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**U.S. Department of Education  
Grant Performance Report**

**I. Cover Sheet**

See Block 5 on the Grant Award Notification.

1.) PR/Award No

S350B020006
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Enter the same title as on the approved application.

2.) Project Title

Transition to Teaching Program (Oregon Teacher Recruitment and Mentoring Project – OTRM)
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Repeat from Block 1 on Grant Award Notification. If address has changed, provide the current address.

3.) Recipient Information

Name: State Board of Higher Education (Oregon University System)		
Address: P.O. Box 3175		
City: Eugene	State: OR	Zip+4: 97403-0175

Provide the name of the project director or the contact person who is most familiar with the content of the performance report.

4.) Contact Person

Name: Dr. Holly Zanville
Title: Associate Vice Chancellor for Academic Affairs
Telephone Number: (541) 346-5726
Fax Number: (541) 346-5764
E-mail Address: holly_zanville@ous.edu

Include the interval for the information requested in the performance reporting period. See instructions on page 2 for details.

5.) Performance Reporting Period

07/01/03 – 04/01/04
---------------------

Report actual budget expenditures for the above performance reporting period. See instructions on page 2 for details.

6.) Cumulative Expenditures

	Federal \$	Non-Federal \$
Current Budget Period	136,688	10,510
Previous Budget Period	6,386	11,146
Negotiated Indirect Cost Rate: 8%		
Exp. Date: 9/30/04		

If applicable, see instructions on page 2 for details on annual IRB approval (Please circle one).

7.) Annual Certification of Institutional Review Board (IRB) Approval

Yes ____	No ____	NA <u>X</u>
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Authorized Representative:

To the best of my knowledge and belief, all data in this performance report are true and correct.

Name (typed or printed): Tom Anderes	Title: Senior Vice Chancellor, Finance and Administration
Signature:	Date:

## II. Executive Summary

The Oregon Teacher Recruitment and Mentoring (OTRM) project is a statewide initiative to support the recruitment and retention of highly qualified mid-career professionals, school paraprofessionals, and recent college graduates as teachers in high-need schools in high-need LEAs through enhanced alternative pathways to certification. The project is a statewide partnership between the Oregon University System (OUS), the Oregon Department of Education, five public universities, and LEAs. The project is designed to enable high-need school districts in Oregon, many of them rural, to address their teacher shortages by enabling them to hire and retain highly talented skilled individuals who desire to make a career move into teaching.

The OTRM project focuses on two objectives:

Objective #1: Teacher Shortages: During the first four years, the project will expand the state's capacity to address critical teacher shortages through new recruitment strategies and alternative pathways to teaching by enrolling 50-60 teachers into the five universities' various pathways to licensure, for a total of 200-240 by the end of the project. (\$5,000 tuition assistance scholarships will be provided to students who agree to serve a high-need school for at least three years.)

Objective #2: Retention Through Mentoring and Induction: During 2002-2007, the project will expand the state's capacity to address critical teacher attrition through new induction/mentoring programs for beginning and student teachers in high-need schools. About 110 teachers per year will be trained to serve as mentors to these teachers.

Since the conclusion of a lengthy project final negotiation period (nine months, concluding in July 2003 – see Progress Report 2002-03), OTRM has made rapid progress in implementing program activities. Examples of accomplishments include:

- High-Need LEA/School List. Working closely with the Oregon Department of Education, OTRM developed a high-need LEA and high-need school list to be used by the five participating universities and partnering schools. (*Attachment 1*)
- Central Project Website. OTRM developed a website to provide centralized information for the participating campuses, and links to national Transition to Teaching (TTT) resources. The website was up and running in early September 2003. Staff visited TTT websites in other states to gather information about common forms being used, outreach strategies for recruitment, and other information of interest to the OTRM project during this developmental work. University representatives reviewed several drafts of the website with the goal of making it useful for all partners involved. (*Attachment 2*)
- Scholarship Agreement and Promissory Note. In consultation with General Counsel, OTRM developed a Scholarship Agreement and Promissory Note to provide students the necessary information about OTRM requirements, the three-year service obligation, payback provisions, and other important information. OTRM consulted with other projects nationwide to review their scholarship agreements, as well as TTT staff. (*Attachment 3*)

