



INTEGRATED NEEDS ASSESSMENT

The guidance offered here is intended to give applicants a framework from which to structure their approach to engaging with this integrated needs assessment, and embeds suggested actions, processes and sources of data that may be helpful for teams. This integrated needs assessment tool will provide a snapshot in time of the ever-changing landscape of education in Oregon.

FACILITATION AND USE

Engaging in a needs assessment occurs over time, not in one sitting. It is informed by community input, varied perspectives, data analysis, and discussion with a diverse team who can speak candidly about the district or school's strengths and opportunities relative to the four common goals. This integrated needs assessment tool is designed to support applicants in capturing a moment-in-time analysis of needs. It is intended to be a summary of the deep work done through a needs assessment and is aligned to the four common goals: equity advanced, engaged community, well-rounded education, and strengthened systems & capacity.

Important outcomes resulting from engaging in a thorough and well organized needs assessment include developing a shared sense of understanding about how the district or school is doing, what the strengths are and what opportunities are emerging in order to be ready to confidently elevate, prioritize and communicate the improvement work that needs to happen.

There are many approaches teams can take as they engage with this integrated needs assessment.

A few general considerations include:

- Consider the scope and timing of engaging with this integrated needs assessment. Engagement can happen at the school, district and consortia levels. Summarizing trends and patterns learned by individual schools can be a valuable source of information for a district or consortia, and adequate time is necessary to engage in an effective way.
- A needs assessment team should consist of diverse membership representing varying perspectives. Consider the size of the team, too small and the perspectives may become skewed, too large and the information and discussion becomes overwhelming. Recognizing that not everyone can be a part of the needs assessment team, applicants are encouraged to share a summary or highlights of the learning with their community.
- Team make-up can vary. Applicants may choose to have one consistent group meet intermittently over a period of time to move through the integrated needs assessment. Another approach is to have several smaller teams focus on key aspects of the integrated needs assessment, breaking it up into smaller, more focused sections. A few ways you might consider forming teams are:
 - CTE teams to examine and analyze CTE data across all four common goals at a CTE Regional Consortia meeting
 - An accelerated learning team to examine data with college partners and / or former students
 - Elementary practitioners might form a small team to explore elementary literacy data
- Prepare the team for the work ahead; attend to scheduling needs, ensure time is protected, gather necessary data, set expectations or community agreements that allow room for transparent discussion, use of an equity lens and divergent thinking.
- Leadership is critical in setting the tone for work, and will be important in determining how decisions are made when the time comes for identifying priorities.

IDENTIFYING PARTICIPANTS

Consultation with a diverse body of partners is an important aspect of a needs assessment. Review the list of participants below, and identify which roles apply to your team or district. Prior to beginning the integrated needs assessment, assemble a leadership team to help guide the work, facilitate conversations, and ensure an equity lens is employed each step of the way. The team should be small but must include people who can leverage systems to assist in the task ahead.

Potential Participants¹

- *Students and parents (use multiple avenues such as existing meetings, surveys, focus groups)
- Representatives of focal groups as defined within the [Student Success Act](#): students of color; students with disabilities; emerging bilingual students; and students navigating poverty, homelessness, and foster care; and other students who have historically experienced disparities in our schools.²
- Representatives from Indian tribes or tribal organizations
 - *If you are a district receiving greater than \$40k in Title VI funding or have 50% or more American Indian/Alaska Native Students, you are **required** to consult with your local Tribal Government. As evidence of your consultation, you will be asked to upload documentation of your meeting(s) containing signatures from Tribal Government representatives as well as School District representatives. As this consultation includes all aspects of the Integrated Plan you will be asked to upload the “Affirmation for Tribal Consultation” within this application.*
- *Representatives from agencies serving at-risk, homeless and out-of-school youth and adults, foster youth, military families, disability services, STEM Hubs, and Regional Educator Networks

- *CTE Regional Coordinators
- *CTE faculty, advisors, and administrators from secondary and postsecondary institutions
- *State or local workforce development board representatives
- *Representatives from a range of local businesses and industries, particularly those representing the area labor market needs
- Administrators & Educators (including postsecondary representatives)
- Community partners associated with SSA Statewide Plans - [African American/Black Student Success Plan](#), [American Indian/Alaska Native Student Success Plan](#), [Latino/a/x and Indigenous Student Success Plan: Phase 1](#), [LGBTQ2SIA+ Student Success Plan](#).
- Local workforce agency staff
- Local economic development board members

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¹ Asterisk (*) indicates required participants for CTE / Perkins grantees.

