O A E S D

 OREGON
ASSOCIATION
of
EDUCATION
SERVICE
DISTRICTS

STRATEGIC
PLAN
2023 - 2025
BIENNIUM

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OAESD
**OREGON ASSOCIATION OF
EDUCATION SERVICE DISTRICTS**

**Great Service.
Even Greater *Together.***

Oregon's **19** Education Service Districts are
building a powerful and equitable system for
nearly **600,000** students in 197 districts.

CONTENTS

1. EXECUTIVE SUMMARY

Over the past several years, Oregon Association of Education Service Districts (OAESD) has grown significantly, from a single 0.5 FTE Executive Director to an organization of 2.8 FTE when fully staffed. With this growth, OAESD leadership recognized the need to conduct a strategic planning process to guide the organization's growth, ensure sustainability for their programs, and identify high-priority services to focus on. Planned activities included: (1) reviewing OAESD's purpose, vision, and mission statements; (2) identifying common values and beliefs of association members; (3) gathering input on OAESD's strengths, weaknesses, opportunities, and threats; and (4) identifying potential organizational goals, priorities, and objectives. After an open RFP process, OAESD contracted with a third party, Kelley Nonprofit Consulting (Kelley NPC), to oversee this strategic planning process. The first step was to create a set of Essential Questions to guide the strategic plan development process. Once finalized, these questions served as a "North Star" to ensure the questions asked, resources gathered, ideas proffered and explored, and more would help the process move towards OAESD's goals and priorities. OAESD leadership worked with Kelley NPC to craft five Essential Questions: 1) what is OAESD's unique role in the education community of Oregon? 2) What programs and services should we focus on moving forward? 3) How do we effectively grow revenue without increasing membership dues? 4) What legal structure should OAESD take? 5) How can our governance structure be revised to best support our goals?

To identify common values, beliefs, strengths and opportunities, and evaluate potential organizational objectives, Kelley NPC gathered qualitative data from three sources: a survey, a series of one-on-one in-depth interviews, and a moderated focus group discussion. During interviews and the focus group, Kelley NPC took detailed notes of the interviewee's perspectives. This data was collected and examined through an inductive analysis, a method of analyzing qualitative data without preconceived themes or assumptions. Rather than filtering data through a constructed framework, meaning and structure is derived from the data itself. This results in an analysis that is more closely tuned to the perspectives of the community, rather than preconceived assumptions of the person conducting the analysis. Once all the data was collected, Kelley NPC read through each interview and "coded" the data, marking individual sentences and paragraphs according to topics under discussion (such as "Hiring and Retention," "Budget Cuts," "Effective Collaboration," and more). Once each interview had been coded, quotes were organized according to codes and grouped into overarching themes. Kelley NPC analyzed this coded and organized data to identify priorities, needs, and other key lessons from the data.

HIGHLIGHTS INCLUDED:

Legislative advocacy and lobbying is incredibly important to the OAESD community. Many interviewees expressed appreciation for OAESD's legislative advocacy. These efforts help keep ESDs and their needs as the focus, and OAESD members place high value on this. This should be taken into consideration when looking into potential legal structures for the organization.

OAESD's ability to build connections across ESDs is universally recognized. Almost without exception, interviewees pointed to OAESD's support in relationship building as one of the key value-adds they receive. This is experienced differently by different members of the community (job alikes, mentorship opportunities, etc), but overall this was reported as highly important.

The public does not understand the work of ESDs, and this is a problem. Interviewees mentioned the opaqueness of ESD work. New legislators do not understand it or recognize its value, and this opens ESDs up to the risk of losing funding (a concern that was mentioned several times). There is a recognized need to tell the story of ESDs and their place in Oregon's education landscape.

Professional development opportunities are valued insofar as they connect to the unique responsibilities of ESD staff. The value of PD was mixed; some interviewees rated it highly, while others preferred to seek out their own through their communities of peers. Generally, the PD that was found most valuable was that which took into consideration the unique job of working in an ESD, rather than general topics of relevance to education.

ESDs need help with hiring and onboarding staff. Interviewees mentioned several challenges related to hiring and retaining staff: identifying quality candidates in a narrow recruitment pool (as ESD work is unique in the education field); filling positions in rural communities; training and onboarding new staff; and more.

Once the listening sessions and survey responses had been fully analyzed, OAESD leadership and Kelley NPC worked together to analyze OAESD's existing Purpose Statement and reconfigure it into shorter, standalone Mission and Vision statements. These are centered on clarity, brevity, and inspiration, to help OAESD reach various audiences more effectively and contribute to broader organizational visibility.

These statements are meant to guide OAESD, in its unique role supporting its member ESDs, as it continues to make strategic decisions for the future. They will help OAESD staff and leadership to easily and effectively communicate their work to funders and the public. The Mission Statement explains what OAESD does in its day-to-day programming, while the Vision Statement imagines the future that OAESD is working to build. Both of these statements were crafted based on the values and priorities of OAESD members, as revealed through the listening process.

With a clear mission and vision in place, OAESD has committed to intentionally building financial stability through two funding streams: strategic programming and grant management.

OAESD provides a core set of direct services to member ESDs, including networking, professional development, and legislative advocacy. These core services are largely supported through member dues, but there is an opportunity to seek grant funding to support expanded and deepened approaches to these programs, as well as building new adjacent programming. Currently, OAESD receives external grant funding through the US Department of Education's Comprehensive Center Network Program. This grant supports key services of professional learning, network building, and more. By building new strategic partnerships and seeking additional grants, OAESD can secure more funding for the work it's already doing. Furthermore, OAESD can secure grant funding by developing new strategic programming, such as specialized professional development opportunities and research projects.

MISSION STATEMENT:

OAESD supports Oregon's Education Service Districts through coordination, partnership, and advocacy, to ensure the locally-responsive mission of each ESD is accomplished.

In the summer of 2022, OAESD served as the administrator for the Oregon Department of Education's Summer Learning Grant. Under this funding strategy, OAESD works with philanthropic and government funders to create requests for proposals, solicit and evaluate requests, make award determinations, manage relationships with grantees, and evaluate progress. Grant management represents a valuable opportunity for generating revenue and stability for the organization.

Two additional funding strategies were identified for future consideration: resource navigation and coalition building. Under the "resource navigation" strategy, OAESD would provide a new

"add-on" service, helping member ESDs identify and secure grant funding for their projects. This would be available to member ESDs for an additional hourly fee. The "Coalition Building" strategy is similar, in that OAESD plays a pivotal role in securing grant funding for ESDs. However, under this strategy, member ESDs do not pay OAESD for grant writing and navigation services; instead, OAESD acts as the primary grant applicant and receives a cut of the grant fund for administrative costs, with member ESDs included as subgrantees. At the time of this report, OAESD is holding both of these funding strategies for future consideration.

Finally, as OAESD solidifies the new mission and vision statements and works towards building long-term, sustainable revenue, the leadership team has investigated several options for adjusting the legal status of the organization. So far, OAESD has operated as a nonprofit fiscally sponsored by Linn Benton ESD. The leadership team examined several options, including filing as an independent 501(c)3, 501(c)4, or 501(c)6, before deciding to file with ORS 190 as an intergovernmental agreement (IGA) between the 19 ESDs. This filing identifies OAESD as a government agency and helps clarify responsibilities and liabilities across the association. Moving forward, OAESD is retaining the 501(c)3 and 501(c)6 structures as options that may provide important stability as the organization grows, and the leadership will reconsider these in the future.

This process, conducted over a full year of strategic conversations with OAESD leadership and members, has created a roadmap to building a stable future for OAESD. Through this work, we hope to realize our vision – a network of locally-responsive, equitable, and coordinated PreK to post-secondary educational services throughout Oregon.

VISION STATEMENT:

OAESD envisions a network of locally-responsive, equitable, and coordinated Pre-K to post-secondary educational services throughout Oregon.

2. BACKGROUND

Oregon Association of Education Service Districts (OAESD) is a network of 19 Education Service Districts (ESDs) across the State of Oregon, each of which provides support in equitable, high-quality educational services to Oregon's school districts. OAESD supports its 19 member ESDs with networking opportunities, professional development, legislative advocacy, and more, to ensure they have the resources and knowledge necessary to respond to their local school district needs.

Over the past several years, OAESD has grown significantly, from a single 0.5 FTE Executive Director in 2019 to a team of 2.8 FTE (a 1.0 FTE Executive Director, 1.0 FTE Program Administrator, and a 0.8 FTE Executive Assistant) when fully staffed by 2023. Additionally, OAESD works with contractors for government affairs and lobbying services. Furthermore, these years saw turnover in key leadership positions and both local ESD and Association levels.

With this growth and change, OAESD leadership recognized the need to conduct a strategic planning process to guide the organization's growth, ensure sustainability for their programs, and identify high-priority services to focus on.

In early 2023, OAESD contracted with Kelley Nonprofit Consulting (Kelley NPC) to lead and oversee the strategic planning process. This document includes an overview of the process led by Kelley NPC and the strategic decisions made by OAESD leadership, based on Kelley NPC's input and findings.

3. GOALS

Establish priorities for future decision making. As the organization and its work continue to grow, OAESD leadership will be faced with decisions about programs to focus on, opportunities to say "yes" to, and prospects to pass on. These decisions should be made proactively based on a clear understanding of the needs and priorities of member ESDs and their staff, rather than reactively based on what becomes available.

Gather input from stakeholders on the association's strengths, weaknesses, opportunities, and threats. OAESD leadership placed a high value in centering this process on the voices of member ESDs and their employees. Gaining high-quality and detailed input, through a variety of accessible opportunities, ensured that the insights from this strategic planning process would accurately reflect the views and priorities of the OAESD community.

Develop Mission and Vision statements for the association. Prior to engaging in this process, OAESD was guided by a "Purpose Statement." One of the leadership's key priorities was to re-evaluate the Purpose Statement and, based on the insights gleaned from community members, rewrite this into a set of meaningful and actionable Mission and Vision statements.

Evaluate various non-profit statuses as alternatives to fiscal sponsorship. OAESD had been operating as a fiscally-sponsored organization under Linn Benton ESD. The association and its members had recognized the need to explore options as a stand-alone nonprofit organization.

Create a funding plan for long-term stability. Between 2019 and 2023, OAESD grew its staff capacity significantly, and to support this growth they raised membership dues for ESDs. However, even with this increase in dues, questions remained about the financial stability of the organization. OAESD leadership recognized that raising membership dues again was not an option, and with only 19 ESDs in the State of Oregon, there cannot be any growth in members. Additional programming that has generated revenue for OAESD in the past has either been one-time/short-term (for example, $300,000 in summer learning grants that were not renewed) or only breaking even (such as the summer conference). Identifying new and sustainable sources of revenue was identified as a top priority.

4. PROCESS

From this process, OAESD leadership and Kelley NPC put together a roadmap for future stability and growth.

KELLEY NPC AND OAESD LEADERSHIP'S
PROCESS FOR STRATEGIC PLANNING FOLLOWED THREE STAGES:

DEVELOP ESSENTIAL QUESTIONS

01

Kelley NPC worked with OAESD leadership to develop "essential questions" to guide the strategic planning The formation of these questions was an important first step to provide guidance, keep the project on track, and ensure actionable outcomes.

ENGAGE THE COMMUNITY IN A DISCOVERY PROCESS

02

Kelley NPC conducted in-depth interviews, facilitated group conversations, and surveys with key members of OAESD's community (including staff, member ESDs, and others as determined with OAESD leadership during the planning phase), using the Essential Questions as the guide. The goal of this was to collect valuable and in-depth information about the values and priorities of OAESD members.