- Universities' Revised Year 1/2 Budgets and Workplans. The five universities submitted revised budgets and work plans in October 2003 to accommodate the combining of Year 1 and Year 2 funds, as previously approved by the TTT program officer. This process required amendments to earlier subcontracts with these five universities.
- Contacting Eligible High-Need Schools. In conjunction with another statewide Title II grant, Oregon's Title II Teacher Quality Enhancement-Recruitment Grant, OTRM sent a letter of introduction to eligible high-need schools. This letter outlined the two programs and the benefits to qualifying schools for participating in the project. The five universities followed up with schools in their geographical areas for further planning. (*Attachment 4*)
- Advisory Committee. OTRM is working with a statewide Interagency Management Team (IMT) that is providing guidance to key teacher workforce projects, including OTRM. The IMT has met to date on October 6, 2003, December 18, 2003, and March 29, 2004. Membership includes representatives from the Confederation of Oregon School Administrators, the Governor's Office, Northwest Evaluation Association, Department of Community Colleges and Workforce Development, Oregon Association of Colleges for Teacher Education, Oregon Department of Education, Oregon Education Association's Center for Teaching and Learning, Oregon School Boards Association, Oregon School Personnel Directors, Oregon University System, State Board of Education, and the Teacher Standards and Practices Commission.
- Project Communications and Meetings. OTRM established a listserv to facilitate regular communications among project staff at the five partner universities and OTRM staff. As questions arise, they are shared with all partners to assist in effective project management. The Deans of Education and program representatives from each university met in March 2004 to discuss progress on the project. Universities provided an overview of the number of scholarships awarded, strategies to recruit students, and reported on mentor recruitment and the establishment of partnerships with school districts.
- Teacher Shortage Report. OTRM staff worked with the Teacher Standards and Practices Commission and the Oregon Department of Education to update state teacher workforce data, including critical shortage areas. These data are being used by OTRM to assist universities in their recruitment efforts. (*Attachment 5*)
- Recruitment. The five universities began to implement teacher recruitment strategies in fall 2003. The five-university partnership has implemented a variety of recruitment strategies in their regions of the state. These include working with school partners to identify candidates, putting together brochures that describe the program, and developing radio public service announcements. Campuses began awarding scholarships winter 2004 and since, have been establishing mentoring partnerships with school districts. The universities have recently begun to recruit students for Year 3 scholarships.
- Composite Data Collection. OTRM established a centralized data collection process to facilitate project evaluation. Each university sends completed scholarship applications, signed promissory note agreements, and supplemental data forms to the OTRM office. OTRM adds key student data into an Access database for report generation to support project evaluation and record-keeping.

### III. Project Status

#### 1. Progress in Meeting Objectives and Examples of Accomplishments

The Oregon Teacher Recruitment and Mentoring (OTRM) project is a statewide initiative to support the recruitment and retention of highly qualified mid-career professionals, school paraprofessionals, and recent college graduates as teachers in high-need schools in high-need LEAs through enhanced alternative pathways to certification. The project is a statewide partnership between the Oregon University System (OUS), the Oregon Department of Education, five public universities, and LEAs. The project is designed to enable high-need school districts in Oregon, many of them rural, to address their teacher shortages by enabling them to hire and retain highly talented skilled individuals who desire to make a career move into teaching.

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## 2. Description of Project Components

The components of the OTRM project are outlined below.

- Selection Criteria. All five universities (Eastern Oregon University, Oregon State University, Portland State University, Southern Oregon University, and Western Oregon University) are following similar selection criteria. Candidates must be accepted into a teacher education program using university-established admission requirements. In addition, students complete an OTRM scholarship application, individually designed by each university to meet their program needs.

**Table 1: Selection Criteria**

University	Common Selection Criteria for Scholarships*			
	Preparing in Shortage Area	GPA	Work Experience	Praxis Scores (Content Areas)
Eastern Oregon University	x	x	x	x
Oregon State University	x	x	x	x
Portland State University	x	x	x	x
Southern Oregon University	x	x	x	x
Western Oregon University	x	x	x	x

\*Other criteria may be used by universities as well.

- Training, Preparation, and Verifications. The five universities each offer a 9-12 month post-baccalaureate teacher education program under OTRM. Students take university coursework preparing them for Initial Teacher Licensure. Candidates are placed in a high-needs school whenever possible in order to complete the Oregon-required student teaching practicum. (If students cannot be placed in a high-need school for practicum and student teaching because of a lack of sites in proximity to the teacher preparation program, universities will place students in other schools but will obtain teacher mentors from high-need schools.) Universities obtain written verification that the schools they are partnering with are not involved with other Transition to Teaching projects, and of their intent to employ the teacher if a position is available and funding allows. Teacher mentors receive training for working with new teachers.
- Financial Support. The five universities are each providing \$5,000 per student scholarships to offset tuition for the teacher preparation programs. Mentors are provided \$750-\$1,500 stipends, depending on the university they will be working with and the scope of their duties.
- Recruitment Strategies. Each campus is using individualized recruitment strategies, as depicted below.

