmt to Public Universities						
8000 General Fund	250,000	-	-	-	250,000	-
SPECIAL PAYMENTS						
8000 General Fund	4,260,000	-	-	-	1,500,000	2,760,000
TOTAL SPECIAL PAYMENTS	**$4,260,000**	**-**	**-**	**-**	**$1,500,000**	**$2,760,000**
EXPENDITURES						
8000 General Fund	8,693,803	1,104,712	366,957	545,467	1,838,667	3,060,000

Description	Total Policy Packages	Pkg: 101 Operational Restructure Priority: 00	Pkg: 102 SLDS Staffing Priority: 00	Pkg: 103 Research & Evaluation Priority: 00	Pkg: 104 Network for Quality Teaching and Learning Priority: 00	Pkg: 105 Chronic Absenteeism - Trauma Informed Pilot Completion of HB 4002 Priority: 00
TOTAL EXPENDITURES	$8,693,803	$1,104,712	$366,957	$545,467	$1,838,667	$3,060,000
ENDING BALANCE						
8000 General Fund	-	-	-	-	-	-
TOTAL ENDING BALANCE	-	-	-	-	-	-
AUTHORIZED POSITIONS						
8150 Class/Unclass Positions	4	3	1	-	-	-
AUTHORIZED FTE						
8250 Class/Unclass FTE Positions	4.00	3.00	1.00	-	-	-

Description	Pkg: 106 Statewide Longitudinal Data System (SLDS) Priority: 00					
REVENUE CATEGORIES						
GENERAL FUND APPROPRIATION						
0050 General Fund Appropriation						
8000 General Fund	1,778,000					
AVAILABLE REVENUES						
8000 General Fund	1,778,000					
TOTAL AVAILABLE REVENUES	**$1,778,000**					
EXPENDITURES						
SERVICES & SUPPLIES						
4150 Employee Training						
8000 General Fund	24,000					
4250 Data Processing						
8000 General Fund	639,800					
4300 Professional Services						
8000 General Fund	442,000					
4315 IT Professional Services						
8000 General Fund	10,000					
4325 Attorney General						
8000 General Fund	10,000					
4650 Other Services and Supplies						
8000 General Fund	52,200					
SERVICES & SUPPLIES						
8000 General Fund	1,178,000					

Description	Pkg: 106 Statewide Longitudinal Data System (SLDS) Priority: 00					
TOTAL SERVICES & SUPPLIES	$1,178,000					
CAPITAL OUTLAY						
5550 Data Processing Software						
8000 General Fund	600,000					
EXPENDITURES						
8000 General Fund	1,778,000					
TOTAL EXPENDITURES	$1,778,000					
ENDING BALANCE						
8000 General Fund	-					
TOTAL ENDING BALANCE	-					

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PKG	CLASS	COMP	DESCRIPTION	POS CNT	FTE	MOS	AVERAGE RATE	GF SAL	OF SAL	FF SAL	LF SAL	AF SAL
000	B	Y7500	AE BOARD AND COMMISSION MEMBER		.00	.00	0.00	3,060				3,060
000	MEA	HZ7016	HA PRINCIPAL EXECUTIVE/MANAGER I	1	1.00	24.00	14,023.00	336,552				336,552
000	MEN	NZ0830	AA EXECUTIVE ASSISTANT	1	1.00	24.00	4,320.00	103,680				103,680
000	MEN	NZ7010	AA PRINCIPAL EXECUTIVE/MANAGER F	3	3.00	72.00	7,571.66	545,160				545,160
000	MEN	NZ7012	AA PRINCIPAL EXECUTIVE/MANAGER G	2	2.00	48.00	10,828.00	519,744				519,744
000	MES	NZ7006	AA PRINCIPAL EXECUTIVE/MANAGER D	1	1.00	24.00	7,352.00	176,448				176,448
000	MMN	X7008	IA PRINCIPAL EXECUTIVE/MANAGER E	1	1.00	24.00	8,496.00	203,904				203,904
000	MMS	X7010	IA PRINCIPAL EXECUTIVE/MANAGER F	1	1.00	24.00	10,319.00	247,656				247,656
000	MMS	X7012	AA PRINCIPAL EXECUTIVE/MANAGER G	1	1.00	24.00	10,828.00	259,872				259,872
000	UA	C0119	AA EXECUTIVE SUPPORT SPECIALIST 2	2	2.00	48.00	3,708.00	177,984				177,984
000	UA	C0870	AA OPERATIONS & POLICY ANALYST 1	1	.50	12.00	5,034.00	60,408				60,408
000	UA	C1117	AA RESEARCH ANALYST 3	2	2.00	48.00	5,809.00	278,832				278,832
000	UA	C1488	IA INFO SYSTEMS SPECIALIST 8	3	3.00	72.00	5,970.00	429,840				429,840
000				19	18.50	444.00	4,570.54	3,343,140				3,343,140