² ODE is currently in the rule-making process to add additional focal student groups that would be required to be engaged as part of the plan development process which could include migrant students; recent arrivers; incarcerated and detained youth; and LGBTQ2SIA+ students . The rules are anticipated to be adopted by the State Board of Education in April 2022.

DURING THE INTEGRATED NEEDS ASSESSMENT MEETING

A facilitator will walk the team through an overview of this integrated needs assessment tool, including its purpose and desired outcomes. Then, they will guide the team as they work through each of the four common goals utilizing the following steps:

- Read the goal and its definition.
- Solicit clarifying questions from the team.
- Confirm the team's shared understanding of the goal.
- Guide the participants through a discussion of each of the primary questions, ensuring the observations or findings of the team are supported by data. The primary questions are intended to be high-level questions that look across the district, schools, programs, etc.
- A team member should take notes on the data sources used, and capture each new observation or finding as this discussion takes place.
- Once the team is satisfied with the observations or findings they've listed for the primary questions, move to do the same process with the deeper analysis and high school focus questions. You'll also find embedded within each goal application requirements. These are questions for which you will need to provide a response on the application itself, so it is critical you have detailed notes from which to craft your response. One thing to note is that the application will have additional requirements beyond what is articulated in this integrated needs assessment.
- Move the team into thinking about and documenting contributing factors that impact the patterns and trends identified.
- Finally, utilize a consensus-based approach to determine the priority level of addressing the observation or finding.

COMPLETING THE INTEGRATED NEEDS ASSESSMENT

Once all participants have had a chance to provide input on the integrated needs assessment, it is important to share your learnings with your community, your CTE Regional Coordinator to inform regional planning, and other partners who may like to offer additional input. Additionally, the information captured should be accessible as applicants move to completing the integrated application and integrated plan and budget template.

QUALITY OVER QUANTITY

Engaging in this integrated needs assessment is as much about developing shared understanding about your system's needs as it is about articulating plans and strategies for your integrated application. The tools, templates, and resources included in this document are intended to support your team to dive into a process to rigorously analyze data, bring teammates and partners together, understand and illuminate known and unknown contributing factors, and build consensus on priority levels for key issues. Attending a highly attentive and quality process for each row of the goal charts (below) will take more time, *and* it will yield more valuable insight and agreement on the core issues that your district faces. For example, one approach might involve assigning a single staff member to populate the needs assessment before trying to inform their team about the work they did and obtaining their agreement. This might yield many entries in the table but it has also not brought together different knowledge and many of the primary contributing factors were analyzed from a single person's perspective. Another approach, for example, could involve a more diverse team that works closely together through each entry, taking their time to analyze discrepancies/patterns in data and filling out the contributing factors matrix (below). They might slow down to have discussion on a particular data point or a factor they were unaware of. This team might populate less entries in the table, but would have uncovered new ideas or insights that could alter what teammates had originally thought was priority in their district. As you engage in this needs assessment, think about what benefits come from a high quality process versus a process that quickly populates information without registering its significance.

DATA SOURCES & ANALYZING DATA

The insights that are gleaned from data review and community engagement must inform the selection of priorities for the planning and application processes as it relates to the system's responsibility to better meet the strengths and needs of students. Gathering, analyzing, and taking the time to fully understand, contextualize and process data is a critical component of this integrated needs assessment as applicants prepare for the integrated application. Reviewing data can help uncover trends, highlight students' strengths, identify gaps in access or opportunity, and help make meaning out of the complexity of the school or district. Disaggregated data, or data broken out into smaller categories such as focal groups, can be illuminating and limiting.

The process of reviewing student data can differ, but often a team or multiple teams conduct a focused review for each student population that is served, examining trends and highlighting strengths, outcomes, opportunities, and disparities. Analysis may be conducted by teams focused on grade and age bands such as elementary, middle and high school, post high school, then analyzed across the K-12 continuum.

While the term disaggregated data is often associated with student-level data, regional, district and school teams should also consider reviewing other types of data that relates to educators (e.g., retention rates for recently hired educators), school offerings (e.g., advanced courses offered), and the community (e.g., median household income).