**Table 2: Key Recruitment Strategies, to Date\***

<i>University</i>	<i>Print Media</i>	<i>Radio</i>	<i>Website/ Email</i>	<i>Direct Notice</i>	<i>LEA Referrals</i>
Eastern Oregon University	x		x	x	x
Oregon State University			x	x	x
Portland State University			x	x	x
Southern Oregon University		x	x	x	x
Western Oregon University			x	x	x

\*Universities expect to use other recruitment strategies in the future, such as TV and job fairs.

- Retention Strategies. Each university is recruiting teachers to provide mentoring to OTRM teachers for a minimum of one year. For a description of mentor program planning activities, see Section 3, Report on Performance Indicators. Several universities have planned training opportunities for mentors and preservice teachers (e.g., Western Oregon University has arranged for communication training to assist mentors and teachers).

### 3. Report on Performance Indicators

Scholarship Activities. The universities partnering in OTRM have awarded 37 scholarships to date. The universities expect to award an additional 42 scholarships by the end of the program year; i.e., the total number of scholarships expected to be awarded by the end of Year 2 (fall 2004) is 79. Information on the number of scholarships awarded by university, recruitment for Year 3, and scholarship recipient demographics are depicted in Tables 3-9.

**Table 3: Scholarships Awarded in Year 2\*  
(\$5,000 per award)**

<i>University</i>	<i>Scholarships Awarded in Year 2</i>	<i>Awards Still in Process for Year 2</i>	<i>Total Anticipated Awards for Year 2</i>
Eastern Oregon University	15	–	15
Oregon State University	4	8	12
Portland State University	–	20	20
Southern Oregon University	10	5	15
Western Oregon University	8	9	17
<b>Total:</b>	<b>37</b>	<b>42</b>	<b>79</b>

\*Year 2 is Year 1 + 2 since we were instructed by the TTT program officer to combine the two years given the late start of OTRM.

**Table 4: Student/Teacher Certification (Licensure) Status**

<i>Student and Teacher Status</i>	<i>Number of Students/Teachers</i>
Currently enrolled in an OTRM Teacher Education Program	37
Teachers who have been certified (licensed in Oregon)	<i>None yet</i>

**Table 5: Student/Teacher Employment Status**

<i>Student/Teacher Employment Status</i>	<i>Number of Students/Teachers</i>
Preservice teachers in employment negotiations with a high-need school	7
Teachers who have been retained by a high-need school	<i>None yet</i>
Teachers hired as teacher of record in a high-need school	<i>None yet</i>
Preservice teachers who have been hired at or are in negotiations with a non high-need school	7
Teachers who are currently not involved in employment negotiations	23

**Table 6: Recruitment for Year 3 Scholarships**

<i>University</i>	<i>Students Recruited for Year 3</i>
Eastern Oregon University	<i>70 eligible applicants – selections yet to be made</i>
Oregon State University	<i>In process</i>
Portland State University	<i>In process</i>
Southern Oregon University	<i>In process</i>
Western Oregon University	<i>In process</i>

**Table 7: Scholarship Award Recipients by Target Population**

<i>Target Population</i>	<i>Number of Students</i>
Mid-career Professionals	10
Recent College Graduates	22
Teachers with Transitional License	1
Double Baccalaureate Students in Science and Mathematics	<i>Still in application stage</i>
Highly Qualified Paraprofessionals	4
<b>Total:</b>	<b>37</b>

**Table 8: Number of Students being Prepared in Shortage Areas by Subject Area, Authorization Level (not yet the teacher of record)**

Subject Area*	Authorization/Grade Level								Total per Subject
	ECE	ECE/Elem	Elem	Elem/Middle	Middle	Middle/High	High	Elem/Middle/High	
Elementary – Reading, Mathematics		4							4
ESOL/Bilingual Education			3	.5		2.5			6
Foreign Language – Spanish				.5			.5		1
Language Arts							.5		.5
Mathematics				1	1	3.5	2.5		8
Sciences				1		2	.5		3.5
Civics, Govt., Economics, History – Social Sciences						1	2		3
Special Education	1	3	2			3		1	10
Other Shortage Areas								1	1
<b>Total Students per Grade Level</b>	<b>1</b>	<b>7</b>	<b>5</b>	<b>3</b>	<b>1</b>	<b>12</b>	<b>6</b>	<b>2</b>	<b>37</b>