PKG	CLASS	COMP	DESCRIPTION	POS CNT	FTE	MOS	AVERAGE RATE	GF SAL	OF SAL	FF SAL	LF SAL	AF SAL
101	MENNZ7010	AA	PRINCIPAL EXECUTIVE/MANAGER F	1-	1.00-	24.00-	6,673.00	160,152-				160,152-
101	MENNZ7014	AA	PRINCIPAL EXECUTIVE/MANAGER H	1	1.00	24.00	11,938.00	286,512				286,512
101	UA C0870	AA	OPERATIONS & POLICY ANALYST 1	2	2.00	48.00	3,972.00	190,656				190,656
101	UA C0873	AA	OPERATIONS & POLICY ANALYST 4	2	2.00	48.00	6,704.00	321,792				321,792
101	UA C1117	AA	RESEARCH ANALYST 3	2-	2.00-	48.00-	5,809.00	278,832-				278,832-
101	UA C1118	AA	RESEARCH ANALYST 4	1	1.00	24.00	6,096.00	146,304				146,304
101				3	3.00	72.00	6,408.55	506,280				506,280

PKG	CLASS	COMP	DESCRIPTION	POS CNT	FTE	MOS	AVERAGE RATE	GF SAL	OF SAL	FF SAL	LF SAL	AF SAL
102	UA	C0854	AA PROJECT MANAGER 1	1	1.00	24.00	5,544.00	133,056				133,056
102	UA	C1488	IA INFO SYSTEMS SPECIALIST 8		.00	.00	6,765.33	114,528				114,528
102				1	1.00	24.00	6,590.85	247,584				247,584
				23	22.50	540.00	5,223.40	4,097,004				4,097,004
				23	22.50	540.00	5,223.40	4,097,004				4,097,004

PKG	CLASS	COMP	DESCRIPTION	POS CNT	FTE	MOS	AVERAGE RATE	GF SAL	OF SAL	FF SAL	LF SAL	AF SAL
				23	22.50	540.00	5,223.40	4,097,004				4,097,004

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PKG	CLASS	COMP	DESCRIPTION	POS CNT	FTE	MOS	AVERAGE RATE	GF SAL	OF SAL	FF SAL	LF SAL	AF SAL
000	B	Y7500	AE BOARD AND COMMISSION MEMBER		.00	.00	0.00	3,060				3,060
000	MEA	HZ7016	HA PRINCIPAL EXECUTIVE/MANAGER I	1	1.00	24.00	14,023.00	336,552				336,552
000	MEN	NZ0830	AA EXECUTIVE ASSISTANT	1	1.00	24.00	4,320.00	103,680				103,680
000	MEN	NZ7010	AA PRINCIPAL EXECUTIVE/MANAGER F	2	2.00	48.00	7,347.00	385,008				385,008
000	MEN	NZ7012	AA PRINCIPAL EXECUTIVE/MANAGER G	2	2.00	48.00	10,828.00	519,744				519,744
101	MEN	NZ7014	AA PRINCIPAL EXECUTIVE/MANAGER H	1	1.00	24.00	11,938.00	286,512				286,512
000	MES	NZ7006	AA PRINCIPAL EXECUTIVE/MANAGER D	1	1.00	24.00	7,352.00	176,448				176,448
000	MMN	X7008	IA PRINCIPAL EXECUTIVE/MANAGER E	1	1.00	24.00	8,496.00	203,904				203,904
000	MMS	X7010	IA PRINCIPAL EXECUTIVE/MANAGER F	1	1.00	24.00	10,319.00	247,656				247,656
000	MMS	X7012	AA PRINCIPAL EXECUTIVE/MANAGER G	1	1.00	24.00	10,828.00	259,872				259,872
000	UA	C0119	AA EXECUTIVE SUPPORT SPECIALIST 2	2	2.00	48.00	3,708.00	177,984				177,984
102	UA	C0854	AA PROJECT MANAGER 1	1	1.00	24.00	5,544.00	133,056				133,056
101	UA	C0870	AA OPERATIONS & POLICY ANALYST 1	3	2.50	60.00	4,326.00	251,064				251,064
101	UA	C0873	AA OPERATIONS & POLICY ANALYST 4	2	2.00	48.00	6,704.00	321,792				321,792
101	UA	C1117	AA RESEARCH ANALYST 3		.00	.00	5,809.00					
101	UA	C1118	AA RESEARCH ANALYST 4	1	1.00	24.00	6,096.00	146,304				146,304
102	UA	C1488	IA INFO SYSTEMS SPECIALIST 8	3	3.00	72.00	6,500.22	544,368				544,368
				23	22.50	540.00	5,223.40	4,097,004				4,097,004