ANALYZE INSIGHTS

03

Kelley NPC reviewed the data collected through the discovery process and presented OAESD leadership with a series of reports on the insights learned and how they might be applied to answer key questions faced by OAESD.

PROCESS / ESSENTIAL QUESTIONS

Essential questions serve as a "North Star" for all stages of the strategic planning process, in particular the listening sessions. These questions were not posed directly to ESD members and stakeholders during the interviews – rather, they guided OAESD leadership in their strategic planning, to ensure the questions asked, resources gathered, ideas proffered and explored, and more would help resolve the key issues that instigated strategic planning. Essential questions were developed based on conversation between OAESD leadership and Kelley NPC.

"Essential questions serve as a "North Star" for all stages of the strategic planning process, in particular the listening sessions."

What is OAESD's unique role in the education community of Oregon?

- *Who is our community?*
- *What are their goals?*
- *How is the landscape shifting/changing?*
- *Do we have sufficient communication with our community?*

What programs and services should we focus on moving forward?

- *Which services are most beneficial to ESD members?*
- *Which services are less beneficial?*
- *What is within the scope of our organization?*
- *How do we know when it's time to reassess a program or service?*

How do we effectively grow revenue without increasing membership dues?

- *What "add-on" services would members be eager to pay for?*
- *What paid services can we offer to outside entities?*
- *What other grant management opportunities could we pursue?*
- *What previously successful fund development could we expand and/or capitalize on?*

What legal structure should OAESD take?

- *How valuable is our advocacy and lobbying to ESD members?*
- *What kind of advocacy is valuable?*

How can our governance structure be revised to best support our goals?

- *Is confusion about the structure widespread?*
- *Do people need to understand it better?*
- *Do we change the structure, or the presentation?*
- *Is the self-governed collaborative structure appropriate to our goals?*
- *What are the ideal roles for board members, ESD staff, and other stakeholders?*

Kelley NPC engaged with members of OAESD's community in intentional conversation to assess needs and priorities to inform the direction of this strategic plan. To identify common values, beliefs, strengths, and opportunities, and evaluate potential organizational objectives, Kelley NPC gathered qualitative data from three sources: a survey, a series of one-on-one in-depth interviews, and a moderated focus group discussion. Across these different activities, Kelley NPC heard from representatives of all 19 ESDs and a cross-section of job titles and perspectives. Interviews (including one-on-one conversations and with the focus group) were designed to follow up on key themes that emerged from the survey, and both the survey and interviews were then analyzed together as equally essential pieces of the process.

Survey questions were developed in collaboration between Kelley NPC and OAESD leadership, and the survey was disseminated through various outlets, including in-person at OAESD's annual conference and smaller working groups, and virtually through the OAESD association-wide newsletter. Respondents were asked about current goals for their ESD, the OAESD programs/services they find most beneficial, and current needs that they would like OAESD's assistance with.

This survey launched the discovery process.

What is OAESD's unique role in the education community of Oregon?

1. Name (optional)
2. Contact Info (optional)
3. Which ESD are you associated with?
4. How would you best describe your role in education?
5. What goals do you have for your work with your ESD?
6. On a scale of 1 (low) to 5 (high), rate your knowledge and understanding of the services OAESD provides.
7. Which of the following OAESD services and programs do you find most beneficial? Choose up to 3.

- Legislative Advocacy
- Job Alike Groups
- Collaborative Groups
- Professional Networking Opportunities
- Trainings and Professional Development
- Communication

- Events
- Single Point of Contact for ODE, OHA, OSBA, COSA, and other state agencies
- Research Support - Using the network of ESDs for relevant learning needs
- Program design (Ex. SIA, SSPS, SPED TA)
- Other

8. What specifically has been beneficial about these services?
9. What is a need within your ESD that you would like help addressing?
10. Is there anything else you would like to share that would help us as we develop and refine our programs and services?

Questions about OAESD on a scale of 1 (low) to 5 (high), rate your knowledge and understanding of the services OAESD provides
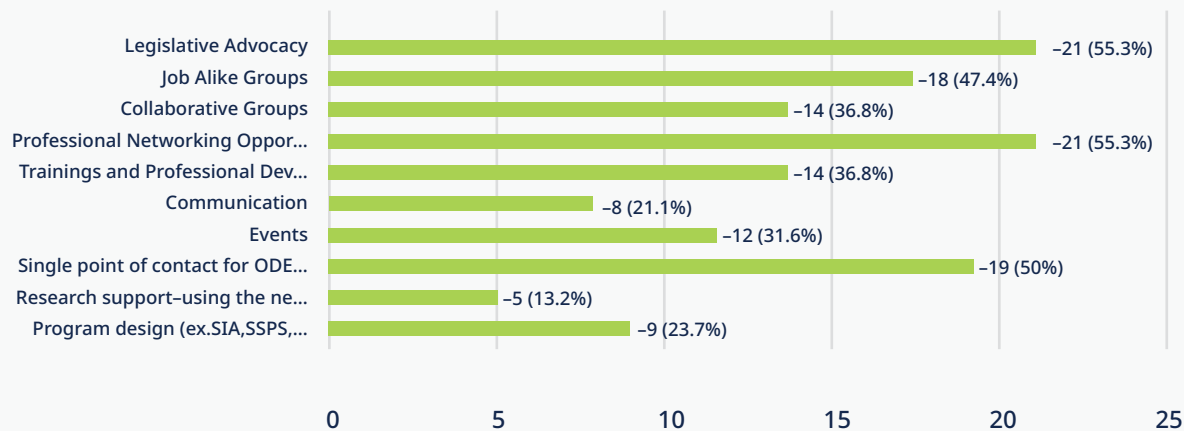
38 Responses

Rating	Responses
1	0 (0%)
2	0 (0%)
3	10 (26.3%)
4	18 (47.4%)
5	10 (26.3%)
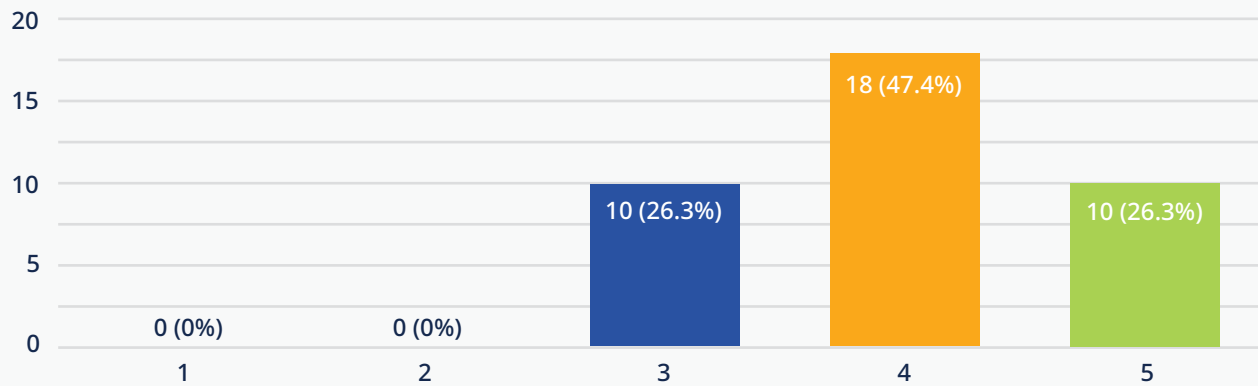
When asked to rate their knowledge and understanding of OAESD services, about 74% rated their understanding 4/5 or 5/5, while 26% rated it 3/5. The most highly rated individual services were "legislative advocacy" and "professional networking opportunities" (both selected by 55% of respondents), followed closely by "single point of contact for ODE" (50%) and "job alike groups" (47%). The least valued services were "research support" (13%), "communication" (21%), and "program design" (23%). In the middle was "professional development," selected by 37% of respondents.

Questions about OAESD Which of the following OAESD services and programs do you find most beneficial? Choose up to 3.

38 Responses

Service	Responses
Legislative Advocacy	–21 (55.3%)
Job Alike Groups	–18 (47.4%)
Collaborative Groups	–14 (36.8%)
Professional Networking Oppor...	–21 (55.3%)
Trainings and Professional Dev...	–14 (36.8%)
Communication	–8 (21.1%)
Events	–12 (31.6%)
Single point of contact for ODE...	–19 (50%)
Research support–using the ne...	–5 (13.2%)
Program design (ex.SIA,SSPS,...	–9 (23.7%)

Of the survey responses, 34% came from superintendents, 32% from board members, 18% from ESD administrators, and the rest from ESD staff and other partners. Kelley NPC and OAESD leadership analyzed the results of this survey and developed a plan and conversation guides for targeted one-on-one interviews and a focus group discussion.

Listening Sessions

Building on findings from the survey, Kelley NPC developed conversation guides with input from OAESD staff and conducted a series of one-on-one in-depth interviews along with a facilitated focus group conversation. In-depth interviews were one-on-one conversations between Kelley NPC and OAESD stakeholders (names provided by OAESD) that focused on exploring the community's needs and priorities and learning how OAESD can best meet these needs. The one-on-one format allowed for follow-up questions and gathering additional detail as appropriate. The focus group was a facilitated hour-long group session with 8 individuals representative of the OAESD community (names provided by OAESD). While this format did not allow for the same depth of response (or breadth of questions) as the In Depth Interviews, it did allow the opportunity for varied stakeholders to listen and respond to one another. Together, these two conversation formats provided significant data to inform the strategic planning process.

Interview and focus group participants were identified and selected by OAESD staff to include broad representation across ESDs and job titles. These conversations allowed an in-depth exploration of challenges/opportunities faced, values and priorities, and current needs of members of OAESD's extended community.

Every participant was not asked every question, but the guides provided structure for the interviewer and pointed conversations towards key themes. Data collected through these conversations was synthesized and used to derive answers to strategic planning Essential Questions.

In Depth Interviews	Focus Group

In Depth Interviews

ESD Specific Questions:

- Tell me about a time your work was positively impacted by collaboration with another organization (does not have to be OAESD). What do you think made that collaboration so valuable?

- What is your ESD's greatest need?

- How would you describe your relationship or connection with other ESDs? How would you like it to be described?

- What changes would you like to see in your ESD?

OAESD Specific Questions:

- *In 2-3 sentences, how would you describe OAESD's work?*

- *What OAESD services have you used?*

- *How would you characterize the partnership between your ESD and OAESD?*

- *Tell me about a time programs or services from OAESD had a noticeable effect on your ESD and/or schools*

- *What kind of support would you like to see more of?*

- *What is unique about the needs of schools and education in Oregon (that legislature/OAESD/ decision makers need to know about)?*

- *How connected do you feel to the work of OAESD?*

- *Do you have the level of collaboration you would like with OAESD? If not, what would you like to see changed?*

- *What kinds of professional learning opportunities would you like to see OAESD focus on?*

Focus Group

Focus Group Questions:

- Introductions – Each participant states their name, job, and ESD

- What are your ESD's most important goals right now?

- What is a current priority need faced by your ESD? What is a long-term priority goal (and are these the same)? What support would help you meet these needs?

- What OAESD services have been most valuable to you and why?

- What topics would you like to see OAESD focus its professional learning opportunities on?

- Is there any service not currently offered by OAESD that you would like to see added?

- Follow up: If we had to de-prioritize something to make that happen, what would you recommend?

- Do you have the level of collaboration/ partnership you would like with OAESD? If not, what would you like to see changed?

Analysis

During interviews and the focus group session, Kelley NPC took detailed notes of interviewees' perspectives. Data was collected and examined using inductive analysis, a method of analyzing qualitative data without preconceived themes or assumptions. Rather than filtering data through a constructed framework, meaning and structure is derived from the data itself. This results in an analysis that is more closely tuned to the perspectives of the community, rather than to preconceived assumptions of the person conducting the analysis. Once all data was collected, Kelley NPC read through each interview and "coded" the data, marking individual sentences and paragraphs according to topics under discussion (for example: "hiring and retention," "adapting to new laws"). A given passage or sentence could be marked with multiple codes.