*\*In cases when students are preparing in two subjects, they appear as .5 in each subject.*

**Table 9: Number of Candidates Currently Placed in a High-Need School by Subject/Grade Level**

Subject being Taught	Grade Level			
	ECE	Elementary	Middle	High
Elementary – Reading, Mathematics	<i>There are no completers yet, but 40 are already in schools in practicum and student teaching. Note: There are not enough high-need schools in some university geographic areas for student placements, so the universities are placing students in non-high need schools for them to meet licensure requirements with special activities put into place to link them to high-need schools (e.g., mentoring by teachers in high-need schools).</i>			
ESOL/Bilingual Education				
Foreign Language – Spanish				
Language Arts				
Mathematics				
Sciences				
Civics, Government, Economics, History – Social Science				
Spanish				
Special Education				
Other Shortage Areas				
<b>Total:</b>				

Mentoring Activities and High-Need School Partnerships. Each OTRM university has developed its own strategies for mentor recruitment and training following guidelines established by the project. Summarized below are campus’ mentoring activities to date.

- Eastern Oregon University (EOU): EOU has mailed letters to high-need schools in its geographic region to provide information about OTRM. EOU worked with school districts to develop a recruitment brochure. There has been a good response from schools to participate.

EOU reports there are enough high-need schools to place their student teachers in. EOU is currently recruiting district staff for the mentorship program and is hosting a meeting summer 2004 with the mentor teachers.

- Oregon State University (OSU): OSU is partnering with local districts to establish a mentor program to assist in its OTRM efforts.
- Portland State University (PSU): PSU is currently developing its mentor program with local districts.
- Southern Oregon University (SOU): SOU has established a mentor application and distributed it to schools in a regional mailing. SOU's advisory board will select 20 applicants to be part of its 2004-05 mentor cohort. SOU is developing a mentor training workshop to hold summer 2004. A meeting has been scheduled in May 2004 to allow the current OTRM teacher cohort to meet with their mentors and to be paired up for future activities. SOU is also developing a mentor guide which will be available to assist other campuses.
- Western Oregon University (WOU): WOU is working with districts with which they have strong relationships and will be working with students from those districts via an online program. A summer 2004 institute that focuses on mentoring will be held for mentors. Students will be involved in the institute along with their mentors. A mentor guide has been developed for use in training. WOU has agreed to share the guide with other OTRM universities at the OTRM website. WOU has also arranged a communication training event that students and mentors will attend.

#### **4. Description of Evaluation Methods and Outcomes**

OTRM has established a centralized data collection process to facilitate evaluation activities. In consultation with university partners, OTRM staff developed a list of data elements necessary for tracking program performance. This information is gathered during the application process. A sample Supplemental Data Form (*Attachment 6*) was developed to assist campuses in collecting necessary data. Processes developed to date to track "outcomes" are as follows:

- Data Collection. Upon completion of the OTRM Scholarship Application and Supplemental Data Form for the prospective teacher, each university forwards copies to the OTRM office. Data from these forms are then entered into an Access database. The database has been developed to provide a clearinghouse for student data and to generate statistical reports for evaluation purposes over the life of the grant. The database will also provide information for purposes of tracking employment over the term of the teachers' three-year service obligation.

Examples of data reports currently generated by the database are: a) matrix of student target populations by campus; b) matrix showing teacher preparation by subject and grade level; c) student contact information; and d) student educational background and demographic information.

- Data Analysis. OTRM is still early in its data collection processes. No program changes have been made based on data analysis.

## **5. Why Were Planned Objectives Not Met or Scheduled Activities Not Implemented**

Planned objectives have been met; OTRM is on course after a delayed start during lengthy Year 1 negotiations with TTT.

OTRM does anticipate difficulties in the future regarding employment of new teachers since our universities report that teachers are currently having difficulty finding employment at high-need schools in their geographic areas due to the state's economic downturn.

There are also concerns by some universities that there are too few eligible schools in their geographic areas which could impact the project in the future as students complete teacher licensure and seek fulltime employment within geographic proximity of their university (many mid-career professionals are placebound, and therefore are restricted in their employability options).

## **IV. Budget Information**

### **1. Actual Budget Expenditures**

Actual budget expenditures are provided in the charts on pages 12 and 13.