Examples of disaggregated data for analysis include, but are not limited to:

K-12 Continuum

- Students identified as eligible for Special Education services and Special Education outcomes
- Student discipline rates
- Student regular attender/chronic absenteeism rates
- District & staff demographics (including retention)
- Teacher credentialing, tenure, performance, and observational information
- SEED survey

Early Learning & Elementary Focused

- PreK and early learning experiences of children arriving in kindergarten
- Universal screening data
- Third grade reading and math proficiency rates in assessment
- Local metrics for student wellness

Middle/High School

- 9th grade on-track rates, graduation rates, and completion rates
- CTE/Perkins disaggregated data on performance targets³
- [Oregon CTE Participation Data Explorer](#)
- Labor Market Information
- Transitional outcomes for students entering middle and high school
- Credits earned including dual credit/AP/IB achievement
- Rates of participation, concentration, and success in career and technical education Programs of Study including work-based learning experiences
- Learning opportunities and outcomes in alternative learning environments
- Results of High Quality Program of Study assessments
- FAFSA/ORSA completion and college enrollment
- Participation in the arts, sports, or other extracurricular and co-curricular programs

3 CTE Regional Coordinators are available to support districts in exploring CTE data.

CONTRIBUTING FACTORS

While analyzing data and making observations and findings, it is crucial to begin to identify contributing factors that impact the trends and patterns you are noticing. These may include factors that are both within and outside your sphere of influence, but are important to name so that clear prioritization can occur based on your system's capacity and readiness. It is important to try and note both what is known and unknown. *Example Factors to consider include:*

- **Learner Factors** (e.g. Engagement, Mobility, Language Barriers, Mental Health, Socio-economic)
- **Instructional Factors** (e.g. Culture of high expectations, Continuous improvement processes, Aligned instructional system, Use of RtI systems, Extended Learning Time, Teaming, Transition)
- **Climate / Culture Factors** (e.g. Safe, orderly, engaging and challenging learning environments, Communities of Practice, Recruitment / Retention, Integrated and aligned interventions, Supports for the whole-child, Partner Engagement, Two-way Communication)
- **Family & Community Factors** (e.g. Support for the learners' families, Family / community engagement in the learning process, Authentic community engagement, Ability to leverage new and existing partnerships)

While analyzing contributing factors, it is important to try and name the factors that you are confident are occurring, *as well as* factors that may be beyond your awareness (or that you don't have sufficient data) that you may wish to track. For example, your district may be confident that professional learning and coaching is happening around literacy instruction. At the same time, students are navigating unfinished learning due to pandemic impacts that are contributing to the patterns you are noticing. The latter may reveal a new need or priority for data collection.

PRIORITY LEVELS

Once your team starts to examine data sources, make observations/findings, and identify contributing factors, priorities may start to emerge (or you may have already had a sense of priority as you went through the process). It is important to note that what might be priority for one person or group can look different than others, or that what might seem like a "naturally" high priority level relates to one's own values, positionality, and even unconscious biases. A clear process or protocol for assigning priority level is therefore needed. It is recommended that you utilize your equity lens throughout the needs assessment and in particular when prioritizing issues over others. Understanding that there are a variety of logistical realities that go into setting priorities, some key considerations are:

- **Who** determines (and should determine) priority? What power do they have (or not have)?
- **How** should priority be determined (i.e. what process will you use)? Are you using a consensus-based approach (like Fingers to Five) or delegating decision-making power? Why?
- **If** you are navigating differences in perspective and feelings about prioritization, how will you address that? What agreements have you created about engaging tension, allowing for pause/non-closure, or decision-making?

EQUITY ADVANCED

Each of the six programs integrated under this guidance are linked to outcomes that would end the predictable disparity in academic success and student well-being based on both poverty and race. Each initiative contributes to creating richer and more meaningful learning conditions where children, young people, their families, and educators are seen as whole.

Primary Questions

- To what extent have we advanced equity, or not, in the past year?
- What patterns or trends can we identify over the past 3-5 years?
- As we look at disaggregated data, what patterns or trends do we identify among the focal student groups?
- What factors contributed to the patterns / trends identified?

Deeper Analysis

- What barriers currently exist that prevent certain focal student groups from accessing programs?
- What adaptations and supportive services would help ensure access and equity for students within programs?
- How effective have you been in recruiting diverse populations of learners into your programs?
- Which recruitment efforts are most and least successful?