Examples of Coded Text

Interview Notes	Applicable Codes
Greatest need of your constituents – The greatest needs of our constituents is offering Professional Development. **We are having a huge turnover in district staff, and they have no background in finance or in public education, which is completely different than doing the books or being an accountant at a private company.** This has been a challenge for people, and **because of the new laws, Professional Development is one of the things that we are asked for.** The need for initial onboarding and getting people up to speed is important, and the additional Professional Development for people to educate them on statewide issues is important, as well. **The main contacts for legislative issues changes, and part of work is to see if we need to change or not, and then communicate those needs to the members.**	*Hiring and Retention* *Professional Development* *Uniqueness of ESD Work* *Adapting to new laws* *Professional Development* *Lobbying*
Greatest risk for ESDs – **A lack of knowledge amongst the community and legislatures regarding what ESDs do.** Our organization is small. ODE has recognized the value of ESDs because it's easier work for them, and it helps streamline the process in the workload. **Over the last 3-5 years, the collaboration has been improved.**	*Public Perception* *Legislator Lack of Understanding* *ODE Collaboration* *What OAESD Does*

Overall, 31 codes were identified. Once each interview was coded, quotes were organized according to codes and grouped into overarching themes, including: ESD Priorities, Staffing, Collaboration, Political/Policy Concerns, and OAESD SWOT (strengths, weaknesses, opportunities, and threats) analysis. Finally, this organized data was analyzed to identify priorities, needs, and other key lessons.

Full Codes

1. ESD Priorities

1.1 What ESDs do

1.2 Uniqueness of ESD Work

1.3 Risks to ESDs

1.4 Uniqueness of each ESD

1.5 DEI

1.6 Incarcerated Students

1.7 Technology Needs

1.8 Post COVID Recovery

1.9 Mental Health

1.10 Special Education

1.11 Early Learning

2. Staffing

2.1 Hiring / Retention

2.2 Professional Development

2.3 Adapting to New Laws

3. Collaboration

3.1 ESD Collaboration - Good

3.2 Insufficient Collaboration (general)

3.3 ODE Collaboration

3.4 OAESD Collaboration

3.5 Inter-State Collaboration

4. Policy Concerns

4.1 Budget Cuts

4.2 Adapting to New Laws

4.3 Lobbying

4.4 Public Perception

4.5 Legislature Lack of Understanding

5. OAESD SWOT

5.1 What OAESD Does

5.2 OAESD Funding

5.3 OAESD Conference

5.4 OAESD Services

5.5 OAESD Committees

5.6 OAESD Risks

5.7 OAESD Strengths

Through analysis of the data collected throughout the Discovery Process, Kelley NPC identified four overarching themes – ESD priorities, staffing, collaboration, and policy concerns – as well as strengths, weaknesses, opportunities, and threats for OAESD.

ESDs and their Priorities

Each ESD had their own priorities, needs, and opportunities, and this was universally recognized. An oft-repeated phrase was "if you've seen one ESD, you've seen one ESD." This is often an advantage of the ESD structure, as they're flexible organizations, able to meet the many diverse needs of the school districts they serve. Each ESD is well positioned to identify needs in their communities and bridge those gaps. For example, ESDs in some small, less-resourced rural communities focus on supporting their districts to fill in the gaps on special education programs. Some of these districts may only have a few students requiring certain supports (for example, Deaf/hard-of-hearing or blind students) in a given year, or none in others. Urban districts, meanwhile, often have those covered, as their larger student populations tend to give them a critical mass of students in various special ed programs. ESDs are flexible and can quickly adapt to meet changing landscapes. One interviewee stated "we have learned that it is not always best to do the things we normally do. We must focus on what's in the now and what's in front of us." There is a constant need to re-evaluate and modify ESD work, based on what's happening at every level from the classroom to the legislature.

> "why are my dues going towards that, when we're not doing that initiative?"

In other cases, this lack of consistency across ESDs presents challenges. A district may serve 400,000 students or less than 200. If OAESD focused its programs and services too strongly on one particular topic, they would risk alienating the ESDs for whom that is not a significant concern. For example, one interviewee spoke about the current push for environmentally friendly transportation such as electric school buses. This was viewed as an urban issue, while "that type of technology does not fit in some of the smaller communities," because there are no charging stations nearby. The cost of implementing this in small, rural communities is large, and the community buy-in is weak. Another interviewee mentioned career-tech education (CTE) as something focused on by about half of the ESDs. That is a significant portion of the community and may justify OAESD's time. On the other hand, resources are limited, and the risk is that other ESDs will begin asking "why are my dues going towards that, when we're not doing that initiative?"

Differences in ESD priorities were caused by budget constraints, cultural differences, and varying regulatory constraints. Financial concerns were felt most heavily by small, rural ESDs, who often felt their staff was stretched thin and required to cover multiple roles. Some serve only a few schools with low student populations and their own budget challenges.

Finally, each ESD is its own organization and makes its own operational decisions. Individual ESD superintendents may participate in collaborative groups, but at the end of the day they make their own decisions based on the needs and constraints faced by their community. OAESD programs and services (such as PD) cannot assume that different ESDs will share operating procedures.

Some specific ESD priorities, which were mentioned by some interviewees but not universally shared, include:

Diversity, Equity, and Inclusion. The Equity statement, adopted by OAESD in [YEAR], provides a strong foundation for DEI work, but one participant stated "we need to figure out how we weave this idea into a strategic planning process, and how to make this plan a part of our DNA to see it in action." This could include building career pathways for more educators of color, addressing district and school level policies that negatively affect students from marginalized backgrounds, and more.sources of revenue was identified as a top priority.

Supporting Incarcerated Students. Funding for incarcerated students operates on a different model, which is often insufficient. Supporting these students requires building a sustainable model that helps them to find a path that does not involve the criminal justice system.

Technology Needs. As schools across Oregon rapidly adopted technology systems during the COVID-19 pandemic, the need for cyber security has quickly increased. Additionally, many schools and ESDs are still working on outdated technology and would benefit from modernization. All this work requires additional staff, and many ESDs do not have the capacity for this.

Post COVID Recovery. Schools are still recovering from (and working to understand) the effects of the COVID-19 pandemic. Students have not fully recovered from either the mental health effects of lockdowns and illness or the learning loss that's been associated with remote schooling.

Mental Health. Across all levels of education, from the classroom up to ESDs, staff (and students) are experiencing burnout. There is a vital need to figure out how to best support the mental health of all members of the community.

Special Education. Many ESDs (in particular those serving smaller and rural school districts) provide services that the school districts don't have the capacity to provide, such as a Deaf/hard-of-hearing specialist, as well as professional development for various specialists employed by the districts. Hiring and retaining these positions is frequently a challenge.

These differences complicate many OAESD efforts, notably professional development. ESD-specific priority needs varied widely, from DEI to technology upgrades and implementation, continued post-COVID recovery, mental health support, career and tech education, early learning resources, services for incarcerated students, and more. This range of topics arose from differences in student population, geographical considerations, cultural differences, school and district level capacity, and budget sizes. No single PD opportunity will meet the needs of all ESDs. This is not inherently a bad thing, but efforts should be made to meet the needs of all member districts. As professional development is a core service to ESD members, OAESD should prioritize offering responsive sessions that are intentionally designed to cover a wide variety of relevant topics.

Common priority needs, shared widely across ESDs, included:

Supporting their Districts

The primary purpose of ESDs is to provide services and support to the school districts and schools within their jurisdiction. The nature of this support varies greatly from one ESD to the next, but they are all working to better understand and meet those needs.

Staffing

All ESDs face difficulty filling key staff positions, though urban ESDs tend to have an easier time than rural ones, as they have a deeper bench of candidates to pull from.

Statewide Policy Decisions

Any statewide policy change (whether through ODE, the legislature, or the governor's office) affects all ESDs, though the effect may play out differently across various communities. Interviewees mentioned policies such as Senate Bill 819 (preventing abbreviated school days for students with disabilities), House Bill 3198 (Early Literacy Success Initiative), and more. All ESDs are looking for guidance on how to implement policy changes while working on a limited budget (this is a particular concern for small, rural ESDs).

Staffing

Participants frequently mentioned difficulties in hiring and retaining qualified ESD staff, due to two primary factors: a small pool of eligible applicants, and general issues in hiring for education.

First, the pool of eligible applicants is small. Working in an ESD setting is unique in the education landscape. Generally speaking, the job is to help school districts and campuses best serve their students across a variety of specialty needs. ESD staff must have professional expertise in education (including special education, literacy, ed tech, education administration, or others), but they also work with job responsibilities and structures not typical to the education field. Most work primarily with adults in an office setting, though ESD staff also includes specialists who work directly with students. Those who work directly with students are often "on their own," floating between the ESD office and multiple school campuses. They must make decisions by themselves and be able to manage their own workflow. People whose professional experience is focused on the classroom tend to have not developed office-work skills, while those with traditional office jobs lack professional expertise in education-related issues. The combined need for education expertise, office-setting soft skills, and ability to work autonomously creates a small pool of qualified applicants.

Moreover, ESDs are increasingly finding it difficult to hire high quality specialists (such as speech language therapists, school psychologists, and other licensed professionals). Contracting out is not as cost-effective as hiring a full-time employee, but sometimes it's their only option to remain in compliance. Some small ESDs only need a 0.5 or 0.25 FTE, and some potential hires have strong preferences for or against dividing their work between various locations. These complications create a prohibitively small pool of candidates. One interviewee stated it simply: "the number of people who want these positions is dwindling."

Second, all these complications are layered on top of an already-difficult time for hiring in education. Housing is expensive throughout the state, and ESDs have difficulty paying a high enough salary to attract talent. This is especially true for rural ESDs, which are often asking potential job candidates to relocate to the community for the job. Furthermore, the fraught cultural conversations around education right now are making hiring difficult. One interviewee said "it doesn't matter how much money you throw at new prospective staff members — if work doesn't feel good, then they don't work good."

"the number of people who want these positions is dwindling."

These issues compound when it comes to creating leadership succession plans. ESDs are looking to upcoming retirements, and without a well-developed workforce pipeline and a strong bench of qualified candidates, these positions risk going unfilled. ESDs have already been experiencing turnover in their staff and leadership, causing crucial roles to go unfulfilled and important institutional knowledge to be lost. Other complications to hiring include retaining staff and filling recently vacated positions. Ideas for hiring include: Oregon job fairs, looking outside the state, etc. ESDs need to find additional sources of applicants.

Finally, interviewees were divided on the value of professional development. Many felt that the professional development offered to them (from OAESD, their ESD, or elsewhere) was "stuck in K-12" rather than focusing on the day-to-day needs of their own job. It was not designed for ESD staff, but for the district and school level staff they support. There is a different skill set for supporting and coaching adults, and this is what ESD staff needs to develop. Many professional development opportunities were viewed as too theoretical, without practical connections to the work. Generally, perspectives on professional development reflected ESD priorities: where there were common priorities due to the nature of ESDs or recent legislature/ODE decisions, professional development can be useful. Where priorities diverged among ESDs, professional development from OAESD was less valued. Participants were divided on a preference for in-person versus virtual professional development, with some wanting more opportunities for in-person learning to develop relationships across ESDs, while others asked for more virtual PD opportunities to increase accessibility.

"It's not helpful to receive training for the people that I'm supporting, and not for my own role. I would love to see, 'how do I support these people?' trainings."