### **2. Why Funds Were Not Expended at Expected Rate**

Funds were not expended at the expected rate due to a delay in project implementation during the lengthy Year 1 grant negotiation period. Year 1 + 2 funds were combined. In summer 2003, the universities revised their budgets, assigning some funds to expanding Year 2 activities, and requesting to carry over some funds to projected expanded Year 3 activities.

### **3. Significant Budget Changes Resulting from Modified Program Activities**

During the Year 1 negotiations, the federal TTT program indicated it would be acceptable for Year 1 funds to be carried over into Year 2, allowing OTRM the latitude in making up the difference in spending in the remaining years of the project. See above explanation (#2). There have been no significant budget changes from modified program activities.

### **4. Anticipated Changes to Budget for Next Budget Period**

The participating five universities increased the number of scholarships awarded in Year 2 and expect to increase the number in Year 3 by using unexpended scholarship funds from Year 1. This adjustment will allow for the total number of scholarships awarded over the five-year grant to equal the full amount approved in the project proposal (total of 220).



**U.S. DEPARTMENT OF EDUCATION**

**BUDGET INFORMATION**

**NON-CONSTRUCTION PROGRAMS**

OMB Control Number: 1890-0004

Expiration Date: OMB Approved

Board of Education (Oregon University System)  
 PO Box 3175, Eugene, OR 97403  
 Award #5350B020006-03

Applicants requesting funding for only one year should complete the column under "Project Year 1." Applicants requesting funding for multi-year grants should complete all applicable columns. Please read all instructions before completing form.

**SECTION A - BUDGET SUMMARY  
 U.S. DEPARTMENT OF EDUCATION FUNDS**

Budget Categories	Project Year 1 (a)	Project Year 2 (b)	Project Year 3 (c)	Project Year 4 (d)	Project Year 5 (e)	Total (f)
1. Personnel	3,817	7,459				11,276
2. Fringe Benefits	1,829	3,331				5,160
3. Travel	149	0				149
4. Equipment	0	0				0
5. Supplies	118	391				509
6. Contractual	0	16,272				16,272
7. Construction	0	0				0
8. Other	0	0				0
9. Total Direct Costs (lines 1-8)	5,913	27,453				33,366
10. Indirect Costs	473	895				1,368
11. Training Stipends	0	108,340				108,340
12. Total Costs (lines 9-11)	6,386	136,688				143,074

Board of Education (Oregon University System)  
 PO Box 3175, Eugene, OR 97403  
 Award #5350B020006-03

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**SECTION B - BUDGET SUMMARY  
 NON-FEDERAL FUNDS**

Budget Categories	Project Year 1 (a)	Project Year 2 (b)	Project Year 3 (c)	Project Year 4 (d)	Project Year 5 (e)	Total (f)
1. Personnel	*8,435	7,919				16,354
2. Fringe Benefits	*2,711	2,591				5,302
3. Travel	0	0				0
4. Equipment	0	0				0
5. Supplies	0	0				0
6. Contractual	0	0				0
7. Construction	0	0				0
8. Other	0	0				0
9. Total Direct Costs (lines 1-8)	*11,146	10,510				21,656
10. Indirect Costs	0	0				0
11. Training Stipends	0	0				0
12. Total Costs (lines 9-11)	*11,146	10,510				21,656

**SECTION C - OTHER BUDGET INFORMATION (see instructions)**

ED form No. 524  
 \*reported in Year 1

## **V. Supplemental Information**

### **1. Changes Proposed to Performance Objectives**

No changes are proposed in project objectives.

### **2. Unanticipated Outcomes and Other Information**

In January 2004, the Governor requested and the Legislature approved a major change within the Board of Higher Education; i.e., eight of eleven members of the Board were replaced. The new Board subsequently initiated a review of the System office of the Oregon University System (OUS). One of the objectives of the new Board leadership is to eliminate grant management from the System office, as a cost-saving measure. The Board is directing that current grants be migrated to one of the universities within OUS or other appropriate entities, with project management to be provided by the currently approved project directors. This directive will impact OTRM.

The Board reviewed its first-phase reorganization plan for the Chancellor's Office at its recent May Board meeting, with the directive to begin migration activities July 1, 2004, or at the earliest date following consultation with and approved by federal program officers.

The OTRM project is specifically requested to migrate to the Teaching Research Institute located at Western Oregon University. The project director will continue to be Dr. Holly Zanville. This change is not expected to negatively impact the progress of the OTRM project.

Following submission of this performance report, OTRM will request consultation with our TTT program officer regarding the proposed migration of the project from OUS to Teaching Research at Western Oregon University.