High School Focus

- Which focal student groups are underrepresented in your CTE Programs of Study and CTE Student Leadership Organizations (or CTSO)?
- Which focal student groups are underrepresented in your advanced course and career pathways and offerings (CTE, Dual Credit, AP, IB, etc.)?
- How are schools ensuring English Language Learners are taking appropriate courses to ensure on-time graduation?

Application Requirements⁴

- Overall strengths and needs in terms of equity and access.
- Strengths and needs within CTE Programs of Study.

Data Sources (List sources of data used)	Observations / Findings (Summarize positive and negative key findings from review of data source. Statements should be in response to the guiding questions above.)	Contributing Factors (Use community, educator, and student engagement to explore and expand on potential root causes of the finding. Ask students about their experiences.)	Priority Level (Minimal, Minor, Moderate, Significant, or Severe)
CTE / Perkins Data	Students navigating poverty are underrepresented in CTE courses.	Recruitment efforts have not intentionally included students navigating poverty.	Significant
Advanced Course Participation	Focal student groups are underrepresented in advanced courses.	Complicated prerequisites and enrollment processes may be preventing student participation.	Significant
Student Focus Discussion Notes	Students report that counseling staff tend to discourage advanced level students from participating in some CTE Programs; while counseling students experiencing disabilities and english language learners to enroll in CTE programs.	May need to provide time and resources for counselors to job shadow CTE Program offerings. There has not been opportunity to discuss the value of CTE for all students with counseling staff.	Significant

⁴ These are questions for which you will need to provide a response on the application itself, so it is critical you have detailed notes from which to craft your response.

ENGAGED COMMUNITY

Communities form the larger education system that supports families and students. Deepening relationships, partnerships, and engagement with communities is critical to achieve equitable outcomes and build healthy school and district systems.

Primary Questions

- To what extent have we engaged our community and / or strengthened partnerships, or not, in the past year?
- What patterns or trends can we identify over the past 3-5 years?
- As we look at disaggregated data, what patterns or trends do we identify among the focal student groups?
- What factors contributed to the patterns / trends identified?

Deeper Analysis

- Do all students have the opportunity to participate in career related learning experiences that are aligned to their goals?
- What opportunities exist in our region to improve communication and information flow to create a more coherent and inclusive process?
- How have we engaged with partners such as SIA liaisons, CTE Regional Coordinators, and others to assist with the implementation of this integrated guidance and completing the needs assessment?
- How well have we integrated the planning for the six programs represented in this application?
- How are we doing on the Community Engagement spectrum? Are we using the spectrum to grow skill and build trust?

High School Focus

- What opportunities could your region provide to have a broader range of students, youth, and adults participate in Career Connected Learning activities, especially work-based learning?
- How well does your school, institution, or region provide training, information, and support to educators, counselors, family, and administrators and/or volunteers about and around CTE as an opportunity for students to envision career options and start along a career pathway?

Application Requirements

- Who was engaged in the planning process (including the needs assessment) and how they were engaged?
- Artifacts of engagement.
- How are we doing on the Community Engagement spectrum? Are we using the spectrum to grow skill and build trust?

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Data Sources (List sources of data used)	Observations / Findings (Summarize positive and negative key findings from review of data source. Statements should be in response to the guiding questions above.)	Contributing Factors (Use community, educator, and student engagement to explore and expand on potential root causes of the finding. Ask students about their experiences.)	Priority Level (Minimal, Minor, Moderate, Significant, or Severe)
CTE Regional Advisory Group	Labor market is reflecting continued need in the Healthcare field. There are not enough qualified workers to match demand. There is currently 1 Health Sciences CTE Program of Study in the region. There are no Health Sciences Programs in our district.	Cannot find instructor No space in building High student interest	Moderate

WELL-ROUNDED EDUCATION

Well-rounded education moves beyond the courses students take and into the essential knowledge and skills students need to be successful in life. This requires a focus on the whole student. This means student mental and behavioral health, safety, and well-being cannot be separated from academic opportunity and achievement. This requires a commitment to pedagogy and practices that ensure students are known and seen in their learning and school experiences.

Primary Questions

- To what extent have we provided a well-rounded education, or not, in the past year?
- What patterns or trends can we identify over the past 3-5 years?
- As we look at disaggregated data, what patterns or trends do we identify among the focal student groups?
- What factors contributed to the patterns / trends identified?