Key statements from interviewees on professional development included:

"I obviously value professional learning. I'm not sure that that's the focus of where I think OAESD needs to be putting its primary capacity right now . . . The saying I was taught 25 years ago is when you've seen one ESD, you've seen one ESD. And so trying to get us to move in a similar direction or learn something that we all think is valuable is headache causing. And so I think it is less about professional learning opportunities and more about building the infrastructure stronger, building the foundation stronger, building the relationships, collaboration, that sort of thing."

"I've had previous experiences with OAESD sessions, where I show up and think 'is this for me? Not sure if this is for me.' It is a common wedge that happens with people that are instructional leaders versus operations leaders. We need tangible information to take back to work with us, versus theoretical information."

"Many of our employees basically work alone – they might come into the mothership once in a while, but mostly, they are autonomous in what they do, and it requires someone who has the ability and training without having to work without a principal who is not checking in on a daily basis— someone who is responsible with making decisions for students and parents. Those are skills that need to be developed, and OAESD could do more to help those specialists and aids who are not in a school setting."

"It's not helpful to receive training for the people that I'm supporting, and not for my own role. I would love to see, 'how do I support these people?' trainings."

"The greatest need of our constituents is offering Professional Development. We are having a huge turnover in district staff, and they have no background in finance or in public education, which is completely different from doing the books or being an accountant at a private company."

"We only offered in-person trainings and events, and if you didn't show up, you didn't train; but we see people joining our organization all year long, and we only hold trainings in July, so we need to offer trainings online and on demand when our new employees start instead of making them wait."

"I wish there were more opportunities for in-person learning. We should not just be evaluating—we should be partnering."

"We [ESDs] see ourselves as professional learning organizations ourselves, and so we'll go seek out and get what we need. I don't see OAESD as being ultimately a professional learning collaborative and I might be alone in that, but that's my perspective.

Collaboration

By and large, ESDs have positive relationships with one another and with ODE, thanks to several years of hard work. These relationships have greatly benefited individual ESDs, though collaboration can at times be challenging.

> **"…without the job-alike collaborations, we would not have much collaboration with the other 19 ESDs in the state."**

The strongest source of collaboration was through the job-alike program. One interviewee stated "without the job-alike collaborations, we would not have much collaboration with the other 19 ESDs in the state." They might have some collaboration with their geographical neighbors, but OAESD and its programming was widely recognized as the "glue" holding statewide ESD collaboration together. Through these working groups and committees, ESDs can learn from one another, share resources as needed, and advocate for ESDs at the state level. Collaboration allows ESDs to work proactively, discussing emerging trends or issues they see on the horizon. This collaboration often extends past the formal meetings, as personal relationships are formed and ESD staff continue informal talks and collaboration. Each ESD tends to collaborate closely with a small group of peer ESDs based on their needs, while maintaining frequent communication with the full network. Several interviewees requested additional job-alike meetings, and possibly PD aimed at job-alikes. Overall, this collaboration between ESDs builds trust and creates a sense of "the whole being greater than the sum of the parts."

Additionally, OAESD has a birds-eye view of the opportunities and challenges within each ESD, and therefore can act as a powerful connector, ensuring effective collaborative relationships by bringing those with a need together with those offering a solution. For example, when small, rural ESDs are working to support students with disabilities, OAESD can look at the full map of resources and services available and facilitate mutually-beneficial connections between ESDs. If one ESD is struggling to support their students with mental health concerns, OAESD can connect them to another district that has been successful in this. OAESD helps districts fill in each other's gaps, and interviewees expressed strong appreciation for this. One interviewee said "knowing we had regular OAESD services . . . has helped us be more intentional with networking. We can simply call a friend and get some assistance." Moreover, interviewees consistently described a strong and positive working relationship between their ESD and OAESD staff, and they have been pleased with OAESD's response speed.

OAESD's work was also recognized as the primary factor in maintaining collaboration and communication between ESDs and ODE. The state Department of Education does not have enough "boots on the ground," and they often look to ESDs to do the work of carrying out their policies and achieving their goals. OAESD has significantly helped ESD superintendents to stay up to date on ODE and legislative decisions. OAESD fulfills a vital role by holding the primary relationship between ODE and the ESDs and facilitating this collaborative work.

The high level of collaboration experienced today was not always the case. Consistently, interviewees stated that "five to seven years ago" relationships between ESDs were not strong, and collaboration was not widespread. Collaborative relationships were built up through hard work by OAESD, then greatly accelerated during the COVID-19 pandemic, as everyone was facing unprecedented challenges together. ESDs began meeting together more regularly than before, and one interviewee stated that "bonding occurred during that time that likely changed the nature of our relationships in a positive way that probably would not have occurred if we only had the job-alikes." People were forced to work together.

Some interviewees expressed concern that collaboration could fall apart. Several participants noted that friction still exists, particularly along the urban/rural divide, and that ESDs sometimes fall back into a "competitive" and "zero sum game" operating mode, competing for resources rather than working together. Collaboration requires

shared values and goals, and these can be difficult to maintain, particularly when responding to controversial topics. Several interviewees reported conflict around COVID-19 mitigation strategies and Black Lives Matter / DEI, which "pitted east against west" in Oregon. This poses a particular risk if OAESD takes a strong stance on a contentious issue. Conversely, however, the "resettling into post-COVID life" means that "now we are not all doing the same things anymore." Shared issues pose both a risk and an opportunity. Participants also reported silos within ESDs, as individual departments seek to stay in their lane. Overall, ESDs tend to have stronger collaboration with their geographic neighbors. According to one interviewee, "we're all so very different that it's difficult to relate to one another, and it's easier to speak with someone closer in proximity because they're having the same issues."

> **"OAESD is a membership, and you get what you put into it. There are fewer people that are doing the heavy lifting. We need to broaden that."**

Finally, interviewees noted ways that collaboration across OAESD could still be improved. There was a need to spread out the burden of responsibility. One interviewee stated "OAESD is a membership, and you get what you put into it. There are fewer people that are doing the heavy lifting. We need to broaden that." Some interviewees felt disconnected from other ESDs in the association when their only means of collaborative work was over Zoom, which is well-suited to conveying information but less effective at building interpersonal relationships. Overall, interviewees valued opportunities to connect and meaningfully collaborate, and they wanted more of these opportunities.

Political/Policy Concerns

Participants reported three key political/policy level concerns.

First, ESDs need to adapt their work to meet shifting state-level policy decisions. This involves both getting ESD staff up to speed on the latest changes from ODE and staying ahead of potential upcoming changes. Many participants mentioned literacy as a current state priority, and one felt the need to be a proactive "tea reader" and prepare for upcoming changes. ESDs need assistance with professional development, strategic planning, and information gathering; many ESDs do not have the capacity to position themselves as tea readers, particularly when looking beyond the high profile issues into more minute budget decisions, such as free and reduced school lunches. Responding appropriately to legislative decisions often requires significant advanced notice, as ESDs have to change their staffing and other plans.

Second, ESDs need assistance raising awareness of their work, both to the public and the legislature. ESDs are the most "invisible" part of the education system in Oregon, with most members of the public rarely interacting with their work directly. One participant explained the problem simply: "when 40% of the legislators are new, they don't know who we are . . . the public needs to know what we do, as well, but that's hard to communicate." When the work of ESDs is not valued, they are at risk of losing funding.

Furthermore, legislators need to understand what ESDs do, so that ESD work can be meaningfully incorporated into the structure of legislation and policy changes. Legislation is usually written as a high-level intervention, and ESDs will be a key entity responsible for implementation.

Legislators generally do not understand what ESDs are, how they're structured, or where their funding comes from. State funding is generally less than 20% of an ESD's budget (compared to about 90% of a school district's). A middle-sized ESD has about 60 different programs, all funded through varying sources. The structure is complex, and if legislators don't understand it, ESDs won't get the support they need to keep all their projects running.

Finally, lobbying is essential. ESDs need an advocate in front of the legislature to prevent budget cuts but also to ensure ESD needs are considered when education priorities are set. The state formula for funding ESDs is inadequate, and there's a need to advocate for a better long-term funding model, rather than a one-time fix. Legislative mandates need to come with sufficient funds to carry them out. Across the board, participants mentioned lobbying as a key and highly-valued OAESD service.

Interviewees recognized that OAESD has put in significant work to build a strong relationship with ODE. This relationship is a vital resource, and should be protected and grown.

". . .when 40% of the legislators are new, they don't know who we are . . . the public needs to know what we do, as well, but that's hard to communicate."

OAESD Strengths, Weaknesses, Opportunities, and Threats

Through our conversations with members of the OAESD community, we identified several key strengths, weaknesses, opportunities, and threats to OAESD as an organization.

OAESD SWOT Analysis

Strengths	Weaknesses
• *Strong collaborative relationships across ESD network* • *Strong relationships with ODE* • *High capabilities and output of OAESD staff and leadership* • *High board engagement*	• *Limited staff capacity* • *Limited avenues to increase revenue*
Opportunities	**Threats**
• *Increased lobbying* • *Resource navigation for ESDs*	• *Urban / rural divide* • *Conflict around contentious statewide issues (COVID mitigation, DEI, etc)* • *Changes in funding structures*

OAESD's strength is in the collaborative relationships they have formed. With a small staff and budget, OAESD has developed robust networks across the state, both within the association and with the legislature/ODE. The association has high involvement with the board, with one interviewee stating "OAESD is a unique environment where the boards and executive leadership really do collaboratively work together and share a lot of authority." All these strengths can be attributed to the high capability of the OAESD staff and leadership, who have put in significant work with limited resources.

OAESD's primary weakness lies in the inverse to its greatest strength: they have a small staff and low organizational capacity. When asked what they would like to see from OAESD, many participants did not mention additional services, but rather additional staff and an increased budget. One interviewee said "they're a tiny organization that does a lot of amazing work – they must never sleep or take vacations. It almost feels irresponsible to say that I can ask them to provide anything further." In order to grow or expand services, OAESD would need increased staff capacity, but this causes budget complications. Every capacity need cannot be met by raising membership fees, and the association already includes membership of all 19 ESDs. Consistently, interviewees recognized the valuable work done by OAESD and the need for additional staff capacity to keep up this work. These comments were prescient, as OAESD has seen several staff vacancies since beginning strategic planning efforts.

To build long-term stability, it's vital that OAESD identify and capitalize on opportunities to build additional funding streams. A number of pathways have been explored through the strategic planning process and are explored in more detail in the "Funding Strategies" section below.

The greatest threat faced by OAESD is losing the collaboration and strong relationships they have built. Many participants explained that this collaboration has not been the norm historically, and proactive effort is needed to sustain it. The tendency of any organization (or group of organizations) is to revert to the status quo, which for Oregon ESDs has been operating individually with limited collaboration. The most likely threats to collaboration pertain to the urban/rural divide and in the current prevalence of contentious issues around education. Additionally, there is a risk that ESDs will lose funding (threatening OAESD's funding base as well). Legislators and members of the public tend to not understand (or often think about) ESDs and their work, and when faced with tight budgets, ESD budgets will be cut more quickly than programs that are at the front of people's minds. Finally, there is a risk that OAESD work will be hindered by staff turnover. OAESD's work relies on the hard work of its highly-capable staff, but this creates a vulnerability. One interviewee described the organization as "fragile," despite significant accomplishments; because OAESD is operating at capacity, their work is at risk of being disrupted by unforeseen challenges. OAESD must work to identify and capitalize on opportunities to build additional funding streams to grow staff capacity to sustainably and reliably support member ESDs.

5. GROWTH STRATEGY

Rather than providing a rigid timeline and action items, this strategic plan outlines a flexible "growth strategy," which will position OAESD to grow steadily and build stability for its work.