PKG	CLASS	COMP	DESCRIPTION	POS CNT	FTE	MOS	AVERAGE RATE	GF SAL	OF SAL	FF SAL	LF SAL	AF SAL
				23	22.50	540.00	5,223.40	4,097,004				4,097,004

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POSITION NUMBER	AUTH NO	ORG STRUC	PKG	F Y	POS TYP	CLASS	COMP	RNG	ST P	POS CNT	FTE	BUDGET RATE	MOS	GF SAL	OF SAL	FF SAL	LF SAL	TRK
5240009	001213530	001-01-00-00000	101	0	PF	MENNZ7010	AA	35X	02	1-	1.00-	6,673.00	24.00-	160,152-				
EST DATE: 2017/07/01 EXP DATE: 9999/01/01																		
5240009	001213530	001-01-00-00000	101	0	PF	MENNZ7014	AA	40X	09	1	1.00	11,938.00	24.00	286,512				
EST DATE: 2017/07/01 EXP DATE: 9999/01/01																		
5240014	001213710	001-01-00-00000	101	0	PF	UA C1117	AA	26	09	1-	1.00-	5,809.00	24.00-	139,416-				
EST DATE: 2017/07/01 EXP DATE: 9999/01/01																		
5240014	001213710	001-01-00-00000	101	0	PF	UA C0873	AA	32	06	1	1.00	6,704.00	24.00	160,896				
EST DATE: 2017/07/01 EXP DATE: 9999/01/01																		
5240015	001213720	001-01-00-00000	101	0	PF	UA C1117	AA	26	09	1-	1.00-	5,809.00	24.00-	139,416-				
EST DATE: 2017/07/01 EXP DATE: 9999/01/01																		
5240015	001213720	001-01-00-00000	101	0	PF	UA C1118	AA	30	06	1	1.00	6,096.00	24.00	146,304				
EST DATE: 2017/07/01 EXP DATE: 9999/01/01																		
5240026	001288840	001-01-00-00000	101	0	PF	UA C0873	AA	32	06	1	1.00	6,704.00	24.00	160,896				
EST DATE: 2017/07/01 EXP DATE: 9999/01/01																		
5240027	001288850	001-01-00-00000	101	0	PF	UA C0870	AA	23	04	1	1.00	3,972.00	24.00	95,328				
EST DATE: 2017/07/01 EXP DATE: 9999/01/01																		
5240028	001288860	001-01-00-00000	101	0	PF	UA C0870	AA	23	04	1	1.00	3,972.00	24.00	95,328				
EST DATE: 2017/07/01 EXP DATE: 9999/01/01																		
			101							3	3.00		72.00	506,280				

POSITION NUMBER	AUTH NO	ORG STRUC	PKG	F Y	POS TYP	CLASS	COMP	RNG	ST P	POS CNT	FTE	BUDGET RATE	MOS	GF SAL	OF SAL	FF SAL	LF SAL	TRK
5240023	001261410	001-01-00-00000	102	0	PF	UA	C1488 IA	33	02	1-	1.00-	5,970.00	24.00-	143,280-				
EST DATE: 2017/07/01 EXP DATE: 9999/01/01																		
5240023	001261410	001-01-00-00000	102	0	PF	UA	C1488 IA	33	09	1	1.00	8,253.00	24.00	198,072				
EST DATE: 2017/07/01 EXP DATE: 9999/01/01																		
5240024	001261420	001-01-00-00000	102	0	PF	UA	C1488 IA	33	02	1-	1.00-	5,970.00	24.00-	143,280-				
EST DATE: 2017/07/01 EXP DATE: 9999/01/01																		
5240024	001261420	001-01-00-00000	102	0	PF	UA	C1488 IA	33	08	1	1.00	7,880.00	24.00	189,120				
EST DATE: 2017/07/01 EXP DATE: 9999/01/01																		
5240025	001261430	001-01-00-00000	102	0	PF	UA	C1488 IA	33	02	1-	1.00-	5,970.00	24.00-	143,280-				
EST DATE: 2017/07/01 EXP DATE: 9999/01/01																		
5240025	001261430	001-01-00-00000	102	0	PF	UA	C1488 IA	33	04	1	1.00	6,549.00	24.00	157,176				
EST DATE: 2017/07/01 EXP DATE: 9999/01/01																		
5240029	001288900	001-01-00-00000	102	0	PF	UA	C0854 AA	26	08	1	1.00	5,544.00	24.00	133,056				
EST DATE: 2017/07/01 EXP DATE: 9999/01/01																		
			102							1	1.00		24.00	247,584				
										4	4.00		96.00	753,864				
										4	4.00		96.00	753,864				

POSITION NUMBER	AUTH NO	ORG STRUC	PKG	F Y	POS TYP	CLASS	COMP	RNG	S T P	POS CNT	FTE	BUDGET RATE	MOS	GF SAL	OF SAL	FF SAL	LF SAL	T R K
										4	4.00		96.00	753,864				