Deeper Analysis

- How do we ensure equitable access to well-rounded education for students from focal student groups both within individual schools and between schools in your district?
- How is Career Connected Learning incorporated into your district’s approach to a well-rounded education?

High School Focus

- How are students in each CTE Program performing on federal accountability indicators compared to non-CTE students?
- How are students from special populations and students from different gender, races, and ethnicities performing in each CTE Program?
- Where do the biggest gaps in performance exist between groups of students? Why might these gaps exist?
- Which CTE Programs overall have the highest outcomes and which has the lowest? What are potential barriers?
- Using the High Quality Program of Study Rubric, which programs are meeting current or future labor market demand in high demand, high skill, high wage occupations?
- What progress has been made toward implementation of CTE programs and Programs of Study?
- What opportunities exist for students to earn postsecondary credit while in high school?

Application Requirements

- Describe any new CTE Programs of Study to be developed.
- Describe how students’ academic and technical skills will be improved through integrated, coherent, rigorous, challenging and relevant learning in subjects that constitute a well-rounded education, including opportunities to earn postsecondary credit while in high school?

Data Sources (List sources of data used)	Observations / Findings (Summarize positive and negative key findings from review of data source. Statements should be in response to the guiding questions above.)	Contributing Factors (Use community, educator, and student engagement to explore and expand on potential root causes of the finding. Ask students about their experiences.)	Priority Level (Minimal, Minor, Moderate, Significant, or Severe)
Parent Survey	Elementary after school enrichment program has provided opportunities for students to experience a variety of activities, and has provided necessary support for families as we continue to navigate COVID-19 impacts.	Support for the learner’s families.	Moderate

STRENGTHENED SYSTEMS & CAPACITY

Educational systems are made up of people, practices, policies, resources, community assets, and partnerships. Joint determination is needed to strengthen the capacity for whole system success. Shared responsibility and accountability for the success of students in Oregon’s schools requires systemic change.

Primary Questions

- To what extent have we strengthened District Systems & Capacity, or not, in the past year?
- What patterns or trends can we identify over the past 3-5 years?
- As we look at disaggregated data, what patterns or trends do we identify among the focal student groups?
- What factors contributed to the patterns / trends identified?

Deeper Analysis

- What evidence based practices are being used to increase student attendance? What barriers exist?
- How are teacher instructional practices systematically reviewed and needed changes incorporated into school level professional development plans?
- What factors influence the recruitment, retention and training of educators and counselors? What groups are underrepresented in teaching, support, counseling and leadership?

High School Focus

- How are you systematically partnering with students and families in grades 9-12 to discuss transcripts, graduation requirements, and students’ educational goals? If there are multiple high schools in your district how do you ensure these systems are in place at each site?
- Are there systems in place to provide academic support to students that are at risk of not graduating on time? If there are multiple high schools in your district how do you ensure these systems are in place at each site? Are there any barriers that prevent students from accessing these supports?
- What policies are in place that remove prerequisite barriers for students accessing advanced coursework? If there are multiple high schools, including alternatives sites, in your district, what does each school’s policies look like?
- Looking at demographic data related to advanced course enrollment (AP, IB, dual credit, etc), what systems need to be put in place to ensure equitable participation, retention, and success rates in those classes?

Application Requirements

- How do you recruit, onboard, and develop quality educators and leaders? How are you recruiting and retaining educators and leaders representative of student focal groups?
- How will you coordinate with ODE in the recruitment, retention, and training of CTE educators, including groups underrepresented in the profession?
- What systems are in place to monitor student outcomes and identify students who may be at risk of academic failure?

Data Sources (List sources of data used)	Observations / Findings (Summarize positive and negative key findings from review of data source. Statements should be in response to the guiding questions above.)	Contributing Factors (Use community, educator, and student engagement to explore and expand on potential root causes of the finding. Ask students about their experiences.)	Priority Level (Minimal, Minor, Moderate, Significant, or Severe)
Employment Records	BIPOC teachers and administrators are underrepresented and do not reflect the diversity desired; BIPOC support staff are overrepresented. There is a higher turnover in BIPOC teachers than any other employee group in the district - and at even higher levels at the middle school.	Recruiting practices need to encourage BIPOC applicants. Retention and supports need to be developed to retain BIPOC teachers and administrators.	Significant