THREE KEY ELEMENTS OF THIS GROWTH STRATEGY INCLUDE:

PURPOSE, MISSION, AND VISION STATEMENTS

01

The pre-existing Purpose Statement contained useful information, but it was repetitive and somewhat vague. Kelley NPC helped to analyze this statement and recontextualize it into actionable Mission and Vision statements.

FUNDING STRATEGIES

02

Kelley NPC outlined several funding strategies that OAESD could pursue. Two of these (strategic programming and grant management) were selected as high-priority strategies, while two more (resource navigation and coalition building) were selected for future consideration.

NONPROFIT STATUS

03

Kelley NPC presented several options for OAESD's nonprofit status, with analysis on the pros and cons of each. OAESD elected to apply for intergovernmental agreement status under Oregon Chapter 190. Analysis of other nonprofit options is included for future consideration.

These shifts will better position OAESD to secure additional funds and pursue programming with clarity and intentionality.

GROWTH STRATEGY /
PURPOSE, MISSION, AND VISION STATEMENTS

Kelley NPC conducted a review of OAESD's Purpose Statement and assessed its applicability and accessibility, presenting a report on OAESD's purpose, mission, and vision to staff in April 2024. That report began by analyzing the OAESD's "purpose statement," which was comprehensive and inclusive of all of OAESD's work and goals, but which lacked clarity and accessibility. The report and subsequent statement review process led to reconfiguring the Purpose Statement into shorter, standalone Vision and Mission Statements. ESD superintendents had an opportunity to give feedback on the new statement options.

OAESD's new Vision and Mission Statements are centered on clarity, brevity, and inspiration, which will help OAESD reach intended audiences more effectively and contribute to broader organizational visibility. These statements are written specifically to describe OAESD's work supporting member ESDs, rather than work of individual ESDs themselves.

Previous OAESD Purpose Statement

OAESD Constitution & Bylaws: Article II – The Purpose of OAESD

Section 1. To assist school districts and the Oregon Department of Education in achieving Oregon's educational goals by providing equitable, high quality, cost-effective and locally responsive educational services at a regional level.

Section 2. To serve as the parent organization for the Oregon ESD Support Network in order to ensure the equity of, and access to, educational opportunity for all of Oregon's Children; utilize all Oregon ESDs in a coordinated and integrated approach to focus on statewide implementation of targeted initiatives; and, support the Oregon Department of Education and other state entities in the effective and efficient design and implementation of initiatives requiring statewide or multi-ESD coordination and collaboration.

Section 3. To coordinate and improve infrastructure to deliver services for school improvement, technology, special education and administrative services; establish cooperative regional programs among ESDs, school districts and partners; provide leadership to develop innovation processes and practices to meet the needs of local districts, students and families; promote cost efficiency through collaborative service models; and, provide equitable access and opportunities for all students.

Section 1: *To **assist school districts** and the Oregon Department of Education in **achieving Oregon's educational goals** by providing equitable, high quality, cost-effective and locally responsive **educational services at a regional level**.*

Section 2. *To **serve** as the parent organization for the Oregon ESD Support Network in order to **ensure the equity of, and access to, educational opportunity for all of Oregon's Children;** utilize all Oregon ESDs in a **coordinated and integrated approach to focus on statewide implementation** of targeted initiatives; and, support the Oregon Department of Education and other state entities in the effective and efficient design and implementation of initiatives requiring statewide or multi-ESD coordination and **collaboration.***

Section 3. *To **coordinate** and improve infrastructure to deliver services for school improvement, technology, special education and administrative services; establish **cooperative** regional programs among ESDs, school districts and partners; **provide leadership** to develop innovation processes and practices to meet the needs of local districts, students and families; promote cost efficiency through collaborative service models; and, provide equitable access and opportunities for all students.*

The OAESD Purpose Statement was focused on supporting the needs of various stakeholders – "assisting schools," "achieving Oregon's educational goals," ensuring equity "for all of Oregon's Children." Other key phrases include "coordinate," "cooperative," and "leadership." This was a very service-oriented Purpose Statement, describing an organization that exists to lift up and support other mission-aligned organizations, while also making room for OAESD to lead when necessary.

The Purpose Statement was inclusive of all OAESD services and activities, conveying the complexity – and uniqueness – of OAESD's role. The content of the statement was also well-aligned with the insights gleaned from the listening process. When asked to describe OAESD, interviewees repeatedly made statements such as: "without OAESD's work . . . we would not have much collaboration with the other 19 ESDs in the state," "they are a network builder, a convener, and an advocate for us in Oregon," and "OAESD is in a really good spot with strong leadership." It is clear that the current Purpose Statements do an accurate job of representing OAESD's work.

However, while meaningful within the context of internal bylaws, the Purpose Statement was recognized to be less useful for external storytelling and decision making. The statement was long and complex, likely inaccessible to some readers, and included similar/repetitive statements. Its many ideas were not ordered in terms of priority, and each of the three sections contained multiple ideas. Due to this confusing structure, it was difficult to summarize, and therefore had limited use as a decision-making tool. It was also less useful to external audiences. A simpler, more straightforward, and less repetitive statement would better help those outside the

organization understand what OAESD is and why it matters. Revised statements would also help OAESD leadership in various efforts related to relationship building, including grantseeking (as funders typically ask for a mission statement). These audiences look to a Mission Statement to easily understand OAESD's purpose and evaluate whether or not to work together.

Kelley NPC recommended condensing the three-part Purpose Statement into straightforward Vision and Mission Statements, concentrating on action-oriented language that succinctly convey OAESD's coordination and leadership roles. The original purpose statement could be retained in the bylaws, in addition to the new Mission and Vision statements.

Vision Statements

A Vision Statement is a tool to help an organization clearly convey long-term, big-picture goals to external audiences and stakeholders while also providing internal guidance. In short, the Vision Statement tells what change or outcome you want to see come from your work. As such, crafting or revisiting a Vision Statement is an important part of the Strategic Planning process, providing the opportunity for organizations to take stock and ensure that they are actively and collectively working toward shared goals. While a Vision Statement is intended to reflect future goals and aspirations, it is useful to review it collaboratively from time to time (i.e., during Strategic Planning), to ensure the statement remains relevant and aligns with the organization's values, trajectory, and intended impact.

Mission Statements

A Mission Statement is more grounded in action than the vision statement – it states your purpose, what you do, and why you do it. Working hand in hand with the Vision Statement to tell an organization's story, a Mission Statement relays the current action being taken to achieve (or work toward) the stated vision. A general audience should be able to read a Mission Statement and gain an immediate understanding of what an organization does and why it exists. To that end, an effective Mission Statement is a tool to be utilized on your website, social media, print materials, in grant proposals, in verbal "elevator pitches" and more.

Statement Options and Review Process

After the OAESD leadership team reviewed the Purpose, Mission, and Vision Statements materials compiled by Kelley NPC, OAESD staff met to collaboratively review and analyze the suggested statements. Kelley NPC then provided revised Vision and Mission statement options that were presented to the OAESD governance council for feedback. OAESD staff and the governance council collectively decided on the following Vision and Mission Statements, which will be utilized broadly moving forward:

MISSION STATEMENT:

OAESD supports Oregon's Education Service Districts through coordination, partnership, and advocacy, to ensure the locally-responsive mission of each ESD is accomplished.

VISION STATEMENT:

OAESD envisions a network of locally-responsive, equitable, and coordinated Pre-K to post-secondary educational services throughout Oregon.

Key Words

Coordination

OAESD is a connector organization, working on a high level to bring together member ESDs and amplify their work

Partnership

OAESD works directly with member ESDs, individually and collectively, to strengthen each organization

Advocacy

OAESD advocates for ESDs before the Oregon legislature; many community members listed this as a priority service

Locally-Responsive

Each ESD is unique to its community; when you've seen one ESD, you've seen one ESD!

Equitable

All learners deserve a high-quality education

Pre-K to Post-Secondary

ESDs don't just serve K-12 learners, but begin in early childhood and extend to college and career education

These newly developed mission and vision statements will guide OAESD leadership through strategic decision making while allowing for more clear and effective communication with external audiences.

Funding Strategies

To build long-term stability, it's vital that OAESD identify and capitalize on opportunities to build additional funding streams, allowing OAESD to grow staff capacity to support member ESDs while simultaneously strengthening partnerships with ESD members and resource providers. OAESD leadership identified two high-priority funding strategies for immediate implementation and growth: grant management and strategic grant-funded programming. OAESD already has a strong foundation for both these funding strategies, and we are well-positioned to invest intentional time and resources in developing them further. Additionally, we have identified two more funding strategies for long-term consideration: resource navigation and coalition building.

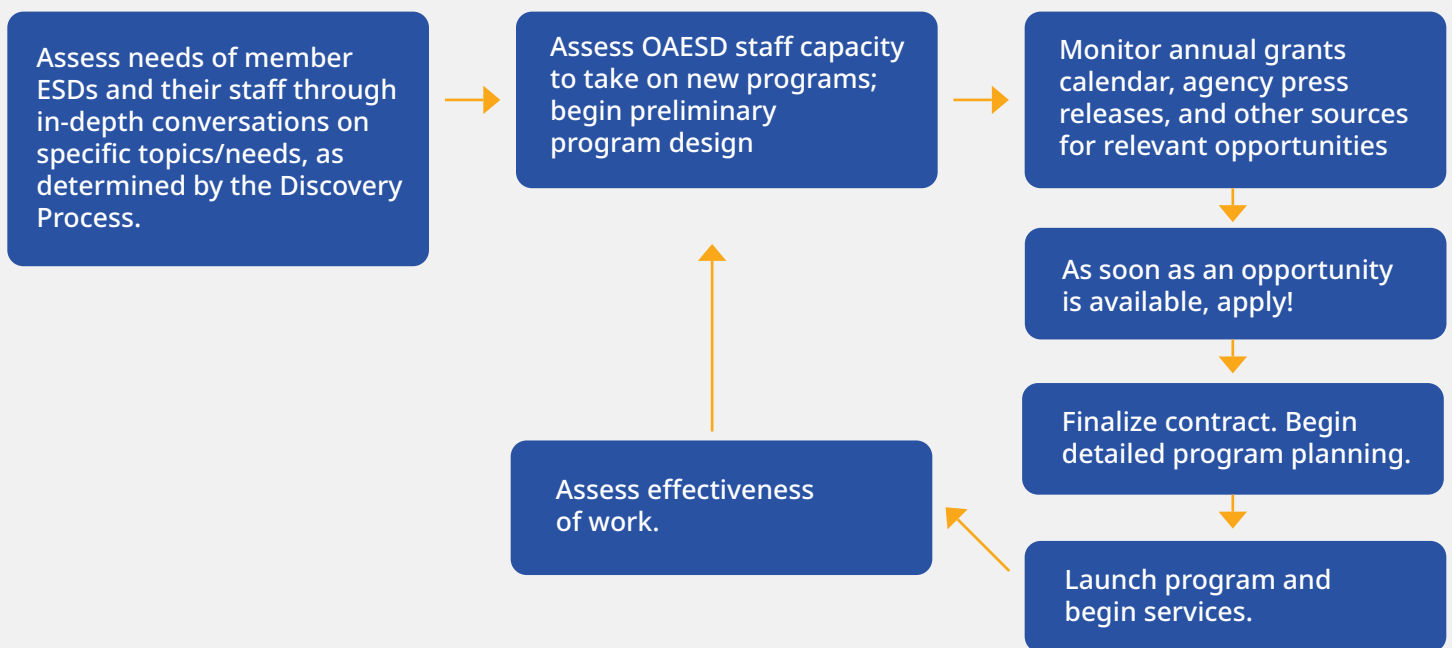| Funding Strategies Summary				
	High Priority Strategies		**Long Term Growth**	
	Grant Management	Strategic Programming	Resource Navigation	Coalition Building
One-Sentence Summary	Manage grant administration for government and philanthropic entities.	Launch new programs, funded by grants.	Help member ESDs identify and secure	Act as lead applicant (with member ESDs as sub-applicants)
Funding Source	Direct fee for service, charged to the funder.	Grants from government or philanthropic sources	Direct fee for service, charged to ESD	OAESD staff time and admin/indirect included in grant budget
Benefits	High income Expanded influence for OAESD's work	Build capacity for OAESD and member ESDs	High income Builds capacity for ESDs	Improves OAESD collaboration
Challenges	Requires political capital to implement Inconsistent throughout year (has busy and light seasons)	Most funds would go to program costs Significant work involved in developing and running new programs	Many ESDs already have this in-house	Some ESDs already lead partner applicants. Goal is to support (not supplant) pre-existing ESD work.
Strategic Steps	Lobby to ODE and build relationships with foundations Hold listening sessions with member ESDs and education nonprofits to gauge needs	Hold listening sessions with OAESD stakeholders to identify needs Internal strategy sessions to design priority programs Build a calendar of upcoming grant opportunities	Conduct ESD interest survey Build business plan (hourly rates, time required, etc) Build a calendar of upcoming grant opportunities Begin holding conversations with member ESDs about funding needs	Conduct ESD interest survey Evaluate staff capacity to manage grants Build a calendar of upcoming grant opportunities Begin holding conversations with member ESDs about funding needs

High Priority Strategies

OAESD's first priority is to intentionally invest time and resources into two funding strategies that have yielded results in the past: strategic programming and grant management.

Strategic programming includes any direct services offered by OAESD to ESDs, state or federal departments of education, or any other relevant stakeholder, funded by grants. ESDs. Under this strategy, OAESD develops their own, in-house programs and applies for grant funding to carry out the projects. To create additional revenue streams, these strategic programs must go beyond the core services that member ESDs pay membership dues for (job alikes, annual conference, etc).

Once a grant is secured to support strategic programming, OAESD can allocate a portion to administrative/indirect expenses (usually 10% of the direct charges) and a portion to leadership salaries for project supervision. Creating multiple programs, each with their own stream of grant income, diversifies income and helps build stability. One of the recurring themes from our interviews was that OAESD staff is overextended, and new programming would likely go to new staff, rather than supporting current staff. Considering these limitations, OAESD should assess which programs will provide maximum benefit to ESD members while requiring minimum OAESD staff time to plan, deliver, and administer.

Currently, OAESD receives supplemental funding as part of the Region 16 Comprehensive Center Network, which includes peer organizations in Alaska and Washington, through a grant by the U.S. Department of Education. This grant is designed to "improve the quality of the learning experience for each student by reimagining education systems" and "offer technical assistance to agencies, professional learning for state and local education agency staff, network-building opportunities for educational leaders, and programs for students, families, and communities regionwide." This is very closely aligned with OAESD's work, and partnering with the Department of Education provided funding for core services. **The first priority should be to look for grants that would further add funding for this core work.**

Assess needs of member ESDs and their staff through in-depth conversations on specific topics/needs, as determined by the Discovery Process.

Assess OAESD staff capacity to take on new programs; begin preliminary program design

Monitor annual grants calendar, agency press releases, and other sources for relevant opportunities

As soon as an opportunity is available, apply!

Finalize contract. Begin detailed program planning.

Launch program and begin services.

Assess effectiveness of work.

To build on this foundation, OAESD will intentionally consider new strategic programs, as they align with the new Mission and Vision statements. This will ensure that new programming fits the needs and priorities of association members, rather than merely taking any funded opportunity that presents itself. Examples of potential high-value programs include:
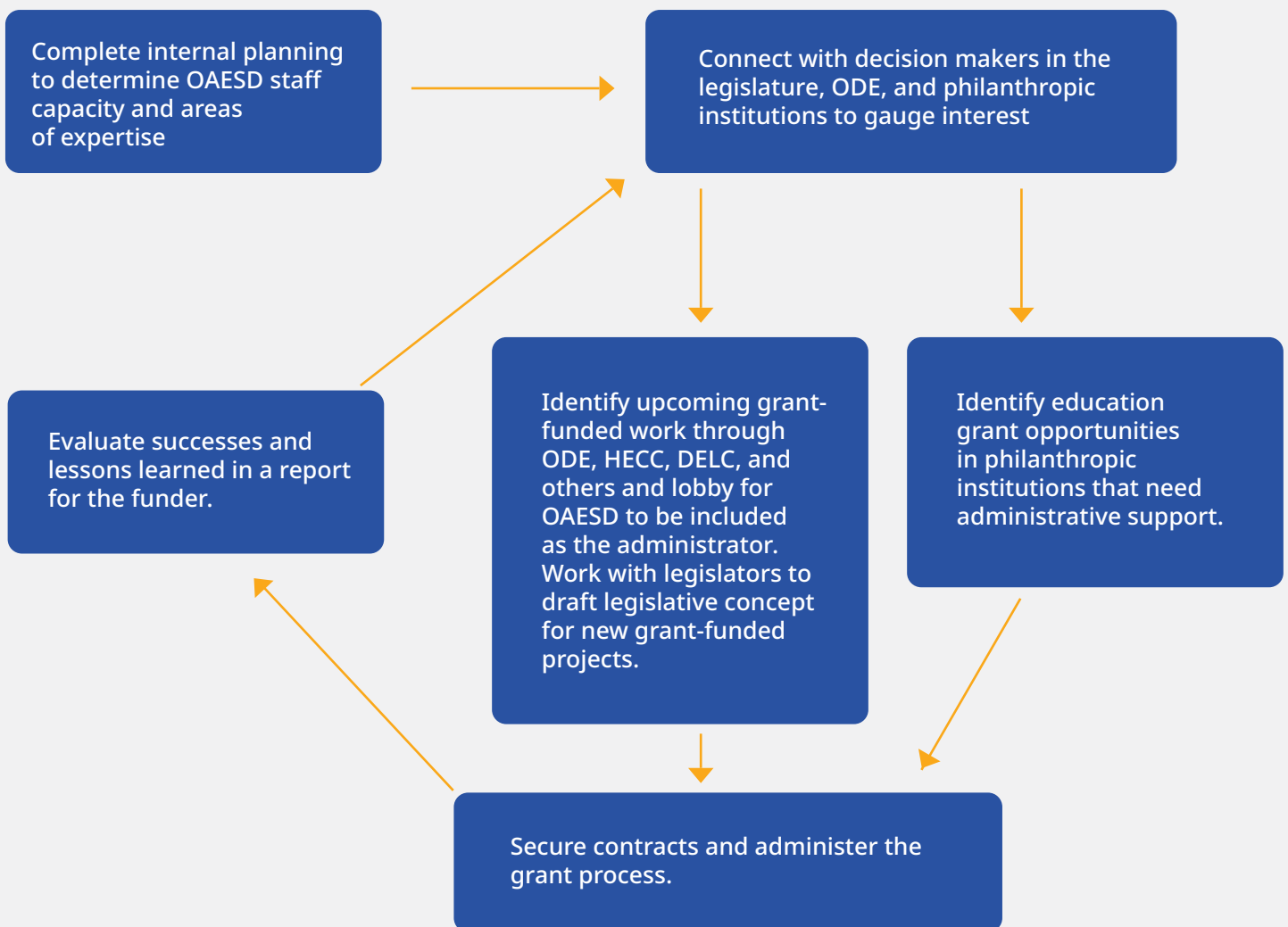
	Description	Potential Grant Funding
Specialized Professional Development and Technical Assistance	During listening sessions, ESDs expressed interest in additional professional development and training specifically targeted to their capacity needs, versus those of the district and educators they support. One ESD interviewee stated "It's not helpful to receive training for the people that I'm supporting, and not for my own role. I would love to see, 'how do I support these people?' trainings."	The US Department of Education provided grants (CFDA# 84.326) to improve results for students with disabilities by "providing TA, supporting model demonstration projects, disseminating useful information, and implementing activities that are supported by scientifically based research." Grant-funded programs include direct training of educators.
Research Projects	OAESD could conduct research on issues relevant to ESDs (for example, researching innovative and creative solutions to ESD staffing issues or best practices for supporting school literacy program needs). OAESD's status as a powerful connector organization for P-20 education services in Oregon positions them to conduct high-quality research into what is working across diverse educational settings.	The US Office of Elementary and Secondary Education regularly posts research grant opportunities (CFDA# 84.411A, B, and C), providing funding to "create, develop, implement, replicate, or take to scale entrepreneurial, evidence-based, field-initiated innovations to improve student achievement and attainment for high-need students; and rigorously evaluate such innovations." Research grants are made for a five-year duration, with awards up to $2.2M in 2023 and $12M in previous years. Successful applications involved researching literacy, math education, rural opportunity, STEM, and more. Awards are made for early-phase, mid–phase, and expansion projects (each for 5-year terms), providing stable long-term funding.

Grant management involves tasks to assist government and philanthropic entities administer their grant funds, with a direct fee charged to the funder. Under this strategy, OAESD works with the funder to create Requests for Proposals, solicit and evaluate requests, make award determinations, manage relationships with grantees, and evaluate progress. Funders can include private foundations, ODE, or local level funders. Grant Management can provide a steady and reliable funding stream, especially if relationships with multiple funders are established and nourished over time. This approach has the added benefit of expanding OAESD's influence and increasing its visibility as the organization forges new

(and instrumental) partnerships. Government programs often operate for many years, and this funding strategy has the potential to be more consistent than applying for grant funding.

OAESD has previous experience with this funding strategy, having administered the Oregon Department of Education's Summer Learning Grant in 2022. While steps can be taken to improve OAESD's coordination of future similar endeavors (including communication with applicants and grantees), managing the Summer Learning Grant experience provided valuable internal capacity building and strengthened OAESD's ongoing relationship with ODE.

Complete internal planning to determine OAESD staff capacity and areas of expertise

Connect with decision makers in the legislature, ODE, and philanthropic institutions to gauge interest

Evaluate successes and lessons learned in a report for the funder.

Identify upcoming grant-funded work through ODE, HECC, DELC, and others and lobby for OAESD to be included as the administrator. Work with legislators to draft legislative concept for new grant-funded projects.

Identify education grant opportunities in philanthropic institutions that need administrative support.

Secure contracts and administer the grant process.

Securing grant administration contracts will require extensive relationship building with decision makers in philanthropic institutions, the Oregon legislature, and state agencies such as Oregon Department of Education, Higher Education Coordinating Commission, Department of Early Learning and Care, and others. There is also the possibility of standing up new grant programs, through advocacy and lobbying, which OAESD could be positioned to administer.

Grant Management shows promise as a steady and reliable funding stream, especially if relationships with multiple funders are established and nourished over time. This approach has the added benefit of expanding OAESD's influence and increasing its visibility as the organization forges new (and instrumental) partnerships. Government programs often operate for many years, and this funding strategy has the potential to be more consistent than applying for grant funding.

Long Term Growth Strategies

Key strategies for long-term growth include Resource Navigation (offering grantseeking as an add-on service for member ESDs) and Coalition Building (operating as the primary applicant for collaborative grant applications, with member ESDs as sub-grantees).

With Resource Navigation, OAESD serves as an intermediary to help ESDs find and secure project funding. Under this strategy, OAESD will charge ESDs a direct service fee, gaining a significant new income stream, while ESDs gain both increased access to and additional capacity to apply for funding. While some larger ESDs have existing fund development capabilities in-house, many small or rural ESDs do not, and this service will help build their development capacity. OAESD could assess an ESD's funding needs, develop and refine programs, identify relevant funding opportunities, and assist with preparing grant applications and reports. The exact level and configuration of resource navigation services could vary based on the member ESD's needs. Some ESDs may only need help identifying relevant opportunities, while others may need the full suite of services.

The need for this service was explicitly mentioned during the listening process. One ESD interviewee said "we are burdened with trying to raise funds and trying to find funds. It may be helpful if OAESD could serve as an intermediary where the funding resources exist."

One example of a grant that OAESD could help ESDs secure is the Oregon Department of Education (ODE) Technical Assistance grant, designed to help ESDs determine capital construction and maintenance needs and develop plans. Funding through this grant is offered in four categories: 1) facilities condition assessments, 2) long-range facility planning; 3) seismic assessments; and 4) environmental hazards assessments. These technical assistance grants are the first step in applying for more significant funds from ODE, through the Oregon School Capital Improvement Matching (OSCIM) Program and the Seismic Rehabilitation Grant Program. This set of funding opportunities also serves to provide ODE with information about the status of school facilities, and helping ESDs navigate these resources (and other ODE grants) would additionally bolster the relationship between OAESD and ODE.

Additional grant opportunities (current and historical) can be viewed at:

- [Oregon Department of Education : Grants and Funding Resources : Grants and Funding Resources : State of Oregon](#)
- [Oregon Department of Education : Grant Opportunities : About Us : State of Oregon](#)
- [2021-2023 GYO Grantee Recipients | Educator Advancement Council (state.or.us)](#)
- [Oregon Department of Education : Secondary Career Pathway : CTE Funding : State of Oregon](#)
- [Oregon Department of Education : Early Indicator and Intervention System (EIIS) : Student Success Act : State of Oregon](#)
- [KickUp | Available Federal Education Funding for Professional Development Programs](#)
-

OAESD can adopt a more integrated approach through Coalition Building by acting as lead applicant (with ESDs as sub-applicants) for larger grants, thereby providing ESDs with increased access to federal funding and other complex grant opportunities. Pursuing this funding strategy will entail deeper involvement in ESD grant projects, as OAESD will shoulder the responsibility of project management and grant administration/reporting. However, OAESD staff time will be written directly into grant budgets, in addition to administrative and indirect costs, rather than receiving a fee for service. OAESD could, with only a few coalition grants per year, sup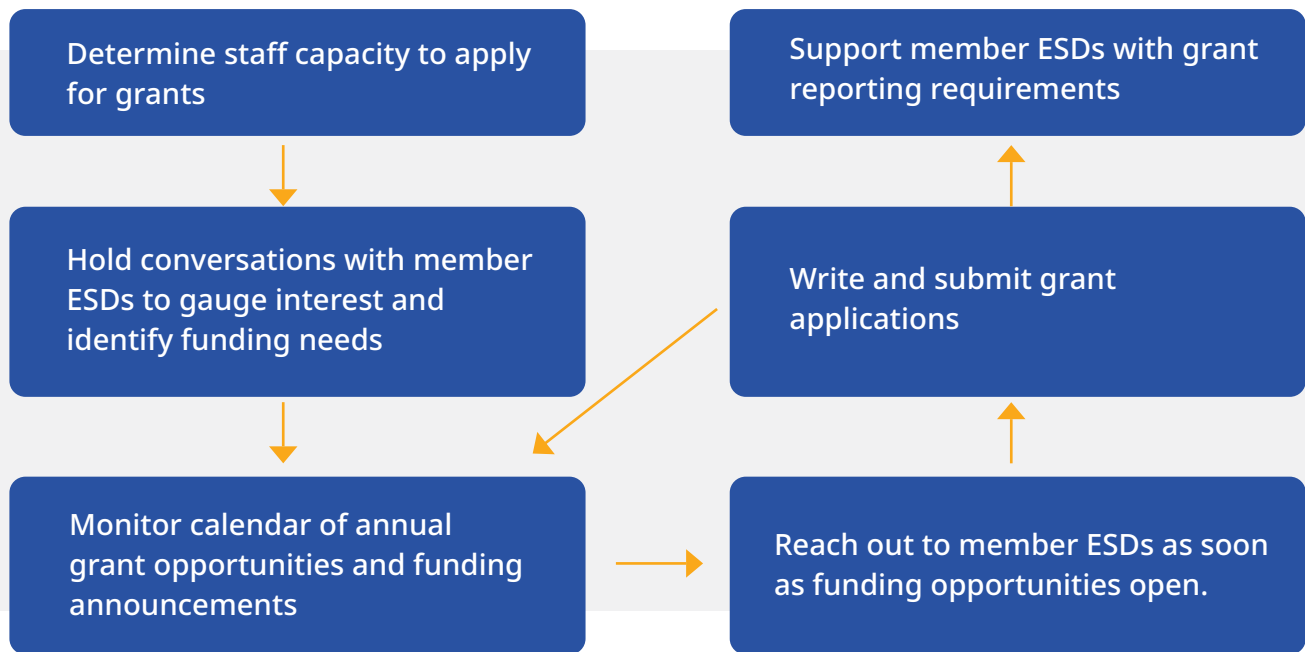port a new "Project Manager" FTE to manage this work (or, alternatively, choose to spread out that FTE work across current staff positions).

One drawback to this approach is that some ESDs already act as lead applicants for grants with other ESDs as sub-applicants, and OAESD wants to avoid duplicating services. The joint benefits to both OAESD and to ESDs who lack existing collaborations with other ESDs likely outweigh this minor disadvantage, particularly if OAESD provides thoughtful communication about this added service, clarifying that OAESD will avoid competition with other ESD lead applicants. The goal of this would be to improve collaboration, and care must be taken to not cause divisions between ESDs.

In addition, a Coalition Building approach will strengthen OAESD's relationships with participating ESDs and provide added opportunities for collaboration and mutual capacity building. If OAESD pursues the Coalition Building approach, first steps are similar to those for Resource Navigation – surveying ESD members, building a calendar of federal and other large grant opportunities, and holding initial discussions with ESDs about forming coalitions to collaboratively apply for project funding.

The list of grant opportunities for this would be similar to the one provided above for resource navigation, as most grants are available to either single or group applicants. OAESD could also pursue both options simultaneously.

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┌─────────────────────────┐         ┌─────────────────────────┐
│ Determine staff capacity│         │ Support member ESDs with│
│ to apply for grants     │         │ grant reporting         │
│                         │         │ requirements            │
└─────────────────────────┘         └─────────────────────────┘
            │                                   ▲
            ▼                                   │
┌─────────────────────────┐         ┌─────────────────────────┐
│ Hold conversations with │         │ Write and submit grant  │
│ member ESDs to gauge    │         │ applications            │
│ interest and identify   │         │                         │
│ funding needs           │         │                         │
└─────────────────────────┘         └─────────────────────────┘
            │                                   ▲
            ▼                                   │
┌─────────────────────────┐         ┌─────────────────────────┐
│ Monitor calendar of     │────────▶│ Reach out to member ESDs│
│ annual grant            │         │ as soon as funding      │
│ opportunities and       │         │ opportunities open.     │
│ funding announcements   │         │                         │
└─────────────────────────┘         └─────────────────────────┘
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The Funding Strategies outlined above are not mutually exclusive – a combination of funding streams is advised and will provide more organizational stability in the long term. In addition to providing stability and resiliency, diversifying OAESD's funding will provide new opportunities for partnership and capacity building, raise the organization's profile, and expand its influence. Resource Navigation and Coalition Building can be explored in tandem; by providing these services, OAESD will help ESDs remain fully funded, thereby bolstering OAESD's own funding base.

Nonprofit Status

During conversations with the community (including OAESD staff and leadership, as well as stakeholders throughout the various ESDs) Kelley NPC repeatedly heard that OAESD should strongly consider changing their structure to operate under their own charter, rather than continuing with fiscal sponsorship by a single ESD. Kelley NPC presented and analyzed five different nonprofit legal structures, looking at the advantages and disadvantages of each and weighing them against the association's long term goals and priorities.

After considering the options, OAESD decided to file an intergovernmental agreement (IGA) under ORS 190. Shifting to an IGA solves several of the challenges brought on by fiscal sponsorship, in particular the issue of liability. Prior to this, the fiscal sponsor (Linn Benton ESD) took on all legal liability for OAESD programming, despite decision making power being held by all 19 ESDs. The IGA clarifies where the fiscal sponsor's responsibilities and liabilities end, and where the other 19 ESDs' begin. With this filing, OAESD is a government body of its own, through coordination of 19 ESDs and supported through fiscal sponsorship by Linn Benton ESD. This change was approved by the boards of all 19 ESDs.

The governance council recognized that filing for a 501(c) status may still be advantageous in the future, but due to staff and financial capacity, now was not the right time. Information about the various nonprofit statuses is being retained for future consideration, with 501(c)6 as the most likely candidate.

	ESD fiscal sponsor (current)	501(c)3	501(c)4	501(c)5	501(c)6
Description	Government body; ESDs designated by legislature	Charitable or educational org that benefits the public	Trade unions, social welfare organizations and civic leagues	Labor, agricultural, or horticultural organizations (ie labor unions, county fairs, etc)	Business leagues that support their members' business practices
Lobbying	YES	LIMITED	YES	YES	YES
Federal Income Tax Exempt	YES	YES	YES	YES	YES
State Tax Exempt	YES	YES	YES	YES	YES
Tax Deductible Donations	NO	YES	NO	NO	NO
Tax Deductible Membership Fees	MAYBE; depends on entity	YES	YES	YES	YES
Grant Eligibility	YES, depending on grant/grantor	YES	Depends on Grant/Grantor (see below)	Depends on Grant/Grantor (see below)	Depends on Grant/Grantor (see below)
Employment /payroll Concerns	Must pay payroll taxes Exempt from FUTA	Must pay payroll taxes Exempt from FUTA	Must pay payroll taxes and FUTA	Must pay payroll taxes and FUTA	Must pay payroll taxes and FUTA
Other advantages	Fiscal sponsor reduces administrative burden	Eligible for the greatest number and variety of grants; highest tax exempt advantage	No limits on lobbying	No limits on lobbying	No limits on lobbying Easier application process (IRS form 1024)
Other Disadvantages	Fiscal sponsor takes a cut of revenue; general opinions from members were that this should change	Registration can be difficult and time consuming	Registration and tax filings can be more complicated than 501(c)(3) organizations	Political expenses made by the 501c5 are generally not tax-deductible. Significant lobbying can jeopardize tax deductible status	Must report percentage dues used on these activities to members

Lobbying Considerations

While the IRS defines many different types of nonprofit organizations, the most relevant to OAESD are 501(c)3 and 501(c)6. The most common type is 501(c)3, defined as a "charitable organization that benefits the public." This definition is broad, and since K-12 education is a public benefit, OAESD could position itself to meet this definition. However, OAESD would also be a good fit for the 501(c)6 designation, designated for business leagues that support the practices of individual member businesses/organizations. The other two types included in the analysis chart – 501(c)4, for social welfare and political organizations, and 501(c)5, for labor unions – do not clearly fit OAESD's work and structure, but are included in the table for informational purposes.

Based on the interviews and survey conducted by Kelley NPC, lobbying is a core service that OAESD must preserve. At first glance, this gives some preference to the 501(c)6, for which the IRS places no limits on lobbying. However, 501(c)3s do have some ability to lobby, and depending on OAESD's needs, these limitations may not be prohibitive to your work.

With an annual budget of $500k, an organization could not spend more than $100k on lobbying; with an annual budget of $200k, the organization could only spend $40k on lobbying. A 501c3 expecting to lobby should elect the "expenditure test" under section 501(h), by filing IRS Form 5768, to ensure its lobbying is evaluated under the constraints listed above. Without completing this form, 501(c)3s will be subject to the "substantial part test," in which the IRS "considers a variety of factors, including the time devoted (by both compensated and volunteer workers) and the expenditures devoted by the organization" to determine whether or not lobbying constitutes a substantial portion of the organization's work. This standard is unclear, and violating it would result in losing tax-exempt status and receiving a 5% lobbying tax.

Generally, lobbying is considered to be any attempt to influence legislation. A 501(c)3 can conduct general advocacy around issues, and if there's no mention of specific legislation, it is often not counted towards the lobbying limits. However, this may be determined on a case-by-base basis, and if OAESD decides to pursue 501(c)3 status, it will likely want to budget regular consultation with a lawyer and a tax professional to ensure their lobbying actions and expenditures remain in compliance.

IRS Lobbying Restrictions on 501(c)3 Organizations

Lobbying costs cannot exceed 20% of the first $500,000 of expenditures, 15% of the second $500,000, 10% of the third $500,000, and 5% of any further expenditures. Organizations of all sizes have an annual maximum of $1M to spend on lobbying. No more than 25% of an organization's total expenditures can go towards "grassroots lobbying" (defined by the IRS as "efforts to influence legislation through an attempt to affect the opinions of the general public or any segment of the general public"). Organizations cannot engage in political campaign activity (ie no direct involvement in a candidate's election efforts.

If these restrictions are acceptable, OAESD could pursue establishing itself as a 501(c)3. If OAESD expects to spend more than this on lobbying (for example, by hiring a single full time employee to lobby, with an overall budget under approximately $300k) then a 501(c)6 designation may better serve the association's goals. As a 501(c)6, the IRS would place no limits on OAESD's lobbying.

Different nonprofit statuses are subject to different tax implications, but OAESD's primary income (member dues) will not be affected. Member fees are tax deductible for each member organization as business expenses. Only 501(c)3s can accept tax-free donations from individuals, but that is unlikely to represent a sustainable funding model for OAESD, as the individuals likely targeted by donation appeals already have their employer (the ESD) paying dues. Additionally, switching status to 501(c)4, 501(c)5, or 501(c)6 would require OAESD to pay FUTA, while ESDs and 501c3s are exempt from FUTA.

Grant Eligibility

A final consideration is grant eligibility. 501(c)3s are eligible for the largest range of grants, though the other forms have eligibility as well. In a comparison of Requests for Proposals (RFPs) from funders over the past 12 months, the general trend was that 501(c)4, 501(c)5, and 501(c)6 organizations (as well as the ESD fiscal sponsor) usually qualified for government grants, as most of the time these RFPs did not specify anything beyond "nonprofit organization," though some of these restricted applicants to 501(c)3s as well. However, only 501(c)3s (and sometimes the ESD) qualified for private foundation grants. Most private foundations are themselves 501(c)3s, and granting to organizations with other designations could jeopardize their own tax status. Finally, it should be noted that, even if a 501(c)6 can apply for state funding, it may be seen as less competitive than a 501(c)3. With grant funding as a major potential revenue stream (either through Strategic Programming or Coalition Building), the 501(c)3 status should be given additional consideration. Nonprofit status would not affect OAESD's ability to conduct Resource Navigation or Grant Management.

Grant Opportunity	Type	ESD fiscal sponsor (current)	501(c)3	501(c)4	501(c)5	501(c)6
ODE Integrated Community Partnerships (Oct 2023)	State	YES	YES	YES	YES	YES
ODE Community Learning Centers (May 2023)	State	YES	YES	YES	YES	YES
Oregon Youth Development Division - April 2023	State	YES	YES	YES	YES	YES
Oregon Youth Development Division - August 2023	State	YES	YES	YES	YES	YES
US Dept of Education - Education Innovation and Research	Federal	YES	YES	NO	NO	NO
Gray Family Foundation	Private	YES	YES	NO	NO	NO
Collins Foundation	Private	YES	YES	NO	NO	NO
Oregon Community Foundation - Community Grants	Private	YES	YES	NO	NO	NO
Marie Lamfrom	Private	NO	YES	NO	NO	NO

GROWTH STRATEGY /
STRATEGIC GOALS

To guide OAESD's progress towards this long-term growth strategy, we have created specific and actionable goals around our strategic development areas of: grants & funding, advocacy, communication & professional development, member engagement, and a review of OAESD operating structures.

Grants & Funding Goal: OAESD will apply for available grant contracts to secure at minimum the needed annual revenue deficit.

OAESD will begin by creating a grants calendar for the 2025 calendar year, establishing regular practices of checking for new state and federal grant opportunities and aligning opportunities with OAESD program needs. Leadership will apply for grants throughout the year, regularly evaluating grant applications and adjusting application language when unsuccessful.

Additionally, OAESD will identify opportunities to engage in expanding consistent grant management/admin contract opportunities. As the 2025 legislative session comes closer, OAESD will work with their relationships in ODE and the legislature to identify opportunities to manage state grants, based on the model of the summer learning grant from 2022.

Advocacy Goal: OAESD will build a legislative platform for member ESDs to improve outcomes for students furthest from opportunity in our education systems.

OAESD will develop an advocacy protocol and timeline, with a focus on establishing legislative priorities through in-depth conversation with partners and association members and aligning the protocol with partners such as COSA and OSBA. We will place strong focus in this advocacy on securing additional grant revenue and increasing revenue through early literacy work.

Communication and Professional Development Goal #1: Create and execute a Communication and Advocacy Plan for when a new issue arises. One of the key needs of OAESD members is help "reading the tea leaves" when it comes to the legislature. Members need to know what changes to expect and plan for as legislative sessions approach, and how to respond to changes once they're enacted. OAESD will create an ongoing "Communication and Advocacy Plan" to help members stay up to date and give actionable advocacy steps. This plan will include "quick advocacy guides" that can be distributed, regular debrief calls, professional development sessions, and other strategies.

Communication and Professional Development Goal #2: Plan and host a bi-annual "Legislative Summit" with professional development sessions on current legislative/ODE priorities and upcoming changes. During the long legislative sessions, OAESD will host "legislative summits" to inform members of upcoming changes due to legislative action. During these summits, we will offer professional development sessions, geared towards giving members actionable steps they can take to effectively advocate on behalf of ESDs and their members.

Member Engagement Goal: Establish work groups identified through the Program Cabinet. In the past, program cabinet committees have often been based on listening, learning, or advising. OAESD will shift these committees to become more action-oriented, reflecting the value that what you get out of the association depends on what you put into it. Each committee will be based on a different topic.

Review of Association Operating Structures Goal #1: Write an ongoing policy for evaluating committee performance and need. Committees will be regularly evaluated to determine if they are effective at meeting their goals, member attendance, and if that goal is still relevant to the overall association. This will be an iterative and ongoing process.

Review of Association Operating Structures Goal #2: Design and implement a fiscal agent RFA process to assess and secure a fiscal agent for the Association for 2025-26. OAESD is planning an open call to evaluate which member ESD is best equipped to serve as the Association's fiscal sponsor and meet the needs of the entire association. This process will allow for greater transparency and ongoing accountability.

Two-Year Timeline of Milestones

	Grants & Funding	Communication & Professional Development	Member Engagement	Advocacy	Review of Operating Structures
2025 Q1	Develop grants calendar for 2025; conduct landscape analysis to match grant opportunities to OAESD programs Begin conversations with ODE and OR Legislatures about funding management	Conduct internal strategy meetings to identify key upcoming issues in the 2025 long session and how members can support effective advocacy.	Hold conversations with OAESD stakeholders and internal strategy meetings to evaluate committee needs.	Evaluate partner needs for advocacy Establish legislative priorities Advocate during the long session additional grant funding and early literacy work	Evaluate fiscal sponsor needs; write and release RFP Hold strategic conversations to evaluate committee needs, challenges, and opportunities
2025 Q2	Engage in lobbying during the long session Apply to Q1 grants	Host professional development sessions through a "Legislative Summit," both before and after the long session, to inform members about developments and priorities	Re-launch OAESD committees under new plan	Evaluate successes and challenges of the long session	Evaluate RFP proposals and select successful applicant.
2025 Q3	Apply to Q2 grants	Hold post-session debrief calls with association members Collaborate with program cabinet to plan professional development opportunities	Committees continue to meet	Develop ongoing advocacy protocol	Complete draft of committee performance policy

Two-Year Timeline of Milestones, cont.

	Grants & Funding	Communication & Professional Development	Member Engagement	Advocacy	Review of Operating Structures
2025 Q4	Apply to Q3 grants. Evaluate strengths and weaknesses of apps so far.	Begin developing "Communication and Advocacy Plan" by evaluating effectiveness of communication during the 2025 long session.	Formulate evaluation questions, with a goal to regularly reevaluate each committee for its effectiveness and value it brings to OAESD.		Review committee policy draft with governance council
2026 Q1	Apply to Q4 grants	Complete draft of "Communication and Advocacy Plan."	Evaluate first year of new committee structure		Revise committee policy
2026 Q2	Apply to Q1 grants and submit reports for 2024 grants Evaluate first year of grantseeking efforts	Host professional development sessions through a "Legislative Summit," both before and after the short session, to inform members about developments and priorities	Launch second year of new committees, adjusted based on evaluation process		Introduce new policies and procedures to committee members
2026 Q3	Apply to Q2 grants and submit reports for 2024 grants	Continue to execute Communication Plan	Committees continue to meet		
2026 Q4	Apply to Q3 grants and submit reports for 2024 grants	Continue to monitor the effectiveness of the communication plan.	Committees continue to meet		Evaluate fiscal sponsor performance

Future Decision Making

As OAESD works to enact the strategies included in this plan – growing new programs, seeking grant funding, and more – it will be vital to hold on to several core insights from the discovery process. These will help ensure that programming is grown and developed in the way that best aligns with the needs of OAESD community members.

- **Key issues for stakeholders included working with the legislature, filling staff positions, and maintaining their budgets.** These were the most significant, frequently-recurring needs that came up during the discovery process. As much as possible, programming decisions should be made to meet these three core needs.

- **OAESD members show great responsibility for their corner of the association, but beyond that their time is protected.** This high level of involvement from members is a strength of the organization, with incredible levels of volunteer engagement driving the mission. However, individual OAESD members are busy; with their own job responsibilities and organizations to run, they cannot be expected to take on too much responsibility for OAESD too. This speaks to the need for a central organization to OAESD that directs and operates programs, for the benefit of association members. Roles and responsibilities should be carefully considered to ensure that everyone's time is well spent.

- **High value is placed on networking and collaboration.** Association members benefit greatly from the opportunity to meet with their job-alikes and other peers. These meetings can be for collaborative work planning, or simply the chance to talk with someone doing the same job. ESD work is unique in education, and many staff members rarely get the chance to connect and troubleshoot with a peer.

> *"It was a bad year, because 40% of the legislators were new and didn't know a thing. The budget for Regional inclusive services was gutted, because the new legislators didn't understand, and it was a late night "put-together" by CoSA."*

> *"I wish there were more opportunities for in-person learning . . . we should be able to sit down and engage with other staff about our greatest obstacles and figure out how to overcome our biggest challenges."*

6. CONCLUSION

The decisions and resources collected in this document provide a framework for building OAESD's future. Recognizing that organizational development and growth is complex and dependent on many external factors and opportunities, this is not a singular linear process but rather a set of tools and foundational decisions that will set OAESD up for success.

With clear and actionable mission and vision statements, comprehensive input from association members, plans for building revenue streams, and detailed guidance for navigating future decisions about the organization's legal structure, this document has a strong set of tools to support OAESD in its vision of creating a network of locally-responsive, equitable, and coordinated Pre-K to post-secondary educational services throughout Oregon.